LEADERSHIP SPITBALL FACILITATOR GUIDE

Getting a clear message on what the head of an organization really wants to see as a result of a change can sometimes be much harder than it sounds. A lot of times, the leader "knows it when s/he sees it" but cannot really describe it in a concrete way to help the change leaders help ensure they truly get what they want. Having an informal "spitball" conversation with leadership is a great way get all of the thoughts out of the leader's head and onto paper where plans can be made. Below is a sample methodology that I use regularly to help leadership move from a "squishy" idea to concrete initiatives to achieve their goals.

Purpose of Session

The purpose of this session is to get all of the ideas out of the leader's brain and onto paper so the rest of the change and leadership teams can build on and react to it. It is always easier for people to react to and improve on existing ideas than it is for groups to start from scratch. This initial session also ensures that the leader is taking ownership of this process and sends the underlying message that s/he is inviting the change team into the process and that they move forward on the same page.

Other Considerations

As you start to schedule and set up these conversations, here are some things to consider:

- **Format:** These sessions can be done in person or virtually. When in person, notes are most effectively taken mind-map style in real time on 11x17 or 18x24 sized paper. This allows notes to be taken in a visual way and for real time synthesis of themes and ideas to occur. When virtual, notes are most effectively taken in a spreadsheet that can be shared later.

- **Duration:** Typically, 1-2 hours, depending on the leader's style
- **Attendance:** The facilitator, the leader, and maybe the deputy. That's it. You want the leader to feel comfortable speaking without editing. The more people in the room, the less likely that will be true.
- **Facilitator:** A neutral party who can synthesize data in real-time, ask powerful questions, and create a comfortable environment.

Set-up and Preparation

Invite the leader to participate and get them thinking about their vision for the change. Below are things to share with the leader(s) when prepping them for the session:

- **DO NOT** share the actual questions you will ask on the day of facilitation.
- **DO** ask the leader to think about their ideas around the change vision and strategy – they can even share a write up of their thoughts ahead of time if they want
- **DO** keep the initial meeting small – there will be an opportunity to involve everyone else soon, this meeting is all about what is in the leader's brain.
- Determine the format and duration of the meeting.
- Book the room and/or create the virtual meeting room link.
- Send out the invitations.
- Gather your facilitation materials – find the paper and colored markers for taking notes or build the spreadsheet.

Day of Facilitation

Make sure to do everything possible to create a conversational and comfortable environment. Once you have the leader in the room (or virtual room), it is time to get a conversation going. Below are some trigger questions you can use to keep the conversation moving. Some leaders require prompting and will only answer the questions asked. Others will pontificate easily and you will only need to ask clarifying questions or questions to get them to dive deeper in a particular area.

- Imagine you are reading a public article about [your organization] 5 years from now, what do you want it to say?
- Talk to me about your ideal organization, what does it look like?
- What are the elements you see as important focus areas to get to that ideal?
- What do you need to be to get there?
- What questions need to be addressed to get to that ideal? Areas to consider:
    - Financial solvency

- Workforce
- Customers
- Culture/Change/Resiliency
- Others

Example of the notes taken during some sessions are below.

Virtual Notes

When the meeting is virtual, you have three options to choose from. Choose whichever makes the leader you are interviewing the most comfortable.

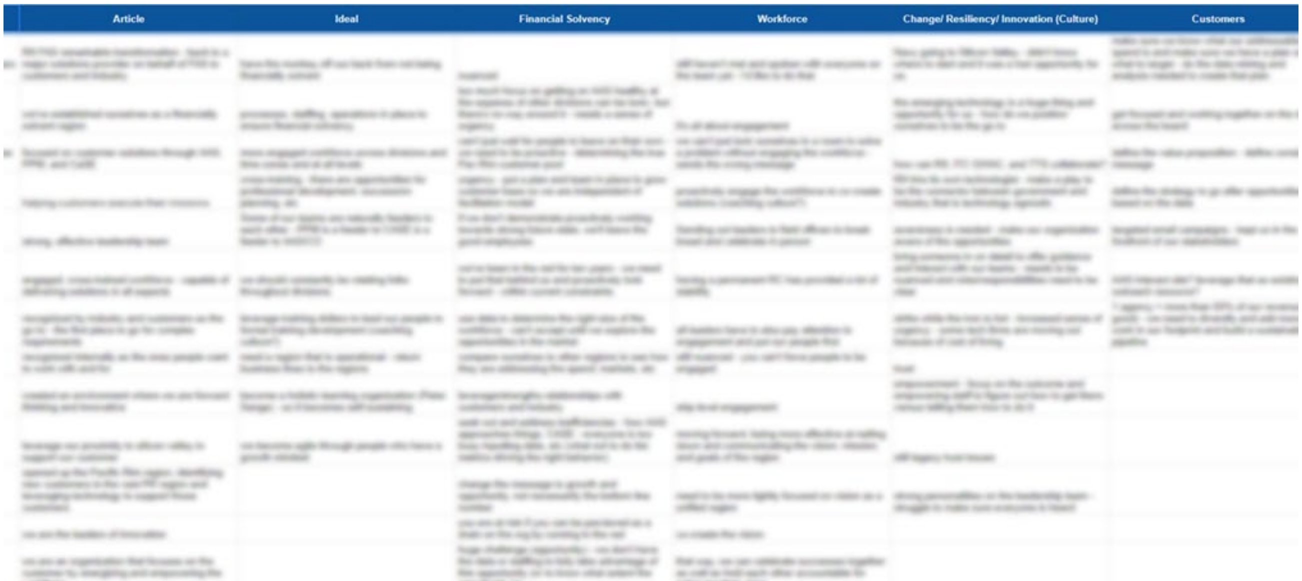
Option 1: You can share the screen of notes with the leader so s/he can see everything you are typing in real time. For visual thinkers, seeing you type their words might trigger other thoughts and make the discussion very lively.

Option 2: You can both have your video up so that you are looking at each other as you have the discussion. This is harder for the facilitator because you will need to look observant as you also type notes but might be desirable, at least for part of the interview, especially if you don't have a previous familiarity with the leader.

Option 3: If you use a cloud spreadsheet for your notes, you can share the link with the leader so that you can both have a split screen between your video and the live note taking. This may make it harder to focus, but using something like Google Spreadsheets so you can both see the edits as they happen can help if bandwidth is low.

When taking virtual notes, I open a spreadsheet and format all columns for wrapping text and wider than standard so it can be read as we go. I use one column for each trigger question I am planning to ask and capture thoughts and phrases (almost verbatim) in the appropriate columns as the leader is talking. As themes emerge, I create a new column for that theme and put all notes from that theme in that column.

Below is a blurred image of notes I have taken in a virtual session. The notes themselves are blurred to keep the content private. But you can see the formatting and the amount of content you can get out of a single hour-long meeting.



In-Person Notes

When the meeting is in person, I use 11x17 tabloid paper and colored markers to mind map in real time in front of the leader as s/he is talking. The first trigger question is designed to get them to spill the big central theme for the change first. That becomes the center of your mind map.

As the leader expands on that idea and continues to talk and answer questions, you'll have ideas that directly relate to the main idea as well as ideas that expand on previous ideas. You'll determine that in real time, draw a line, and write a summary for each concept the leader brings up.

When there is a lull in the conversation, or a good stopping point, you can change colors for your marker and work with the leader to synthesize everything that came up and bucket items. You can see in the blurred mind map below that there were several "buckets" in brown coming off the main concept. The blue pen was then the synthesis I did with the leader once he felt everything was out on the table.

In this specific case, I took several pages of notes and synthesized them into this mind map as themes emerged. The leader and I were then able to discuss the themes and elaborate on them as needed.

Follow Up After Session

Once the spitball session is over, it is time to put the conversation into a visual that can be easily reviewed and absorbed. One chart I use is the sun ray chart below. Providing this to the leader after the spitball session allows them to see how that informal conversation actually turned into a great starting process for the change. Once approved by leadership, this can then be shared with the change team to get them thinking about how to implement the desired change.