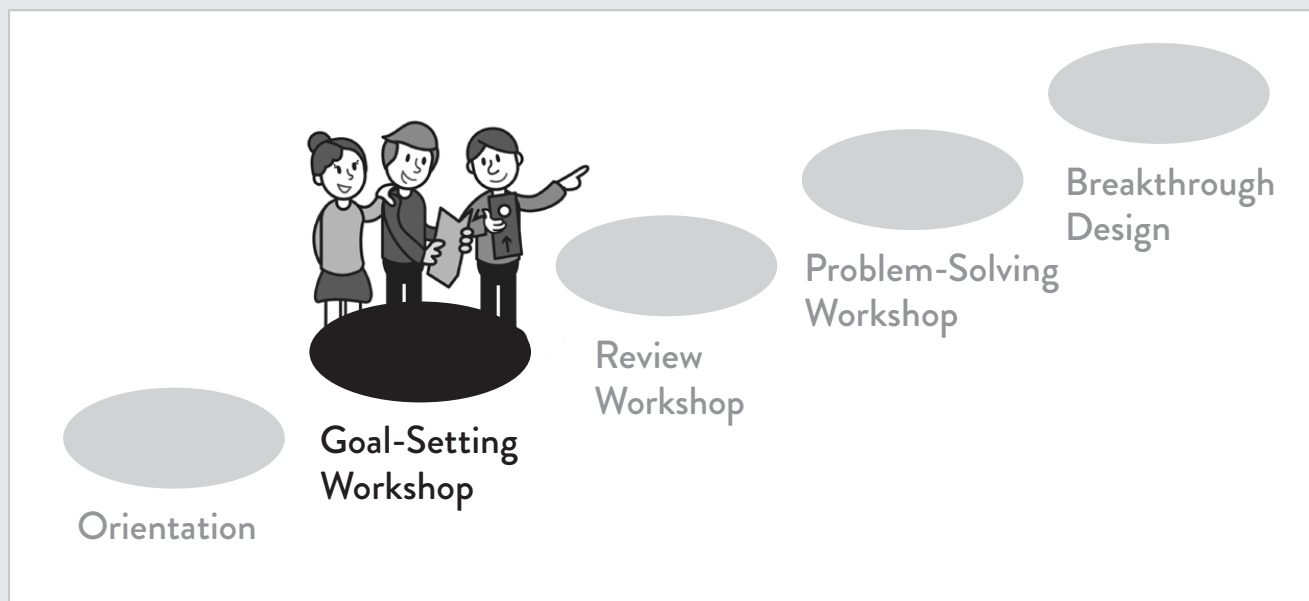


3.3: Goal-Setting Workshop: Creating actions with Me/We/Us and Blossom



What's here

- **Case study:** The action stage of the 3-stage goal-setting workshop. The objective of this stage is for the group to create steps to follow to reach their larger goals.
- **Tools:** Me/We/Us, Blossom, One Breath

How it helps

You will learn to facilitate an action planning session that creates concrete results and outlines the who, what, and when for each action. These actions are also related back to the content created in earlier stages of the workshop to create a unified plan that spans from the broad goals all the way to the specific actions that will achieve them.

The home stretch

After the break I was back to complete the final stage of the workshop with UTS. The now-familiar group was gathered in conference room 4 after enjoying a cup of tea.

“I hope everyone enjoyed the break as much as I did! If I worked here regularly and had access to your company’s fantastic biscuits and cakes, my diet would be in serious trouble!”

“The struggle is real, Pepe!” said Paula in a show of support.

I continued, “We have come a long way so far; we began by wishing for a better future for your company. Then we found solutions which can make those wishes a reality. Now we will take things a step further in our final session together. We are going to find out which actions each of you will take in order to put the solutions into place. You will break down the solutions into actionable steps, and then decide which ones you are going to complete.”

Josef raised his hand and asked, “Are we only thinking of individual actions? Some of the solutions involve more cross-team collaboration, so I hope that we can make these as a group.”

“Great point. You will have the opportunity to involve others in the actions you create, so no need to worry about that.” I drew everyone’s attention to a wall with eight large sticky notes placed on it. “Remember these? They are the top solutions that you guys created and committed to during the last session. Now we are going to map out the actions needed to attain these solutions, which in turn will help you reach the goals that you wished for earlier. That is our objective. Any questions?”

The solutions prioritised during the previous session:

- Create personal relationships with valued customers
- Avoid silos and isolated working practices
- Ensure a sustainable workload
- Follow up with customers post-service for feedback and review
- Develop a more detailed orientation process for new hires
- HR as a more available and regular resource
- Showcase coworkers as an available and helpful resource
- Offer competitive pricing to maintain customers

Growing actions from solutions

No one had any questions for me, so it was time to start. “Please begin by looking at the chosen solutions that are posted on the wall and write down action points for yourself. You do not have to commit to anything now, but you will need to think about what your next actions are. You have around five minutes to do this, so please begin.”

Everyone stood up and walked over to the wall to read the solutions. It took a few moments for the group to read and familiarise themselves with them before pen hit paper and they began writing. After a few moments it was time to change gears and move on.

“Does everyone have at least three actions written down?” A chorus of nods was the reply. “Fantastic, now please find the person who is standing closest to you, turn to them and smile. This is your partner for the next stage. Once you have a partner, go find a place to sit with them.” A moment later the group was divided into six pairs.

“Now I want you to discuss your actions with your partner. Take a few moments to ask each other questions about them, align, and improve actions together. Take about ten minutes for this. Go!”

Twelve voices filled the room, and as I walked from pair to pair, I heard people describing a wide range of actions. Company President Bill was talking to Chi about lobbying to increase personal vacation days, Josef was telling Yao about how he was going to create an ori-

entation packet to help new hires get used to their roles, and Donald was loudly stating that he was going to call an old client of his that had not been heard from in some time; “I don’t know if they have simply quit using us or if they found another provider, but you can be sure that they will be hearing from me one way or another!”

I was happy that the conversation was flowing so easily, and equally as important, I was glad to see that most everyone was writing down new actions, too. *This is exactly what emergence should look like* I thought to myself. As the pairs finished up their discussions, I walked to the wall where the solutions were posted and adjusted the eight Post-it notes so that they were evenly spaced apart. It was important that there was plenty of room around each one for what was coming next.

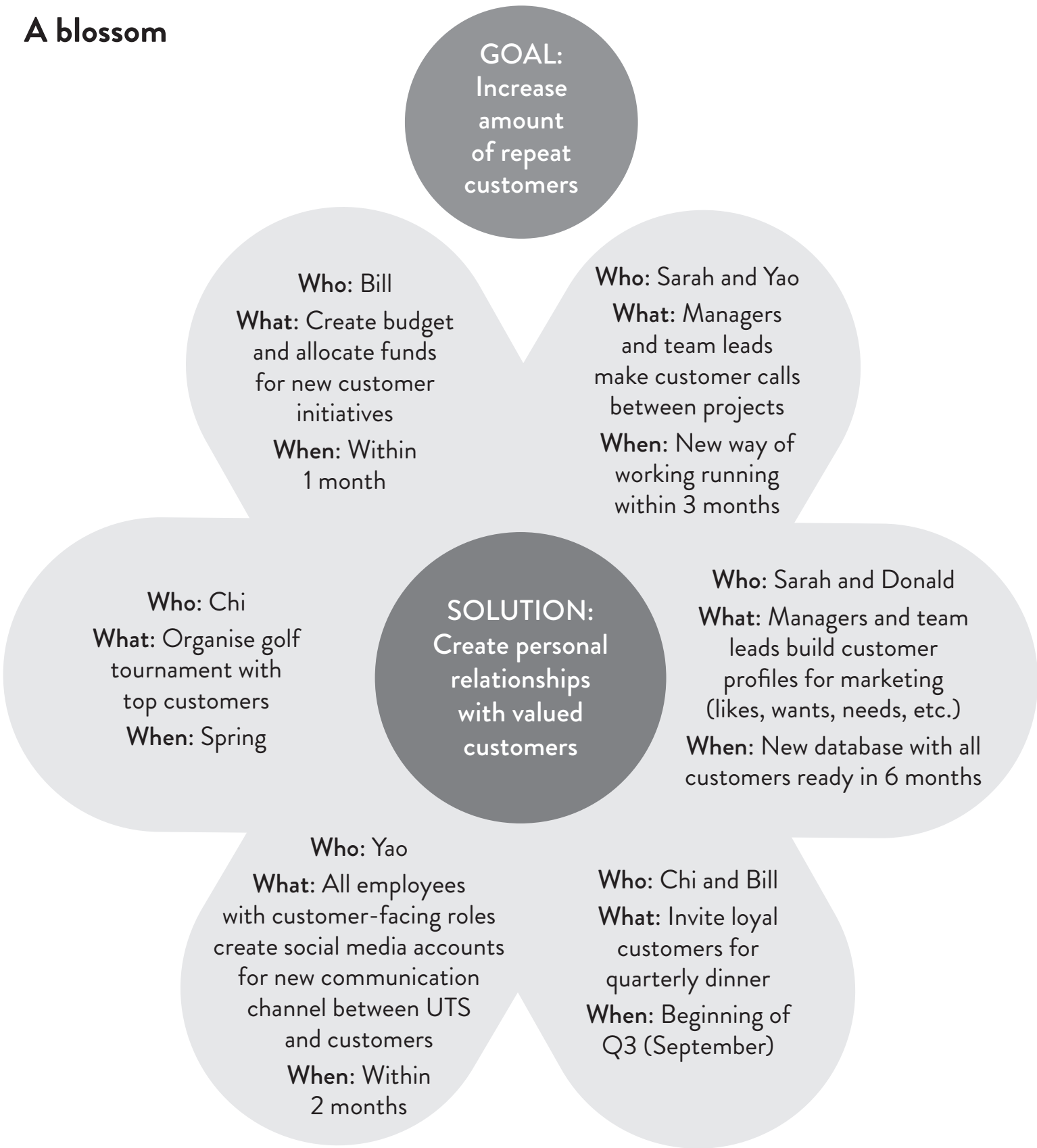
I gathered everyone’s attention. “You all make my job too easy! I will miss you guys and how wonderfully you follow instructions. I have gone ahead and passed out a stack of jumbo Post-it notes to each pair. Together with your partner I want you to write down your actions in the following format: who, what, and when. Only one action per Post-it note. Once you have written down all the actions on the Post-it notes, please place them around the corresponding solution on this wall.” As I said this, I pointed to the wall with the solutions behind me.

“Pepe, what if an action could apply to more than one solution?”, asked Paula.

“In that case you can write it down twice and place it around both of the related solutions. The idea here is to surround each solution with the actions. See if you can make it look like a flower! Take a few moments to do this now.”

All twelve participants each had a few actions to place on the wall. Once everyone had finished, each solution was surrounded by concrete actions. And while the result did not look too much like flowers, it was beautiful, nonetheless.

A blossom



“Very impressive”, I said. “If you squint your eyes just so, they almost look like flowers! More importantly, you all have plenty of actions that relate to each solution. Please take a moment to read all of them silently. If you have a question or if anything is unclear, please ask!”

Choosing the best actions

Everyone was quietly focused on the blossoms on the wall. “We can take these blossoms a step further”, I said. “Think critically about what is missing or what should be changed to improve these actions. Look at the actions and the names and times associated with them. Is anything missing? Do any actions need to be added? You can also adjust the timeframe of the actions as you see fit.” This is still an individual activity, so no talking for now.”

After a few moments I gathered everyone’s attention once again. “If you need to add a new person to one of the actions or you want to change someone else’s actions, please make sure you talk to that person and let them know you are doing so. Now find a new pair and take five minutes to share your ideas with them. If you need to change some actions, you are welcome to do so!”

New pairs were formed, and more discussion took place. The actions were becoming more and more detailed and refined. The discussions were becoming more focused as well; earlier they dealt with broad points and now everyone was diving into the minutia of each action. The group was ready for the final step.

“You all are doing a wonderful job. Now we are going to come back together as a group. Look at the blossoms once again. Is there anything that you still need to change?”

After a few moments and some revisions, I instructed everyone to read the actions once again in silence. I stood back with the group and admired their work. Detailed, concrete actions surrounded each solution. Some blossoms were larger than others as the solution had more actions related to it, but all eight of the solutions had a few or more actions surrounding it. I took a look at one of the larger blossoms which had the solution *ensure a sustainable workload* at the centre of it. The actions that surrounded it involved employees at all levels. *WHO: Yao, Isabelle, Donald, Sun WHEN: Next week WHAT: Revise the performance review process.* I was glad to see that the managers were going to review their practices to find a better and more sustainable way to assess how well their team members are performing. Bill Chen, UTS’s President, wrote down that he was going to discuss expanding the number of employees to lighten the workload. He was going to bring this up with the board of directors during their next meeting;

WHO: Bill Chen, the Board WHEN: Q3 board meeting WHAT: Discuss the possibility of expanding the hiring quota to ensure proper division of work.

No solution was left without actions blossoming from it.

One Breath to say goodbye

I was pleased to see the results, but my opinion was not the one that mattered.

“Can I have everyone’s attention here please? You all can take a seat,” I said. “It looks like our work here is done. You all have developed detailed, concise actions for each solution. Just this morning we began by making broad wishes about how to improve your company, and now you have identified what is needed and how to do it to make these wishes come true. We are going to bring things to a close by sharing our thoughts about the workshop. Anything that comes to mind is fine, but due to limited time, you only have one breath to share your thoughts, so chose your words carefully! Who starts?”

A few people began inhaling their one breath sharply in preparation to share, but Caitlyn was the quickest. “It was a great workshop and I liked chatting and working with everyone and I hope to take some of these tools with me back to my role in human resources!”

Josef was next. “It was great to see our dreams and wishes become more and more realistic as we outlined them and how to achieve them. I enjoyed it.”

The group was satisfied and more importantly, the workshop produced the results they wanted. I thanked everyone for a great workshop and left to enjoy my remaining time in Shanghai.

Analysis

This 60-minute long session concluded the workshop with UTS, and it was the final part of the CSA workshop structure—the *action* stage. The objective of this session was for the group to create specific action points to be completed in the coming days, weeks, and months. By this point in the day, we had already been working together for hours, so I did not need to provide much of a check-in activity. I opened the *action* stage of the workshop by simply presenting the objective and asking if it was clear, or if there were any questions.

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

Emergence

I began by having everyone look at the top solutions that the group ranked the highest during the Investment Activity from the previous session. These solutions were posted on the wall for everyone to see. I used jumbo Post-it notes for this session, but you can also tape a piece of copy paper to the wall; the important thing is that everyone is able to view the solutions. The instructions I gave the group at this point were to “look at the solutions on the wall and write down action points for yourself.” I emphasised individual commitment; we start with our own actions and thinking about what we personally can do. People are very capable of thinking of actions for other people to do—creating action points for other people does not require a high degree of commitment. This can become problematic later when it is time to commit to the actions. It is better to have people think about their own actions from the beginning.

As seen in the previous stages of the workshop, the Me/We/Us structure was used. Participants were first asked to think about actions individually (ME), then develop actions with a partner (WE), and finally review the actions together as a group (US).

Me/We/Us was used for both emergence and convergence in this session. One trick I learned through the years is to have people work in pairs for a good portion of the session, instead of working in a

structure where people can give lengthy monologues with only one person talking at a time, and everyone else stuck listening. People tend to work very constructively together in pairs or small groups, whereas in one big group people end to take positions and argue. In addition, pairs or small groups are the best format to create thoroughly new emergent ideas.

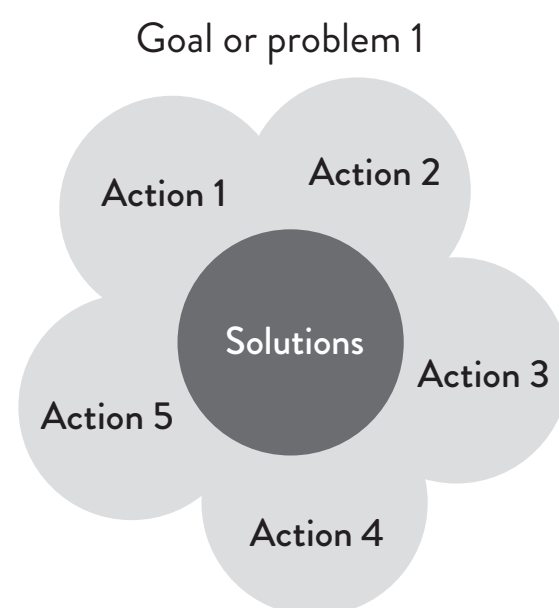
Blossom

Blossom provides a visual reminder of how actions relate directly to a solution (and goal). The actions surrounded the relevant solutions, and each solution was marked with the broad goal it pertained to, which meant that everything tied together—all the way from the bold and broad wishes that were made in the morning, to the specific actionable steps produced in the afternoon. Blossom is designed to allow the exploration of multiple topics at once, and it was a great choice for this session because there were eight different solutions that the group created actions for. Blossom requires that all actions link to a specific solution. If each solution has 5 actions created for it, then there are 40 actions. Imagine a wall filled with 40 sticky notes. It would be a bit chaotic without some organisation, right? With Blossom, actions are placed around the solution that they are linked to which clearly illustrates how everything fits together when looking at the big picture. There are also different timeframes for executing the actions. These important details are accounted for by labelling each action with a defined *who* and *when*.

After the workshop ended and I had left Shanghai, UTS still had the finished action plan with the top solutions surrounded by clear actions that defined the *who*, *what*, and *when* to refer to and to review.

Blossom

- Collect specific action points around each solution: *who, what, when*
- This allows you to visualise the actions and to make sure that each solution has the correct actions surrounding it.



Convergence

All parts of Me/We/Us were present during convergence. First, I had people look at the actions and think individually about how they could be further developed. Second, we worked in small groups to give participants time to share and talk about how to develop the actions. Finally, we looked at the results together as one large group.

I concluded the convergence phase by asking everyone how well we did in achieving the workshop objectives. To evaluate, I usually take comments from at least three participants. The evaluation went smoothly in this workshop with UTS. People were satisfied and they understood the results. But what if this is not the case? One thing to look for is if there are solutions that do not have people clearly committed to them, or if the group seems to be having difficulty getting the right people matched up with the right actions. If there is confusion about the actions, disagreement, or a lack of alignment, I circle back to more convergence. As the group leader, you can decide which part of Me/We/Us you want to circle back to. You can return to individual thinking, discussion in pairs or small groups, or you can have the entire group discuss together.

One Breath

- Participants form a circle
- Ask participants to comment on the workshop or meeting
- Prompts: I enjoyed..., I did not like..., I liked....I learned.....I had....

Rules: You have only one breath to use when sharing.

After everyone has shared, it is time to applaud. The workshop/meeting is over.

One Breath

I ended the workshop with a feedback activity called One Breath. It gives everyone the chance to share their thoughts about the session with the catch that they only have one breath to do so. This activity may seem like just a silly game, but when you give someone a limited amount of time, they will be more careful in gathering their thoughts and give feedback with a greater sense of purpose. Different prompts to begin such as “I learned...”, “I enjoyed...”, or “I didn’t like...” can be given to help encourage people to begin.

What tools were used and why

- **Me/We/Us**—Basic tool for getting everyone involved and for creating understanding
- **Blossom**—For visualising actions
- **One Breath**—Used to collect candid feedback during check-out



Workshop process: Action

Objective: To create concrete actions that actualise the solutions outlined by UTS.

Time: 60 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: Individual thinking—Me/We/Us and Blossom (25 minutes)

1. “Look at the chosen solutions on the wall and write down action points for yourself. You do not have to decide to do anything, but you will have to think about actions for a few minutes!” (ME)
2. “Share and develop actions with the nice person next to you.” (WE)
3. “Write down your actions in the format what, who, when on jumbo Post-it notes and post them next to the corresponding solutions. Let’s see if we can form flowers by adding leaves.”
4. “Read the actions in silence. If you have a question about one of the actions, please ask!” (US)

Convergence tools: Me/We/Us (25 minutes)

1. “Have a critical look at the actions in silence and think about what is missing or needs to be changed.” (ME)
2. “Pair up with someone you need to talk to and share your ideas.” (WE)
3. “Make the necessary changes on the blossoming flower field. If you need to add someone’s name, feel free to connect with them and ask their permission.”
4. “Let’s read the actions again in silence. If you have a question about one of the actions, feel free to ask!” (If there is still disagreement after this step, you can repeat convergence from the beginning). (US)
5. Evaluation: “Did we reach the objective?” Ask for three comments from the group.

Check-out (5 minutes)

1. “Now that we have the actions ready, it is time to finish the workshop. I would like each one of you to share your thoughts about how the workshop went. To keep things moving, you only have one breath to share your thoughts. Who starts?”