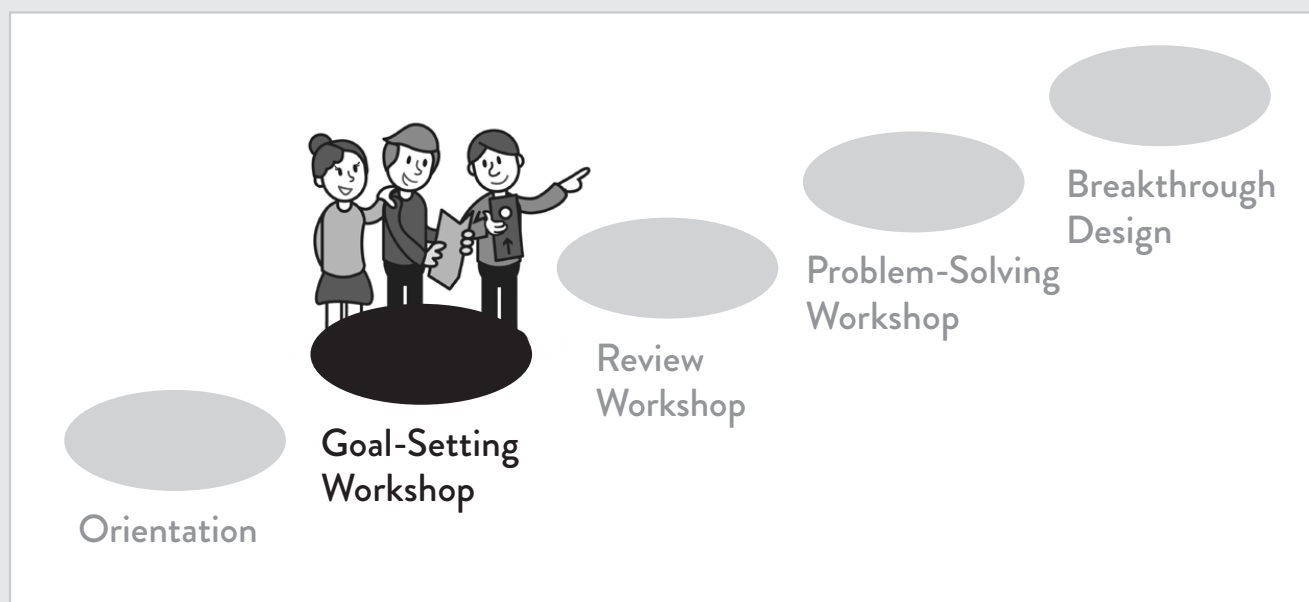


3.2: Goal-Setting Workshop: Finding solutions with Café



What's here

- **Case study:** The second stage of a 3-stage workshop. The objective in this stage is to find solutions to current challenges.
- **Tools:** Café, Investment Activity, Silent Moving, Group Ranking

How it helps

Café lets a group discuss multiple topics at once and is an ideal tool for emergence. This section shows you an example of a successful Café method and teaches you how to incorporate it into your meetings and workshops.

The workshop continues

After a short break following the clarifying stage, I continued the workshop with the group of UTS employees to build on the work done earlier in the day. It was time for them to take the next step in turning their goals and visions for the future into a reality; I was about to lead them into the Solutions stage of the workshop.

Check-in

I gave a friendly wave as Yao, Bill, Chi, Donald, and everyone else filed back into the room. I pulled out the dartboard from the previous stage which still had the Post-it notes placed all around it. In the centre of the dartboard, there were three Post-it notes that had been placed in the zone marked *crucial*. I pointed to them and said, “These are the specific goals that you all decided were the most important.” I pointed to each note one by one and read the goals aloud; “Improve communication between departments”; “reduce employee turnover”; and “increase the number of repeat customers.”

No one had any questions so far, so I continued and explained to them that the objective for this afternoon session is to figure out solutions for the goals. “Your job now is to look at the goals and decide what would allow UTS to reach them.”

Paula stopped me and jumped in with a question. “So, by solutions you mean how we are to solve the problem ourselves? Actions we take?”

“Not quite Paula. By solutions I am referring to more general trends or factors that would help UTS achieve a goal. One good way to distinguish between the two is to think of a solution as something larger than one person, and an action is something you can specifically participate in yourself to help reach a solution. Take your goal of having longer customer relationships. A solution for this goal could perhaps be to provide unmatched service that is so good, customers will have to come back. Creating solutions to our goals is serious business. We will need something out of the ordinary to make sure that we are up for it. Luckily, I have just the thing in mind.”

“What now? Should we prepare ourselves for a game of billiards or to go skiing?”, asked Sarah.

“That is not a bad idea, but no more sports. Instead we are going to partake in a classic Finnish pastime; We are going to a beautiful café to chat amongst friends. Look around the room now! We are already there!”

Sun was already looking around and he seemed a bit disappointed. “Pepe, we know this room. It is conference room #4. We had the morning session here, remember? I don’t see any donuts or coffee. There are just some groups of chairs and flipcharts scattered about.”

Sun was right, and I hoped that he did not mind the lack of coffee and donuts too much. To make things clear, I continued with the instructions and emphasised that a bit of imagination would be required to bring the café to life.

“Think again, Sun,” I said. “Most of you probably think that you are seated in a large conference room in UTS headquarters, but don’t be so sure! We have left the boring confines of conference room #4 and moved to a wonderful café. Look around. There are different tables around the café.”

I pointed to the three separate groups of chairs, each with a large flipchart at the centre of it and with a few markers on the table.

“Those are not menus on the flipchart. If you look a bit closer, you will see that each flipchart has one of your goals written on it. Can someone read out loud what the three flipcharts say?”

Donald nodded and said, “This flipchart says, ‘reduce employee turnover’. Over here on this other table the flipchart says, ‘improve internal communication’. And on the table in the back the flipchart says, ‘increase the amount of repeat customers’.”

“Thanks, Donald. These are the goals from earlier today. First walk around the room and take a few moments to think about solutions for each of the goals. Write down your own ideas for each topic, and once you are ready, choose a seat at one of the tables. This will be your discussion group. Do not worry about which table you choose, because you will rotate through all of the tables before the activity ends.”

Everyone stood, and around the room they went, silently considering each goal and occasionally pausing to write down their thoughts. After about five minutes, everyone was seated at a table, so I continued by giving the next set of instructions.

“Just like in a real café, we are going to have some great conversations with friends listening to each other and connecting diverse perspectives. Look at the people seated at your table. This is your discussion group, and together you will rotate from table to table writing down your discoveries so that you have the chance to discuss each topic...well most of you that is.

Each table will have a host overseeing each table in the café. The host has an important job which is to stay and write down the solutions that the group comes up with. The hosts also help develop the conversation with new groups as they rotate by explaining the solutions that have already been written down.”

I continued, “I need one volunteer for each table to be the host and help newcomers to catch up with the conversation and to also record solutions on the flipchart as you think of them. The host needs to stay at the same table for the entire 30 minutes, so this person should be very enthusiastic about the goal that they volunteer to host. Let’s start with the goal to improve internal communication in UTS. Would anyone like to...” Before I could even finish, Caitlyn, the head of Human Resources, shot her hand up to volunteer. Hiring Director Josef volunteered to host the conversation about reducing employee turnover, and Donald volunteered himself to host the meeting about increasing the number of repeat customers.

“Thank you, hosts, for volunteering. I will be here to help if needed, so let me know if I can assist in any way. I will not keep you from your café time any longer, get to it!”

Conversation flowed freely at all three tables and people rotated easily from table to table when I asked them to. Josef was hosting the discussion about reducing employee turnover, and he was doing a good job by leading the discussion, asking people to expand on their thoughts, and taking notes the entire time. I could tell he was quite passionate about the topic, considering that he was responsible for all hiring practices at UTS. One table over, Caitlyn was already beginning to write down solutions on the flipchart for her hosted topic of improving communication between teams and departments. Considering her role in human resources, this topic was an important one for her, too. In the other corner of the room was Donald who was loudly leading his group in a discussion about the obstacles that are keeping UTS from having more repeat customers.

About every twelve to fifteen minutes I would call for everyone to rotate groups and announce how much time was remaining.

“26 minutes left, time to move to the next table!”

“13 minutes remaining, so rotate to the next table.”

“Just 2 more minutes, so make sure you have time to finish your thoughts and do not leave any business unfinished!”

And finally, “OK everyone! Your time in the café has concluded, it is time to come back to conference room #4.”

“That was a quick 40 minutes. I feel like I could go for another 40 minutes or so,” said Chi. A few others agreed, and more remarks were made about how quickly the time had passed. I said, “Time flies when you are having fun. Speaking of fun, we are going to now transition from our nice café to another favourite thing of mine, money!”

Put your money where your mouth is

”First things first. Can each host make sure that their flipchart with the solutions is set up so it is easily visible for people walking past?”

Seeing that this was the case, I gave the instructions for the next stage. “Everyone please take out a piece of paper and something to write with. Around the room are three tables with the solutions for each goal written on them. Your job now is to walk around and read all of the solutions that are written on each flipchart. Take a few moments to think about them, and then choose only your favourite solutions that you want to be implemented for each goal. Some goals might have several favourite solutions, and others might not have any. I know that this may be hard as there are so many good solutions, but not everything can be your favourite. This is a silent and individual activity, so there is no need to talk to anyone, but if you have any questions, please ask me.”

Solutions for reducing employee turnover

- Hire right (now the skills match and people perform on a high level, but perhaps change the slant of the hiring process slightly to include long-term motivation and fit as well)
- More support systems in place—reduce isolation and silos
- Outbid competitors to retain talent—competitive salary and ages and compensation packages
- Sustainable workload for employees to avoid burnout
- Review old talent pipelines and establish new talent pipelines
- Develop a deeper orientation for new hires
- Push HR as an available resource that should be actively used
- Find out why employees are leaving and analyse the data

Solutions for improving internal communication

- Avoid silos and isolated working practices—(within UTS tech division)
- More collaboration and discussion beyond small talk and exchanging pleasantries
- Unified team vision and KPI's that go beyond a singular person or project team
- Common targets
- Sharing more time together during normal working days
- Spend time together outside of work
- Better email communication
- Higher participation using internal tools
- Expand mindset to include more people (not “I work for the Blockchain Team” but “I work for in the Tech Division of UTS, one of the best consulting firms out there!”)

Solutions for increasing the amount of repeat customers

- Follow up post-service with customers to check experience
- Offer level of service that stands out
- Package services in a way that lends itself for repeat business
- Solicit reviews to identify strengths and areas to improve
- Find out why customers switch from us to a competitor
- Create personal relationships with valued customers
- Offer competitive pricing to keep current customers
- Market towards existing customers and not only to find new customers

The group did as they were told and circulated the room silently and wrote down their favourite solutions. They had half an hour in the café to discuss and debate, so for this I only gave them a few moments.

“It looks like you are finished choosing your favourite ideas. Now it is time to put your money where your mouth is. Please find a partner for this activity. I am going to give each pair \$15 to invest in the best solutions. Decide with your partner where you want the money to go. If one solution is by far the best, you may want to invest all your money into that. Or you can decide to split the cash up between a few different solutions. If all the solutions seem bad simply keep the money for yourselves.”

The six pairs got to it. Most groups were deciding quietly among themselves where to invest, but I could hear Isabelle and Phil from across the room.

“Thirteen dollars? That is almost all our money! How can we put that much into just one idea?”

“Well it is easy if it is the best, and I think that this is the key for better communication among employees!”

They carried on their spirited discussion, which I liked seeing. *At least they care*, I thought.

Finally, people began to quiet down and turn to me once their money had been invested. Even Isabelle and Phil had reached an agreement and found peace with one another and were ready for the next stage.

I walked around the room distributing markers and pieces of A4 paper, and said, “The last part of this activity is to count up the amount of money spent for each solution. If a solution has \$3 or more invested into it, write it down here on this piece of paper in large letters. One solution per paper, please. When writing down your solutions, also write down the goal that it corresponds to. It may seem obvious, but this will help keep everything clear later.”

The group decides

Among the six pairs, there were nine total solutions that had \$3 or more invested into it. I took the pieces of paper from each pair and shuffled them together to mix them up.

“Alright, please get back into three even groups that match the original topics. I have here a stack of the ideas which you invested in. I mixed them all together because I want each group to have the chance to see and compare solutions from all three topics. I will distribute the ideas randomly to all of you. Your job is a simple one; read them and decide together what the best ones are, and no ties allowed! You are going to rank them from best to worst. Once you have decided what the best solution is, take that piece of paper and write a #1 on it. Do the same for the rest of them. The second best is #2, and so on. You have 5 minutes.”

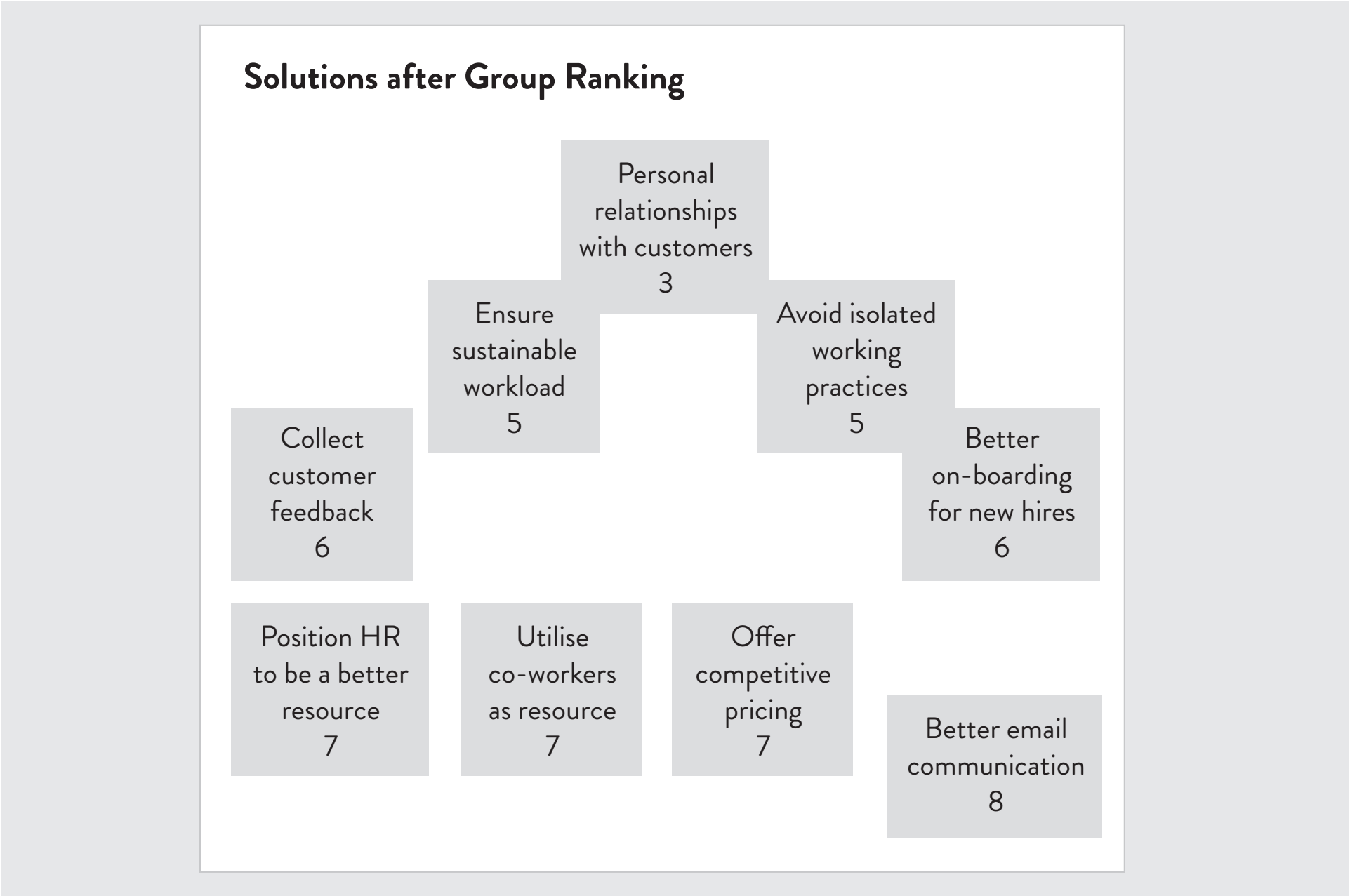
Once five minutes had passed, I collected the papers and rotated them to new groups so they could be ranked again. I did this a 3rd time to give each group the chance to review and rank all the solutions.

“Now that all the solutions have been ranked by each group, let’s tally the results! Please add up the ranking scores for every idea now.”

I walked to a large wall and explained how to organise the solutions. “Since we have three groups of solutions, the best possible rank is three. Who has a three? Please use some tape and place the solution on this wall. Who has a four? We will organise them by rank; the solutions with the highest rank go towards the top of the wall, and the solutions

that were ranked lower can go towards the floor. Tape them on the wall so we can read the solutions. Who has a five?”

Everyone followed instructions (what a great group!) and soon the solutions were taped to the wall.



Once the jumbo Post-its had settled, everyone stood back and admired their work. “Nice work, everyone. What we have here are the pathways towards the goals we were wishing for this morning. And better yet, you all have organised them together, and we can clearly see what the best ones are. But we are not quite done yet. We need to take things a bit further. The last step for today is to commit to our solutions. Read them all, and if you see a solution that you are willing to commit to, take it off this wall and walk over and place it on the wall behind you. Once you have done this you can sit down. If someone takes a solution off the wall that you want to commit to, that

is OK. The important thing now is to make sure at least one person is committed to making the solution a reality. No need to chat here, either. You can read the solutions quietly and move any of them that you are committed to.”

Bill started things off by pulling a piece of paper off the wall almost immediately and moving it to the other wall. Others followed his lead, and soon almost all solutions were on the other wall. Only the lowest-ranked idea related to better email communication remained. I was feeling proud. We began the day only a few hours earlier by wishing for an abstract better future for UTS, and now the entire group from different departments and levels within the company had agreed on the solutions to get these goals, ranked them, and committed to them.

I closed the session by asking everyone how we did in achieving the objectives for the day, and by calling on three volunteers to give feedback. Everyone was content, so I was able to end things there.

Analysis

This section covers the *solutions* stage of my workshop with UTS, which was the longest stage of this workshop, clocking in at 90 minutes.

UTS workshop schedule

- Half-day session
- Total time: 4 hours (includes two 15-minute breaks)

CLARIFYING	SOLUTIONS	ACTION
• 60 minutes long • Give a 15-minute break before continuing to solutions	• 90 minutes long • Give a 15-minute break before continuing actions	• 60 minutes long

Check-in

This stage of the workshop took place with the same participants and was a direct continuation of the work done that morning, so I did not need to use any icebreaker activities. This check-in could be quick and simple, and I used it to focus the group after their short break and to present the objectives for what was coming next.

I presented the objectives, which were to outline solutions and find the elements needed to achieve the goals that the group created in the morning. It was worthwhile distinguishing *solutions* from *actions*. The task of this stage was to think of solutions for their goals, which are broader and more general than an action is. It can be common for participants to mix up terms, so clarifying with examples is a reliable way to avoid confusion and misunderstandings.

Emergence

I gave everyone time to walk around the room and think individually about the three goals that were posted on flipcharts. The aim of this section of the workshop was to break down the broader goals into solutions towards realising the goals. I gave the following instructions to guide participants: “Look around the room and think about the key elements of these goals. What are the solutions that you can work towards to make these goals happen? You can write down your ideas if you wish.”

I used a method called Café to help UTS find the solutions to their goals. It was an obvious choice, really. In the solutions stage of a workshop you typically have several topics. The Café method allows the group to work on several topics at the same time. And—most importantly—the group size is always small; people can have a good talk, ideas become clear, and new ideas emerge. Café also creates a relaxed atmosphere within the group, making it a perfect tool for emergence.

Café process

1. Choosing a topic

- Can be done before the event
- Normally around 3–5 topics

2. Group work

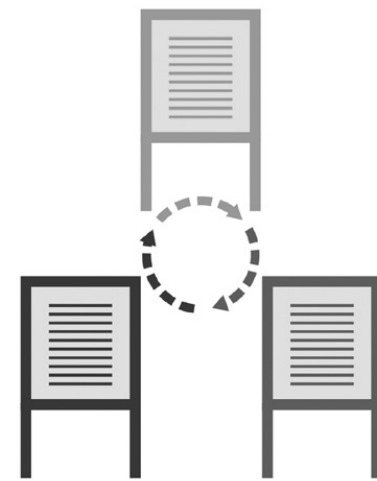
- Grouping based on own interest and knowhow
- Each group should be the same size
- Participants take notes using a flipchart

3. Rotation

- One of the group members stays behind to present the notes to the new group (host)
- Other group members rotate to a new flipchart
- New groups add ideas after hearing the presentation

4. Summaries

- Original work groups will make and present a summary of best solutions



The Café method has four steps. The first step of choosing topics was completed in the morning workshop when the three goals were created and prioritised by everyone. The three goals were the topics to be discussed during the 30-minute Café. The second phase of the Café calls for discussion in groups. Each group has one dedicated host to the topic, and the host's job is to take the meeting notes and to fill in gaps in the conversation and bring newcomers up to speed. This brings us to the third phase of the Café method, rotation. This creates many simultaneous conversations at once. And we end things with the final step, conclusion. This is where the convergent tools are added, and the group comes to an agreement and understanding of the results. Depending on the type of Café tool, sometimes groups summarise the content by talking about it, and sometimes they prioritise the content using a polling tool, like Dot Voting, for example.

My Café, the World's Café, Finnish Café... many different cafés

In my opinion, one of the biggest advantages of Café is creating a relaxed atmosphere where people are completely comfortable talking and exploring ideas at their own pace. This atmosphere is where the method derives its name—people communicate in a way that resembles how friends talk with each other in a real café. The Café method allows participants to explore complex questions and gain new insights by listening to and encouraging one another. These principle benefits make Café an outstanding tool for dealing with multiple, complex topics, like we had in this session with UTS, making it a perfect emergence tool. While the benefits of Café are consistent, the method itself goes by many names and can be applied in a variety of ways.

In addition to Café, the method is also known as, Learning Café, Knowledge Café, Group Expo, Poster Method, and its most famous version, World Café, which is perhaps the most well-known facilitation method there is, along with classical brainstorming.

A world of Cafés

The World Café method was originally developed by David Isaacs and Juanita Brown in California in the mid-1990s, and as they tell it, it was a bit of a happy accident. David and Juanita were hosting a reunion of leaders and academics. It was a rainy morning and traffic was terrible. People living close to the venue arrived early and sat in a café waiting for others and spontaneous conversations broke out. People were exploring ideas and as the discussion topics got more complex some people started keeping a written record on tablecloths. When everyone had arrived the quality of discussion was so deep that Isaacs and Brown decided to continue the event at the café, but there was a challenge; how to connect the conversation groups? This was their a-ha moment—let's leave a host or hostess to explain and have the others rotate! The Café method was born. They realised that this was magic in a bottle, and they explored the format further, and later

gave birth to the World Café method.* While the World Café method is widely adapted and very famous, its principles were being used long before David and Juanita stumbled upon it. The World Café method is a dialogue method. This means that it prioritises relaxed and authentic conversations above anything else.

I have heard of similar methods being used already in the 70s, though it is difficult to identify the original founder of the idea since there are many variations on the World Café method. There is even a Finnish version called *Group Expo*, which was developed by Veikko Mantere, a well-known and successful consultant. His method has many principles in common with the World Café. In true Finnish fashion, Veikko developed a practical method that did not have any added frills to it. He did not focus so much on creating a “café” atmosphere, and he did not leave any cookies or drinks on the tables. Instead he had flipcharts placed around the room where people could formally write down key conversational points.

The version of Café that I used follows Mantere’s practical version more closely than the World Café method. I do not have cookies on the table either, and I think that the average group will have no problem creating spontaneous conversation without the prompting of cookies or coffee. With my business groups I do not see the need to try and develop this aspect of the method too much. I am working in offices and sometimes very formal working situations, which means that the increased formality is more appropriate and better received than a plate of cookies would be. Instead of cookies, I have shared flipcharts (large pieces of paper) where the topic notes are recorded during the session.

Convergence

Café methods work wonderfully for emergence, but the most important thing I can say about Café methods is that they are incomplete without convergent methods. Most experienced group leaders and facilitators can create a perfect Café with great conversations and have groups create lots of interesting ideas. Yet, the Café method is the source of a lot

* You can read more about the history at the official World Café webpage:
<http://www.theworldcafe.com/about-us/history/>

of bad facilitation because many group leaders will end a session after the conversations during Café but will not use the correct tools to bring everyone back together and align them. Remember, during Café, people are talking in small groups and rotating from topic to topic at regular intervals. They will understand the framework and logic of the other Café groups, but they have never talked about which solutions should really be implemented. As a result, they will leave the workshop with an incomplete picture. “What did we decide?”, “What next?”, “What’s my role now?” These are the questions that remain for confused participants after a Café session without the proper convergent tools being used.

In the solutions stage of the goal-setting workshop with UTS, multiple topics were discussed at once. Moreover, each topic was detailed and carried with it its own set of complexities. To make sure that things were clear, and everyone was on the same page at the meeting’s conclusion, I used several rounds of prioritisation.

The tools used during the conclusion part of the session were the Investment Activity where I gave USD \$15 to each pair, and Group Ranking. I began with the Investment Activity (also known as USD \$15). This is a prioritisation tool that forces people to rank the content they produced. Money is a great tool to use with groups; it is important to everyone and it makes the prioritisation process seem more real. People tend to be good at voting with their wallets, and the act of spending is a great way to see what is important. The Investment activity followed the Me/We/Us format. I began the activity in the Me portion of Me/We/Us by asking people to think of their favourite solutions on their own. After this, I separated them into pairs and gave them \$15 which they could invest into their favourite ideas however they pleased. Once their money was invested, they were asked to write down the solutions which had more than \$3 invested in it. The Investment Activity can be adjusted depending on group size and the amount of material that needs to be reviewed. Here, I gave \$15 to each pair, but I can choose to give more money or less money as needed.

It was time to rank the ideas in small groups. The ideas with a minimum of \$3 invested were considered the best and written down on separate pieces of A4 paper. Now the papers were rotated to different groups and each group added their own scores—first, second and third—to them. Rotation was repeated until every group had ranked all the ideas and the scores were added up.

Group Ranking

- Group Ranking is a communication tool that creates better understanding and priorities by discussing, evaluating, and ranking content.
- Small groups rank ideas/solutions/actions.
- Ideas rotate from group to group until everything has passed through all of the small groups.
- The results are then posted for all to see, and at the end of Group Ranking there will be a clear hierarchy of importance.

Finally, I moved the Investment Activity to the Us section. The ideas with the highest scores were posted on the top of the wall, and those with the lower scores were placed closer to the floor. This gave a great visualization to the group, and with this setup one can see at a glance where things stand. But hey, I could have visualised the ideas on the wall immediately after the Investment Activity! Why did we have to do the ranking, too? Because it is extremely effective at creating understanding of ideas. When someone asks you to rank something, you automatically begin weighing their pros and cons and pit the ideas against each other. You can't help but think why one idea is superior to another, which requires you to understand the logic behind it.

If I lead a workshop, the minimum quality requirement is that people understand what was decided and why. Group Ranking is the right knowledge sharing tool in situations when you have had many simultaneous meetings or if multiple solutions or complex topics are involved.

The sound of silence

Convergence continued after the best ideas were posted on the wall. The tool I used here was Silent Moving. People were asked to look at the solutions, and if they found one that they were committed to, then they could take it off the wall and move it to the other side of the wall.

You may think that the higher-ranked ideas would be the first to be taken off the wall and committed to, but this is not always the case. Sometimes an idea is very highly prioritised, but no one wants to do it. This could be because the task is difficult, or it slips through the cracks and no one thinks that completing it is their responsibility. On the other hand, sometimes the lowest-prioritised ideas are the first to be taken off the wall. This is because they may be a needed step to achieve a larger idea or to take a step forward.

Now stop and imagine if the session ended with the Group Ranking tool. We would be left with the ideas ranked (which is a great start!) but without anyone committing to them. I like to use Silent Moving to check commitment. It is fast, easy to do, and straight to the point. There is no need for discussion at this point, and I do not want any further debate or for people to begin arguing over who does what. I just want to make sure that there is a clear commitment to each idea we take to the next stage, action.

Check-out

An effective check-out can be done by bringing everyone back to the objective. “How did we do today in reaching our meeting goals?” A prompt like that works well, especially if the convergent phase of the session was detailed and ended with clear commitment. After posing this question to the group, I ask for three volunteers to share their comments. This is a simple stage, but an important one as it provides a final opportunity for anyone to share concerns or doubts. I have facilitated sessions where things go wonderfully smooth, and after the meeting I receive an email, or someone pulls me aside to ask for clarification or express confusion about the results. I ask for three different people to comment in order to briefly take the room’s temperature and give a fair chance for people to share what they need to. If there are more than three people that wish to comment, then I try to keep the session going until no one has anything else left to share.

The tools used

- **Café** – Tool for getting everyone involved and for creating understanding when there are many simultaneous questions
- **Investment Activity** – Uncovering priorities (\$15 was given to pairs but you can choose to give more or less money to invest depending on group size and the scope of the content)
- **Me/We/Us** – Getting everyone involved and creating an understanding of thinking frameworks
- **Group Ranking** – For discovering and creating understanding of priorities
- **Silent Moving** – More of a component of an activity rather than a tool itself, Silent Moving quickly checks for commitment by placing ideas or content into a shared space

Workshop process: Solutions

Objective: To find the right solutions for the key elements of a common goal.

Time: 90 minutes

Presenting the objective

Check-in tool: Asking whether the objective of the next stage is clear and presenting the main stages of the process (5 minutes).

Emergence tool: Café (40 minutes)

1. “Look around the room and think about the solutions for the key elements of a common goal. You may write them down if you like.”
2. “Next go to your favorite topic (max 4 participants/topic) and listen, explore, and write down solutions on the flipchart with a marker.”
3. “Choose a host or a hostess who will stay to explain the topic to future participants. Others will move to the next topic, listen to the presentation and add ideas.”
4. Repeat until all topics are discussed by everyone.

Convergence tools: Investment Activity, Group Ranking, and Silent Moving (40 minutes)

Investment Activity

1. "Think on your own and choose your favorite solutions."
2. "With a pair invest \$15 into best solutions. You may put all money on one solution, or you may split the money on best ideas on different solutions under different topics ($5 + 2 + 3 + 4 + 1 =$). Remember that the total should be \$15 per pair."

Group Ranking

1. "Get back to your favorite topic and write down all solutions that have more than \$3 invested into them. One idea per A4 paper and with a big marker" (if there is a danger that the initial topic and context can be lost, it is a good practice to write down a topic number or name, too).
2. The group leader shuffles the solutions and gives each group an even number of solutions (as even as you can, do not worry if one group gets one solution less, there will be a final round of prioritising to make sure the statistical errors will be corrected).
3. "Please rank the solutions. For the best solution write number one on the back of the paper, for the second-best solution number two and so on..."
4. Rotate papers.
5. Now that you have ranked all solutions, count the total and write the score on the front with a marker."
6. Start counting and posting ideas: "Since we have three groups of solutions, the best possible rank is three. Who has a three, four, five, six..." Post the solutions on the wall, the highest-ranking ones the highest.

Silent Moving

1. "Here are the results and the rank of each solution. Now let's check for commitment. If there is a solution that you are personally committed to implementing, please move it on the other wall in silence."

Check-out tool: Evaluation (5 minutes)

1. "Did we reach the objective?" Solicit three responses.