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Facilitation:
Applied Basics Workshop F102

SYNERGY PROFESSIONAL SERVICES

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Agenda & Table of Contents

Process Facilitation Techniques

- **Prepare (7)**
  - Agree on Results (10)
  - Assess (12)
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- **Hold Session (36)**
  - Opening (40)
  - Guide Problem Solving
    - Generate Ideas (43)
    - Group and Select Ideas (50)
    - Facilitate Analysis (59)
  - Herd Cats
    - Get Participation (68)
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    - Language and Questioning (86)
    - Plan for Action (96)
  - Closing (103)
- **Follow up (105)**
  - Summarize
  - Monitor
  - Improve

Numbers in parenthesis show starting slide for section

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Review: Three Types of Techniques in a Facilitator's Toolbox

Meeting management techniques
- Example: collect and follow up on action items

Consult based on subject matter expertise
- Example: recommend measures to increase the effectiveness of citizen participation organizations

Our Focus

Process facilitation techniques
- Example: use effective questions to steer discussion

"RollerToolBox" by Philip McMaster is licensed under CC BY-NC 2.0

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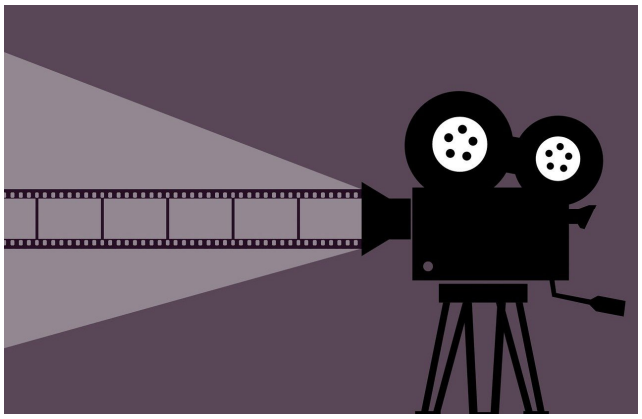
Video - "What do facilitators do?"



https://youtu.be/UDLGjKBHSXg

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But What Does a Facilitator *Do*?

A facilitator actively guides a group's process and behavior by doing these things:

Architect (before)

1. Get agreement on desired results
2. Assess relevant context
3. Design the sessions
4. Prepare logistics

Pilot (during)

5. Manage room and materials
6. Clarify roles
7. Manage pace
8. Monitor progress
9. Steer the course
10. Ensure closure

Guide (always)

11. Create trust and safe space
12. Guide problem solving process
13. Inject enthusiasm and energy

The three categories are from the International Institute for Facilitation and Change

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Prepare

- Agree on Results
- Assess
- Design

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Steps to Prepare for a Facilitation

1. Charter
- agree with sponsors on general expectations

2. Assess
- gather and assess relevant info

3. Design
- formulate specific objectives
- design the process and tools
- get feedback

4. Final Prep
- create pre-work, agenda, facilitator's guide, and logistics

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Don't Underestimate Prep Time

Jeff's rules of thumb:
- Meeting of a standing workgroup: ½:1 -> 1:1
- Special facilitated session: 1:1 -> 2:1
- Professional training: 5:1 to 10:1

Ingrid Bens's guideline: 1 day prep for each day of facilitation

Workshop type	Interview time	Design time	Session time	Total
One day workshop for 18 people	½ day	½ day	1 day	2 days
Two day workshop for 18 people	1 day	1 day	2 days	4 days
Two day retreat for 60 people	1 day	3 days	2 days	6 days

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Preparation Step 1: Charter

Purpose: get agreement about general expectations
Who with: sponsors
Template: charter

What to Discuss with Sponsors

- Purpose of the Facilitation
- Specific Deliverables
- Timelines
- Roles and Effort
- Reporting
- Success Measures

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Worksheet

Charter for a Facilitated Session

Instructions
The purpose of the charter is to get agreement on high level expectations among the main sponsors and the facilitator of a session. The facilitator should use this charter template to guide the discussions and document the agreements. Do this at the very beginning, when first discussing the possibility and need for facilitation. Make sure that everyone reads and buys into the final charter document.

Name of this facilitation:
Purpose: why is it important for us to hold this session(s)?

Handout packet page 1

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Preparation Step 2: Assess

Purpose: gather and assess relevant info; formulate specific objectives
Who with: facilitated group or team
Template: assessment

Types of Info to Gather

- About the participants
- About the problem to be solved
- About the organizational context

Methods of Gathering

- Individual interviews
- Group interviews
- Surveys
- Group observation

What to Assess

- Emotional climate
- Authority structures
- Preferred communication styles
- High-context vs. low-context (directness)
- Task vs. process orientation

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Are the Participants a Group or a Team?

Work Group

- Members work to achieve their individual goals
- Group's objectives and process are set externally
- Members work mostly independently
- Each member's authority empowerment depend on position in organization

Team

- Complementary skills
- Committed to common purpose, performance goals and approach
- Hold themselves mutually accountable
- Deeply committed to one another's personal growth and success

Chat

During the next several slides, please share tips for how to do what Bens suggests in the quote below.

"It's important to know whether you are facilitating a team or a group …Not all groups need to become teams, but all groups can be encouraged to act like teams." – Ingrid Bens

Facilitation at a Glance 4e, p. 82 Ingrid Bens

The Discipline of Teams, Jon R. Katzenbach and Douglas K. Smith

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How Groups and Teams Work Differently

Attribute	Groups	Teams
Focus	"I"	"We"
Motivated by	Individual purposes	Common goal defined by team
Protocols	Externally imposed	Norms developed by teams
Teamwork	Mostly works individually	Frequently works together
Leadership	Defined chair	Leadership is shared
Focuses on	Info sharing	Problem solving
Environment	Tends to compete	Foundation of trust enables constructive disagreement
Friendliness	Liking is nice but not necessary	Strong bond

Adapted from Facilitation at a Glance 4e, p. 82-84 Ingrid Bens

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Understand the Organizational Culture

As Values

- Deep seated practices within an organization that influence moral judgments, responses to others, and commitment to personal and organizational goals. (Kloppenborg)

As a Script

- Hidden script that a group of people use to guide their behavior (Carr)

Power Culture	Role Culture	Task Culture	Person Culture
Boss controls competition, conflict resolution, and communication	Strictly follow specified roles	Top priority is to get job done	Strong interest in needs of workers

Four types from Timothy Kloppenborg, *Contemporary Project Management 2e,* © 2012 by South Western, Cengage Learning

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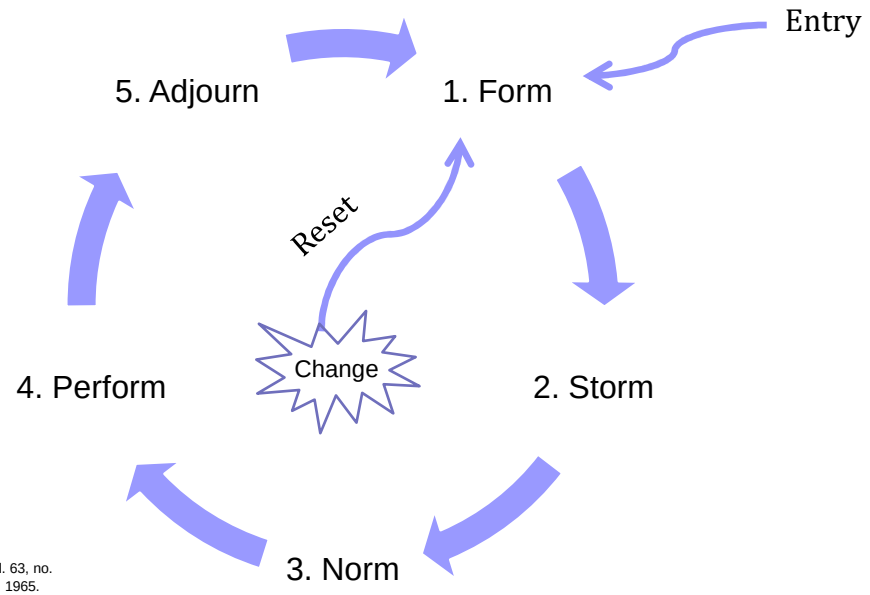
Understand the Developmental State of the Group

Tuckman's Model of Team Dynamics



Ref: Tuckman, Bruce, Psychological Bulletin, vol. 63, no. 6, pp. 384-399, American Psychological Bulletin, 1965.

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What Happens in Each Stage

Stage	Behaviors	Team Actions
Forming "Orientation"	•Excitement and anticipation •Optimism •Guarded	• Testing dependencies • Abstract discussions • Identifying the tasks • Complaints
Storming "Independence"	•Emotional responses to tasks •Resistance and competition	• Conflict and intra-group hostility • Arguing, tension • Bids for power
Norming "Interdependence"	•Expressing opinions •Constructive criticism •Acceptance, relief •Cooperation	• Development of team "Norms" • Clear roles and responsibilities • Team sets common goals
Performing "Cohesiveness and Performance"	• Insightfulness • Satisfaction	• Emergence of solutions • Constructive, self-directed • Positive conflict management • Teamwork
Adjourning "Endings"	•Feeling of loss when team disbands	

Main Focus: Team Dynamics

Main Focus: Work

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Worksheet

Facilitation Assessment Template

Instructions

The purpose of the assessment template is to help the facilitator and participants to gather and assess relevant information that will affect the design of the facilitated session. Some questions are suitable for discussion directly by the participants, while the facilitator may wish to keep others private.

About the Participants

1. How well do they know each other?

2. What have they worked on together in the past and what were the dynamics of that working relationship (e.g. degree of conflict, teamwork, risk-taking, or

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Further Assessment Resources

Ingrid Bens, *Facilitation at a Glance 4e*, GOAL/QPC, 2016, ISBN 978-1-57681-183-2, www.goalqpc.com

- Example assessment questions for a facilitator to use, pp. 78-79
- Group assessment survey, pp. 80-81

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SIDEBAR: TRY MIRO

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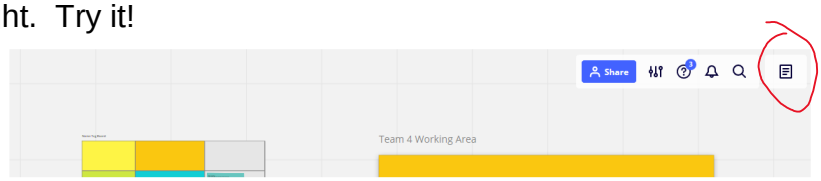
Important Miro Tips

1. Miro activity instructions are in the Note pane. Toggle button is always in upper right. Try it!



2. If you ever see a button that mentions unlocking, don't press it! That will unlock some of the furniture in the virtual classroom, which could be very confusing.

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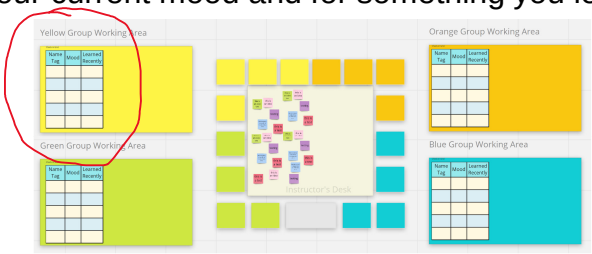
Instructions for "Try Miro" Activity

1. Drag your name tag to an empty row on your team's check in area. Add stickies for your current mood and for something you learned recently.



2. In your Zoom breakout room, briefly explain your stickies to your teammates.

5 minutes total!

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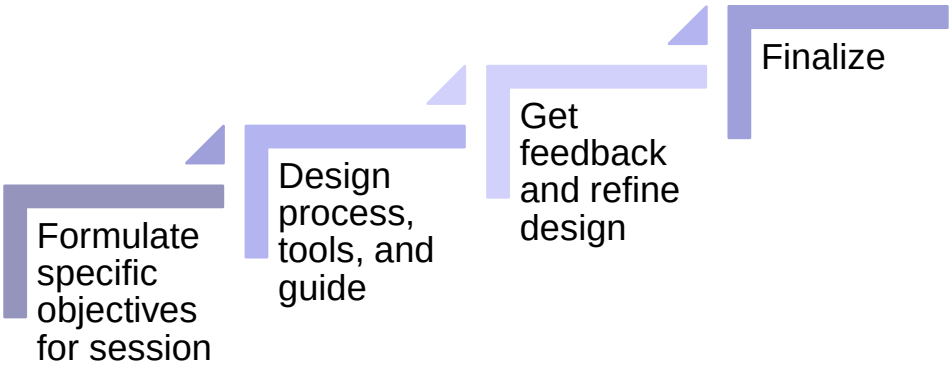
Preparation Step 3: Design

Purpose: design session so that it meets objectives and group will buy into it
Who with: self
Template: facilitator's guide, agenda



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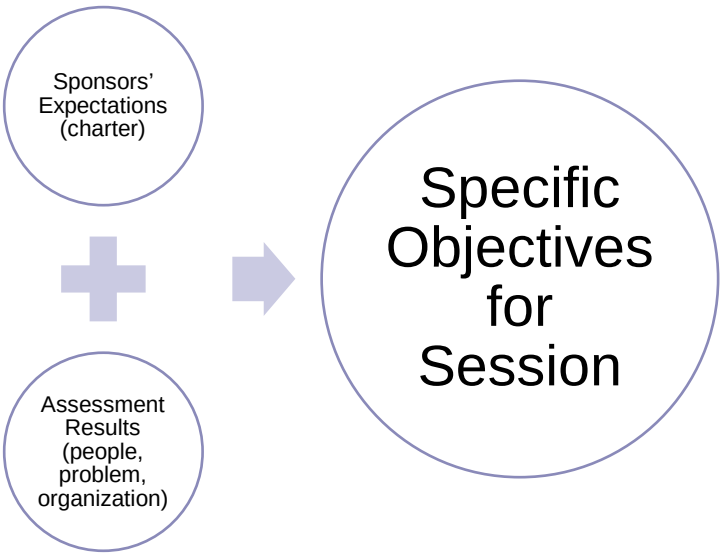
Formulate Objectives for Session



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Objectives Should Be SMART and in Writing

Specific	• Stated as desired *outcomes*, not process • Specific and tangible
Measurable	• How success of each objective will be assessed
Actionable	• Objective can be achieved by taking specific actions
Realistic	• Feasible to accomplish, although perhaps challenging
Time-bound	• Clearly stated end point

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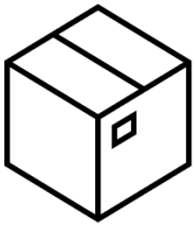
Example

Think of the session as a "black box" that you can't see inside.



A well written objective describes what comes out of the box by the end of the session, not what happens inside the box during the session to produce the output.

Poor example

- Discuss preferred options

Good example

- By end of session, reach agreement on MOU content for a multi-payer collaborative to support CEH during implementation phase

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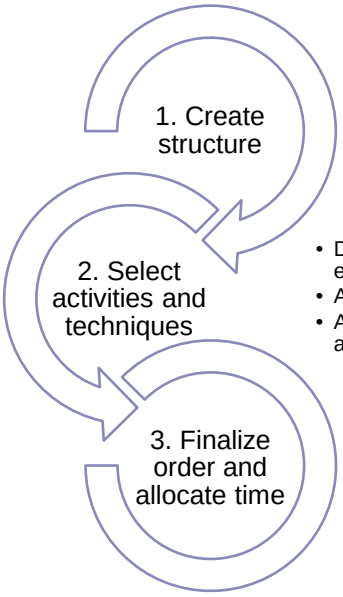
Design Process and Techniques for the Session

"Facilitators spend as much time creating their process notes for a meeting as they spend actually facilitating the dialog." – Ingrid Bens, p. 218



"Lego approach"

- Assemble structure from building blocks
- Ensure building blocks complement each other to achieve meeting objectives

- Define activities and techniques to implement each building block
- All should support objectives of session
- All should consider context and behaviors from assessment

- Think through desired flow of session
- Design to manage energy levels from beginning to end
- "Goldilocks agenda" – not too full and not too sparse

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Example Building Blocks

Welcome and overview	Warm up or relationship building	Needs or situational assessment
Briefings or info sharing	Generating ideas and options	Analysis, planning, or problem solving
Selecting, grouping, or making a decision	Consolidating or summarizing results	Evaluation and reflection

Careful design prepares you to improvise.

"The best-laid schemes of mice and men
Go often askew."
– Robert Burns, *To a Mouse*, 1785

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Miro Activity – Build an Agenda

SMART goal for a fictional facilitated session

- By end of session, develop one actionable "high bang for the buck" idea that would take our organization to the next level of effectiveness in its internal operations.

Activity Instructions

- On your group's Miro board, use stickies to identify topics or activities (building blocks) that you want to include in the agenda for this session. If you have time, order the stickies.

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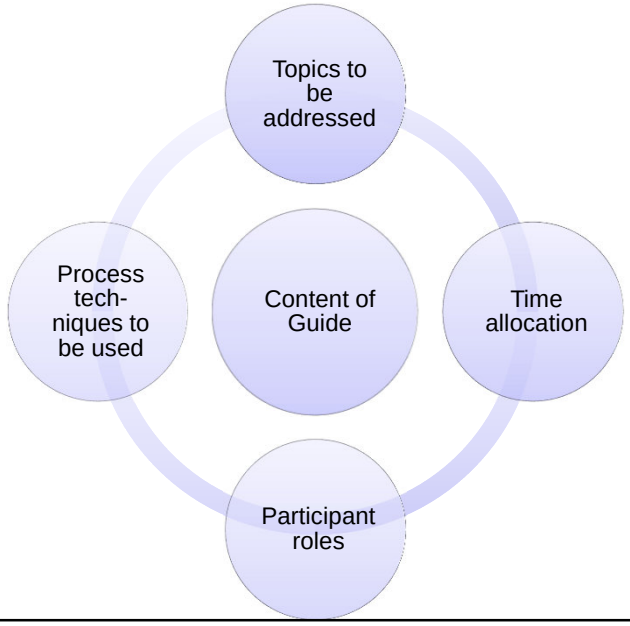
Write Facilitator's Guide



Example for One Topic

Topic: Select quality improvement focus

Purpose: Agree on one thing our organization can improve to get to the next level of operational effectiveness

Techniques:

1. Structured brainstorming to generate ideas (leader: JO)
2. Affinitization to quickly find common themes (leader: JO)
3. Multivoting to select one to dig into (leader: JO)

Other Roles:

1. Process monitor: Jolene

Tentative Duration: 70 m

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Refine Session Design Based on Feedback

Image by Gerd Altmann from Pixabay

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Preparation Step 4: Finalize

Purpose: finalize logistics and assignments
Who with: facilitation team
Template: logistics checklist

People
- Negotiate personal power
- Verify role assignments

Logistics
- Verify suitability of venue, room arrangement, and food
- Create materials and packets
- Gather supplies

Invitations
- Decide on prework
- Send invitations with agenda and directions

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Hold the Session

- Opening a session
- Guide problem solving
- Herd cats
- Closing a session

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Topics

1. Open a session
2. Guide problem solving
   a. Generate ideas
   b. Group and select
   c. Facilitate analysis
4. Herd Cats
   a. Get participation
   b. Maintain forward progress
   c. Language and questioning
   d. Action Planning
5. Close a session

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Process Facilitation Practices (reminder)

Core

1. Maintain neutrality
2. Actively listen
3. Ask questions
4. Continuously paraphrase
5. Summarize discussions

Supplemental

6. Record ideas
7. Synthesize ideas
8. Keep discussion on track
9. Test assumptions
10. Manage norms and make progress checks

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Reminder of Some Process Facilitation Tools

Ideation
(divergence)

- Visioning
- Brainstorming
- Nominal Group Technique (NGT)
- SWOT (SOAR)
- Gallery walk
- Word cloud

Analysis

- Root cause analysis (Ishikawa diagrams)
- Five whys
- Gap analysis
- Force field analysis
- Pareto analysis
- Systematic problem-solving process (PSP)
- Alternatives and options
- Process mapping

Selection
(convergence)

- Affinity diagrams
- Priority setting
- Decision grid
- Multi-voting
- E-voting
- Decision methods
- Parking lot

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OPENING A SESSION

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Establish Climate Quickly

Goals for first minutes

- Establish safety
- Start energetically and quickly
- Communicate objectives and process
- Clarify roles

Introduction Techniques

- Interview and introduce
- Mood board
- Something I've learned this week
- Round robin
- Three sentences about me
- Origin of name
- Word connection
- Continuum exercise

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Agree on Groundrules and Norms

Ask "What groundrules will help this meeting run smoothly?"

Interruptions	Side conversations	Absences
Use of electronic devices	Going off agenda	Frequency of breaks
	Wrong level of detail (rat holes)	

Discuss examples of groundrules that have helped your teams.

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Divergence

TECHNIQUES FOR GENERATING IDEAS

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Divergence Techniques

- ✓ Visioning
- ✓ Brainstorming
- ✓ Nominal Group Technique (NGT)
- ✓ SWOT (SOAR)
- Gallery walk
- Word cloud

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QuickTip - Visioning

Visioning is a highly participative approach to developing a shared description of a desired future state.

When to Use

Use this technique when the group must identify and get alignment on a goal. It helps participants clarify their thoughts, put forward their ideas, and hear perspectives from everyone. It increases buy-in to the future state because the group's direction is coming from all of its members. Visioning often creates a high energy level in the room.

Procedure

1. Identify the area at hand, for example, patient satisfaction. Pose a series of questions about

Handout packet page 5

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QuickTip - Brainstorming

Brainstorming is a method for generating many creative ideas in a short period of time, making it divergence activity. Participants call out their ideas as they think of them, so that each person has a opportunity to build on the ideas of others.

The goal of brainstorming is to stimulate creative thinking. Follow these guidelines:

1. Don't criticize or evaluate the ideas – just record all of them
2. Encourage wild ideas
3. Hitchhike – combine, modify, and build new ideas on the ideas of others
4. Encourage quantity

When

Use brainstorming when:

1. When a broad range of options is desired

Handout packet pages 6 - 8

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QuickTip – Nominal Group Technique

Nominal group technique (NGT) is a structured method for group brainstorming that encourages contributions from everyone. See the Brainstorming article for tips and other variations.

When to Use Nominal Group Technique

- When some group members are much more vocal than others.
- When some group members think better in silence.
- When there is concern about some members not participating.
- When the group does not easily generate quantities of ideas.
- When all or some group members are new to the team.
- When the issue is controversial or there is heated conflict.

Handout packet pages 9 - 10

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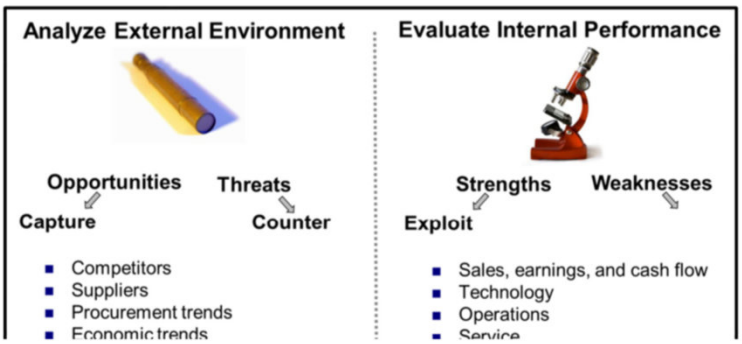
QuickTip – SWOT Analysis

SWOT analysis is a popular tool for situational analysis. SWOT is an acronym for "strengths, weaknesses, opportunities, and threats." It looks at both internal and external factors (figure 1).



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Miro Activity – Round Robin Brainstorming

Brainstorming question

- What specific things could our organization improve to get to the next level of effectiveness in its internal operations?

Activity Instructions

1. At your space on the Miro board, silently write at least three ideas, one per sticky (3 minutes)
2. In round robin format, place one idea (one sticky) per round on the main board. Do as many rounds as time

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Convergence

TECHNIQUES FOR GROUPING AND SELECTING

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Convergence Techniques

- ✓ Affinity diagrams
- Priority setting
- ✓ Decision grid
- ✓ Multi-voting
- E-voting
- ✓ Decision methods
- ✓ Parking lot

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QuickTip – Affinity Clustering

What

An affinity diagram is an information organizing tool. It promotes creative synthesis by asking a team to identify and group similar items from a large list of possibilities. The resulting structured information can then be used in further convergence activities such as ranking and rating. Affinity clustering is often paired with a preceding divergence activity that generates many raw possibilities, like brainstorming.

When

- You need to clarify or structure a large mass of information
- The problem is complex and difficult to understand
- You need to decide which ideas or information are important to the problem

Handout packet page 13

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QuickTip – Fist to Five Decision Method

To use this technique, the facilitator restates an action the group might take and asks the team to show their level of support. Each team member responds by holding up a closed fist or the number of fingers that corresponds to her level of support. If a team member holds up fewer than three fingers, she is given the opportunity to state her questions, objections, or recommendations for improvement. Then the team may respond, modify the idea under discussion, or generate new ideas.

This encourages several positive behaviors that may lead the team toward a higher quality decision.

- Dissenters make a case for their position to the rest of the group.
- Proponents hear and consider differing points of view.
- Everyone works together to make the proposal better.

Handout packet page 14

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QuickTip – Multivoting

What

Multivoting is a way to quantify the positions and preferences of a group by allowing each member to decide how much an option is worth to him. Each member's votes are recorded, but a decision is not necessarily reached. Multivoting gives the group information about where individual members stand and the strength of their positions. The votes are used as a springboard for identifying consensus, surfacing disagreements, and identifying the size of gaps.

When

- "Taking the temperature" of a group as it is moving toward agreement.
- Identifying areas of disagreement, misunderstanding, or differing priorities.

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QuickTip – Rating (Decision Grid)

What

A decision grid (aka rating) helps select the best option from several defined choices. The options are evaluated on important criteria. For example, a decision grid can be used to help a car purchase decision by rating alternative car models on important features like safety, gas mileage, performance, and styling. Criteria can be treated equally or given weights relative to each other – for some people styling is twice as important as anything else. Often the chief value of a team rating exercise is in the discussion and prioritization that it encourages rather than in the absolute point winner.

This sheet describes a simple rating system that is sufficient for many uses. There are more sophisticated methods of weighting priorities and rating options, such as used in QFD.

When

- Selecting the best option from several well-defined choices.

Handout packet pages 16 - 17

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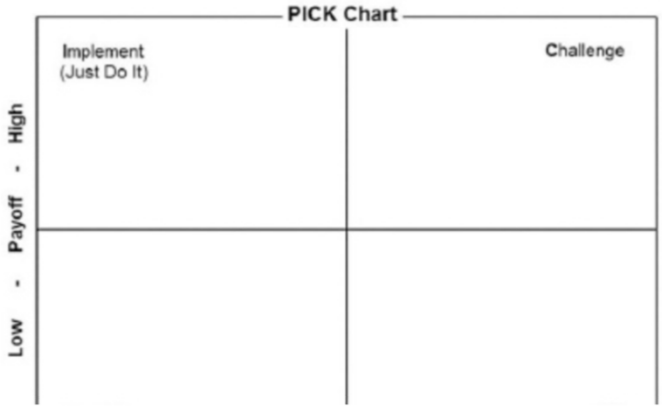
QuickTip – Rating (PICK Chart)

A PICK chart is a Lean Six Sigma tool used to categorize and prioritize improvement ideas. It's sometimes called an effort/impact chart. The chart has four quadrants:

- **P**ossible idea.
- **I**mplement idea.
- **C**hallenge idea.
- **K**ill idea.

An easy way to create a PICK chart is to draw a 2 x 2 grid either on a whiteboard or a large paper flip chart. Have participants place



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Miro Activity – Affinitization

Directions

1. Silently group the stickies from the brainstorming session into like categories
2. If silent “arguments” break out over a sticky, move it to a parking lot
3. When the movement settles down, discuss and name all categories, clarifying if necessary

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Miro Activity – Select an Improvement Idea

Objective: as a group, select one improvement idea to focus on, preferably one with high payoff and low effort.

Method:

1. Use a PICK chart to understand the potential "bang for the buck" of each idea. Discuss each sticky as a group and agree on which quadrant it should be placed in.
2. Use multivoting to select one idea from the most promising ideas on the PICK chart. The selected idea will be investigated further. Place the promising stickies on the multivoting grid. Each voter votes by placing a sticky with the number of votes in the "votes" column.

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TECHNIQUES TO FACILITATE ANALYSIS

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Problem Solving Techniques

- ✓ Root cause analysis (Ishikawa diagrams)
- ✓ Five whys
- ✓ Gap analysis
- Force field analysis
- ✓ Pareto analysis
- Systematic problem-solving process (PSP)
- Alternatives and options
- Process mapping

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QuickTip – Gap Analysis

What

Gap analysis is a steering technique. It is like reading a map to determine where you are, where you want to be, and routes to get there. Gap analysis determines the current state, the desired state, and steps to get from one to the other. Applied periodically, it is a useful way to ensuring forward progress through the fuzzy front end.

When

- You want to start a team off in the right direction.
- You want to align objectives among the team.
- You need to verify that you are still on track.

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QuickTip – Five Whys

This is a very simple but powerful questioning process that helps a team peel away layers of symptoms to get closer the real root cause of a situation. Understanding these root causes is key to making long term improvements to a situation rather than treating symptoms. The technique was originally developed by Sakichi Toyoda who stated that "by repeating why five times, the nature of the problem as well as its solution becomes clear."

When to Use

- When you want to bring clarity and refinement to a problem statement.
- When you need to elicit information on real motivations, needs, or existing ways of doing things. For example, you may need to understand how a business process is really performed instead of how it is supposed to be done, and why.
- When you want to push a group to delve deeper to figure out what the real problem is, not just its obvious symptoms.

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QuickTip – Cause and Effect (Ishakawa) Analysis

In 1943 Dr. Kauru Ishikawa developed cause and effect analysis. The technique creates a visual diagram of what causes an observed effect or situation. The diagram shows is usually called a fishbone diagram (after its shape) or an Ishikawa diagram (after its inventor). This technique is a structured way to think about why something is happening, allowing you to focus your limited resources on the most effective way to change the situation.

When to Use

Use this technique when you need to get to the root causes underlying a situation in order to solve the real problem rather than just a surface symptom.

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QuickTip – Pareto Analysis

Pareto analysis is used to help decide which of many causes to focus on in order to change a situation most effectively. It takes advantage of the Pareto Principle, which says that most problems have only a few primary root causes. Fixing those root causes will fix most of the resulting problems.

When to Use

Use this technique when you don't have enough time or resources to fix everything and want to focus on the things that will have the biggest effect on a situation.

It is often used together with cause and effect analysis. Cause and effect analysis is used to

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Miro Activity – Decide How to Make Improvement

Objective: understand root cause, then select an appropriate way to address that root cause and make the improvement

Method:

1. Get to root cause, if necessary, by doing verbal 5 whys discussion
2. Write current and desired states on Miro stickies and place them on the board with space between them. As a group, list on stickies what actions are necessary to bridge the gap.

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Miro Activity – Decide Whether to Advance the Proposal

Objective: decide whether the proposed actions are sufficiently worthwhile and well thought out to formally propose.

Method:

1. Do one or more rounds of fist to five on the Miro grid to get the feeling of the group on whether to advance the proposal.

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Individual Miro Activity (if time)

Pick a facilitation technique, whether or not covered here, and write yourself some notes on how you'd like to apply it to a future facilitation. Summarize your thoughts on stickies that you leave on the Miro board.

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GETTING PARTICIPATION AND STIMULATING PRODUCTIVE INQUIRY

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General Approaches That Increase Participation

1. Ensure topic clarity because obscurity reduces participation
2. Ensure clear norms for participation
3. Use techniques that involve all participants, such as brainstorming
4. Create buy-in
5. Use appropriate humor
6. Set up room to be physically comfortable and encourage easy interaction
7. Encourage pre-meeting preparation

- May be from individual, project, department, or organization
- Describe extent of organizational support
- If necessary, identify blockers

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High Participation Techniques

My Favorites

- Structured brainstorming
- Round robin or nominal group technique
- Affinity diagramming
- SWOT analysis
- Gap analysis
- Discussion partners with share-back session

Other Techniques

- Tossed salad
- Issues and answers
- Talk circuit
- Pass the envelope
- Visioning
- Appreciative inquiry

"Creating activity and buzz in the room brings people together." Ingrid Bens, Facilitation at a Glance, p. 97

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Activity – Try Discussion Partners Technique

1. In small groups (12 minutes):
   - In round robin, each person share a tip or challenge in getting participation from a facilitated group
   - As a group, agree on one method for improving participation that you will describe to the entire class
   - Prepare your talking points (no more than 3 minutes total)
2. As a class (12 minutes):
   - Each group present its talking points for 3 minutes

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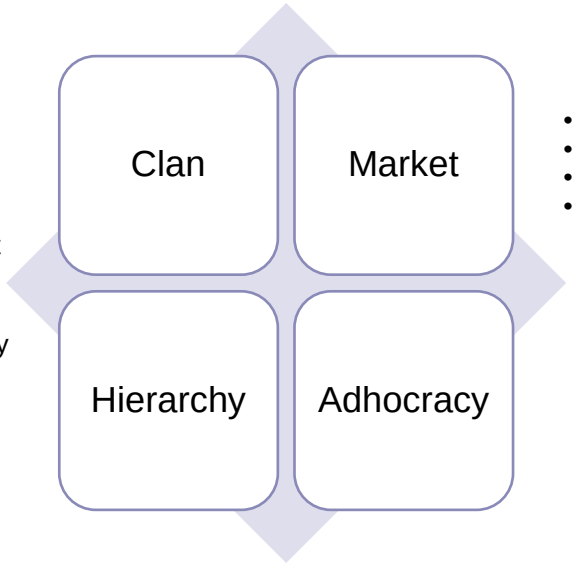
Culture of the Organization Affects Dynamics of Participation

- Organization viewed as extended family
- Leaders viewed as parent figures
- Clan members highly committed
- Teamwork is paramount



- Results-oriented
- Competitive members
- Aggressive leaders
- Emphasis on winning

- Formal and governed by procedures
- Focus on stability and control
- Prefers low risk and “no surprises”

- Dynamic and adaptive
- Oriented toward risk-taking and innovation
- Likes to try new things

Duarte and Snyder, *Mastering Virtual Teams, 2nd ed*, p 61-62

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Participants Will Import Their Organization's Culture

Power distance, especially effect on "voice"	• Willingness to speak up • Degree to which asking for help is viewed as incompetence
"Task" vs. "person" orientation	• Balance between getting things done and meeting the needs of individuals
Preference for "collectivism" vs. "individualism"	• Degree of emphasis on consensus, collective good, and mutual support

Some concepts proposed by Geert Hofstede, Dutch professor of organizational anthropology, in context of national cultures. https://geerthofstede.com/culture-geert-hofstede-gert-jan-hofstede/6d-model-of-national-culture/

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What a Facilitator Can Do

Things to Consider During Design

1. What cultural dynamics are participants likely to bring into the session?
2. What facilitation techniques can leverage or mitigate those dynamics?
3. How do cultural factors affect who to invite to the session

For example, how empowered will participants be to make immediate decisions?

Things to Do During Session

1. When agreeing on norms early in session, discuss cultural factors.
2. Watch for cultural forces at work under the surface of behavior.
3. If you need people to act in ways counter to their culture, use methods that create safety.
4. Allow the group to use its "home base" styles when possible.
5. But be prepared with counteracting techniques if "home base" style starts to significantly impede session objectives.

For example, is power distance affecting what someone is willing to say?

For example, make extra time for a collectivist group to hear every voice and reach consensus.

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Neutrality When You're Both Facilitator and SME

Challenges

- Reduced automatic process credibility
- Increased danger of closing down content discussions

Provide extra clarity

- Empowerment level of others
- Which hat you are wearing at any moment

Options for facilitating colleagues

- Stealth mode
- As-needed assistance
- Advance appointment

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Steering: guiding participants to achieve session's objectives

STEERING AND MAKING FORWARD PROGRESS

Chat

During this module, please share favorite techniques and tips for steering and maintaining forward progress

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Facilitators Are Always Observing

Read body language

Protect "minority rights" (unusual or unpopular ideas)

- Don't stifle – may turn out to be valuable
- Agreement not necessary
- Make sure can be expressed and discussed respectfully

Turn volume down on your own content opinions

"*Keep your mouth shut as much as possible* … it's best to confine your contributions to observations on process, statements of fact, questions to help propel the discussion, and clarification and summarization … The more active you are in the discussion, the more the group will take your positions and ideas as "right," and the less it will come to its own conclusions." *Developing Facilitation Skills,* Community Tool Box, University of Kansas, p. 24

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Technique to Re-steer: 4P Process Check

Progress

- "Is the goal of this meeting still being achieved?"
- When: few ideas are emerging or the discussion goes in circles

Process

- "Is the technique (e.g brainstorming) that we're using still working?"
- When: process is not being followed or technique is not yielding expected results

Pace

- "Is this meeting moving at the right pace?"
- When: agenda timeline is not being met, or people are fidgeting or want to go back over previous material

People

- "How are you feeling? Have you lost the thread of the discussion?"
- When: Meeting has gotten long or people look disengaged, tired or frustrated

"Conducting a process check involves stopping the action to shift member focus to the process or how things are going" Ingrid Bens, Facilitation at a Glance, p. 16

My Tips:

1. Check against the agenda.
2. If off track, let the group help you decide what to do.
3. Process check at periodic intervals, whether or not you think the meeting is on track.

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Techniques to Avoid "Rabbit Holes"

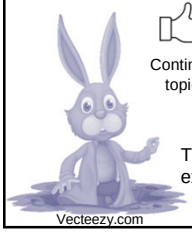
Timebox

At start of meeting set a norm about timeboxes

At start of a topic agree on time limit for it

Call for thumb vote when approaching limit

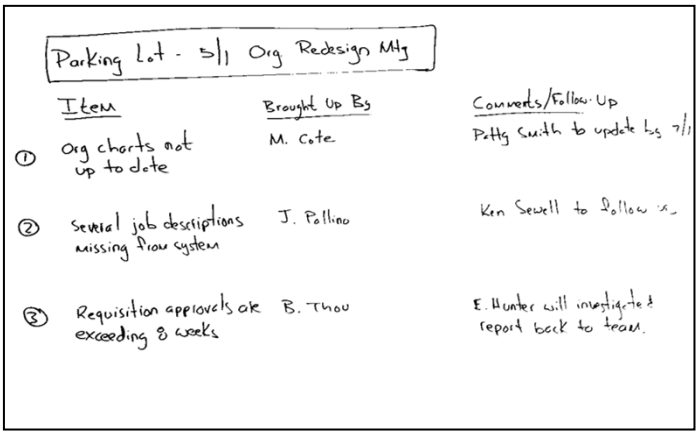
Continue topic | Move on | Either is fine



Vecteezy.com

Tip: group decides whether to extend timebox

Parking Lot



Example from https://projectmanagementskills.info/facilitation-skills/, retrieved 7/3/2017

Parking Lot is a technique for dealing with the tangential issues that threaten to take your meeting off track.

- Ava Butler, organizational development consultant, http://www.avasbutler.com

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Enhanced Parking Lot

Beginning of meeting

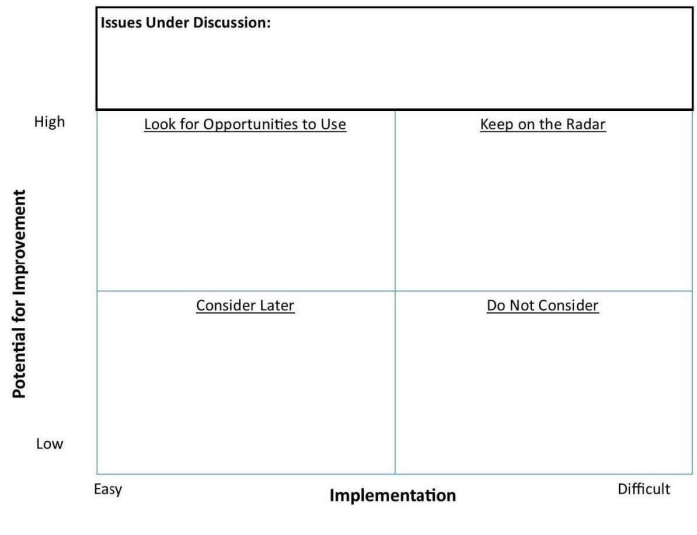
Draw blank parking lot | Explain use

When meeting starts to go off track

Briefly stop the meeting and write brief summary in the parking lot

End of meeting

Decide, as a group, how to address each item in the parking lot



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Technique to Move Forward: Consolidation

Pause the meeting

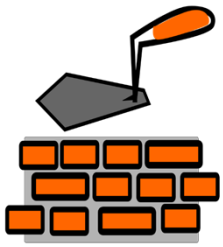
Restate, clarify, or summarize important points, arguments, ideas, or agreements

If agreement, declare closure

Move to next topic or agenda item

"What I think I heard you say is …"

"Let me summarize what we all just agreed on."



Consolidation firms up the foundation of agreement built so far, enabling you to start building the next layer.

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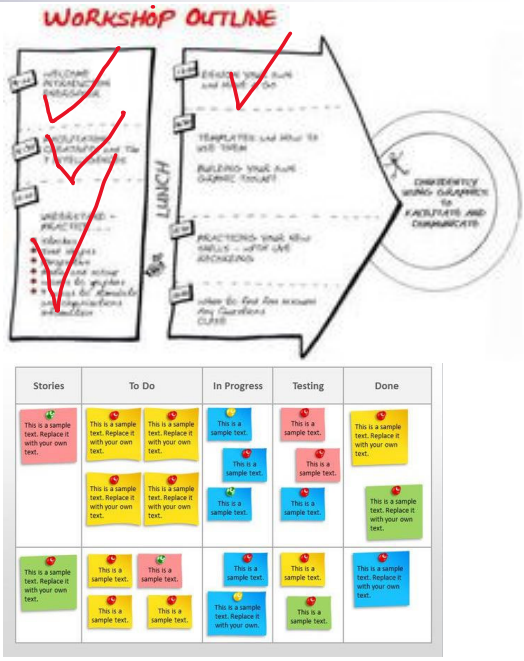
Visually Display Progress

Leave completed work visible (for example, flipcharts, brainstorming stickies, and SWOT diagrams)

Prominently mark up a visual agenda or Kanban board



Base image of outline from //www.pinterest.com/ahsparks/agendas-visual/

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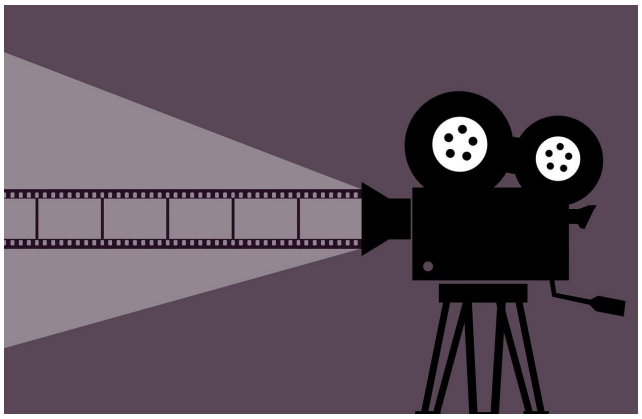
Take a Humor Break to Recharge



After the break, participants will be more creative and productive

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Dealing with Common Disruptions

Disruptor	My Favorite Technique
Domineering people	Create space for quieter people: • Round robin, NGT, or planning poker • Carefully construct discussion partners followed by share back session
Repeated departure from agenda	• Process check • Rat hole monitor
Participants have side conversations	• Advance ground rules or norms • If too obnoxious, pause the meeting and address directly
People who attack or dismiss others' ideas	Use the phrase "brainstorming rules"

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Tips for Preventing Disruptions

Facilitator can …

1. Understand how expectations of participants differ from meeting objectives
2. Get advance agreement on agenda, ground rules, and desired outcomes
3. Observe carefully for early warning signs of upcoming disruption
4. Stay in facilitator role and use "power of the process manager"
5. Use humor instead of getting defensive
6. Respect and acknowledge the experience in the room

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LANGUAGE AND QUESTIONING

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Use Constructive Language Styles

	Paraphrasing	Reporting behavior	Describing feelings	Checking perception
Style				
Example	"What I'm hearing you say is …"	"I'm noticing that we've only heard from the left side of the room on this topic."	"I feel like we've run out of energy and could use a break."	"You seem anxious to move on to the next agenda item."
Benefit	Assures participants that ideas are being heard Helps consolidate discussion so it can move forward	Gives participants information about how their actions are being perceived	Lets participants know it is OK to constructively express feelings	Allows facilitator to take emotional pulse and possibly redirect

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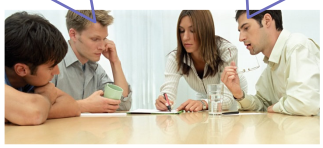
Cultural Diversity

Word choice and speech styles are especially important if participants are regionally or ethnically diverse

1. Frequently review and test for understanding
2. Watch for different culturally-based conversational styles
3. Avoid slang
4. Speak at a slower pace
5. Add extra patience

"Let's put that issue in the sandbox for now."

What does a sandbox have to do with work?



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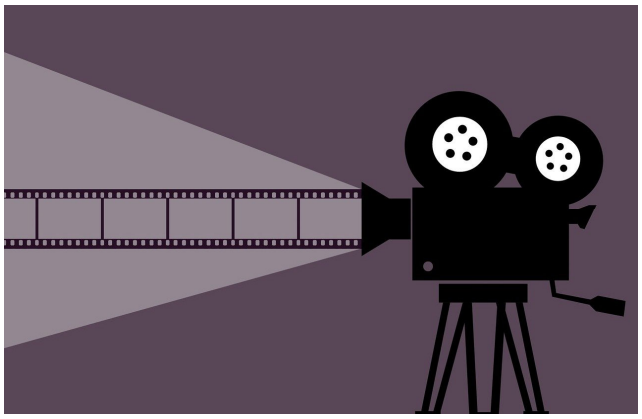
Video - Bowling, Tennis, Football and Rugby



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The Art of Asking Questions

Customize Questions for the Context
- e.g. org culture, recent history, current stresses

Ask Questions that Encourage Thought
- Minimize hinting of your own suggestions

Be Mindful
- Be aware of verbal and body language

Clarify Assumptions
- Terminology may be different
- "What I think I heard is …"

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Thoughtfully Prepare Your Questions

Thoughtfully design for the situation and context (in advance if possible)

- What do I need to know from the group?
- Why do I need to know it?
- What questions can I ask to surface it?
- How might people respond?

"Questions are the heart and soul of facilitation. Facilitation is, after all, about asking for input instead of telling people what to do." Ingrid Bens, Facilitation at a Glance, p. 31

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Questions Can Stop or Start Discussion

Closed-ended	Open-ended
• Elicits short answers • Tends to close discussion • "Is this agenda OK with everyone here?	• Requires explanation • Stimulates thinking • "What ideas do you have for explaining this to our sponsor?"

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Clarifying and Probing are Different

Clarify

- Purpose: ensure everyone understands what is being said
- Example: paraphrase back "What I'm hearing you say is …"

Probe

- Purpose: take group to deeper levels of thought and understanding
- Example: "five whys" technique

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Question Formats

Fact-finding — Gathers verifiable info
- "What progress tracking methods were used on that project?"

Feeling-finding — Reveals subjective opinions
- "What kind of reaction are you expecting from the users?"

Tell-me-more — Encourages people to elaborate
- "What other options can you think of?"

Best / worst — Tests outer limits
- "What is the biggest challenge working on that project team?"

Third-party — De-personalizes challenging questions
- "What are your thoughts about why some people might resist this approach?"

Magic wand — Encourages innovative thinking
- "If you had total control over the project, what would you change first?"
- "I wonder what it would look like if … What do you think?" (empathetic nudge; de-personalizes)

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Individual Activity

1. Write down two categories of questioning that are typically challenging for you to do as well as you'd like
   - Examples of categories: open-ended, closed-ended, clarifying to ensure understanding, probing to encourage deeper thought, thought stimulating, fact finding, feeling finding, encouraging out-of-the-box ideas, testing the limits, and de-escalating
2. For each of those categories, write an example question that you can keep in your hip pocket

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PLAN FOR ACTION

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Use Action Items to Get Agreement on Next Steps

Reminder

Issue and Action Item (AI) List

Project Name: Online for All			List owner: Jessica W.		
ID	Issue Description	Action and Status	Entry Date	Owner	Due Date
1	Department has decided that all fall MBA classes will be 100% virtual, so must replace face to face team exercises with something in cyberspace that is compatible with Zoom.	Find supplementary software that enables virtual, collaborative manipulation of forms, stickies, work breakdowns, and network diagrams. Status as of 6/30/20: Miro recommended by WU EDC, so prototyping virtual classroom. Next step is to demo to department head.	6/16/20	John S.	08/10/20
2					

Really important tips!
1. Ensure that each AI contains information on *what*, *who*, and *when*.
2. If you can't get a firm date for the *when*, ask for a "date for a date."
3. Capture action items and decisions in real time by writing on a whiteboard or flipchart. Take a photo at the end of the meeting.

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General Principles for Facilitating Decisions

Empowerment
- Understand how empowered the group is to make decisions (upcoming slide)

Clear Methods
- Be clear upfront about decision process and roles (upcoming slide)

Assumptions
- Clarify in advance the assumptions that people have about the decision

Avoid Smoothing
- Don't smooth over significant differences (tip: fist to five or multivoting)

Closure
- Be picky about clean closure, including summarizing decision

Time Out
- Do a process check if things start "spinning"

"One of the most important roles of a facilitator is to help groups make complex decisions" Ingrid Bens, Facilitation at a Glance, p. 126

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Be Clear About Empowerment Level of Team

	I	II	III	IV
What is team's role?	Team is informed by management	Team provides input to management	Team recommends course of action for approval by management	Team has full authority to decide and implement
Who crafts course of action?	Management	Management	Team	Team
Does team have input?	No	Yes	Yes	Yes
Who has final approval authority?	Management	Management	Management	Team

Chat

Please share your tips for facilitating a group to come to an appropriate decision about a course of action.

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Decision Methods

Method	Usage	Pro	Con
Consensus	▪ All understand problem, create options, and agree on decision ▪ Best for complex decisions with far-reaching consequences	▪ Diverse ideas lead to high quality decision ▪ Builds strong commitment	▪ Takes lots of time ▪ Can gridlock ▪ Practical use limited to small groups
Democracy	▪ Majority vote wins ▪ Best for large group deciding on well understood options	▪ Fast assessment of large group ▪ Can include many people	▪ Losing side may have low commitment ▪ Poor when options are complex or many
Delegating	▪ Delegate decision to specialist team members ▪ Best when specialized knowledge is required	▪ Simplifies by reducing involvement ▪ Experts make decision	▪ Everyone must trust the experts
Consultative	▪ Decider gathers broad input and attempts to gain consensus ▪ Makes autocratic decision when necessary	▪ Intermediate quality, speed, commitment ▪ Single person responsibility	▪ Doesn't work if decider does not genuinely listen
Autocratic	▪ Team leader makes decision, often with little input ▪ Best when speed is important or agreement is unnecessary	▪ Fast, "decisive" ▪ Takes advantage of leader's different perspective	▪ Uninformed decisions can be disastrous ▪ Can destroy trust ▪ Poor commitment

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Consensus Building

If …

Issues are important

Issues affect many stake-holders

Total buy-in matters

Then …

Consensus is expensive but worthwhile in these circumstances

Hallmarks of Consensus

- Many ideas are shared and built on
- Everyone is heard
- Open and objective quest for new options
- Active listening and paraphrasing
- Outcome is well thought through and all are committed to implementation

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Reminder: Techniques for Making Real-time Decisions

Fist to Five

Multivoting

Decision Matrix

	Cost	Allergy Accommodations	Entertainment	Team Preference	Distance
New York steakhouse	5	4	3	4	2
Italian	3	2	3	2	4
Mexican	3	2	2	3	5
Japanese	4	3	5	5	3

Image credits, retrieved 6/30/20
https://www.iaf-world.org/site/es/articles/2016-07-31/method-month-fist-five
https://www.ahrq.gov/patient-safety/settings/hospital/resource/pressureinjury/guide/apb.html
https://www.lucidchart.com/blog/how-to-make-a-decision-matrix

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Closure Doesn't Mean Everything Is Resolved

CLOSING A SESSION

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Review Accomplishments and Next Steps

Look toward the future

- Summarize agreed on next steps (at a high level)
- Verify next meeting time, location, and participants
- Agree on follow-up methods (how, who and when)
- Help participants draft an agenda for next meeting

Review accomplishments

- Summarize decisions
- Verify action items, including owners and target dates

Find dispositions for what was not completed

- Agenda items that were not reached
- Items in parking lot
- Issues raised but not resolved

Wrap up

- Photograph or transcribe flipcharts, whiteboard and notes
- Evaluate the session (e.g. survey, written evaluations, or plus / delta)
- Thank everyone!

"A common problem in many meetings is lack of closure. Lots of things are discussed, but there is no clear path forward." Ingrid Bens, Facilitation at a Glance, p. 58

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Post-Session Follow-up

Chat

During this module, please share via chat your tips for getting good follow-up after a session is done.

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Send Written Summary of Session

Minimum Content	Speedy	Concise
• Decision log • Action item log • Info on next meeting	• Within 1 business day of session end, if possible	• Full minutes rarely necessary • Usually favor speed over comprehensiveness

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Monitor Action Items (Short Term)

- Regularly check status of AI's (e.g. weekly update on AI's with upcoming target dates)
- Post simple status visually and publicly
  - Example: RYGC dashboard
- Enable pressure and help from colleagues
  - Visual methods create subtle pressure to act
  - Consider scheduling a regular AI review and problem-solving meeting

In my experience, AI monitoring is most effective for AI's with time horizons of less than a month

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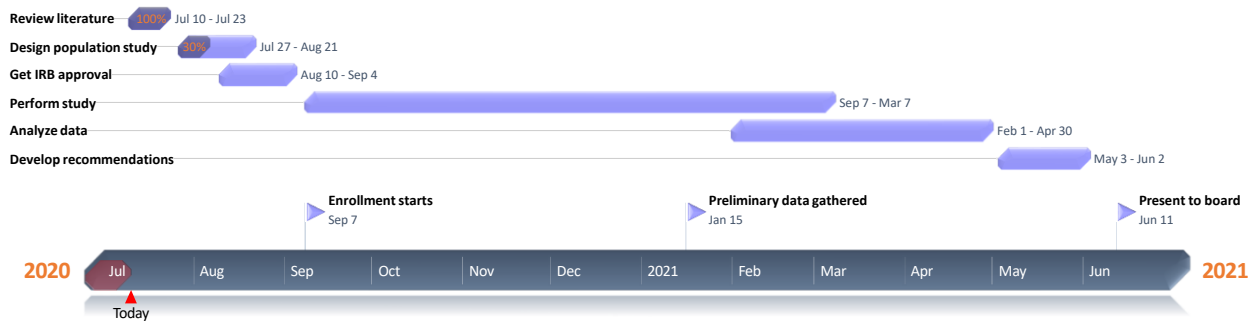
Monitor Action Roadmap (Longer Term)

- Use visual roadmap
  - Communicate and track action plans that have longer horizon
  - A month to several years
- Bar format is easy to understand
  - Example uses Office Timeline plugin for PowerPoint
  - Can also draw using Excel or Miro grid and shape tools



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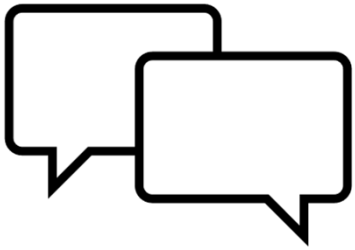
Seek Feedback for Continuous Improvement



As facilitator …

- "What did I do well?"
- "What specific things should I do differently next time?"
- "Is there something new you think we should try?"

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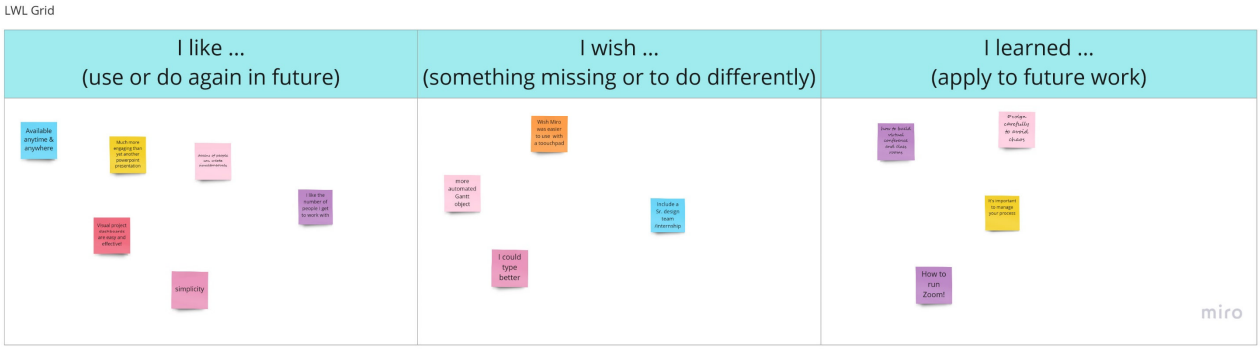
Miro Activity – Quick Retrospective



Alternative: roses, buds, and thorns

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Best Practice Strategies

A good facilitator is …

- Prepared
- Observant
- Firm on process
- Flexible
- A consensus builder
- Optimistic
- Follows through

"Facilitating should be an egoless activity. The purpose is to make the group successful, not to make yourself look really important and clever. An effective facilitator will leave a group convinced that 'We did it ourselves.'" Ingrid Bens, Facilitation at a Glance, p. 25

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Action Planning

1. In small groups discuss what facilitation concepts or techniques seem most applicable to your work (5 min.)
2. As individuals, write a "777" action plan for yourself (5 min.)
   - Three short bullet lists
   - What actions are you going to take in the next 7 days, 7 weeks, and 7 months to apply learnings from this class?

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