
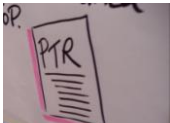



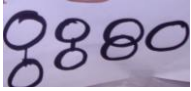

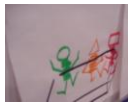

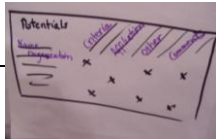



- PROCESS DESIGN – MAKING IT WORK – A PRACTICAL GUIDE TO WHAT TO DO WHEN & HOW FOR FACILITATORS, CONSULTANTS, MANAGERS & COACHES

	Introduction	Part I – STEPWISE		Part II – PEOPLE FACTORS		
		1. SIX STEPS	2. GUIDELINES FOR PROCESS DESIGN	3. PERSPECTIVES FACTOR IN PROCESS DESIGN	4. THE POWER FACTOR IN THE PROCESS DESIGN	5. THE VALUES FACTOR IN PROCESS DESIGN
Key Points	ROI (Return on Investment) Continuous series of action Client demand for good design Dynamic process	Introducing: - Process of design - Language (PTR) - Structure of book - Imagery “Simple design doesn’t mean easy”	Presentation Conscious of time Card the “overs” Strategic use of experience Mental maps Opening and Closings Environment that appreciate learning	Deepening understanding and broaden Develop new insight from deep perspective Group participation 4 client types Different participant style Presenting the issue may not be the real issue Client language	8 types of power (overlapping): <i>Positional, Personal, Reward, Coercive, Enabling, Expert, Resource, Relationship</i> Commitment High-maintenances	Continuum of operational values (way of using values) Levels of values (hierarchy in function): 1-preference (feel) 2-consensus (peer) 3-consequence (impact) 4 –principle (global)
Significance	Consists of: design + facilitation (are different, not just techniques)	We are process consultants and facilitators	The book is deceptive of seminar design	Importance of knowing your group (3 keys)	Try not to schedule high maintenance power Get them involved –give them the job	Choose supportive decision making process
Learning to take away	Block design (time) higher level of planning Effective design is customization Heightened awareness Process consultants Situation dependent	Predictability of facilitation results increases with good design PTR is the output of a design conference, tacit and unnamed in ToP	Traditional design – challenges this thinking Have to consider the guidelines Curve the “overs” Trust the process – tie the camel	Stepping back – broad perspective (client and facilitator) Anticipate group’s process and norms, participation style Not walking into the room w/o anticipating the audience Cultural exploration The whole = greater +different from individual perspective, build into the context	Make explicit the give and get Get clear WIIFM Clarify extent of commitment Make sure you have the right power in the room Use power positively Have/use/recognize your own power so that you can use it most effectively Think about power strategically – related to purpose Sweet spot=smallest number of people to get the job done (w/broadest perspective)	Listen for values Facilitator outline values with actions (systems, protocols) Know if you are a good “fit” with client (“values clash?”)
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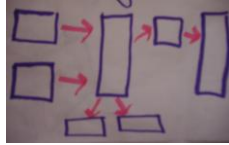

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Part III: DUE DILIGENCE: A PROCESS TERMS OF REFERENCE

	6. ABOUT A PROCESS TERMS OF REFERENCE	7. UNDERSTANDING THE SITUATION	8. DEVELOPING A FOCUS	9. STAKEHOLDER COLLABORATION	10. CORE ASSUMPTIONS
Key Points	Objectivity PTR is a map Collaborative Maintain boundaries Developmental Iterative Enable transparency Ownership leading to outcomes	Circumstances surrounding process Rationale with now Brief history General statement of main challenge Potential benefits	Purpose conversations:” Big picture reason” Focus and scope Map of Intention • Purpose • Objectives • Outputs • Outcomes	Key players in process Some do pre work, consultation, final decision-making, background Complex – relationships, perspectives, weight, balance, competing, conflicting obligations, expertise, legal, moral, practical, organization, funding Identify stakeholders Why, how & at what point in process Give (contribute) & Get analysis (get from process)	Core assumptions: Agreement on key decisions & assumptions
Significance	Engagement of client group starts up front with contracting It is a marriage of the high level with complexity/details	This becomes the objective level of the whole event Skimming the surface	Begin with the end in mind Realize that focus is multi-faceted Provides assessment measure at end Builds ownership – assumes participatory input	Affects whole process Keeps it relevant Affects end results Involvement & Power Willingness to be involved	Watch for: • Scope creep – changes in boundaries or jurisdictions • Scope Drift – slow adjustments in intention
Learning to take away	Compare with design eye, similar ->mixed Objective level for design process to create transparent common ground Avoid jumping ahead – stay focused on PTR The elements(like kaleidoscope are important) This is elastic	The reality in which a process is embedded is always more complex than words to describe it.		Affects end results Involvement & Power Willingness to be involved Consider using stakeholder matrix (p. 141), content expertise, criteria, affiliation, other “Charisma is not the basis of facilitative leadership” “Stakeholders with much power & little commitment are not as valuable as those with less power & a lot of commitment.”	Awareness of drift Assumptions make the implicit explicit
Image					

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Part III: DUE DILIGENCE: A PROCESS TERMS OF REFERENCE

	11. KEY CONSIDERATIONS	12. WORK PLAN	13. GOVERNANCE	14. ESSENTIAL DOCUMENTS
Key Points	<p>Potential impact related to key decisions</p> <p>Assumptions vs. key considerations – important to distinguish between the two – asking the right questions is critical (pg. 156-158)</p> <p>Discover the value tensions</p> <p>Naming the key conversation language – generic or specific</p>	<p>Documents the mile stones, work products, events, and responsibilities & deadlines</p> <p>Design for how to approach process & not the event itself</p>	<p>Process in temporary organization</p>	<p>Collect data to support “O” level of process</p> <p>Glossary</p> <p>Quality checklist / validity</p>
Significance	<p>Generally is what is not seen that matters</p> <p>Core assumptions are closed “givens”</p> <p>Key considerations are open throughout & become important points for discussion & decision making -> significant impact on outputs, outcomes (+ & -)</p>	<p>Process overview</p> <p>Time & outline for each phase</p> <p>Main action items in each phase</p> <p>Deliverables</p> <p>Resources</p>	<p>Structure are</p> <ul style="list-style-type: none"> • Elegant • Simple • Efficient • Match process plan 	<p>Surface all data to get everyone “on the same page”</p> <p>Talk to one another coherently & efficiently</p> <p>Raises issues around when & to what degree data is interpreted prior to meeting (& by whom)</p>
Learning to take away		<p>Range from simple to complex</p> <p>Clarifies what’s expected</p> <p>Could shift from simple to complex</p>	<p>Clarifies roles & responsibilities</p> <p>Sturdy but doesn’t overtake process</p>	<p>Less is more – focused, priority docs</p> <p>Agree on what important words mean</p> <p>Quality checks will drive future</p>
Image		<p>Check design against strategic plan, etc. for relevance</p> <p>Developed by leadership management & implements</p> <p>Customize work plan, terminology & approach for client</p> <p>When its development often before facilitation begins</p>	<p>Not attending to it can lead to disintegration or blockage</p> 	



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	15. PTR – THREE EXAMPLES	16. WHY EVIDENCED BASED SOLUTIONS?	17. A DESIGN FOR DEVELOPING EVIDENCED BASED QUESTIONS	18. A TOWN HALL MEETING WITH XYZ FINANCE DEPARTMENT	19. A WORKSHOP ON MISSION AND VALUES
<p>Key Points</p> <p>Significance</p> <p>Learning to take away</p> <p>Image</p>	<p>PTR has overarching design and is flexible Customizes to client</p> <p>Flexible Knowledgeable of PTR process</p> <p>Starts with a situation</p> <p>Ends with implementation – who and how</p> 	<p>Tighten up the O Nail the D Clarify the facts & data</p> <ul style="list-style-type: none"> Ambiguity of facts Manipulation of data <p>Pay attention to the R Collaborative process to determine what needs to be evaluated for what purpose</p> <p>Once the why is clear, we can design the questions Interpretative level can bias the agenda</p> <p>ToP has the potential for discipline needed to get evidence based Need a process to get assessment of outcomes meaningfully</p>	<p>Experts Develop questions Develop flow chart Get background data Develop questions to get answer</p> <p>Design Question process to get to goal</p> <p>Facilitator brings process ORID brings process</p> 	<p>Blocked agenda Process design = underdeveloped agenda</p> <p>Need aims for each block</p> <p>Need process design embedded</p> <p>Leading to . . .</p>  <p>Thanks to all that participated in this book charting event at the 2011 ToP Network Meeting – Irina Fursman & Heidi Kolbe</p> 