

XPLANE[®]
POWERED BY TIER1
METHOD
CARDS
INSTRUCTIONS

Elevate your
facilitation
game

With over 30 years of facilitation experience, XPLANE has seen organizations fall into cycles of endless meetings, mistakenly believing that merely convening people will automatically result in successful collaboration and positive outcomes. But convening a meeting with no plan for how to collaborate leads to more meetings and greater confusion.

Let's face it, the structures for how we engage and make decisions are largely improvised, and yet we know successful meetings have common ingredients. This is where guided methods come in—methods provide a repeatable, step-by-step, approach for getting from point A to point B.

XPLANE combines methods with visual frameworks to lead engaging and effective workshops and meetings.

- **Methods** are operating structures for collaboration with defined goals and instructions. They provide participants focused and guided parameters for how to contribute to a workshop or meeting, which gives facilitators and participants the freedom to focus on the challenge at hand.
- **Frameworks** are organizational devices that provide a visual structure such as a table or grid for capturing content and ideas.

In this deck, you will find three categories of cards aligned to the phases of the Double-Sided Pencil: **Open**, **Explore**, **Close**.

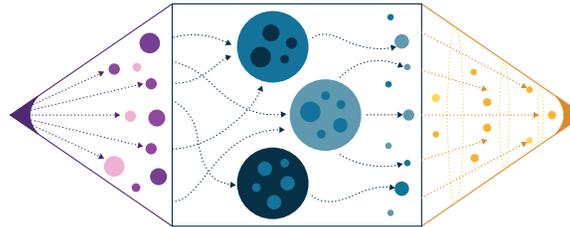
WHAT IS THE DOUBLE-SIDED PENCIL?

The double-sided pencil is a visual framework that helps facilitators organize the sequence of events in

an agenda, ensuring there is a clear arc of engagement with a beginning, middle, and end.

In this deck, the double-sided pencil also helps to determine which Method Cards work best during the three phases of a meeting or workshop.

Opening: The first act is all about opening—opening our minds, opening up possibilities. The opening is about getting everyone in the room, the cards on the table, the information and ideas flowing. The more ideas we can get out in the open, the more we will have to work with in the next stage. The opening is not the



time for critical thinking of skepticism: it's time for blue-sky thinking, brainstorming, energy and optimism. The key word for opening is "divergent": we want the widest possible spread of perspectives.

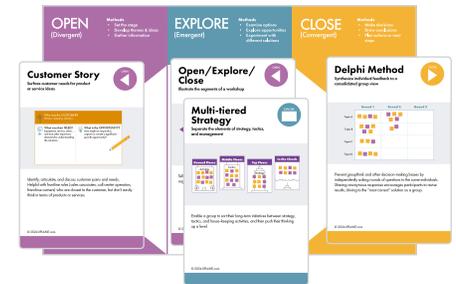
Exploring: Once we have the energy and ideas flowing in the room, we need to do some exploration and experimentation. This is where the rubber hits the road, where we look for patterns and analogies, try to see old things in new ways, sift and sort through ideas, build and test things, and so on. The keyword for the exploring stage is "emergent": we want to create the conditions that will allow unexpected, surprising, and delightful things to emerge.

Closing: In the final act we want to move toward conclusions—decisions, actions, and next steps. This is the time to assess ideas. We can't do everything or pursue every opportunity. Which of them are the most promising? Where do we want to invest our time and energy? The keyword for the closing act is "convergent": we want to narrow the field in order to select the most promising things for whatever comes next.

HOW TO PLAY

Use the planning framework of the double-sided pencil as your base and layer on "methods" for each phase of the meeting or workshop. Select your method cards, then organize them along the framework, and refine your agenda based on your participant's needs, time-constraints, and desired outcomes.

The beauty of these "methods" is that they are interchangeable. We've indicated which phases fit the method best, but these designations are only recommendations. You might choose to use the method card in a different phase of the double-sided pencil. We believe that the best way to become proficient using methods is to experiment with combinations.



SELECT YOUR METHOD CARDS

As a design principle anchor methods to meeting or workshop objectives. Scan through each card in the deck and select the methods that might align with your intended meeting or workshop objectives. Then use the workshop planning canvas on the other side of this sheet to check your thinking.

"YES"



"NO"



BRING IT ALL TOGETHER

Once you've reviewed the method cards and selected potential options, use the Workshop Planning canvas to check your thinking, and then refine your selection.

1. Determine your objectives, this is the purpose for holding the gathering. The desired outcomes are the tangible artifacts or knowledge you will take away from the gathering.
2. Based on your objectives, plot the level of detail for your conversation on the altitude map. Will this meeting get into the details or will it stay at top-line messaging, vision, or process view?
3. Use the altitude of the conversation in step 2 to determine who needs to be in the meeting or workshop. For instance, the more detailed focus conversation, the more expertise you might need in the room.
4. Make a note of any design considerations or constraints. For instance, will this be a virtual or in-person meeting?
5. Review your selected methods, and ask yourself: will the activities selected help me achieve my desired outcomes? Refine your selection and plot out the methods on the double-sided pencil.

EXAMPLE SCENARIO

"A Project Manager needs to reign in a project team that's gone sideways on both timeline and budget."

Example Method Card selection:

- **Visual Icebreaker:** To inspire out-of-the-box thinking, start with a visual icebreaker, prompt the team to "think about a problem that someone has solved in an innovative way."
- **Force Field Analysis:** Then, prompt the group to break down the current context—what's helping and hindering project success?
- **Start Stop Continue:** Knowing that people are coming in with some ideas on how to address timeline and budget, ask them to add those thoughts into the start, stop, continue structure—

this will make it easy to see where there's alignment and disagreement.

- **D4 Decision Making:** To close, come to agreement by assigning each idea to one of the 4 Ds (Do it! Decide when. Delegate it. Dump it!)

Workshop Planning

Use this tool to design an engaging and productive group workshop session or meeting.

1	2	3	4	5
Determine your session objectives and desired outcomes.	Based on your objectives, map the altitude of your session discussion and activities. This will provide a visual anchor to help you plan and determine the audience and/or activities for your agenda.	Use the altitude map to determine who needs to participate in the session.	Articulate any design considerations and constraints for your session.	Map out your activities using the double sided pencil to create a well-balanced agenda with a designed beginning, middle, and end. Download the method cheat sheet to use with the double sided pencil.

OBJECTIVES & OUTCOMES: What is the purpose of the meeting or workshop? What do you hope to achieve?

OBJECTIVE: The purpose for holding the session. **OUTCOMES:** The tangible artifacts and/or measurable knowledge you will take away from the session.

The purpose is to provide the team with space to discuss the barriers they're facing in executing this project.

The outcome is to identify a tangible list of risks and triggers that are causing the project to veer off course and ways to mitigate those risks moving forward.

PEOPLE: Based on the purpose and altitude of your objectives, who needs to participate? Whose voices are represented? If there's a gap in representation, how will you fill the gap?

Functional team leaders or members.

DESIGN CONSIDERATIONS: What considerations should you account for in your agenda design? Time zones, format (in-person, virtual), size of group, etc.

Virtual Need to prepare a digital whiteboard

DOUBLE SIDED PENCIL

Use the Double Sided Pencil to map the methods to the three phases of a session (meeting or workshop): Open, Explore, and Close. XPLANE consultants and designers use a variety of workshop activities or "methods" to plan out their workshops. Use the method cheat sheet to review and plan out your activities across the phases.

OPEN

Visual Icebreaker

Usually provides participants with each other.

EXPLORE

Force Field Analysis

CLOSE

D4 Decision Making

Start Stop Continue

Altitude Map: The Altitude Map is used to align participants on the level of detail to focus on in a workshop or meeting.

High Altitude is the 30,000 foot view, the top-line message, the organizational change, overall vision, or high-level process view.

Lowest Altitude is the weeds, the tactical details. People often get off-course because they are overwhelmed by the details on the ground level.

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