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Ahhhh...this past weekend marks the beginning of summer. The weather is warmer, kids are out of school and it's time to play: take a vacation, staycation, or just travel for the sake of travel! This summer, I'll be based out of Prince Edward Island while executing a 2019 strategic initiative: Being the "Rules Analyst" for the upcoming Presidential primary debate season. In August, I'll have the pleasure of taking my mom on a Milan/Venice cruise. With all that travel, Nick Morgan's new book on communicating virtually will sure come in handy!

This month's newsletter also has a few tips to help you think strategically and inject a little creative play in your team's work. So let's go out there and make it a great summer!

Kristin

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#### **TO STICKY NOTE OR NOT STICKY NOTE FOR STRATEGIC PLANNING?**

My client emphatically declared, "We don't want to do all those Post-its at our strategic planning retreat." Gulp. Every facilitator on the planet uses sticky notes - especially during strategic planning!

I asked for a bit more clarification as to WHY he didn't like using sticky notes. He responded, "Sticky notes are just tactical actions that aren't really strategic. We want to do strategic planning."

Ahhhh...now I understand! Using sticky notes is a great way to solicit ideas from all the team members and then to quickly organize them in categories. The categories then become the strategic initiatives. Perfect for when the team isn't really thinking strategically (yet), or perhaps this is the first time they have ever been through the strategic planning process. Stickies are also useful when the group is too large to have a meaningful, strategic conversation.

So now I'll have to design a process where they will NOT use stickies! In this case, I recommended that the team do some pre-reading on strategic issues facing their industry, and survey their customers and employees (thankfully, they had already done that recently). Then they should take each of the high-level topics/critical issues and conduct a

few focus groups to discuss the current state, the desired state, and the opportunities to close the gaps.

Once the organization does all this prep work, then we can have a strategic conversation with a small group that doesn't involve sticky notes.

### **PLAYFUL PANELS: HOW TO GIVE YOUR BRAIN A HAND WITH LEGO® SERIOUS PLAY®**

It started with a bit of small talk. It was a party of local entrepreneurs, and I met a fascinating woman who wrote her doctorate thesis on how "Serious Play" methods and design thinking tools can support creativity and knowledge sharing and thereby accelerate innovation and value creation. Specifically, Dr. Camilla Jensen is a certified Lego® Serious Play® facilitator and we talked about how building a model can help unleash deep understanding and creativity. It should be no surprise that we also talked about panel discussions.... And then we started brainstorming how we might integrate LEGO® Serious Play® into a panel discussion!

So here is our take on the Lego® Serious Play® Panel Format:

The LEGO® Serious Play® Panel Format is perfect for those topics that are complex, have differing perspectives, and/or the opinions are difficult to access/deeply personal.

The model creates a visual anchor to represent ideas, thoughts, and feelings that may not otherwise be articulated in a group setting.

There are a few nuances to this format that you'll need to consider:

1) Decide who will be building the model:

- **Just the panelists.** If you use this option, I suggest you have the panelists build their models right before the panel starts OR have them working on building the models as the audience filters in...timing it so they are "done" as you start the panel discussion.
- **Just the audience.** You'll want to have them seated at tables – rounds are best – with 4-6 people working on their individual model. If this is the case, you'll want to have the panelists working as one group at a table OR have the panelists each working at different tables. Once the models have been built, THEN introduce the panelists (or, have each table send one representative of their group to be a panelist!).
- **Panelists AND audience.** This is probably the easiest to do with a small group (less than 50).

2) Buy a [Lego® Serious Play® Starter Kit](#) for each panelist and/or small group that will build a model. There are 214 pieces specifically curated for their metaphorical value. You'll want to have them ready to go. (Camilla suggests you put the turntables, hinges, and tires together ahead of time, and make the kits easily accessible.)

3) Think through the logistics of debriefing the model.

- For small groups, this shouldn't be a problem as most audience members will be able to see the models – either up front on the stage or on the table topics.
- For larger groups, it may be difficult to see the models as they are debriefed. If this is the case, you may want to talk to your A/V crew about having a live video feed of the models as they are being presented.

4) Think about how you are going to get all your LEGO pieces back!

- People get attached to their models, so you may decide to gift the model to the panelists. Either way bringing Ziploc bags or sealable containers to store the individual kits.

- For the audience members, encourage them to take a picture, tweet it out (provide your Twitter handle if you would like to be tagged. Encourage hashtags such as #LEGOseriousPlay), and then put all the pieces back in the bag/box. Yes, you literally have to tell them, remind them, and tell them again!

So here's the process to use:

1. Welcome and introduction to how this will be a novel panel format. Explain a bit about what they can expect.
2. Outline the LEGO® Serious Play® method and the ground rules.
3. Take them through a couple of warm-up exercises to help them understand how to build in metaphors.
4. Pose a question, a prompt, a topic, or something that will spark the conversation.
5. Ask the panelists and/or the audience small groups (depending on the size) to use the LEGO sets to build a metaphorical model that enables them to share their perspectives on the question or topic.

Reinforce that it is a metaphorical model – not a literal model. Encourage them to be creative and let their hands do the thinking! 3-6 minutes is a typical timeframe depending on the complexity of the question/topic. You want to instill a sense of urgency to induce a focused and non-analytic building session.

6. Share the models.
  - If models were built at the tables, ask for the group to select a spokesperson to ensure that everybody at the table shares their model one by one.
  - In a roundtable fashion ask for each panelist/spokesperson to share their perspectives. A long LEGO connector piece can serve as a “talking stick” and help participants point to elements in their model:
    - Ask them to share/point to a specific element in the model – what did they build into the model and what does it represent?
    - Request that all listen generously...there is no question of “correctness.” There is no “right or wrong” models; “Better” or “worse” models. They are simply models to help the owner (panelist or small groups) describe what the topic means to them.
  - There should be no interruptions while they are explaining.
7. The panelists (or other participants) then get to ask clarifying questions about something they can physically observe in the model (not their interpretation). If time is an issue (when is it not?), give them a timeframe for the debrief (e.g. 2 minutes per table - otherwise, they may ramble or share EVERYTHING about their model).
8. The panelists then have a discussion about what was shared: e.g. Common themes, differences of opinions, surprises, and interesting discoveries.
9. Optional: Debrief on the experience:
  - What just happened?
  - What was it like for you?
  - How was it different from a normal panel?
  - Why does that matter? I.e. what are the impacts?
  - How else might we ....?

And that's how you use Lego® Serious Play® in a panel discussion!

For more information about how to use Lego® Serious Play® in teams, check out Dr. Camilla Jensen's article. She can also advise you in case you want to get trained as a LEGO® Serious Play® facilitator.

## **FROM THE BOOKSHELF: CAN YOU HEAR ME? HOW TO CONNECT WITH PEOPLE IN A VIRTUAL WORLD**

I have often said that managing geographically dispersed (or virtual) teams is harder than managing face-to-face (F2F) teams - but I really didn't know WHY. Now I know.

Author Nick Morgan in his latest book, "Can You Hear Me: How to Connect with People in the Virtual World" describes the challenges of virtual communication:

1. The lack of feedback and the greater potential for misunderstanding
2. The lack of empathy and ability to convey emotional intent
3. The lack of control of what gets published about you in the online world
4. The lack of (and fragility of) emotional connections
5. The lack of connection and commitment

Frankly, they all blend together and at several points, Morgan repeats himself. But those key messages are so vital to understanding precisely HOW to communicate better in the virtual world, that I really didn't mind it too much!

Here are some key takeaways for me, personally, as I continue to work with teams all across North America:

- It's okay to use emoticons to convey emotional intent in the business world!
- Be clear in your own mind on what you intend, what you expect, and what you require from your virtual interactions.
- Periodically check in with your teammates - at the beginning, during, and at end of the meeting to state their emotional reaction to the outcomes of the discussion. [Yes, this will start off being awkward, but gets easier over time!]
- Periodically Google yourself to see what new team mates might be learning about you
- The best way to establish online relationships is to begin in the real world. Make every possible effort to meet F2F. Morgan says, "This simple (and potentially expensive) technique can save enormous amounts of money and time down the project road, in efficiency and cooperation.
- and I could go on and on and on.....

The second half of the book is packed with specific techniques for the different digital channels:

- Email and texting
- Conference calls
- Webinars
- Chat session (video conferencing)
- And a chapter devoted to sales - since sales calls are more virtual than ever!

So here's what I would do with a new virtual team: Have them read this book and then talk about how they want to communicate in the virtual world. And it's best to do that F2F during the initial kick off meeting! :-)

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USA: 28150 N Alma School Parkway #103-615 | Scottsdale AZ 85262 | (480) 399-8489  
Toll Free: 1-800-589-4733