How to Engage in a Collaborative Conversation

Seven Steps to Getting Astonishing Results Through Teamwork

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col•lab•o•ra•tion [k*uh*-lab-*uh*-**rey**-sh*uh* n]

noun. The action of working with someone to produce or create something.

As a leader, you have three options when something needs to be done in your organization:

1. You can do it yourself.
2. You can delegate it to a specific person.
3. You can involve a group of people (two Collor more) to accomplish the task.

This last option requires collaboration – perfect for when the task is:

Complex and requires expertise from a variety of disciplines. One person doesn't have all the information or answers.

- ***Non-linear.*** The work occurs simultaneously and many different tasks, functions and people are linked together.

- ***High Stakes.*** The problem or opportunity area affects more than a few individuals and people have a big stake in the issue.

- ***High Commitment.*** The business results will require a high degree of involvement and buy-in in order to develop and implement the solution. That which people contribute to has a higher probability of being implemented by those same people.

Collaboration is not the appropriate option when there is:

- ***No Time***. You may not be able to form a team when there is an immediate, full-blown crisis. But you can let others know what you did after the fact.

- ***Expertise***. One person has the knowledge and resources to accomplish the task. In addition, that person should have the power and authority to implement the decision with or without others' involvement, support and commitment.

- ***No Support.*** If the organization doesn't support the team efforts, don't even bother with a collaborative approach. For example, if management isn't open to the team's suggestions, won't provide the resources, or can't accept the team's recommendations.

Just because you put people on a team together doesn't mean they are going to collaborate. It may make perfect sense to continue treating each of your team members as separate individuals, rather than artificially trying to weld them into a more cohesive team unit. The challenge is divert work to where it is best done – and with the highest probability of success.

This white paper will highlight seven steps to ensure the group explores the myriad possibilities, has meaningful discussions, makes the best decision, and is committed to seeing that decision implemented quickly.

cat•a•lyst [kat-I-ist]

noun. A person or thing that precipitates an event or change.

Step 1. Set the Tone for Collaboration

Your role is to be the catalyst for collaboration to take place. As the catalyst, you set the tone for group work to occur. As the leader, your people are looking to you to model the behaviors you seek, so listen closely to what you say as well as what you do.

When setting the tone, you want to:

Create an Engaging Environment. Think through the barriers to effective participation and what you can do to make it easy to get involved. Think about the meeting location, time of day, and any "prework" that should be done in preparation for the meeting.

Get Agreement Up Front. At the beginning of your session, ensure you have agreement on the goal, agenda (or process), deliverable, ground rules and time limits. Keep the session on topic, on time, and moving along.

Tee Up The Discussion. Open up the discussion, setting the context or goal, how the group will achieve the objective, and how the decision will be made – are you aiming for a consensus or a recommendation from the group?

Manage Participation. Once the discussion has been opened, invite participation, manage the conversation flow and tactfully prevent anyone from being overlooked or dominating the discussion. In the event your opinion is not voiced by anyone else, contribute your idea – as a team member.

Gracefully Intervene. When the group gets off track or if the discussion fragments into multiple conversations, step in to bring the group back on topic.

Check Decisions. Groups make small decisions throughout the meeting. When you sense the group is coalescing around a specific decision, check for understanding and agreement. Ideally, you want to aim for consensus; however, if the group has entered into a stalemate (or run out of time), the group should also agree to a "fallback" option. (Most groups agree to fallback to a majority or for the leader to summarize the logic and make the decision.

Manage Conflict Constructively**.** Every group will experience some degree of conflict. Disagreements are natural and a normal part of the process. An effective leader makes sure the conflict is managed constructively to generate light around the issue and not heat.

Summarize. When the conversation is done (or time runs out), you summarize the discussion based on what you heard. Confirm mutual understanding before you move on.

Clarify Next Steps. Every session should end with specific tasks assigned to specific participants. Otherwise, you have just had a great conversation, but no results! Ensure all understand who is responsible for what and by when. Don't forget to document this action list so you can recognize accomplishment and celebrate success!

Develop the Team. As your team matures (and as you train them), team members will comfortably assume many of these catalyst responsibilities as well. Bob Pike, CSP, CPAE often says, "Never do for your audience what they can do for themselves." Think through the different steps, activities, and tools you use. What are you doing that someone else can do as well? If you are keeping time, have someone else be the timekeeper. If you need to record ideas on an easel chart, ask someone else to be the recorder. When you introduce a topic, ask one of the experts on your team to do so. You don't have to do it all! People become more committed to the outcome the more involved they are.

ob•jec•tive   [*uh* b-**jek**-tiv]

noun. Something that one's efforts or actions are intended to attain or accomplish; purpose; goal; target.

Step 2. Clarify the Objective(s)

First and foremost, the best thing you can do whenever you bring your people together is to clarify the overarching goal (if it is one in a series of meetings) as well as the objective(s) of that specific meeting. Once you have clearly identified the objectives, you will communicate the objectives to the participants in the form of an agenda.

The agenda should also include the start/stop times, key topics, logistics and prework required to have a meaningful discussion. Keep in mind, individual work (such as reading a report) should be done prior to the session.

The agenda should also outline a collaborative process you intend to use. At a macro level, all group conversations start with a free flow discussion that generates ideas, problems, causes, solutions, etc. Many have participated in some variation of a "brainstorming" session at one time or another, but brainstorming doesn't stop there! From the generated list of possibilities, the group must organize them in order to make a decision. Once a decision has been made, the group needs to take action.

This is the GODA process—generate, organize, decide, and act – and as the leader, you guide them through this macro process using the appropriate technique to achieve the outcome. The key is to ensure the maximum contribution (fingerprints) given the amount of time you have.

GENERATE ▶	ORGANIZE ▶	DECIDE ▶	ACT ▶
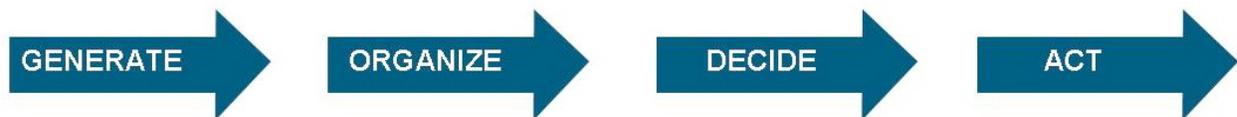
| **Start** with a topic, question or task...
 • Define the terms
 • Outline constraints
 • Identify "fallback"

 Pause to think

 Brainstorm the possibilities by:

 • Freewheel/Popcorn
 • Round-Robin
 • Post-It Notes®
 • AA   Ask all! | **Prioritize** your options down to a manageable number (3-5)

 OR

 Organize the items by:

 • Categories
 • Affinity Groups
 • Time Sequence
 • Flow

 NEVER take the top pick! | **Build** a consensus by asking:

 • Either/Or?
 • Best Features?
 • Combine?
 • Parallel Paths?
 • Straw Poll?

 OR

 Select one among a short range of options | Create an **action plan**

 Devise visual **metrics**

 Follow up relentlessly |

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pos•si•bil•i•ty [pos-*uh*-bil-i-tee]

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noun, plural -ties. The state or fact of being likely; a thing that may be chosen or done out of several possible alternatives.

Step 3. Generate the List of Possibilities

Once you have teed up the topic, problem, or issue, you invite discussion around the topic. Typically, this starts with some form of "listing" the ideas or "brainstorming" new ideas. Although we assume most people are familiar with the term "brainstorming," don't count on it! Before you begin, you may want to remind your team or highlight some of these simple ground rules:

- All ideas are valid. Any idea is acceptable, even if it seems silly, strange, or similar to a previous idea. Unleash your creativity!

- Aim for quantity, not necessarily quantity. We'll evaluate the ideas after we have generated the possibilities.

- Say "pass" if you don't have an idea on your turn.

- The process continues until everyone passes (or a predetermined time limit runs out).

- A person will be assigned to quickly capture ideas on an easel chart or easel chart so all can see.

- You are encouraged to add other ideas, otherwise known as "hitchhiking."

- Remember: no praise, no comments, and no criticism. It's brainstorming!

Start your brainstorming session by clarifying the topic at hand by writing the topic on an easel chart for all to see. Then ask each member offer an idea about the topic. There are three different methods are typically used to brainstorm a list:

1. ***Freewheel.*** Anyone on the team can call out an idea, with one person (presumably you, the speaker, but it doesn't have to be) capturing the ideas on an easel chart or easel chart.

2. ***Round Robin****.* Go around the room so that each person has a chance to contribute a new idea, add to, or "hitchhike" on a previous idea. Each person has the option to pass. You can switch to "freewheeling" as more participants pass.

3. ***Slip.*** Encourage all of the participants to write down in large and legible letters each of their ideas on a separate slip of paper, sticky note, or index card. A great side benefit of writing each idea separately is that team members are expressing their ideas in their own words and in as much detail as they like.

Have the recorder write all ideas on the easel chart so that all can visualize – or post the sticky notes or index cards on the wall. Continue until the group has exhausted its ideas on the topic or you have used the prescribed amount of time. You can then clarify and combine similar ideas, with the permission of the team. Summarize the key ideas and segue into the next step.

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or•gan•ize [awr-**g*uh*-nahyz**]

verb. To arrange into a structured whole; order.

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Step 4. Organize Your List

Once you finish your brainstorming session, you can organize the ideas in one of three different ways:

- ***Synthesize.*** You can summarize what has been said by synthesizing all the ideas into a handful of headlines or highlights.

- ***Sort.*** You can have the group sort the ideas into a few manageable categories or in a specific flow, for example, chronological, process, along a continuum, and so forth.

- ***Prioritize.*** You can have the group narrow down the pool of ideas into a smaller, prioritized list.

Or, you may do a combination of these techniques: first you sort, and then prioritize the categories. Here's how you can organize your list:

Synthesize the Ideas
Based on your active listening and visual recording, pull together the important ideas and reflect them back out to the group. Check for agreement as to the key points.

Sort the Ideas Quickly
The key to sorting the slips, sticky notes, or index cards quickly is to do so without talking. Once all of the ideas are up on the wall or on the table, they are now the team's ideas. Ask the group to silently sort the ideas under predetermined headings or to cluster them around similar ideas. If a team member doesn't like where an idea note or card has been placed, he or she can move it rather than discuss it!

After the flurry of activity, give a ten-second countdown for all ideas to be settled into their clusters. With the group's help, label each cluster with a "header" that describes all of the idea notes or cards in that cluster (affinitization). Or, if the categories are predetermined, confirm that the category header still applies to all the notes underneath it (categorization).

Whether you affinitize or categorize your ideas, you get the same result—several categories or headers with several cards underneath each one. The advantage of using an affinity diagram is that you might see some nontraditional, even creative groupings of your ideas.

Prioritize the List
Now that you have organized that huge brainstorming list, your team may decide to prioritize the categories or headers to focus on one or two high-priority ones. Or your team may decide to divide into sub-teams to look at each category in more detail.

Similar to taking a poll, the quick vote allows you to take a long list of possibilities and narrow it down by at least a half, if not two-thirds. It's analogous to shaking a bottle of oil and vinegar; when you put the bottle down to settle, the oil floats to the top. Your quick vote allows the items of most interest to rise to the top of the group's priority list.

The easiest and fastest way to get a quick vote is ask the group, "Of all the things we have just considered, what is your top priority?" Then go around the room and capture their responses. Or, if the list is already posted on an easel chart, just put a checkmark next to the item as each person votes. You will see a vibrant list of the top priorities emerge.

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or•gan•ize [awr-***guh***-**nahyz**]

verb. To arrange into a structured whole; order.

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Step 4. Organize Your List: Continued...

For a larger group with a larger list, you can also go through these four steps of casting multiple votes, also called a "multivote":

1. ***Clarify and Combine.*** Before you move into a "vote," ask if anyone needs clarification of an item, or if any two items are so similar they should be combined. If the majority of the group agrees, then combine them. If any one member loudly disagrees, keep them distinct.

2. ***Ten Votes.*** Each participant has ten votes. They can place all ten votes on one item or they can scatter their ten votes among the many items. If the list is more than thirty items, you may want to consider allowing the team members to have more votes — typically a third of the items. For example, if you have fifty-one items, then each team member would have seventeen votes. Notice that it will be a bit harder and longer to vote and tally—especially if you have lots of participants!

3. ***Silently Vote.*** Ask each participant to silently vote by writing item choices and the number of votes on a piece of paper. To speed up this process, you may want to letter each item, starting with A, then B and so on down the chart. Then the team members simply write the letter and the number, for instance, A-3, F-2, H-2, I-2, and L-1. Ask the participants to make sure they have cast all of their ten votes.

4. ***Tally the Votes.*** Go through the list, starting with A, and ask the participants to raise the number of fingers for the number of votes they placed on that item. The recorder may then simply count up the numbers, or the participants may choose to "sound off" in sequence by adding their numbers together. Write the total next to the item and take the vote on the next item until you have gone through all of the items.

    If privacy is an issue, ask the participants to write each of their items and the corresponding vote on small, separate sticky notes. For the previous example, the participant would have five separate notes. After the votes of all of the participants have been recorded, turn the easel charts out of sight of the team, and ask each individual to come up to the easel charts and place the sticky notes next to each item. Since this takes a bit longer, take a break after everyone has filed through and voted. The recorder simply pulls off the sticky notes from each item and adds them up! If a sticky note falls off the chart, it's easy to see where it belongs, since both the letter and the vote are written on the sticky note.

5. ***Reorder the List.*** Ask the group for the item with the most number of votes, followed by the next, and the next, and so on. Capture the new list on an easel chart. You will see the list narrow down dramatically—at least by half.

    There may be some vocal members who will want to take the top vote and declare it the "winner." Be careful—less than 50 percent of the group may have voted for the "winner" – in which case you only have a majority!

    The first round of voting is used to narrow down the list, not to select a winner. If your list is really long, you may even do a few multiple votes to narrow down the list to something manageable.

    When you have narrowed the list down to five or so items, see if there is a possible "consensus" in the mix of ideas. Is it possible to combine or create, or must the team select just one?

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de•cide [**dih**-sahyd]

verb. To make a judgment or determine a preference; come to a conclusion.

Step 5. Decide Which Ideas to Pursue

Perhaps an obvious option leaps out of the pack and the group comes to a quick decision. Most of the time, however, they are faced with a choice among many options

If the group is interested and has the time, it can combine, create, and synergize the items into a better idea. The group builds a consensus—striving to reach a decision that best reflects the thinking of all of the participants. Consensus means more than "I can live with it." It means that each person can live with and support the decision upon implementation. Here are steps you can take to build a consensus:

1. ***Define "Consensus."*** Explain what consensus means and why it is important for the group to reach one. Ensure that all participants understand the issue and the most important items. To prevent confusion, take the time to define the specific meaning of the words being used. Clearly outline any constraints (e.g., time or money). Remind each member to participate fully in the discussion, and that they have an equal voice. Finally, identify a "fallback" (majority vote or command decision) if consensus can't be reached within a specified time.

2. ***Ask Questions.*** Take the most important items from your smaller list, category headers, or ideas within a category, and ask a few probing questions such as these:

   - *All of these items are possible. Do we have to choose only one?*
   - *Is there any way we can use the best features of each item?*
   - *What would happen if we took the added/deleted features of several options? Would that get us closer to what we want?*
   - *Could we try out several options in parallel before we commit to just one?*

   Team energy increases as new ideas and possibilities surface. This trial-and-error approach appears chaotic; however, the group builds a new, synergistic alternative based on the best of the best.

3. ***Straw Poll.*** When it appears the group has coalesced and agreed to a new alternative, take a "straw poll"—a pulse check to see how close or how far apart the team is from reaching a consensus. Remind the group that this poll is not a final vote; it simply tells them how much work needs to be done to build consensus. Use these sentence starters to help the group move forward:

   - *It sounds like we're making progress. Let's check that out with a quick straw poll to see how close we are to a consensus. We'll go right around the table. Sally?*
   - *Let's see if everyone can either agree with or agree to support the most popular alternative. Let's start with Sally and go around the room.*

   Record the responses and summarize the results. If everyone can live with and support the alternative, then you have a consensus. Chances are there will be some opposition, so find out what it would take to gain support. Try these simple questions to break a deadlock:

   - *There seems to be a lot of support for this alternative. What would it take for the rest of us to support this?*
   - *What is getting in the way of some team members supporting this alternative? What could we do to meet their needs?*

   Continue to build agreement for the decision until you have a consensus, or time runs out and your team falls back to another decision-making method. By building a consensus, your group has a greater chance of producing a better quality decision, a more cohesive team, and smoother implementation of the decision.

ac•tion [**ak**-sh*uh* n]

noun. Something done or performed; act; deed.

Step 6. Take Action

A few years ago, I was asked to observe a CEO's meeting with his direct reports. They had a robust discussion about their website strategy. It appeared to me that they agreed to a handful of great ideas. After the meeting was over, I asked the CEO, "So, who is going to take action on these great ideas?" The CEO stared at me, believing that one of his VPs would pick up the ball. When I queried the VPs who were at the meeting, they each assumed someone else was going to take the lead.

As a result, nothing got done—until the next meeting.

Accountability is even more important in a collaborative session because the group itself owns the result. If there is no action the session is a waste of everyone's time. Here are a few techniques to ensure momentum after the meeting:

Record Possible Actions. The group has had a great conversation and made some decisions along the way. Have an easel chart ready to record ideas as they emerge as well as the name of the person who suggested the task.

Review Actions. Review this "action plan" at the end of the meeting. Make sure the group thoroughly understands the task assigned and the scope of the work. You may discover a task doesn't need to be done at all!

Confirm Responsibility. Confirm the name of at least one person responsible for completing each task (always ask for volunteers first and "suffer the silence"). That person is accountable to the group for ensuring that the task will be completed. Notice that it doesn't mean they have to do all of the work, but they do have to marshal the right people and resources to get the job done.

Check for Help. Ask the person responsible if they are going to need some help, and then quickly identify who will help them. It's a good practice for those people to touch base right after the meeting to set up a time to get together.

Set a Specific Due Date. Rather than writing down the vague note "next week," target a specific date and time: for example, February 11 at 10:00 a.m. By assigning a specific date, the task becomes much more tangible and can be written on each participant's calendar. If appropriate, put the task on a timeline and show how it affects other events or tasks.

Document. Capture the action items in the meeting minutes. Typically, minutes are sent out within two days of the meeting as a quick reminder to each participant.

Just Do It. Once the commitment has been made, it is up to each individual to do his or her fair share—and for the group to hold each person accountable because each person is depending on that person to complete their task on time.

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suc•cess [*suh* k-ses]

noun. The accomplishment of an aim or purpose.

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Step 7. Recognize and Celebrate Success

As the leader, it is important for you to recognize the individual and team success. While there isn't an "I" in team, there is a "me" – and people like to be recognized for their individual contributions to the whole. Some people like to be recognized publically – and others would prefer you to express your appreciation one-on-one. Regardless, take the time to recognize each individual the way they want to be recognized.

It is also important to celebrate your team's small and large victories. Here are some ideas:

- Have each team member share their most memorable "team moment".

- Ask team members what they do to celebrate success individually and then agree on how the team will celebrate their success together (e.g. go out to dinner).

- Share what you have gained from working on the team - what are you thankful for learning?

- Have a potluck lunch and encourage team members to stay and mingle rather than run back to their office!

- Have each team member share what they think is the team's most significant accomplishment and what contributed to their success.

- Bring in a Polaroid camera and take team pictures.

- Have all the team members sit in a circle. Take a big ball of yarn and wrap one end around your finger. Throw the ball to another team member and thank them for a specific contribution or accomplishment. That team member then wraps a bit of yarn around their finger and continues the process. You can even send it back to the same person too! Watch the interconnected web the team weaves....

- Go for brisk team walk in the afternoon cool air and return to a mug of simmering hot apple cider.

- Bring in a bottle of non-alcoholic champagne and glasses (plastic will do, but it's a lot more fun with glass!). Start the toast with "I am thankful this team is....." Clink glasses, take a sip and encourage others to continue the toast!

It doesn't matter how you celebrate the small and big successes. Some of these might be too smarmy for you. That's okay. The point is that you do something to signify your appreciation – in a collaborative way.

And, when you are not successful, create a safe space to understand why. 99% of the time, it is NOT because the team didn't try hard enough. Something else got in the way. Perhaps they needed more time, more resources, additional access. As the leader, it is your responsibility to ensure the team is successful – and to remove those barriers that get in the way.

<h1 style="text-align:center">sum•ma•ry [suhm-uh-ree]</h1>

<p style="text-align:center">noun. A comprehensive and usually brief abstract, recapitulation, or compendium of previously stated facts or statements.</p>

Summary

You can create collaborative conversations using these seven steps:

1. Set the tone for collaboration
2. Clarify the objective(s)
3. Generate the list of possibilities
4. Organize your list
5. Decide which ideas to pursue
6. Take Action
7. Recognize and Celebrate Success

Keep these seven steps in mind as you bring your team together to achieve astonishing results!

<h1 style="text-align:center">learn•ing [lur-ning]</h1>

<p style="text-align:center">noun. The act or process of acquiring knowledge or skill.</p>

Want to Keep Learning?

Excellent! We have lots of great resources on our website at www.ExtraordinaryTeam.com. We would be honored to talk with you about an upcoming important meeting or your interest in attending one of our master classes.

<h1 style="text-align:center">au•thor [aw-ther]</h1>

<p style="text-align:center">noun. A person who writes a novel, poem, essay, etc.; the composer of a literary work.</p>

KRISTIN ARNOLD, MBA, CPF, CMC, CSP, is one of North America's most accomplished professional meeting facilitators. A consummate author, speaker and trainer, she is on a crusade to make all events in the workplace more engaging, interactive and collaborative.

One of the first women to graduate from the US Coast Guard Academy and the only woman stationed onboard a Coast Guard buoy tender, Kristin learned firsthand how to build high performance teams, engage others in the workplace and get the job done. She is also the past president of the US National Speakers Association (2010-2011).

Kristin earned an MBA from St. Mary's College of California and teaches teambuilding at York University's Schulich School of Business in Toronto. Kristin divides her time between Phoenix and Prince Edward Island, Canada.