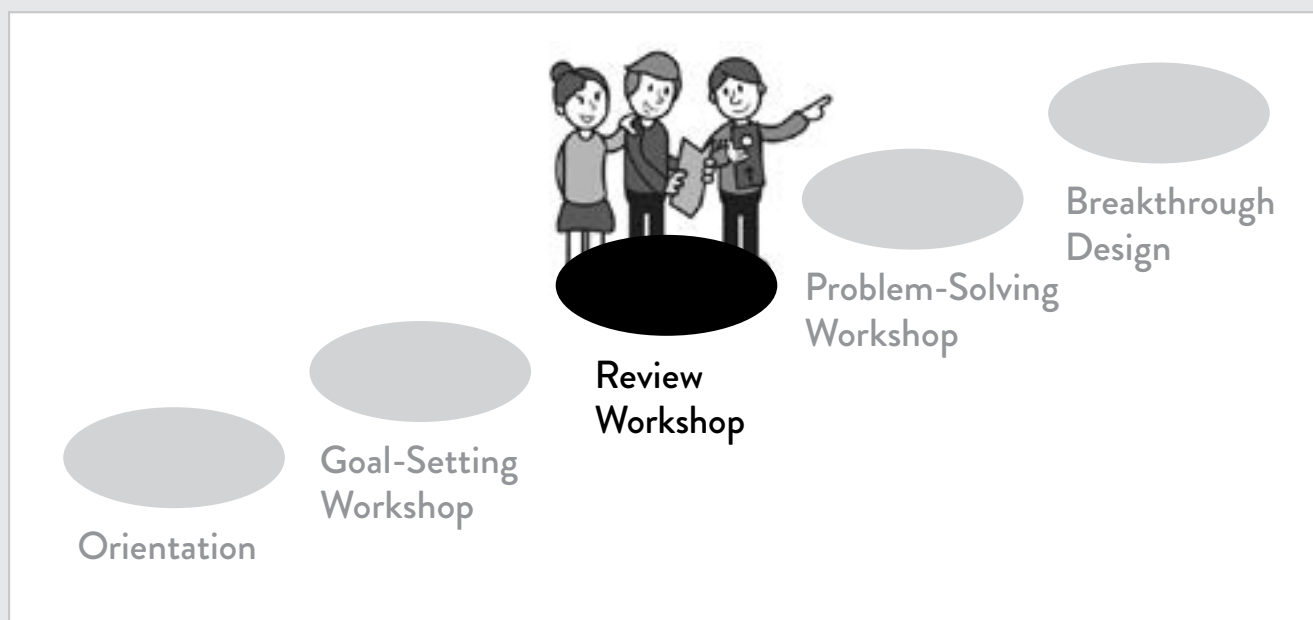


4.1: Review Workshop: Clarifying Current Challenges with Force Field Analysis



What's here

- **Case study:** The clarifying part of a review workshop with UTS that took place a month after the goal-setting workshop
- **Tools:** Force Field Analysis, Silent Moving, urgency-importance matrix, Dot Voting

How it helps

Force Field Analysis is the tool I use for in-depth review.

It identifies the key underlying factors behind any strategy, process, service, or project, and it also can be used to assess team health.

Dealing with emotions

The last time I was in Shanghai was a month earlier when I was leading the goal-setting workshop with UTS consulting. The team performed well, participated enthusiastically in during the workshop, and worked together to produce breakthroughs and relevant solutions for their original problems. The result was a detailed action plan comprised of concrete tasks and actions, all marked with *who*, *what* and *when*.

Although the action plan clearly outlined what needed to be done, new challenges often arise once a workshop ends. An action plan, no matter how detailed or precise, cannot help you with obstacles that arise once the action plan is being followed, so a follow-up meeting is required. Let's review the follow-up session I had with UTS after the actioning workshop to see just how a follow-up meeting should look.

A month had passed, and I was back in Shanghai to work with Bill, Chi, Yao and the rest of the group of twelve that attended the goal-setting workshop. I was back within the familiar walls of UTS's conference room #4 and I was pleased to see that the results from our last session were still displayed. The goals and solutions agreed by the group were posted on a wall in the conference room. Each solution had a cluster of Post-it notes surrounding it that detailed the specific actions that were to be taken and also linked the actions and solutions with the broader goals that were created in the beginning of the workshop.* Believe it or not, quite a few groups go through a workshop and work hard to create an action plan, only to have it taken down or tossed into the recycling bin a few days later. Thankfully, UTS did not make this mistake.

Once everyone had taken a seat and morning greetings were exchanged, I began the day's workshop by sharing the objective for the day.

"Today our objective is to discover the current challenges that you are facing in relation to the implementation of the plan that we created in the last workshop."

* This is a description of the Blossom activity that was demonstrated in Chapter 3.2. The result posted on the wall is an action plan—a visual guide that shows the next steps that need to be taken to work towards a goal and implement solutions.

“*Discover* the current challenges? That should be easy,” said Phil.

A few people nodded in agreement, while Chi replied, “Challenges *and* successes. There has been plenty of success if you are capable of seeing it.”

There was a palpable tension that I could feel in the room. It may not have been serious, but Phil, Chi, and perhaps some others were a bit more charged up now than they were the last time I saw them. I wanted to find out more about how people felt, and I knew just the tool to use.

“Thanks for the comments, Chi and Phil. We all have plenty to discuss today, and it is great to see that you are ready to go. But before we do that, can everyone please stand up?”

Once everyone was standing by their desks, I directed their attention to the front of the room.

“Look at this,” I said as I pointed to the ground.

“It’s our carpet,” deadpanned Isabelle.

“That’s right, Isabelle, but I am not referring to the carpet. Look closer! There is an imaginary line on the floor that runs from one side of the room to the other.” I illustrated my point (and the line) by pointing to the floor as I walked from one side of the room to the other. “Each spot on the line has a specific meaning. This side of the line means that ‘I feel terrible today’. Stand over here if it is one of the worst days of your life.”

I walked to the other side and continued, “And this side of the line means that it is an absolutely fantastic day; a combination of Christmas and your birthday mixed in with payday on a Friday. Stand here if this represents your mood more accurately. Of course, if you feel somewhat between these two extremes, stand somewhere in between. Find your spots now!”

Everyone chose a spot to stand on the line without too much thought. Over half of the group was standing on the *happy* side of the line, and there were a few people in the middle, too. Towards the *worst day ever* side was Phil, who began the session with a negative comment.

“Now turn to the person next to you and let them know why you chose that spot. You have one minute!”

I listened to bits of conversation along the line. On one side Josef was smiling to Caitlyn as he described how he was going to take next

week off to go visit old friends in Australia. In the middle of the line I heard some comments about 'decent coffee' and heavy traffic on the morning commute. On the far side of the line was Phil, who wore a large frown on his face as he explained to a tired-looking Sarah that he was in the middle of a rough morning. He punctuated his complaints with, "And the cherry on top is spending hours today working to fix actions that are stuck and beyond repair!"

I took this as my cue to step in. "Great work everyone, thank you. Can I hear from three people about why they chose their spot in line? Let's start on the happy end."

Bill raised a hand and said, "I slept very well last night, and tonight I am going to spend some time with my grandchildren."

On the far side of the line was Phil, who made it clear that he was not having a very good day. "All these different forms of stress have been piling up and turning into something more. Small things at home, bills, appointments, bad weather, annoying songs you hear in the elevator...everything is just coming one after another and that makes today not very good. The same goes for my state of mind; the actions I have been trying to work on feel like I am running into a wall."

"The only way is up from here, Phil. Chin up!" said Sun. Phil thanked him for the words of encouragement.

I pointed to the middle of the line and Yao commented that so far, the day has been very plain. The subway was crowded, but not too bad. The coffee was not hot, but warm enough, and the week ahead seemed long, but also manageable.

Celebrating success and embracing new challenges

I moved the group to the next activity. "Let's review the work that we did together in the previous workshop. Everyone can stand up and look at the plan which we created last time. It has all the goals, solutions and actions that we created. Take a few moments to review all of these. Which solutions and actions have been implemented and are working well? Write these down as successes. Also write down the solutions and actions that just don't seem to work, or the ones that you can't seem to make progress towards. Mark these down as your challenges. You have around five minutes to do this individually."

After five minutes, I had the group of twelve split into smaller groups of three.

“Share with each other the challenges and successes that you wrote down. Once everyone in your group has had the chance to share, select two challenges and two successes, and write each one down on a large Post-it. Your criteria for choosing the successes and actions is important. What are the most pressing challenges that need to be fixed? On the other side, what have been the biggest and best successes that you have accomplished so far? You have 15 minutes.”

As people chatted in groups, I could see smiles words of encouragement when successes were shared. But despite this optimism, I could see that groups were spending most of the 15 minutes discussing the challenges and difficulties that they had encountered.

“Once you have selected and written down two-three challenges and two-three successes as a group, please post them on this wall so we all can see.”

Everyone followed the instructions perfectly, and after a few moments the challenges and successes were written down and posted on the wall.

“Let’s start with the successes. Please take a few moments to read the success in silence.”

Successes

- H.R proactively offering support and info via email
- Showcased co-workers as resource for knowledge and help
- Improved personal relationships with clients
- Contacted customers proactively to follow up and collect feedback
- Improved work balance

After a few moments had passed, I began clapping loudly and told everyone to give themselves a round of applause. “You have achieved a lot and you need to take some time to give the respect and gratitude that you deserve!”



The sound of applause filled the room, and I could see that people were enjoying patting their own backs for a bit. I told everyone to take a few moments to read the challenges silently, and once they had done so, I asked if everything was clear. No questions so far, so I told everyone to review the challenges and remove any duplicates. Some groups had independently arrived at the same challenges, so a few duplicates needed to be taken down from the wall. Once that step was completed, there were six challenges remaining.

Challenges

- Improve personal relationships with clients
- Building internal knowledgebase
- Cold calling clients and/or emailing clients in a way that feels organic and not like a sales call
- Implementing collaboration tool for cross-team communication
- Establishing contact with former customers via email at > 5 % response rate
- Identifying competitor pricing and product lines

“Which challenges do you prioritise as both urgent and important? In other words, what challenges do we need to solve today? Take a few moments to think about it. Then find a partner to talk to. Sell them on your choices about which challenges are urgent and important.”

A few moments later, everyone was ready and sharing with a partner. Sarah, the director of marketing, was telling Chi that reviewing the price points so far had been an utter failure. Next to her was Bill who was stating that his biggest challenge as company president was to work with team leads to help revise the amount of expected workload that an individual has to take on—something that he had not made progress towards so far.

Next, I changed the dynamic a bit and instructed each pair to find another pair and continue the discussion in groups of four. While they chatted away in their groups, I drew two lines on a piece of flipchart paper so that they formed a large L shape.



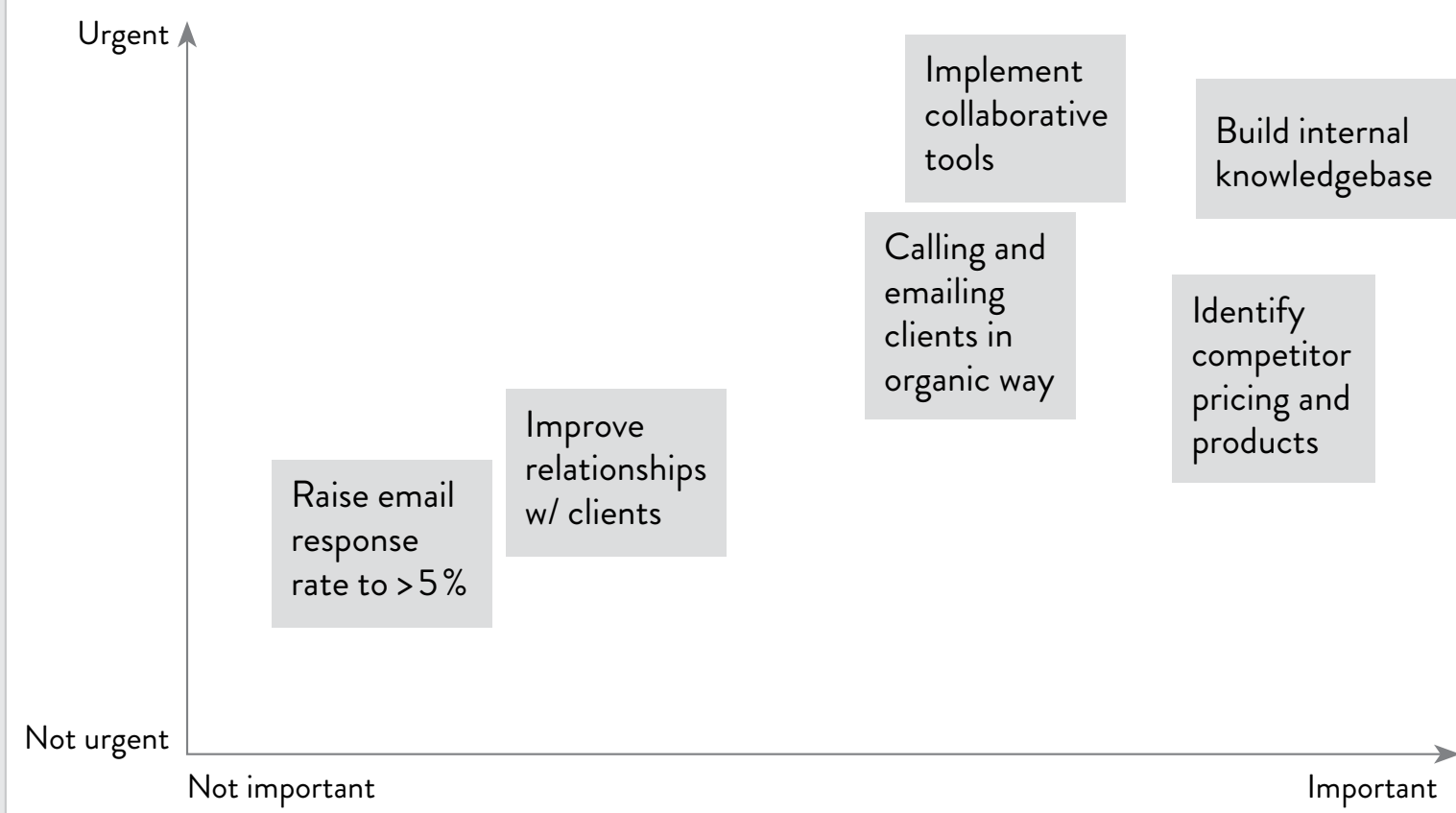
“OK, all of you can stop talking and focus your attention up here,” I said while pointing to the piece of paper. “In front of you is a matrix which we are going to use to prioritise the challenges that you just finished discussing. Can someone read the words written under each line?”

“Urgency and importance,” said Bill.

“Thank you. In silence I would like everyone to place their Post-it notes on the matrix so that they properly match the level of urgency and importance for each challenge. The top right is for the most important and urgent challenges, while the bottom left is for the least important and urgent challenges. Everyone can move the Post-it notes whenever they feel like. When the Post-it notes do not move anymore, we are ready. As an added challenge, let’s try to reach consensus without speaking a word.”

Some people considered for a moment where to place their challenges, while others got right down to it. There were only six challenges to prioritise and placing them on the board initially was quick work. The activity really got going when the challenges were placed and then moved by someone else. Earlier when the group was writing down challenges and successes, both Neil and Sun had mentioned improving relationships with clients. That is not a big coincidence, but it is worth mentioning here because Neil had listed it as a success while Sun prioritised it as a top challenge. Now they were both in front of the matrix trying to find a place for the Post-it note that represented *improving relationships with clients*. They were not talking because this was a silent activity, but no words needed to be said. They both wore tense looks occasionally glared at each other as they moved the Post-it from one corner of the matrix to the other. Eventually a compromise was silently agreed to and the Post-it stopped bouncing from one side of the matrix to the other and settled right in the middle.

Urgency-importance matrix



Wrapping up the session

“Great job, everyone. Our work for the day is just about done. In front of us we have the key challenges, which you now all agree on regarding their urgency and importance. But before we go, someone please remind everyone what our objective was for the first stage.

Bill did the honours by replying, “We had the objective of discovering the challenges that we are facing in implementing the plan.”

“Thanks, Bill. Now everyone can find an intelligent person to partner up with and have a quick discussion about how we did in reaching that objective.”

After some discussion, I asked for three final comments from the group about the objective. All the comments indicated that the objective was clear, and there was no evident confusion about the results, so I thanked everyone for their hard work and drew the session to a close.

Analysis

UTS review 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

The review workshop is a follow-up to the *goal-setting workshop* that was covered in Chapter 3. The objective of this follow up session was to discover the current challenges that have risen when the solutions and actions from the previous workshop were put into practice. In this case with UTS, the time between the two workshops was around one month, which is within the normal 4 to 6-week range of time that separates a workshop from a follow up session. However, fast-moving teams like software developers may elect to have a follow-up session only one or a few days later.

Check-in

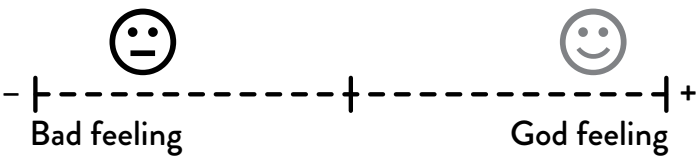
To start things off, I presented the objective to the group. By now you have probably noticed that this is how I have started each stage of the workshop, and for good reason! I believe in explicitly stating the objective to everyone so that no assumptions are made, and to give people a chance to react with any questions they may have. In this session, a participant made a comment indicating that he was feeling frustrated by how difficult it has been to implement some of his actions. I could see that there was some tension in the room, so I decided right then to use a check-in activity called Line to warm



the group up. Line is a classic group tool that can measure almost anything. It is often used to measure work experience, attitudes, or to form groups based on age, hair colour, place of birth, or anything else that you could possibly think of.

In this case I asked everyone to take a place on the line based on mood, and to chat with the person next to them about why they chose to stand where they did. This was no accident-I asked people to discuss their feelings as a direct response to the tension that I observed earlier. This is a rule which I try to follow whenever possible: I ask people to share emotions when I sense trouble. Self-disclosure builds trust, and talking about emotions is therapeutic.

Line



- Line is an active way to measure something.
- It is particularly useful to measure the temperature in the room in the beginning of a meeting or workshop.
- Mark clearly on the floor the line, e.g., by using sticky tape. Walk through the line explaining what different spots on the line signify. Clarify the ends and the middle of the line.
- Ask participants to find a spot on the line that signifies their feeling/ position at that given moment.
- When everyone has found their spot, ask participants to chat with the person right next to them and to explain why they are standing just on that given spot. After a short while, ask a few participants to share their explanations with the whole group.

To this point, a good friend of mine who happens to be a psychologist told me that people are typically not present when they enter a room. Instead, they are preoccupied with their own thoughts and emotions. One way to help people become present is to ask them to talk about their emotions. This works because when we talk about our current feelings, we become more aware and focused on our thoughts, which brings us to the present moment.

Emergence

I used the familiar Me/We/Us structure once again to oversee when people work individually, with a partner, and together as one large group. This time Me/We/Us was matched with Force Field Analysis.

Force Field Analysis

Force Field Analysis is a tool used mostly in change implementation. It is a natural fit with workshops where the objective is to identify challenges that stand in the way of implementing a goal.

I often use Force Field Analysis when facilitating a session dedicated to change management or change resistance. It is common for group leaders and facilitators to work with these topics when organisations implement large-scale changes or some radical new protocol.

The steps of Force Field Analysis

- 1. Introducing the topic
- 2. Listing pros and cons
- 3. Prioritising the cons that need to be solved



In relation to UTS and their actions, we wanted to review the status of their plan. I first asked them to think about the successes (+) and challenges (–) individually, and then discuss and prioritise challenges in pairs, and finally again as one large group, as Me/We/Us dictates.

Remember the brilliant and influential psychologist Kurt Lewin who was introduced in the first chapter of this book? Through his work he developed force field analysis. Think back to Lewin’s discussion groups and the housewives complaining about the negatives of cooking the strange new meat. This was a negative force keeping them from adopting a desired change. On the other side are opposing forces, or positives, such as *it will cost less money*, and *it will help the war effort*.

Lewin calls the negative forces “restraining forces” and the positives “driving forces”. The restraining forces keep things the same and restrict change; they are the thoughts that pop into your head and voice doubt when a change is suggested. The driving forces push towards change. And stuck between these opposing forces is the present state/desired state. An interesting phenomenon exists when companies try to focus too much on the positive side of change (which is a common tactic, I might add.) If the positives are introduced first, and with too much focus placed on them, it actually causes people to think more about the negatives! When there is resistance to change, it is best to first discover the restraining forces that are holding you back. Once these forces are identified, you can introduce the positive forces that will help bring about the desired change.

Two opposing forces evident in the decision-making process

Driving forces cause a push to a new behaviour



CURRENT STATE



Restraining forces push back against change and maintain the current state

The goal of this stage was to identify the challenges so that they could be addressed and eliminated, but Force Field Analysis suggests that the plusses are to be discussed, too. But why? If we only really care about the challenges, why even bother discussing the successes at all?

Let me give you several reasons:

1. We want to gain a whole picture and understanding of what works and what does not work
2. Listing only the negatives could make an entire project seemed doomed
3. We want to highlight the successes, so they carry forward and can be built upon

The application of Force Field Analysis is broad, and I use it to facilitate such topics as strategy review, process development, team health, product development, budget refinement, and more. Once I had a group use Force Field Analysis to review the practice of eating cookies and other high-sugar treats during coffee breaks.

Convergence

To structure the convergent portion of the workshop, I used a familiar structure: Me/We/We/Us. Yes, you read that correctly; there are two *We* sections here. Think back to the workshop process. After the individual stage I asked for people to find a partner for discussion—this is the first *We* section. Next, I had each pair find a new pair to combine with, creating groups of four—this is the second *We* section. I did this to slow down the decision-making process and create deeper understanding of the challenges.

You can decide to slow down thinking or decision-making by extending the *We* section, which can be done by creating new pairs or larger discussion groups.

Prioritising with Field of Two Criteria

I dedicated more time to convergence by using the urgency-importance matrix combined with Silent Moving. I have seen many workshops end after ideas are selected in groups and posted for everyone to see; this is a good start, but the convergent work is not done. A lack of time dedicated to convergence is a critical error that I see again and again.

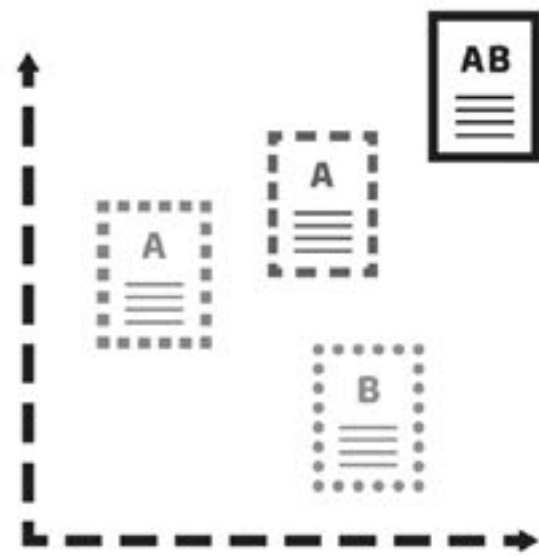
The urgent-important matrix is like the Dartboard activity, yet it provides a different way of visualising the results. The end results will be similar, but it is important to vary the activities to keep people tuned in and willing to participate. The urgent-important matrix comes from a broader tool called Field of Two Criteria. There are two lines on the matrix, each representing degrees of the two chosen pieces of criteria.

Field of Two Criteria

Choose the two most important pieces of criteria. Make a matrix on the wall. Place ideas on the matrix. Those that fulfill both criteria are located in the upper right corner.

Common criteria for example:

- Urgency
- Importance
- Impact
- How easy it is to implement
- Newness
- Quick wins / long term goal
- Estimated costs
- How much can we influence ourselves



Participants place their content on the matrix. Content that fulfil both pieces of criteria go on the upper-right of the matrix. The lower left of the matrix is for content that does not fulfil either piece of criteria. One piece of criteria will be assigned to the left axis of the matrix. The stronger content fulfils this criterion, the higher on the matrix it goes. The other criterion is assigned to the bottom line of the matrix. Content that weakly fulfils this goes to the left, while content that strongly fulfils this criterion is placed on the right of the matrix.

The criteria I used in this instance were *urgency* and *importance*, a combination that worked very well. I would love to take credit for thinking of this combination on my own, but I can't; it was made famous by a tool called the Eisenhower Matrix, which was created originally for prioritising tasks. While it is true that you can use many different criteria with the Field of Two Criteria tool, I find that importance and urgency work great together. Importance makes us question our deeper beliefs and question why some things are more important to us than other things. Urgency also stresses prioritisation, but in terms of how time is allocated. As a group leader, it is easy to

go wrong by choosing criteria that is too specific. When we enter the world of criteria, there are always complexities and always multiple criteria to choose from; individual preferences, value for business, resources, feasibility, management support, budgetary constraints... the list can go on and on.

Check-out

Once again, this stage of a workshop ended by returning the conversation back to the main objective of the day. I had people discuss in pairs how successful we were at reaching the review workshop’s objective, which was to discover the current challenges that were standing in the way of completing the actions and reaching the goals outlined in the goal-setting workshop from a month earlier. This is an important habit to get into because if the objectives were not met, then the group leader would know that more work needs to be done. In this case, if the feedback I received from the group was lukewarm, then I could further develop the ideas or make sure that the content was clearly prioritised by using further rounds of discussion in small groups, or a convergent tool designed to prioritise ideas like the Investment Activity or Dot Voting.

What tools were used and why

- **Me/We/Us**—Basic tools for getting everyone involved
- **Force Field Analysis**—To reveal a status, to find a challenge, to deal with change resistance
- **Me/We/We/Us**—Basic tools for getting everyone involved. You can extend the We section by forming new groups or larger groups
- **Silent Moving**—Prioritising
- **Urgency-importance Matrix**—Visualising priorities



Workshop process: Clarifying the challenges

Objective: To discover the current challenges

Time: 60 minutes

Presenting the objective of the workshop

Check-in tool: Line (10 minutes)

1. “There is an imaginary line on the floor and each spot on the line has a meaning. This end means that I feel terrible today. The spot in the middle of the line means that I am ok. And the other end means that I am feeling super happy. Please find your spot!”
2. “Find a pleasant person next to you and discuss why you chose that spot!”
3. “Now I would like have three participants share what they discussed. Let’s hear from each part of the line. Let’s have the happy people comment first.”
4. “Thank you. Please sit down!”

Emergence tools: Me/We/Us and Force Field Analysis (20 minutes)

1. “Look at the goals, solutions and actions from the previous meeting. Individually write down successes—what we have already accomplished—and current challenges with implementation.”
2. “In groups of three—discuss and find two to three key successes and two to three challenges!”
3. “Write your key successes and challenges on jumbo Post-it notes with big letters.”
4. “Post successes and challenges.”
5. “Eliminate the duplicates (but do not group ideas).”

Convergence tools: Me/We/We/Us, Field of Two Criteria, and Silent Moving (20 minutes)

1. “Let’s look at and read the successes in silence. Everything clear? We have done a great job. Let’s give ourselves a hand!”
2. “Now, lets look at and read the challenges in silence. Everything clear?”
3. “Think on your own and choose the challenges we need to solve today.”
4. “In pairs, influence each other.”
5. “Now join with another pair and influence each other.”

6. “On the wall in front of you is a matrix with two lines drawn on it. The line running from the bottom to the top is marked *urgent*. The higher the urgency, the higher on the line. The line running from left to right is marked *important*. The degree of importance on the line increases the farther left you go. Place the challenges on this matrix based on how they match this criteria, with the most urgent and important challenges ending on the upper left of the matrix.”

Check-out: Pair discussion (10 minutes)

1. “Find an intelligent person next to you and discuss whether we reached the objective.”
2. “Now I would like three of you to comment.”
3. “Thank you, we did a great job!”

Note: You can always check the results of Silent Moving with Dot Voting.



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