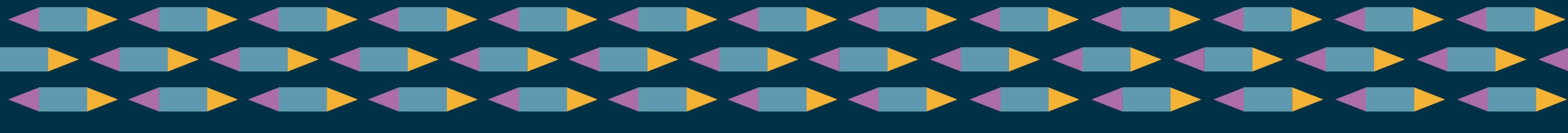


XPLANE[®]
POWERED BY TIER1
METHOD
CARDS

Companion Frameworks



OPEN

What is the Open phase?

In the **Open** phase, activities are designed to set the stage, gather information, and develop themes and ideas.

What are Methods?

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 give facilitators and participants the freedom to focus on the challenge at hand.

What are Frameworks?

Frameworks are visual organization tools such as a table or grid used to capture content and ideas.

Open Method Cards & Companion Frameworks

Not every method card has a corresponding framework. For the ones available, we've listed the method card and their companion below.

Vision Drawing

Vision Drawing
Visualize a desired future state.

Envision, draw, and discuss the future-state in terms of results and outcomes. Provide a group with a goal to reach for and metrics for success.

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Vision Drawing Visualize a desired future state. Envision, draw, and discuss the future-state in terms of results and outcomes. Provide a group with a goal to reach for and metrics for success.

1 SET UP SPACE
Set up a table or table with a blank frame for each participant.

2 FUTURE-STATE TOPIC
Deliberate the future-state topic. This might be the goal and each of its related projects or strategies.

3 ASK THE GROUP
1. "Imagine the results you want in a particular area. Imagine it's coming to you in 10 years. What would it look like? Describe the scene. Observe it in your mind. Is it possible? What do you want?"
2. "How does it feel to think about this future-state scene? Is it a challenge for you to reach this state? What do you need to get there? What do you need to do to get there? What do you need to have in place to get there?"
3. "What are the metrics for success? How do you know you've reached this state?"
4. "What are the metrics for success? How do you know you've reached this state?"

4 INDIVIDUAL ACTIVITY - DRAW
All participants to draw their vision individually. Give the group 10-15 minutes.

5 SHARE
Participants will work in pairs to present their vision to the group in order to provide and get input of 10-15 minutes. Each participant will present their vision to the group.

TIP
The success of the activity is to have participants who draw their vision to be able to describe their vision in their own words and outcomes of their vision in their own words.

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Who/Do

Who/Do
Define an audience and what you want them to do.

Make success tangible and measurable by clearly determining a target audience and frame how they should behave differently in the future. Prioritize action and clarify what a final communication plan should solve for.

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Who/Do The Who/Do is a facilitating device to define an audience (the who) and what you want them to do (to do differently). Make success tangible and measurable by clearly determining a target audience and frame how they should behave differently in the future. Prioritize action and clarify what a final communication plan should solve for.

Under WHO, record a list of target audience(s). Who is involved or asked to support? Who needs to be informed? Who is the decision-maker?

Under DO, record a list of target audience(s). Who is involved or asked to support? Who needs to be informed? Who is the decision-maker?

Under WHO, record a list of target audience(s). Who is involved or asked to support? Who needs to be informed? Who is the decision-maker?

Under DO, record a list of target audience(s). Who is involved or asked to support? Who needs to be informed? Who is the decision-maker?

	WHO IS YOUR TARGET AUDIENCE?	WHAT DO THEY NEED TO UNDERSTAND?	WHAT DO YOU WANT THEM TO DO?
Target 1			
Target 2			
Target 3			
Target 4			
Target 5			

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OPEN

What is the Open phase?

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What are Methods?

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What are Frameworks?

Frameworks are visual organization tools such as a table or grid used to capture content and ideas.

Open Method Cards & Companion Frameworks

Not every method card has a corresponding framework. For the ones available, we've listed the method card and their companion below.

Cover Story

Cover Story
Envision a desired future state.

1. Define the successful outcome of a project, program, or vision with headlines and narrative from a publication cover story. Draw out the details, quotes and #hashtags with teams to create alignment around a shared future state.

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Cover Story
Express the desired future state in the form of a magazine headline.

1. Imagine your desired future state for each of the cover story of a representative organization.

2. Think about the headline and the subtitle that would run with the story, and write it.

3. Draw the change that has occurred.

4. Add extra details (including how the change happened).

5. Add a sub-headline summarizing the impact.

EXAMPLE

Headline	Newsweek
Subline	WWW.WWW.WW
What	WWW.WWW.WW
How	WWW.WWW.WW
Sub-headline	WWW.WWW.WW

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Customer Story

Customer Story
Surface customer needs for product or service ideas.

1. Identify, articulate, and discuss customer pains and needs. Helpful with frontline roles (sales associates, call center operators, franchise owners) who are closest to the customer, but don't easily think in terms of products or services.

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Customer Story
Identify, articulate, and discuss customer pains and needs. Helpful with frontline roles (sales associates, call center operators, franchise owners) who are closest to the customer, but don't easily think in terms of products or services.

1. Create enough cards for each participant to have 2-4 words.

2. Read through the cards together with the group and (if time allows) to make. Assign any questions before taking each participant a 10-15 min of cards on their own, allowing 3-5 minutes per card.

3. When the group has finished, conduct a rotation of the cards. Share any surprising findings or unexpected patterns.

4. Organize the cards based on similarity or goal (perhaps high to low cost, what is most needed). All participants to vote on which 3-5 cards are most helpful in terms of capturing or creating a significant growth opportunity.

What was their NEED? Equipment, services, other... and any other important elements for understanding the situation.	What is the OPPORTUNITY? How might we respond to capture or create a significant growth opportunity?
--	--

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Magic Snow/Future Perfect

Magic Snow/Future Perfect
Envision a desired future state.

1. Quickly visualize the future, align a group toward a shared goal, and encourage discussion about future behaviors. Bring focus to commonalities and differences in a group's visions.

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Magic Snow/Future Perfect
Use this to help teams quickly envision the future and discuss commonalities and differences in their vision of the future.

1. NEXT JANUARY LOOKS LIKE...

2. DESCRIPTIONS OF INDIVIDUAL PICTURES

3. TOP THEMES

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Open/Explore/Close

Open/Explore/Close
Illustrate the segments of a workshop.

1. Tell the story of how a workshop process works and how it might feel as it progresses.

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Open/Explore/Close
The Double-Edged Funnel framework helps determine which method cards best bring them from a workshop: Open, Explore, and Close.

1. On a digital whiteboard or poster, draw a "Double-Edged Funnel" model using sticky notes and colored markers. Label the left side of the funnel "Open" for the workshop, the middle "Explore" for the workshop, and the right "Close" for the workshop. The funnel is divided into three sections: Opening, Exploring, and Closing.

2. When asked the group to be in the process and where to report to be by the end of the workshop.

3. Check with the framework throughout the workshop to see how activities align with the process.

4. When asked the group to be in the process and where to report to be by the end of the workshop.

Opening [Divergent]	Exploring [Emergent]	Closing [Convergent]
-------------------------------	--------------------------------	--------------------------------

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Cover Story

Express the desired future state in the form of a magazine narrative.

1

Imagine your desired future state has made the cover story of a relevant industry magazine.

2

Think about the headline and the subtitle that would run with the story, and write it.

3

Draw the change that has occurred.

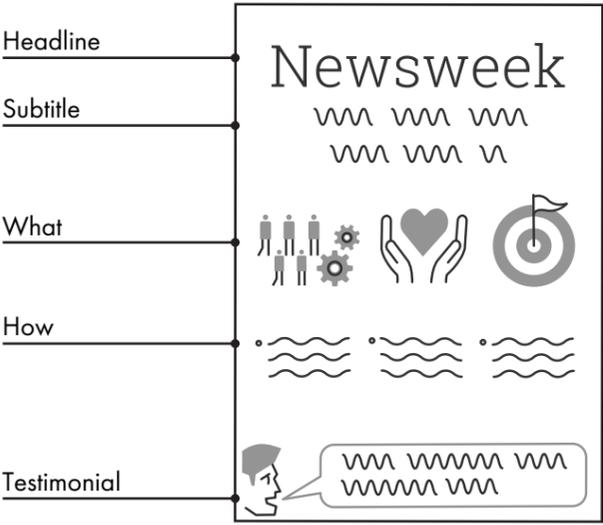
4

Add some details illustrating how the change happened.

5

Add a testimonial summarizing the impact.

EXAMPLE



A large empty rectangular area for drawing and writing, with a gray triangular corner and horizontal lines at the bottom right.

Customer Story

Identify, articulate, and discuss customer pains and needs. Helpful with frontline roles (sales associates, call center operators, franchise owners) who are closest to the customer, but don't easily think in terms of products or services.

1

Create enough cards for each participant to have 2-6 cards.

2

Read through the card together with the group and fill one out as a team. Answer any questions before asking each participant to fill out 2-6 cards on their own, allowing 3-5 minutes per card.

3

When the group has finished, conduct a readout of the cards. Discuss any surprising findings or unexpected patterns.

4

Organize the cards based on similarity or goal (might be high-to-low cost, effort, or timelines). Ask participants to vote on which should be pursued based on a criteria appropriate to the customer goals (i.e. best cost savings potential, or best revenue potential).

What was their NEED?

Equipment, service, other... and any other important elements for understanding the situation.

What is the OPPORTUNITY?

How might we respond to capture or create a significant growth opportunity?

Magic Snow Future Perfect

Use this to help teams quickly envision the future and share commonalities and differences in their vision of the future.

1

Give each person a piece of paper and access to multiple colors of sharpies.
If working digitally, give each person an individual digital board to work in.

2

Pause for two to three seconds and then give the instructions s-l-o-w-l-y. Sit for a minute and, suppose... just suppose that tonight a miracle occurred and when you walked into the office tomorrow, it was next January. And just suppose everything you hoped would happen over the year had come true. What does that look like? Draw that picture. What's changed? What are you doing differently? What are others doing differently?
If working digitally, they can use the pen tool in their digital board to draw, or search for images to convey their idea.

3

Take at least five minutes to let everyone complete their picture. Then, go around the room and ask each person to describe their picture and create a gallery of the pictures on one wall.
If working digitally, have them drop their sketches into a combined digital board.

4

Note out loud the themes and the elements that make people nod their heads in agreement. Also note what people say they would be doing differently, the actual actions.

VARIATION 1

Ask the team to get together and make one big poster-sized vision of the future for the entire team. Encourage them to use the themes that resonated among the group to create one single picture.
If working digitally, have everyone work together in a single digital board instead of across individual boards.

VARIATION 2

To get people out of their fixed mindsets about their organization, start the exercise with something tangible so the second sentence might read: "just suppose that the snow that's falling right now is magical and as it falls tonight a miracle occurs..." OR "just suppose that the coffee you just drank is magical and overnight it creates a miracle..."

NEXT JANUARY LOOKS LIKE...

DESCRIPTIONS OF INDIVIDUAL PICTURES

TOP THEMES

--	--	--	--	--

Open/Explore/Close

The Double-Sided Pencil framework helps determine which method works best during three phases of a workshop: Open, Explore, and Close.

The “Double-Sided Pencil” is a framework we use with clients to explain the process we take groups through to get them to generate insightful and creative ideas and get them to make clear and accountable decisions. In the **Opening** phase, activities are designed to set the stage, develop themes and ideas, and gather information. Activities in the **Exploring** phase examine the options, explore opportunities and experiment with different solutions. Activities in the **Closing** phase are designed to make decisions, draw conclusions, and plan actions or next steps.

1

On a digital whiteboard or poster, draw a “double-sided” pencil: a long rectangle with pointed ends on either side. Label the left side of the pencil Open, the middle rectangle Explore, and the far right pencil Close. Use the illustration as reference for filling in the circles and lines within the double-sided pencil.

2

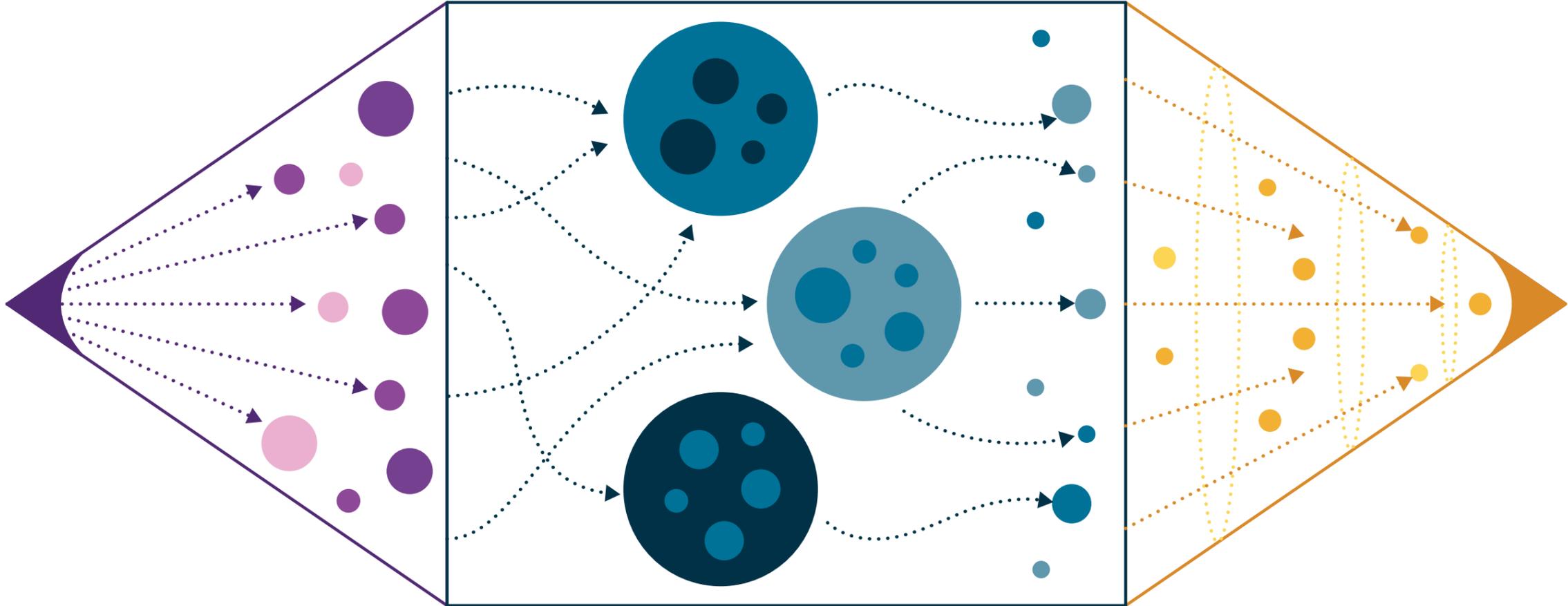
Tell the story of how the workshop process works and how it might feel as it progresses.

3

Show where the group is in the process and where to expect to be by the end of the workshop.

4

Check in with the framework throughout the workshop to show how activities relate to progress toward the goal.



Opening (Divergent)

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. Think of the opening as a big bang, an explosion of ideas and opportunities. 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 or 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 (Emergent)

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 (Convergent)

Closing: In the final act we want to move toward conclusions—toward decisions, actions, and next steps. This is the time to assess ideas, to look at them with a critical or realistic eye. 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.”

Vision Drawing

Visualize a desired future-state. Envision, draw, and discuss the future-state in terms of results and outcomes. Provide a group with a goal to reach for and metrics for success.

1 SET UP SPACE

Set up a grid or table with a blank frame for each participant.

2 FUTURE-STATE TOPIC

Determine the future-state topic. This might be the end result of an initiative, project, or strategy.

3 ASK THE GROUP

1. "Imagine the result you want in your mind's eye. Imagine it happening in real life."
2. "Now imagine yourself as a 'fly on the wall,' observing the event. Observe it as objectively as possible. What do you see?"
3. "Now think of yourself as a film director whose job it is to visualize the scene for a movie. Think of the page in front of you as a stage, on which you'll visualize the scene. What 'props' do you require for your set? Who are the actors? What are their roles? What is the action? What are the people saying, thinking, doing?"
4. "Now, from the perspective of that 'fly on the wall,' try to draw the scene as you see it."

4 INDIVIDUAL ACTIVITY - DRAW

Ask participants to draw their vision individually. Give the group 10-15 minutes.

5 SHARE

When done, ask participants to present their vision to the group in order to provide not just a goal to reach for, but a metric for success for the project or initiative.

TIP

The conversation around the sketch is as important as the sketch itself. Look for people to talk to in terms of the results and outcomes of their vision as they explain it.

FUTURE-STATE TOPIC:

Who/Do

The Who/Do is a useful framing device to define an audience (the who) and what you want them to do (or do differently). Make success tangible and measurable by clearly determining a target audience and frame how they should behave differently in the future. Prioritize action and clarify what a final communication plan should solve for.

<p>1</p> <p>Under WHO, record a list of target audience(s). Who's involved in making this happen? Who needs to be informed? Who is the decision-maker?</p>			
<p>2</p> <p>Jump to the third column. Under Do, think about each audience—when they understand the big picture, what do we want them to DO? (Or stop doing, or do differently?)</p>	WHO IS YOUR TARGET AUDIENCE?	WHAT DO THEY NEED TO UNDERSTAND?	WHAT DO YOU WANT THEM TO DO?
<p>3</p> <p>Go back to the middle column. Once the target audience (WHO) and the actions (DO) have been determined, ask yourself what do they need to understand to move toward the desired actions?</p>	TARGET 1		
<p>4</p> <p>Given all of the possible audiences and actions, what is the most important? Who comes first?</p>	TARGET 2		
<p>TIP</p> <p>Bias yourself toward action. When brainstorming "DOs," there is a tendency to slip into the easier mode of "we just want them to understand." Most often when you want people to understand something, it's because you want them to change something, or learn something that they can then "DO." Don't shortchange what you are really looking for—action.</p> <p>It is beneficial to conduct a communication timeline prior to finalizing the WHO/DO matrix. The timeline's temporal perspective can help straighten out a long and difficult list.</p>	TARGET 3		
	TARGET 4		
	TARGET 5		

EXPLORE

What is the Explore phase?

Activities in the **Explore** phase examine the options, explore opportunities, and experiment with different solutions.

What are Methods?

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 give facilitators and participants the freedom to focus on the challenge at hand.

What are Frameworks?

Frameworks are visual organization tools such as a table or grid used to capture content and ideas.

Explore Method Cards & Companion Frameworks

Not every method card has a corresponding framework. For the ones available, we've listed the method card and their companion below.

Value Proposition

Value Proposition
Identify and articulate a value proposition

Value Proposition Worksheet

Enable the client to clearly identify their value proposition and understand the elements of a strong concept, idea, or product.

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Value Proposition Enable the client to clearly identify their value proposition and understand the elements of a strong concept, idea, or product.

IMPACT AREA	BENEFIT	COST	PROOF	UNIQUE

STATEMENT

1. CHOOSE A COICOA

2. PLACE THE COICOA IN THE MIDDLE

3. CONSTRAINT CARD

4. MORE SALES TO DEFINITION

5. WRITE & DISCUSS

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Virtuous Cycle

Virtuous Cycle
Discover what's needed to turn a linear process into a cycle

Step 1 Step 2 Step 3

Uncover opportunities to transform an existing, linear process into a more valuable and growing process by taking a different viewpoint. Useful in examining processes that are deemed "work repeating," such as the customer experience.

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Virtuous Cycle Uncover opportunities to transform an existing, linear process into a self-reinforcing cycle by connecting its outcomes back to its beginning. Useful in examining processes that are deemed "work repeating," such as the customer experience. Use the one below to start. From process complete, continue on a validated or digital collaboration platform.

1. ADD CURRENT PROCESS

2. BEFORE THE PROCESS

3. AFTER THE PROCESS

4. COMPLETE THE CYCLE

5. IMPROVE THE PROCESS

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Winning Behaviors Ball Game

Winning Behaviors Ball Game
Identify and articulate successful behaviors

Uncover opportunities to transform an existing, linear process into a more valuable and growing process by taking a different viewpoint. Useful in examining processes that are deemed "work repeating," such as the customer experience.

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Winning Behaviors Ball Game Follow the instructions below to experience, identify, and articulate successful behaviors through play and discussion.

LEARNING OBJECTIVE

GAME OBJECTIVE

SETUP & MATERIALS

GAME PLAY

1. CHOOSE A COICOA

2. PLACE THE COICOA IN THE MIDDLE

3. CONSTRAINT CARD

4. MORE SALES TO DEFINITION

5. WRITE & DISCUSS

NOTES

BROAD DISCUSSION

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Challenge Statements

Force an empathic point of view by allocating participants to argue "For" or "Against" a point of view—regardless of their initial instincts on the statements. Challenge a common perspective or provide a non-confrontational method of discussion for potentially contentious and difficult issues.

1
Create a set of 2–5 challenge statements prior to the activity.

2
In a shared document or digital whiteboard, post the first challenge statement. On the left side of the statement, add a "For" column, and an "Against" column to the right.

3
Divide the participants into two groups. One to argue for the statement, one to argue against the statement. Ask each group to use a different colored text or sticky note (For = blue, Against = green for example) and generate arguments for their side. One statement per sticky note. Give the groups 5–10 minutes to draft their ideas.

4
Ask each participant to share their ideas captured in the "For" or "Against", or ask a single participant from each group to present.

5
Discuss the outcome and repeat for the next statement.

VARIATION
Switch the group from For/Against after each challenge statement. After all statements in the exercise are presented, ask participants to vote on each challenge statement and discuss the outcome.

FOR	CHALLENGE STATEMENT(S)	AGAINST

Force Field Analysis

Identify the positive and negative forces surrounding a specific objective, goal, or initiative, and determine the best response to the forces. This is especially useful in planning or developing strategy.

<p>1</p> <p>Draw a table with four columns and five rows. Label the columns from left to right: Forces, Negative Impact, Positive Impact, How We Might Respond.</p>	<p>TOPIC:</p>			
<p>2</p> <p>Determine the topic to be discussed, and add it to the top of the table. For example:</p> <ul style="list-style-type: none"> · What are the internal forces impacting X? · What are the technology forces at work that we need to consider? · What are the regulatory forces at work we need to be ready for? 	<p>FORCE</p>	<p>NEGATIVE IMPACT</p>	<p>POSITIVE OPPORTUNITY</p>	<p>HOW WE MIGHT RESPOND</p>
<p>3</p> <p>Ask the group to brainstorm possible forces, and then identify the top five. Affinity mapping or dot voting can be used to determine the priorities.</p>				
<p>4</p> <p>Put each identified force on its own row, and then begin discussion of the positive and negative implications of each force, and how we might respond.</p>				

Head | Heart | Hand

Activities, products, and experiences appeal to a whole person—they “feed the heart, hand, and mind.” Use three lenses as a means of finding, clarifying, or diagnosing the meaning of an endeavor or initiative.

1

Draw the outline of a person. Add a row for **Head, Heart,** and **Hand** and connect to the outlined person.

2

Write the topic or initiative to explore above the drawing.

3

Ask the participants to think about the characteristics or features that appeal to each of these lenses:

Head, Heart, and **Hand.**

- Consider the **Heart**: What makes it emotionally engaging? Post up with sticky notes.
- Next, consider the **Hand**: What makes it tangible and practical? Post up.
- Finally, think about the **Hand** or the **Mind**: What makes it logical and sensible? Post up.

4

Together, prioritize the results by dot voting or rating each 1–5 in terms of significance.

5

Come back to the big picture and evaluate the strengths and weaknesses of the issue, idea, or product and discuss the outcome.

TOPIC:

HEAD



HEART

HAND/MIND

Pain/Gain Empathy Map

Decisions often come down to basic choices between pain and gain. Brainstorm pains and gains for a particular person, role, or group and uncover the most relevant points that may be influencing their decisions with an empathetic lens.

1

Name the key person, role, or group, and draw a quick sketch of them. Label the left side of the profile Pains and the right side Gains.

2

Ask about their pains first, by prompting the group to step inside the mind of the person and to think and feel as they do.

"What's a bad day look like for them?"

"What are they afraid of; what do they worry about?"

"What are they responsible for?"

"What obstacles stand in their way?"

3

Brainstorm the pains, capture one per sticky note and post up.

4

A person's gains can be the inversion of the pain situation—or go beyond.

"What does this person want and aspire to?"

"How do they measure success?"

"Given the subject at hand, how could this person benefit?"

"What can we offer this person?"

5

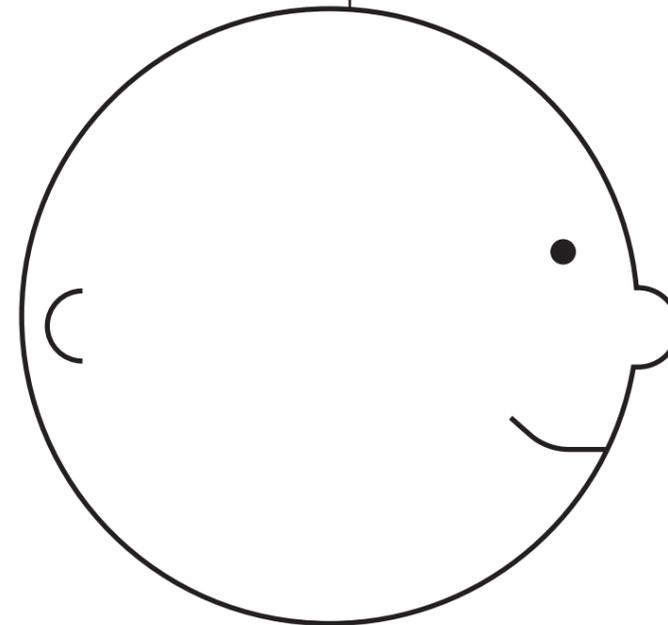
Brainstorm the gains, capture one per sticky note and post up.

6

Discuss the findings as a group.

PAINS

GAINS



Persona Empathy Map

Better understand a target audience by getting inside their head. Define the world through their experience, and understand the forces that are at work in their lives, in order to empathize and explore how to solve their problems.

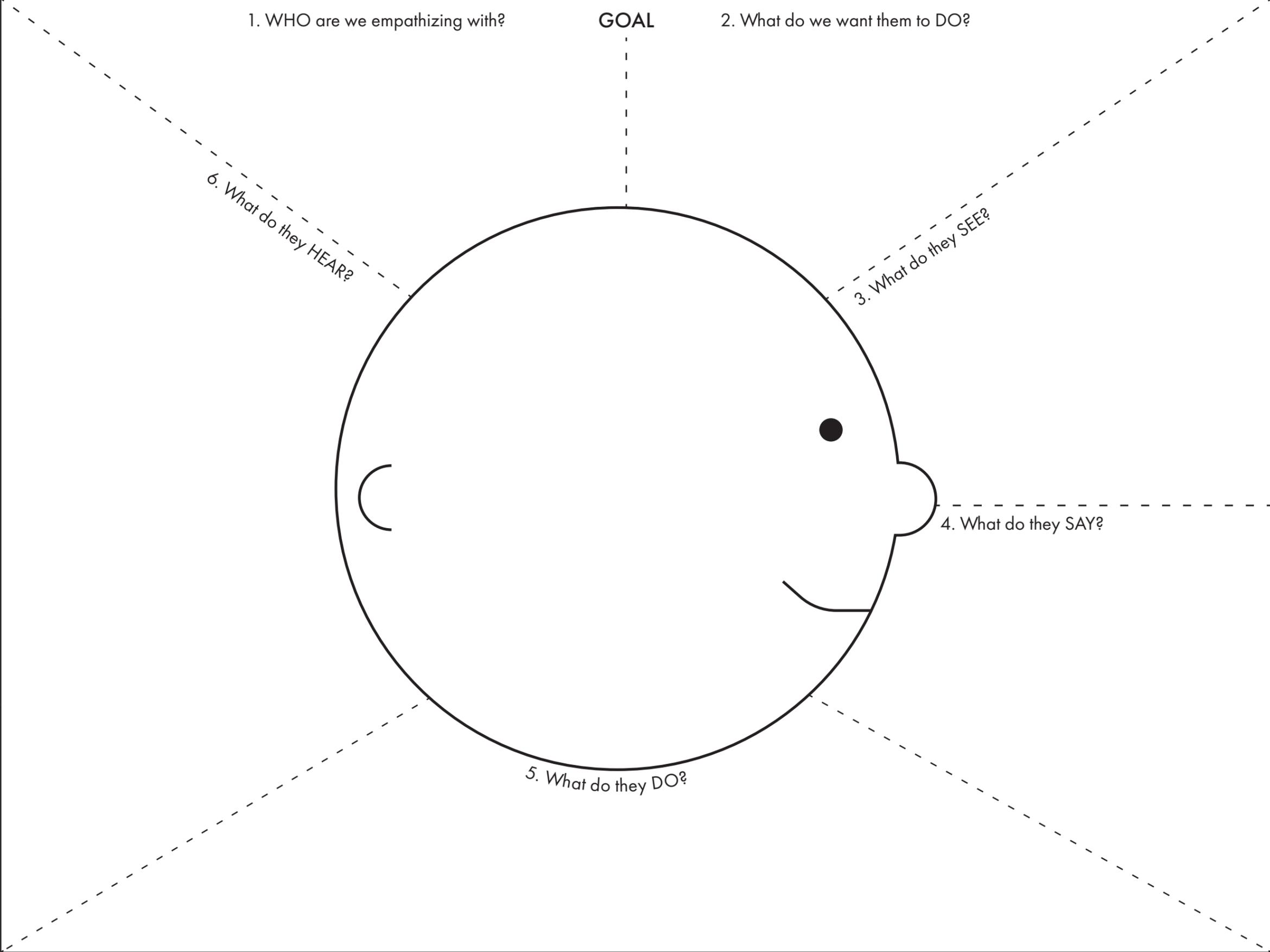
1
Draw a head or profile of the target audience. Give this persona a name. When creating a representative of a large or diverse group of people (users, for instance) it may be better to have an abstract or fictional title. A real person or role will get you stronger examples.

2
Label five different areas around the head: **Hearing** near the ears, **Seeing** near the eyes, **Saying** near the mouth, **Doing** below the head, and **Thinking** above the head.

3
Ask the group to put themselves into this person's shoes:
What are they experiencing; what's changing?
What are characteristics of their world?
What are they or others doing differently?
When collecting thoughts, give more weight to more significant pieces of the puzzle. You may want to consider color-coding the types of thoughts, sights, and sounds.

4
Ask the participants to brainstorm ideas around each lens, and post one idea per sticky note to the drawing. This may be done one at a time, while presenting their ideas, or post all at once as a group without presentation.

5
Discuss the outcome of the empathy map.



Post the Path

Define an existing process at a high level and uncover areas of confusion or misunderstanding. Discuss what to do about the unclear areas, and create overall alignment.

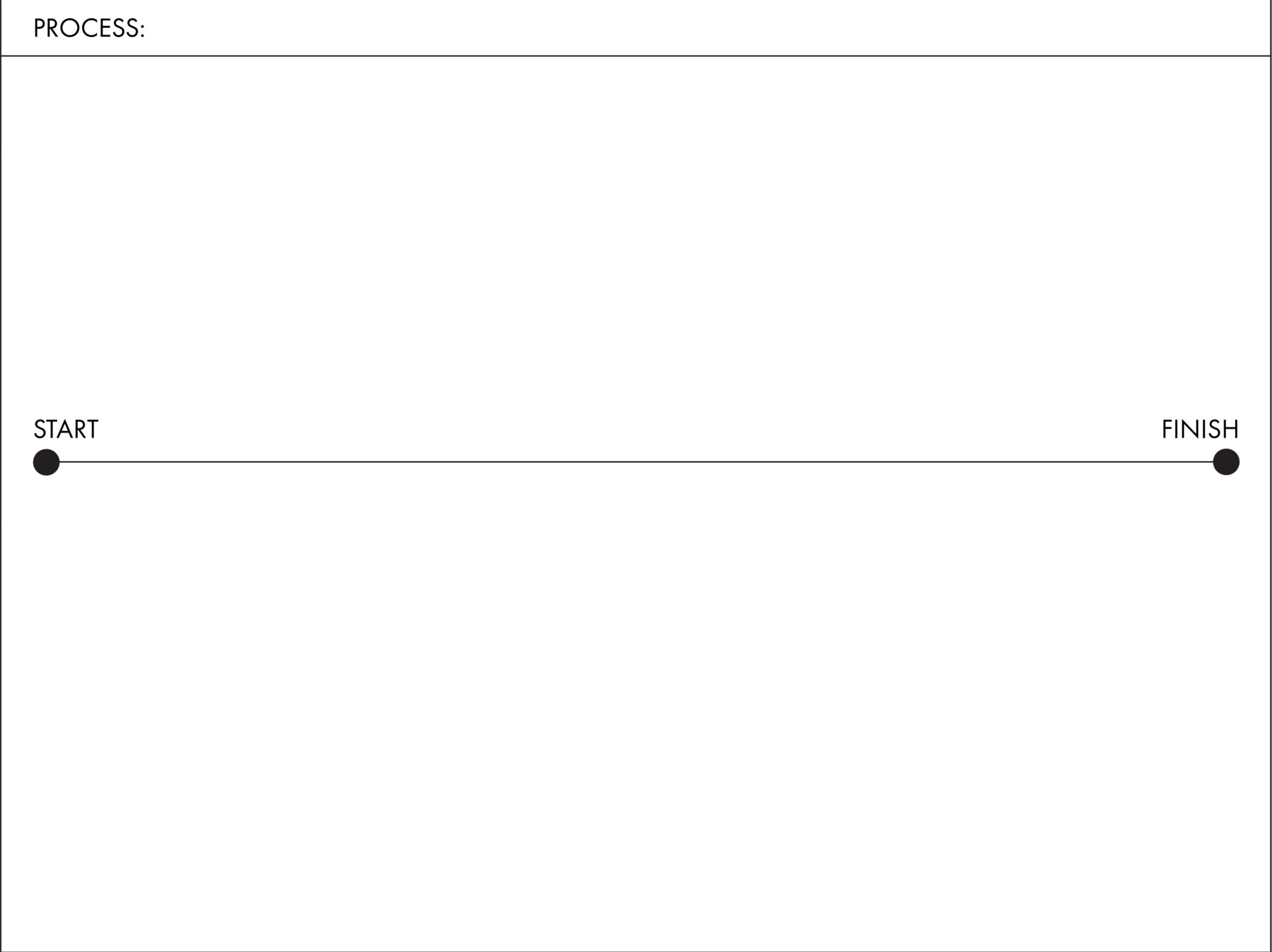
1
Draw a long horizontal line and mark the far left side **Start** and the far right **Finish**. Title the line with the name of the process that will be discussed.

2
Ask participants to think about the process, from beginning to end. Then ask them to individually write down the steps in the process on sticky notes, one step per note. If you sense in advance that the group will be "in the weeds," you may place a limit on the number of sticky notes that they post.

3
Ask one participant to share with the group by placing their sticky notes in order. Instruct them to line up their notes horizontally, so each participant has a row.

4
After everyone has posted their version of the process, prompt the group to find points of agreement and points of confusion. Look for terminology problems, misaligned steps, or any other key points of difference.

5
Discuss the outcome. The group should draw their own conclusions on what the different descriptions of the process means, its implications, and what they can or should do to clarify it.



Race Against the Competition

Play a 3-team game to objectively identify the strengths of a service or product against a competitor. Teams play the role of client, competitor, and judge to encourage debate and discussion.

1
Draw a racetrack with two lanes. Divide the track into 10 segments, large enough to hold a sticky note. Label the first track with an appropriate title: Team A (or Client/Company), and label the second lane as Team B (or Competitor).

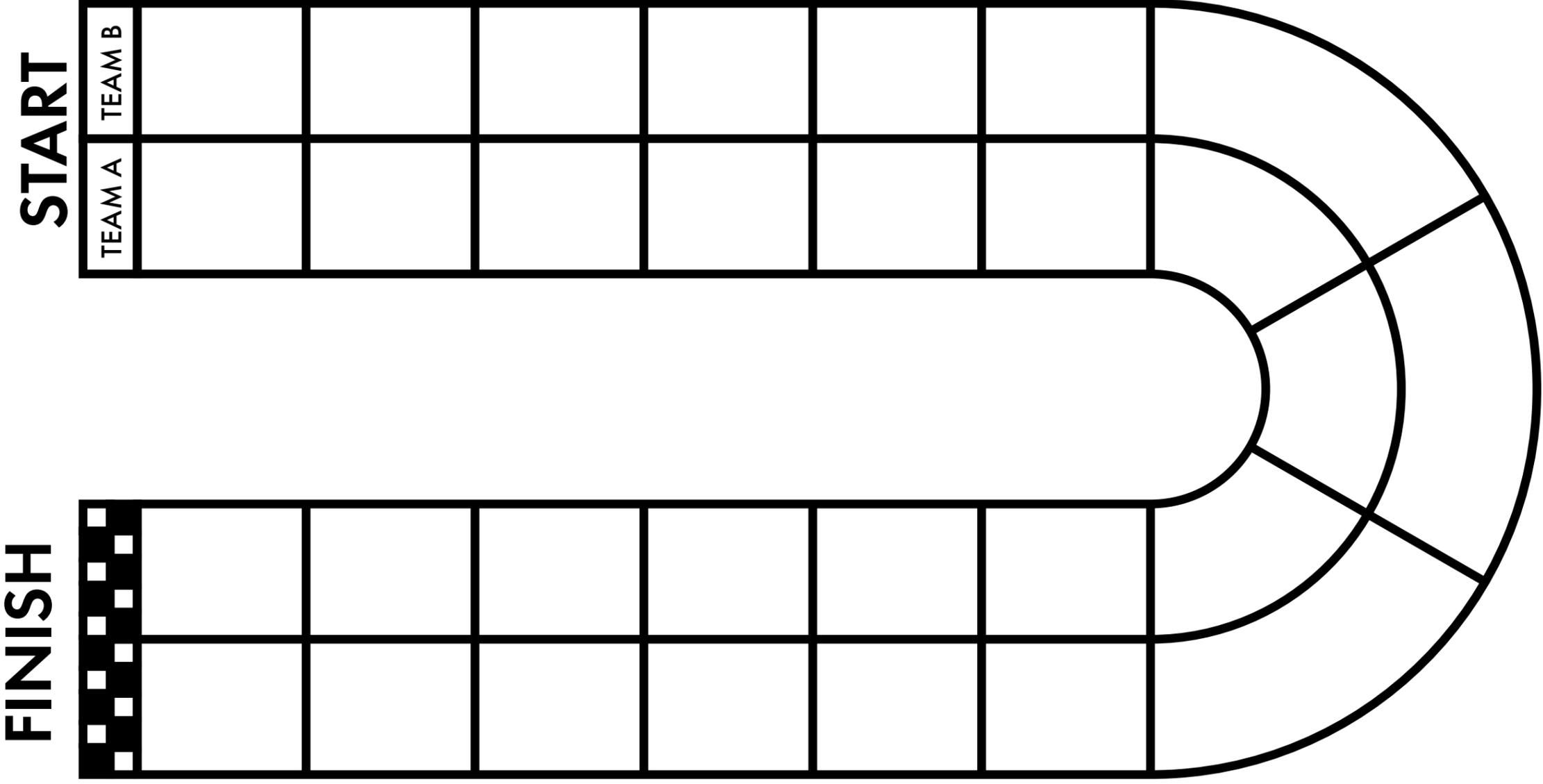
2
Divide the participants into three teams: Team A, Team B, and Judges.

3
Ask Team A to populate the first track, writing their top 10 competitive strengths on sticky notes. Place the sticky notes into their track in order of strength.

4
Ask Team B to then focus on the second track. For each of Team A's strengths, write a counter-argument why Team B is better and place the sticky note into the second track.

5
Ask the Judge Team to evaluate the two statements in each racetrack segment and circle the winning statement. Allow some time for rejection of the judge's evaluation and discussion between the teams and the judge.

6
Add up the winning statements for each team, and give a score out of 10.



1 GROUP BY ROLE

Ask participants to group into similar functions or roles. Ideally all relevant functions are represented in the room, if not, someone might be assigned to represent the function not present.

2 UNREASONABLE REQUESTS

Tell the groups to imagine their function as the rockstar in the organization and in order to perform their best work, they require these conditions to be met. In an ideal world, what would you need from each member of the team to do your best work? For each of the functions around them, they are allowed to create three "unreasonable requests" on sticky notes. Share some rockstar anecdotes to get the groups brainstorming ideas:

- Van Halen: No brown M&M'S
- Mariah Carey: Must have a "staircase assistant" whose primary responsibility is to test stairs to make sure they are safe for the singer to walk down.
- Beyonce: Titanium straws which will be used to drink a special alkaline water that's served at exactly 21 degrees at every show.

Have each member share their three unreasonable requests for each function and post those on a digital whiteboard or poster.

3 CREATE A WEB OF FUNCTIONS

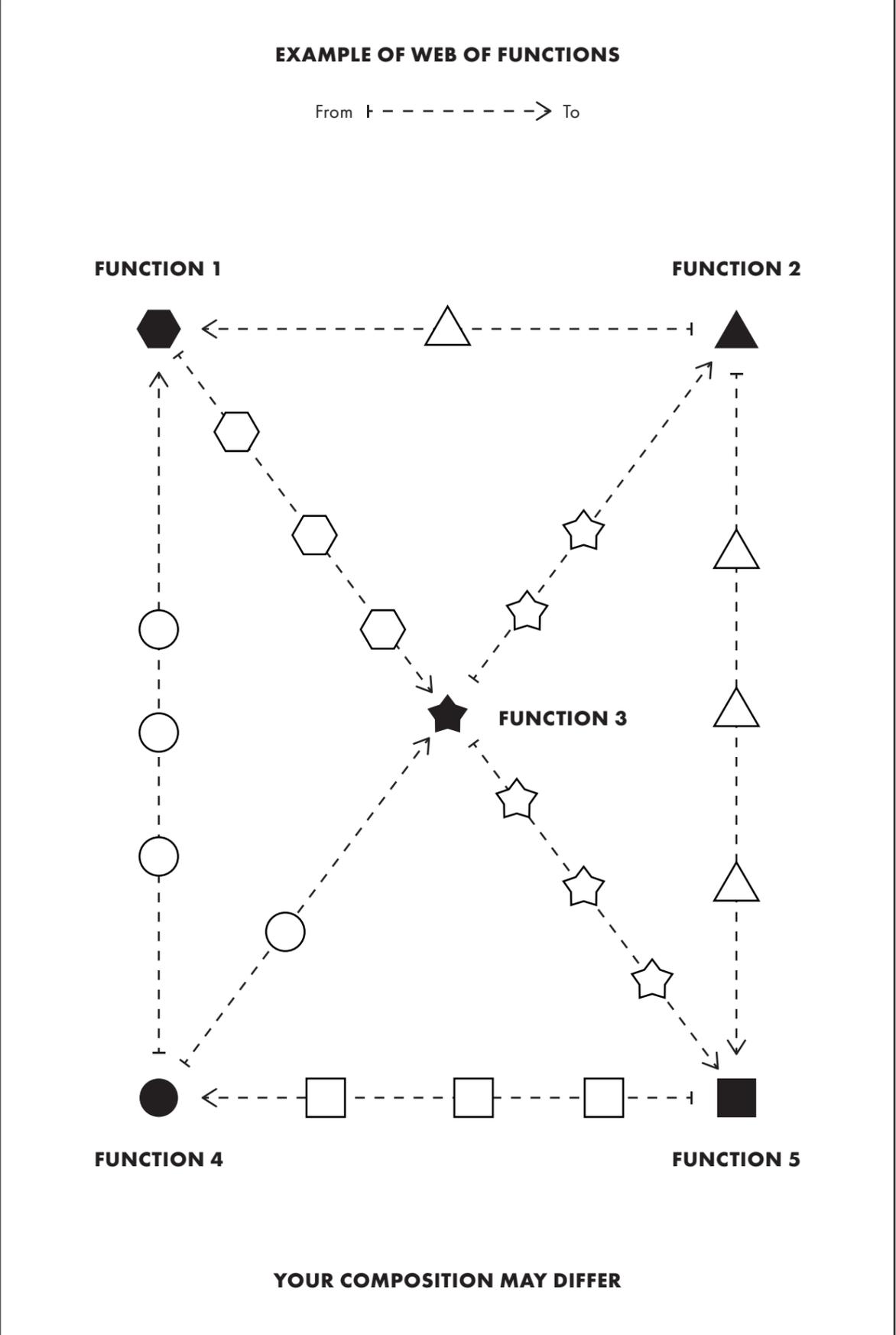
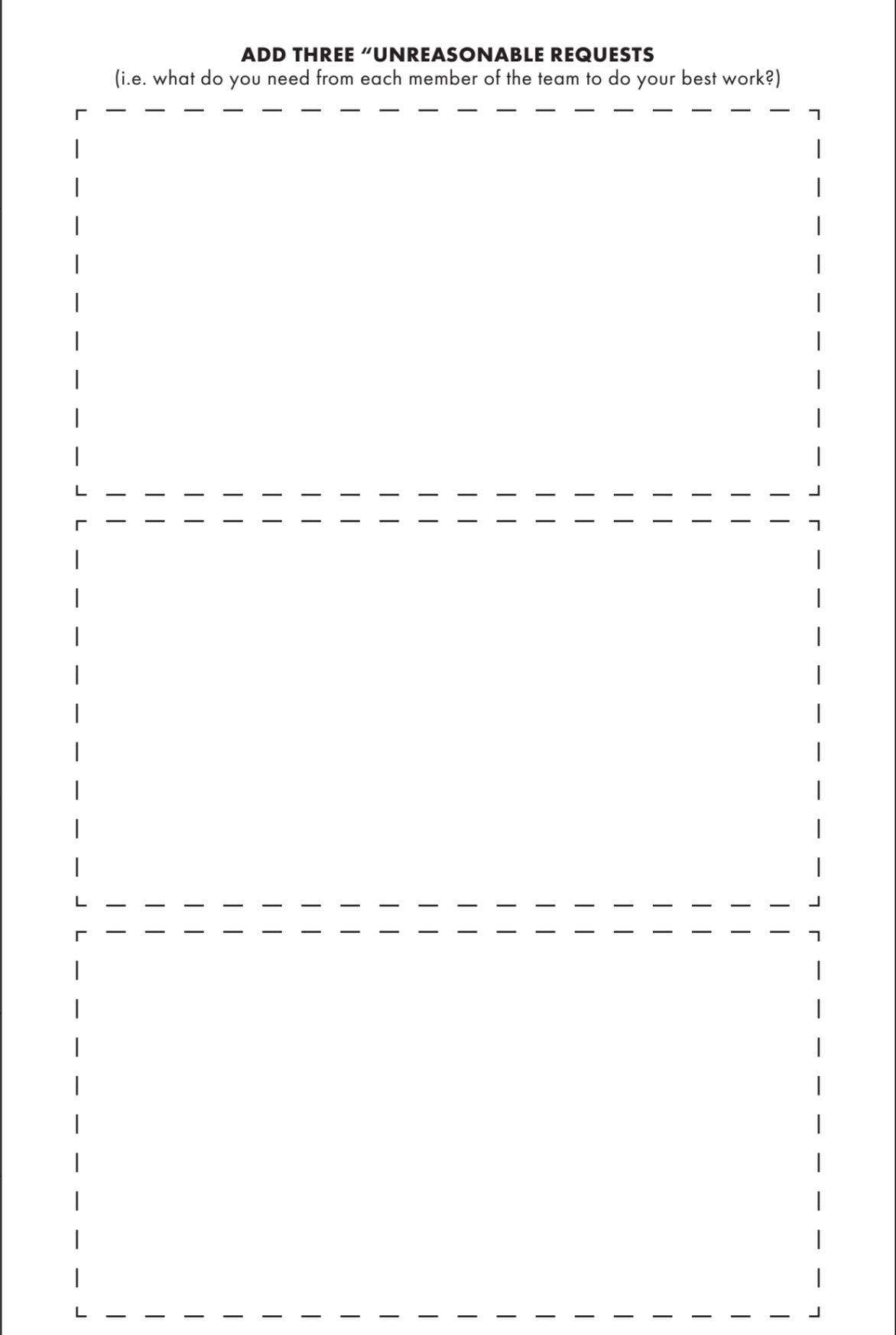
Then, set up a web of the functions with a "to" and "from" line connecting each one, so that as the teams share out they can place their unreasonable requests in a visual space.

4 DISCUSS

Discuss the needs as a group and align on key considerations for ways of working as a group.

5 DOCUMENT

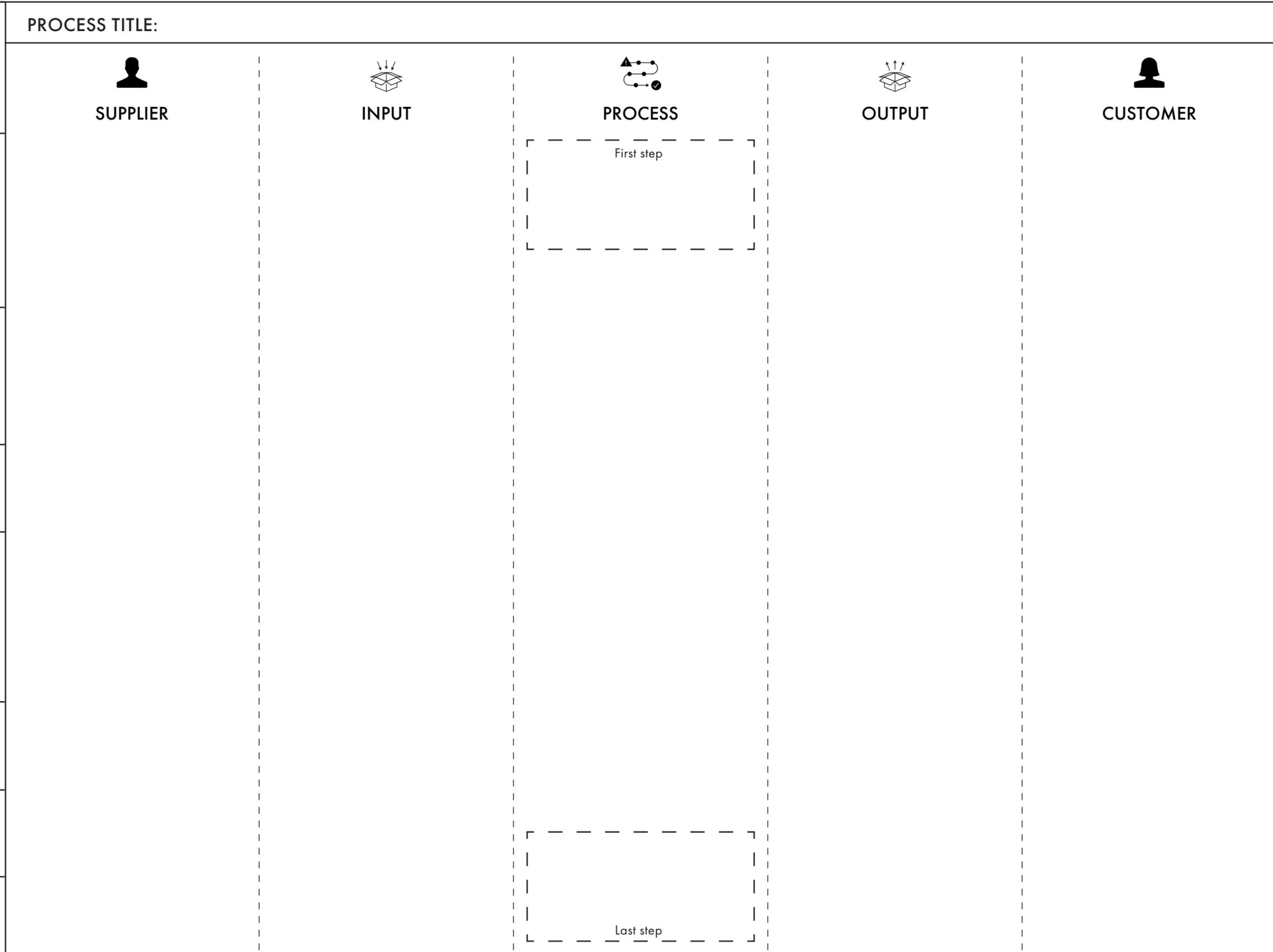
After the activity, the ideas can be compiled into a master document as a basis for expectations-setting that helps illustrate how the groups can work together.



SIPOC

Identify how a process functions, including components such as suppliers, inputs, outputs, and customers. Provide an idea of scope, and help facilitate agreement on key parts and players in the process. Establish a high-level view of a process, process improvement, or innovation project.

- 1 DETERMINE THE PROCESS**
On a digital whiteboard or poster, write the name of the process to be explored above five columns. Label the columns: Supplier, Input, Process, Output, and Customer.
- 2 ADD THE PROCESS**
First, ask the group for the first step of the process and the last step to bookend the scope. Write each on a sticky note and post up horizontally under the Process column.
Next, ask the group to identify each of the next 4–8 steps that follow the starting step by asking, “What happens next?” Post up each to indicate the process flow.
- 3 VALIDATE THE PROCESS**
When the process steps have been identified, confirm them with the group by reviewing from start to end, confirming each step is articulated correctly, flows appropriately, and is within the scope of the process defined.
- 4 IDENTIFY INPUTS**
Next, identify the inputs to the first step.
- 5 IDENTIFY SUPPLIER(S)**
Then ask “Who supplies them?” This could be an individual, group, or system/program. If the group cannot resolve a question they raise or are questioning the process in general, you may not have the right Subject Matter Experts necessary, or the group may be mapping more than the process named in step one, or a completely different process.
- 6 IDENTIFY OUTPUT(S) & CUSTOMER(S)**
From there, address the Output(s) and Customer(s).
- 7 REPEAT FOR EACH STEP**
Repeat steps 4-6 for each step.
- 8 DISCUSS**
Discuss the outcomes as a group.



Staple Yourself to Something

Use an object as a focusing device to visualize and capture the step-by-step flow of a process. Storytelling determines the people involved, the action they're taking, or the amount of time a step takes.

1 DETERMINE THE PROCESS

Determine the process that will be defined. On a poster or whiteboard, post the name of the process. Be clear with the group about what state in time—**today or the desired future**—you are capturing, and add this to the process name.

2 DECIDE WHAT OBJECT TO FOLLOW

Ask the group to decide what their object is, the object that they will staple to through the process (i.e. a product, a trouble ticket, or an idea). The goal is to focus on telling the story of this one object from point A to point B.

3 BRAINSTORM BIG STEPS, PRIORITIZE

Ask participants to brainstorm a list of the big steps in the process, and record them on the wall with sticky notes. If needed, ask them to prioritize them into a desired and workable number of steps. For a high-level story, look to capture seven steps.

4 ADD DETAIL

Before you start to follow the object, work out with the group the vital information you are looking to capture in the story. Ask: "In each step of the process, what do we need to know?" This may be the people involved, the action they're taking, or the amount of time a step takes.

5 FOLLOW THE OBJECT

Now it's time to draw. The group will tell the story of the object as it moves from step to step. As much as possible, capture the information visually, as though you were taking a picture of what they are describing (use stick figures, arrows, and quality questions).

Be aware that the story will want to branch, loop, and link to other processes. Your job is to navigate the flow with the group, and keep things moving toward the end.

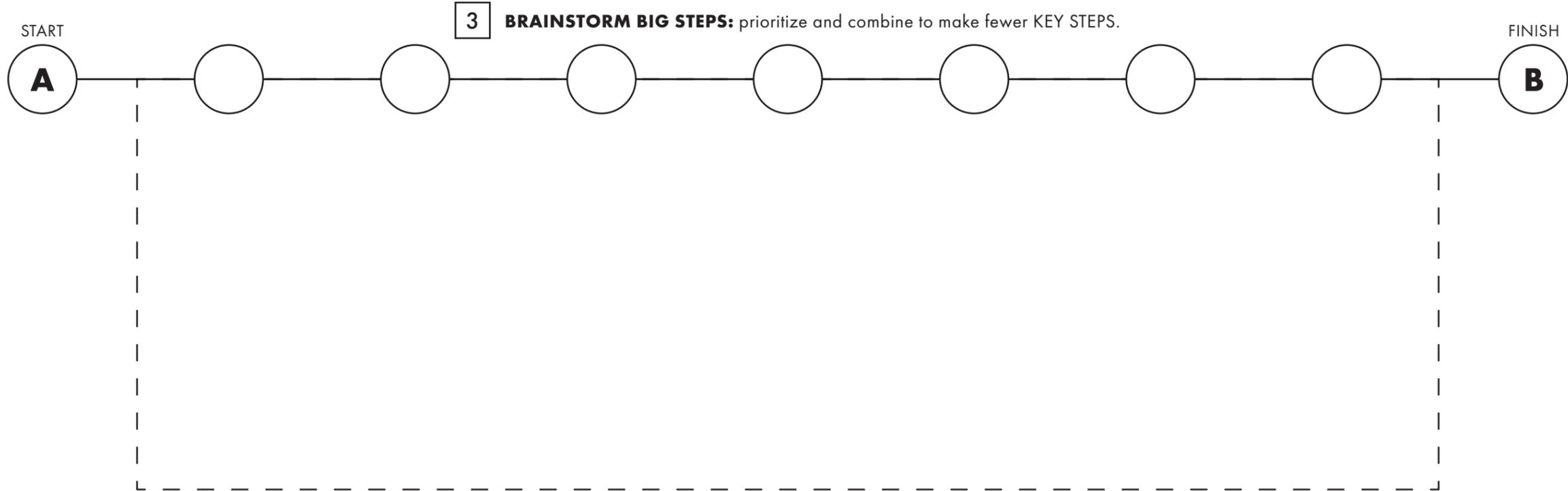
6 DISCUSS & REFINE

Discuss the outcome as a group and refine the steps as necessary.

1 PROCESS TITLE: _____ CURRENT OR FUTURE (if future state, how far in the future): _____

2 DECIDE WHAT OBJECT TO FOLLOW: _____

5 FOLLOW THE OBJECT: Capture the information as visually as possible as you follow the object from step to step.



4 ADD DETAIL: What do you need to know for each step?
Who are the people involved?
What action are they taking?
How much time does it take to complete a step?

Understanding Chain

Shift from a content-focus to an audience-focus, and draw out meaningful requirements for your communication or plan.

1
Determine your audience and the action required of them (use Who/Do or Empathy Mapping methods, if needed).

2
Draw two cliffs, facing each other. Label the left side: Who Is Your Target? Label the right side: What Do You Want Them to Do? Write in the predetermined audience and the action they should take.

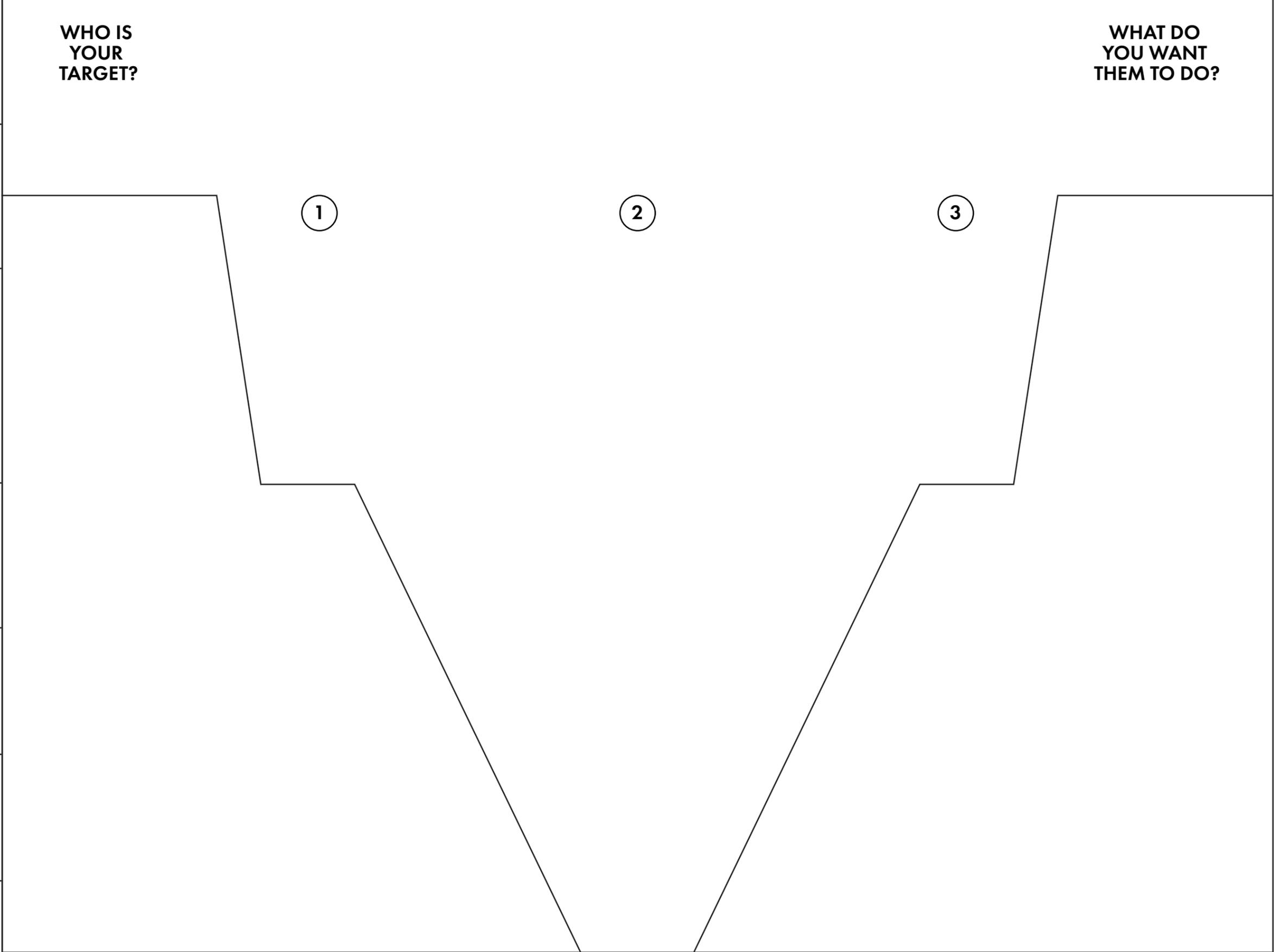
3
Ask the group to think like they are the audience and brainstorm questions that they think the audience would ask on the topic, given an opportunity. The questions should frame what the audience really wants to know and cares about, and they're best captured in the voice or thoughts of the audience. The unanswered questions may be what is holding the audience back from taking that action.

4
Ask the group to write questions on sticky notes, one question per note. It's critical that the questions can be played with—reordered, rearranged, and rewritten.

5
Post up all sticky notes and ask the group to determine the top three questions that need to be answered to get the audience to take action.

6
Post the chosen three questions in order horizontally, to become the stepping stones from the first cliff to the second.

7
Discuss the outcome as a group.



Value Proposition

Enable the client to clearly identify their value proposition and understand the elements of a strong concept, idea, or product.

1
Start with a warm-up exercise, ask participants about what their client's motivations for signing on the dotted line might be?

2
Present the "Elements of a Value Proposition". Explain each of the elements in turn (Impact Area, Benefit, Cost, Proof, Unique). Relate these to the answers they gave in step one.

3
Present the "Value Proposition Statement" template, which shows how to craft the words in a value proposition, with a placeholder for each of the value proposition elements.

4
Provide the "Value Proposition Statement" template to each participant. Lead them through the template one step at a time. Provide verbal examples as you explain each step, and ask them not to jump ahead.

5
Have each participant share out their full Value Proposition Statement.

IMPACT AREA

BENEFIT

COST

PROOF

UNIQUE

STATEMENT

Virtuous Cycle

Uncover opportunities to transform an existing, linear process into a self-reinforcing cycle by connecting its outcomes back to its starting point. Useful in examining processes that are ideally cyclical, such as a customer experience. Use the area below to start. If your process is complex, continue on a whiteboard or digital collaboration platform.

1 ADD CURRENT PROCESS

Begin with a high-level understanding or documentation of the current state of an existing, linear process.

Create a sticky note for each step in the process. Post up on a digital whiteboard or poster, and connect each with arrows in a linear fashion.

2 BEFORE THE PROCESS

Ask the group:

“To the best of your knowledge, what happens before the process?”

“Who or what is involved?”

3 AFTER THE PROCESS

Repeat this for the end of the process:

“What comes after the process?”

“What are the possible outcomes?”

4 COMPLETE THE CYCLE

Next, draw a loop from the end of the linear process back to its starting point—turning a linear process into a lifecycle. Ask:

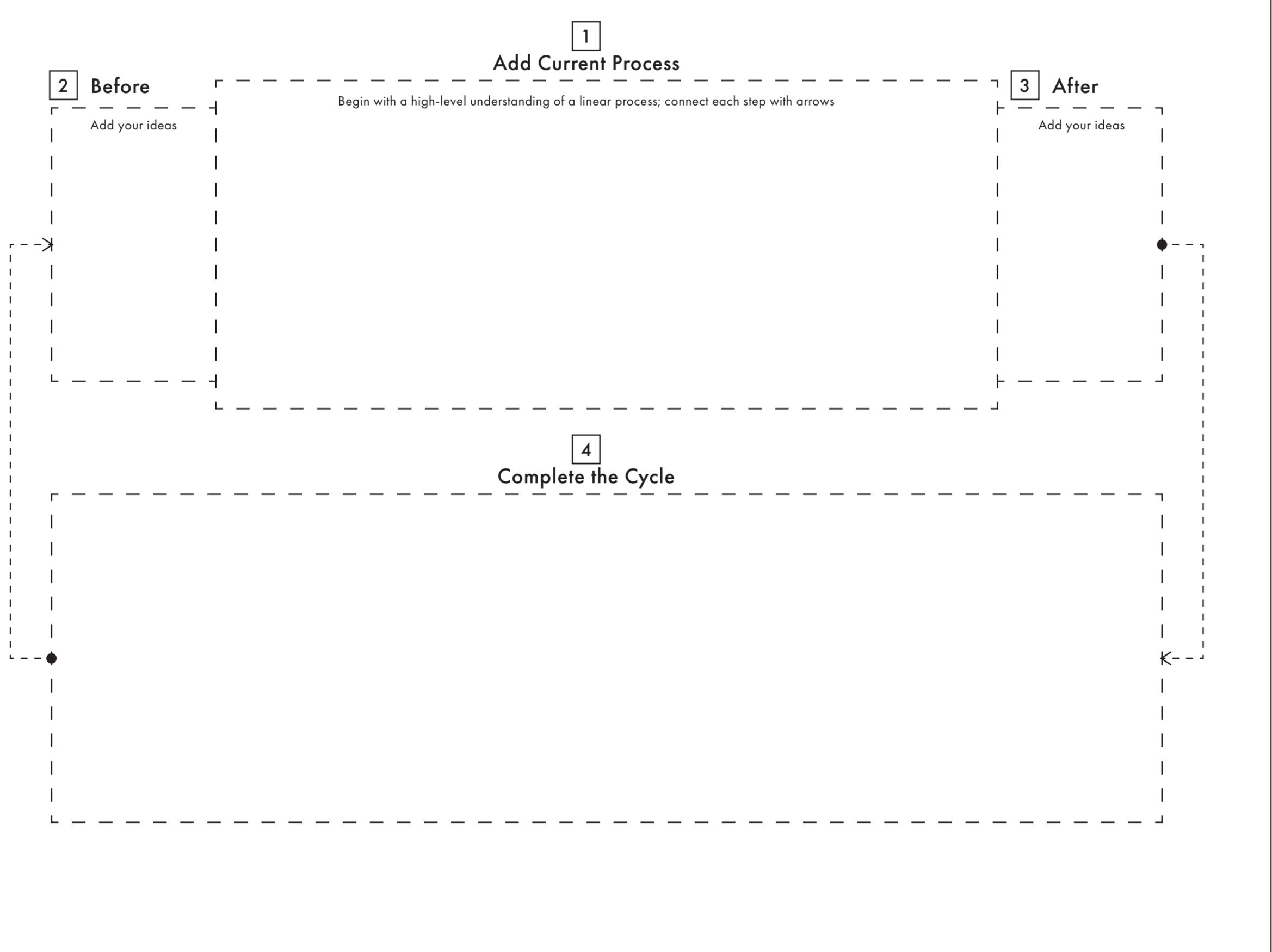
“To get from here, and back again, what needs to happen?”

“What’s missing from the picture?”

Ask the group to explore possibilities and opportunities with sticky notes.

5 IMPROVE THE PROCESS

Summarize the exercise by generating a list of questions and areas to explore.



Winning Behaviors Ball Game

Follow the instructions below to experience, identify, and articulate successful behaviors through play and observation.

LEARNING OBJECTIVE

Identify behaviors and decisions necessary to complete a simple "project" against key constraints.

GAME OBJECTIVE

Move a set of balls of the same color from one place to another. For this game, the set of balls of one color is called the "project" with each ball of that set called a "task".

SET-UP & MATERIALS

Team Play:

Divide the room into 3-5 groups with 3-5 people within each group.

Shared: Bag of Balls

- A bag of balls of different colors. Make sure you have at least 3 different colors with at least 8 balls per color. The more colors you have, the more teams can play at any one time.
- You can substitute the balls with bean bags, blocks, or a set of items you can easily hold.

Each group receives the following:

- A separate container (or bag):** required to hold the balls at their destination.
- One of the following constraint cards:** To create the cards, use five index cards or similar sized cards and write the information below on one side. Each card should have a different constraint:
 - Resource Constraint:** "You can only hand-over tasks in your right hand"
 - Task Dependency:** "You must hand over two balls at a time"
 - Fixed Responsibility:** "You cannot hand over orange balls" (for groups who have not selected the orange balls)
 - Reference Information:** "You must hold a blue ball while handing over balls"
 - Budget Constraint:** "You can only swap balls, not just hand-over"

GAME PLAY

1 CHOOSE A COLOR

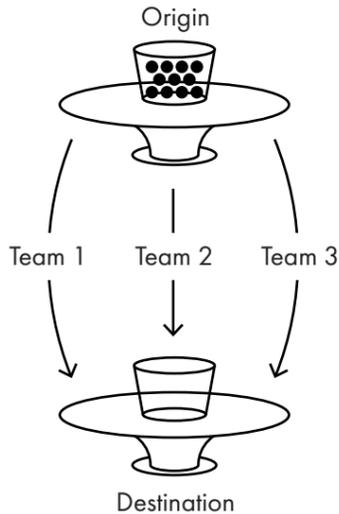
For each team, choose a unique color.

- The selected color represents the team's project
- Each color ball represents the tasks within the project

2 PLACE THE ORIGIN & DESTINATION

Place the bag of balls on the table. This bag is the Origin.

Place the container anywhere else. This is the Destination for all teams.



3 CONSTRAINT CARD

Each team takes a constraint card.

Each constraint is different and open to interpretation. The group should reach a consensus on how to address this constraint.

4 MOVE BALLS TO DESTINATION

The primary objective for each team is to move all the balls of their selected color from the Origin to the Destination.

- Only one ball per team should be AT PLAY at any one time.
- Each ball should be handed over. Do not throw the balls. If a ball falls, the constraint is not followed, or a person is skipped before the ball is placed, the ball goes back to the Origin bag.
- For each team:
 - Everyone must touch the ball once before placing the ball at the Destination.
 - At least one person from each of the other teams must touch the ball before placing the ball at the Destination.
- This is not a competition; this is a study in behaviors and decisions taken.
- This is a whole organization effort. Teams should work together to complete projects.

5 WRITE & DISCUSS

The game is done when all projects are completed.

For each team, jot down the behaviors and decisions you found interesting, confusing, or insightful. Discuss.

NOTES

QUESTIONS PER TEAM

What behaviors or decisions were required to succeed?

Were there behaviors or decisions that prolonged or made completing the project difficult?

BROAD DISCUSSION

Were there themes consistent with all teams?

Were there insights unique to a team? Why?

CLOSE

What is the Close phase?

Activities in the **Close** phase are designed to make decisions, draw conclusions, and plan actions or next steps.

What are Methods?

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 give facilitators and participants the freedom to focus on the challenge at hand.

What are Frameworks?

Frameworks are visual organization tools such as a table or grid used to capture content and ideas.

Close Method Cards & Companion Frameworks

Not every method card has a corresponding framework. For the ones available, we've listed the method card and their companion below.

D4 Decision Making

D4 Decision Making
Sort ideas to make a decision with more clarity

Role and filter information to force a decision. Works well for groups and as a standard time management tool for individuals.

D4 Decision Making
Rank and filter information to force a decision. Works well for groups and as a standard time management tool for individuals.

IMPORTANCE	High		
	Low		
		Low	High
		URGENCY	

Delphi Method

Delphi Method
Synthesize individual feedback to a consolidated group view

Prevent groupthink and other decision-making biases by independently asking rounds of questions to the same individuals. Sharing anonymous responses encourages participants to reveal equally, driving to the "most correct" solution as a group.

Delphi Method
Prevent groupthink and other decision-making biases by independently asking rounds of questions to the same individuals. Sharing anonymous responses encourages participants to reveal equally, driving to the "most correct" solution as a group.

	Round 1	Round 2	Round 3
Topic A			
Topic B			
Topic C			
Topic D			

Forced Ranking

Forced Ranking
Collaboratively rank a group of items

Prompt difficult decisions by agreeing on a single, ranked list of items. Each item is ranked relative to the others, forcing a priority. Encourage decision-making on items like investments, business priorities, and features or requirements—whatever a clear, prioritized list is needed.

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CRITERIA FOR RANKING	RANKING

Impact/Effort Matrix

Impact/Effort Matrix
Map and prioritize activities according to the impact they will have, and the effort they require

Post up and map actions based on two critical factors: effort required and potential impact. Useful with group decision making, as it obliges individual contributors to qualitatively analyze an action before adding it to the group's shared context.

Impact/Effort Matrix
Map and prioritize activities based on two critical factors: effort required and potential impact. Useful with group decision making, as it obliges individual contributors to qualitatively analyze an action before adding it to the group's shared context.

EFFORT	High		
	Low		
		Low	High
		IMPACT	

CLOSE

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In and Out Frame

In and Out Frame
Define what is in and out of scope

Use the analogy of a picture frame to identify aspects of a project which are "in the frame" (clearly within the scope of work), "out of the frame," or "half-in/half-out" (needing to be up for discussion). Helpful for releasing pressure around the ultimate goal of a project or initiative.

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In and Out Frame
Use the analogy of a picture frame to identify aspects of a project which are "in the frame" (clearly within the scope of work), "out of the frame," or "half-in/half-out" (needing to be up for discussion). Helpful for releasing pressure around the ultimate goal of a project or initiative.

1. Draw the outline of a picture frame.

2. In a group, discuss the topic or topic to explore. View the entire picture frame. For example: What are the goals or objectives of the project? What are the priorities of the individual?

3. All participants to brainstorm ideas and write them on sticky notes (one per note). Give each 2-30 minutes to generate as many ideas as they can.

4. When they are ready, ask participants to place their sticky notes inside, on or outside the frame. They should be encouraged to place their sticky notes where they feel they are "in the frame," "out of the frame," or "half-in/half-out" (needing to be up for discussion). The facilitator should facilitate the discussion.

5. In a group, review the placement of each note, and discuss and make as necessary.

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Start Stop Continue

Start Stop Continue
Assess a situation and determine improvements

Quickly and easily frame discussions at "problem solving" meetings, or brainstorm aspirational steps toward a vision. This method is broad enough to work well as an opening or closing exercise.

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Start Stop Continue
Assess a situation and determine improvements

1. Ask participants to consider the current situation or goal and individually brainstorm actions in these three categories:

- Start: What are things that we need to START doing?
- Stop: What are we currently doing that we can or should STOP?
- Continue: What are we doing now that works and should continue?

2. Have individuals share their results, and offer any feedback.

VARIATION

The exercise could be used as a follow-up to a video file. What do you want your audience to do (start, stop, continue)?

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Who/What/When Matrix

Who/What/When Matrix
Collaboratively assign timing and ownership of action items

Focus next-steps discussions with a simple and useful matrix. Connect people with clear actions they have defined and have committed to.

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Who/What/When Matrix
Focus next steps discussions with a simple and useful matrix. Connect people with clear actions they have defined and have committed to.

1. Draw three columns and label each with Who, What, and When.

2. Ask each participant to write into the Who column in the matrix, although everyone may be to write into the Who/What/When and then they need to be direct, the responsibility lies with the Who. They provide who (with timing the action).

3. Ask each participant what they want to do next. Have them commit to fill this in the What column. Participants may need to have a number of next steps that they think are required or feel strongly about.

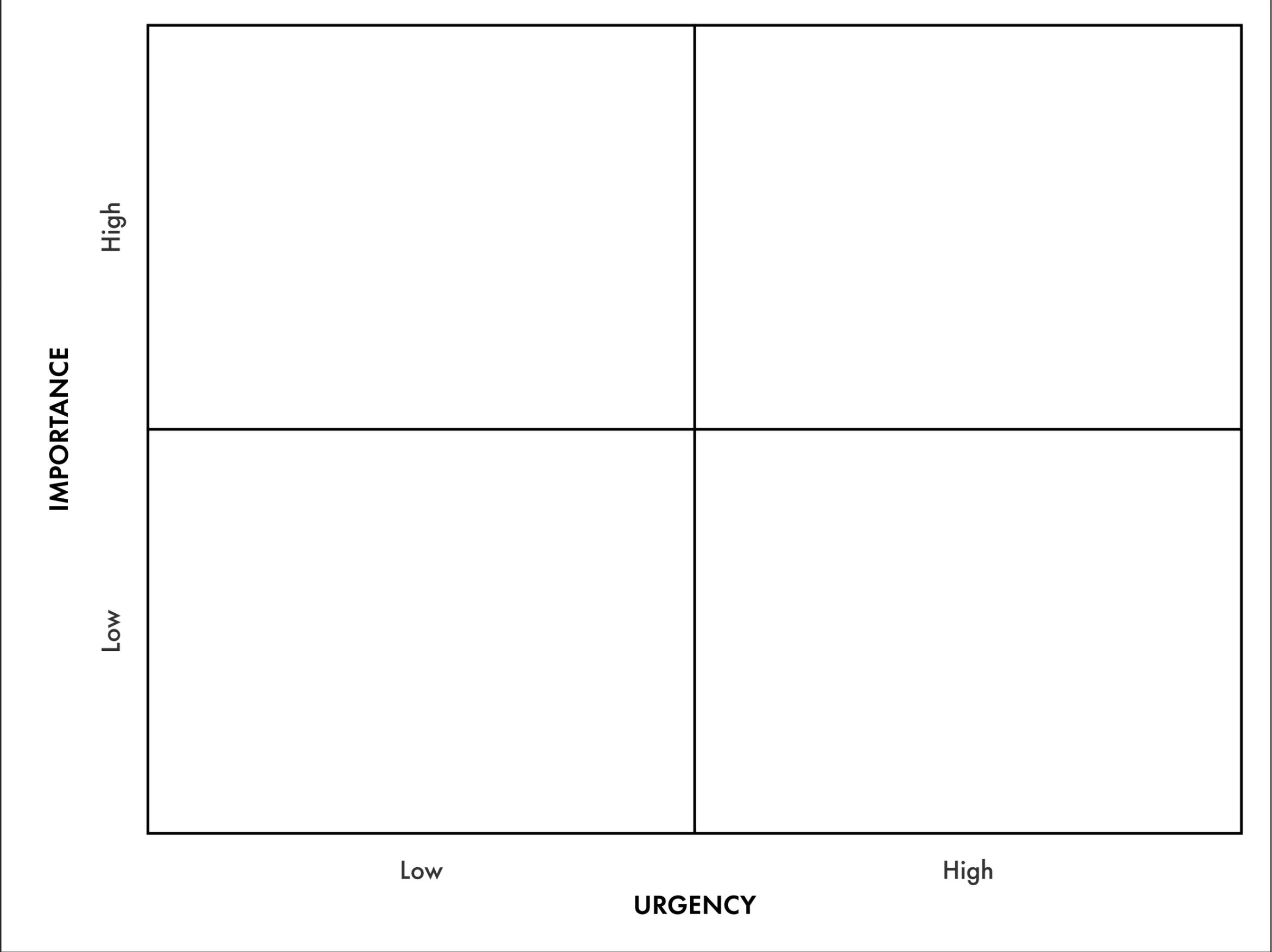
4. For each item, ask that person when they will have the item done, and fill in the When column.

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D4 Decision Making

Rate and filter information to force a decision. Works well for groups and as a standard time management tool for individuals.

- 1**
Draw a two-by-two grid. Label the X-axis: **Urgency**, with **Low** and **High** per box. Label the Y-axis: **Importance**, with **Low** and **High** per box.
- 2**
Above the grid, post the question the group should generate ideas to solve. For example, solutions for a customer need, or event ideas.
- 3**
Ask participants to individually generate five or more ideas on sticky notes, one idea per note.
- 4**
When the group is finished, ask them to silently post their notes into the grid. All notes must fall into one of the four boxes to force a decision.
- 5**
After all notes are posted, label the top boxes: **Do it Now, Decide When**; and the bottom boxes: **Delegate, Dump it**. Discuss the decision outcome based on the new headers.
- 6**
Record the **Do it Now** and **Decide When** for further work.



Delphi Method

Prevent groupthink and other decision making biases by independently asking round of questions to the same individuals. Sharing anonymous responses encourages participants to revise results, driving to the “most correct” solution as a group.

1
Independently interview or question several individuals on a chosen topic (typically a series of future predictions and reasons for their judgment), and gather all responses. Keep interviewees anonymous—the group should not know who else is participating.

2
Create a grid with **Questions** listed on the left, and columns for **Round 1**, **Round 2**, and **Round 3**. Post all responses from the previous interviews into the Round 1 column.

3
Identify common and conflicting viewpoints from all the responses. Independently share this information with the interviewees.

4
Give the interviewees an opportunity to revise their responses using the same framework.

5
Synthesize the information again and either repeat, or bring the group together for discussion.

	Round 1	Round 2	Round 3
Topic A			
Topic B			
Topic C			
Topic D			

Forced Ranking

Prompt difficult decisions by agreeing on a single, ranked list of items. Each item is ranked relative to the others, forcing a priority. Encourage decision making on items like investments, business priorities, and features or requirements—wherever a clear, prioritized list is needed.

<p>1</p> <p>List items for consideration on the left. On the right, leave space for ranking. On the left, list the criteria for ranking, making those as clear as possible. For example:</p> <ul style="list-style-type: none"> · In ranking features for a product, the criteria might be “Most important features for User X.” · In the case of developing business priorities, the criteria might be “Most potential impact over the next year.” · There is no hard limit on the number of items to be ranked, but in a small group setting the ideal list is about ten items. 	<p>GOAL OR CRITERIA FOR RANKING</p>	
<p>2</p> <p>Ask participants to review the list for a few minutes and generate numbered sticky notes to rank the items—but do not post them until the group is ready. The most important item is #1, the second is #2, etc. Because the ranking is forced, no items can receive equal weight.</p>	<p>IDEAS</p>	<p>RANKING</p>
<p>3</p> <p>Remind participants that creating a forced ranking may be difficult, as it requires they make clear-cut assessments about a set of items. In many cases, this is not the normal mode of operation for groups. Making these assessments—guided by clear criteria—is the entire point of forced ranking.</p>		
<p>4</p> <p>When participants are ready, ask them to post their rankings next to the items on the list as a group.</p>		
<p>5</p> <p>Once the items have been ranked, tally them and discuss the prioritized list and next steps.</p>		

Impact/Effort Matrix

Map and prioritize actions based on two critical factors: effort required and potential impact. Useful with group decision making, as it obliges individual contributors to qualitatively analyze an action before adding it to the group's shared context.

1

Draw a large four-square grid. Title the left vertical axis with **Effort**, and **Low** and **High**. Title the lower horizontal axis with **Impact**, and **Low** and **High**.

2

As a group, determine the topic or initiative to explore. Frame the goal in terms of a "What to do" question.

- What will help us reach our revenue target next quarter?
- What activities should we create for the event?

3

Ask the group to generate ideas individually on sticky notes—one idea per note. Give them about 5–10 minutes to generate as many ideas as they can.

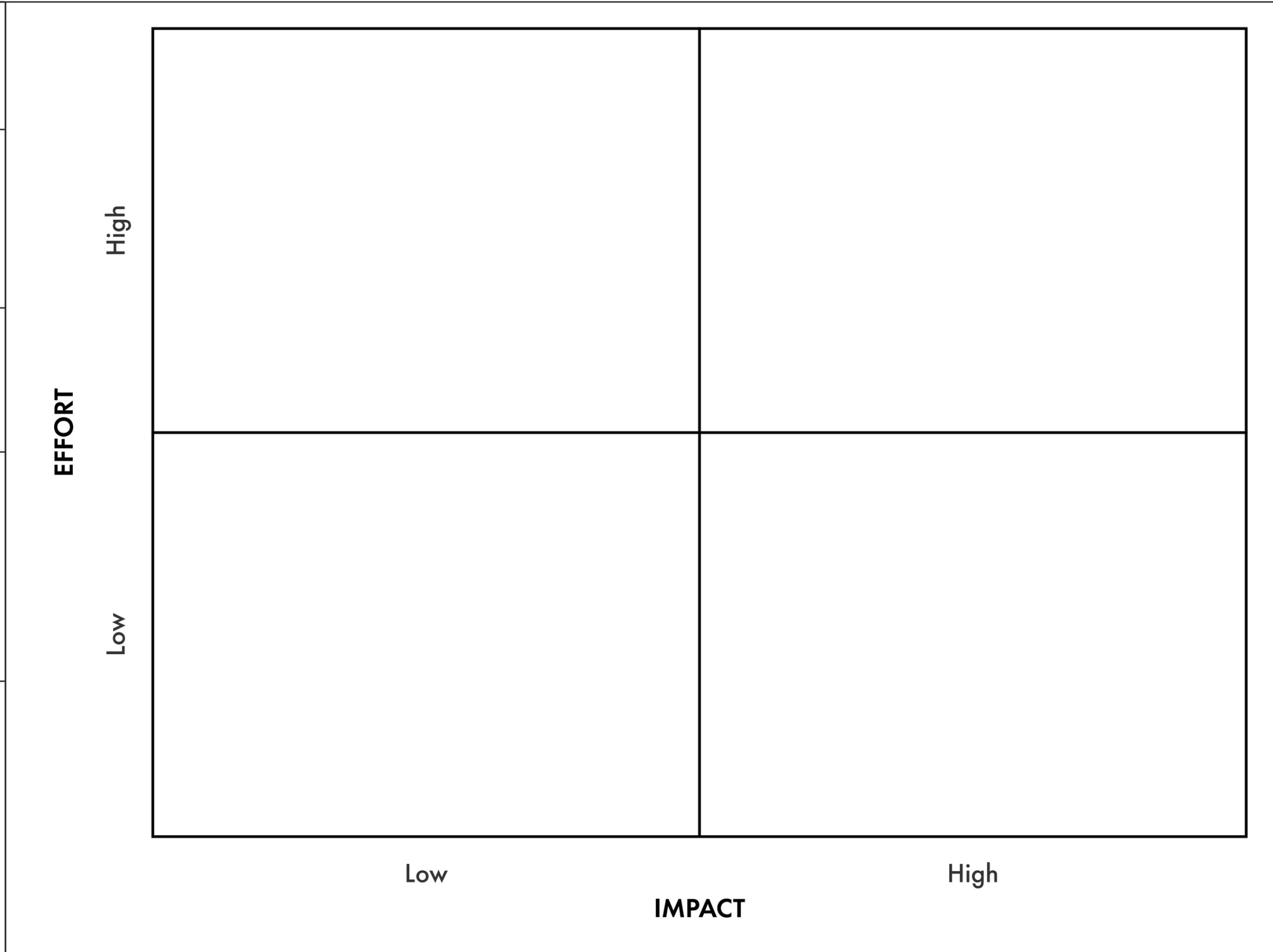
4

When they are ready, ask each person to present their ideas by placing them within the 2x2 matrix. Explain that the Impact is the payoff of the action: is the payoff high or low for their idea? Ask them to determine the Effort of implementing the idea: is the cost high or low?

As participants place their ideas into the matrix, the group may openly discuss and reposition items.

5

Discuss the final results as a group and reposition any ideas as needed. Focus next steps around the **High Impact/Low Effort** ideas.



In and Out Frame

Use the analogy of a picture frame to identify aspects of a project which are “in the frame” (clearly within the scope of work), “out of the frame,” or “half-in-half-out” (meaning this is up for debate). Helpful for refocusing teams around the ultimate goal of a project or initiative.

1

Draw the outline of a picture frame.

2

As a group, determine the topic or initiative to explore. Write this above the frame. For example:

- What are the goals or deliverables of the project?
- What are the priorities of the initiative?

3

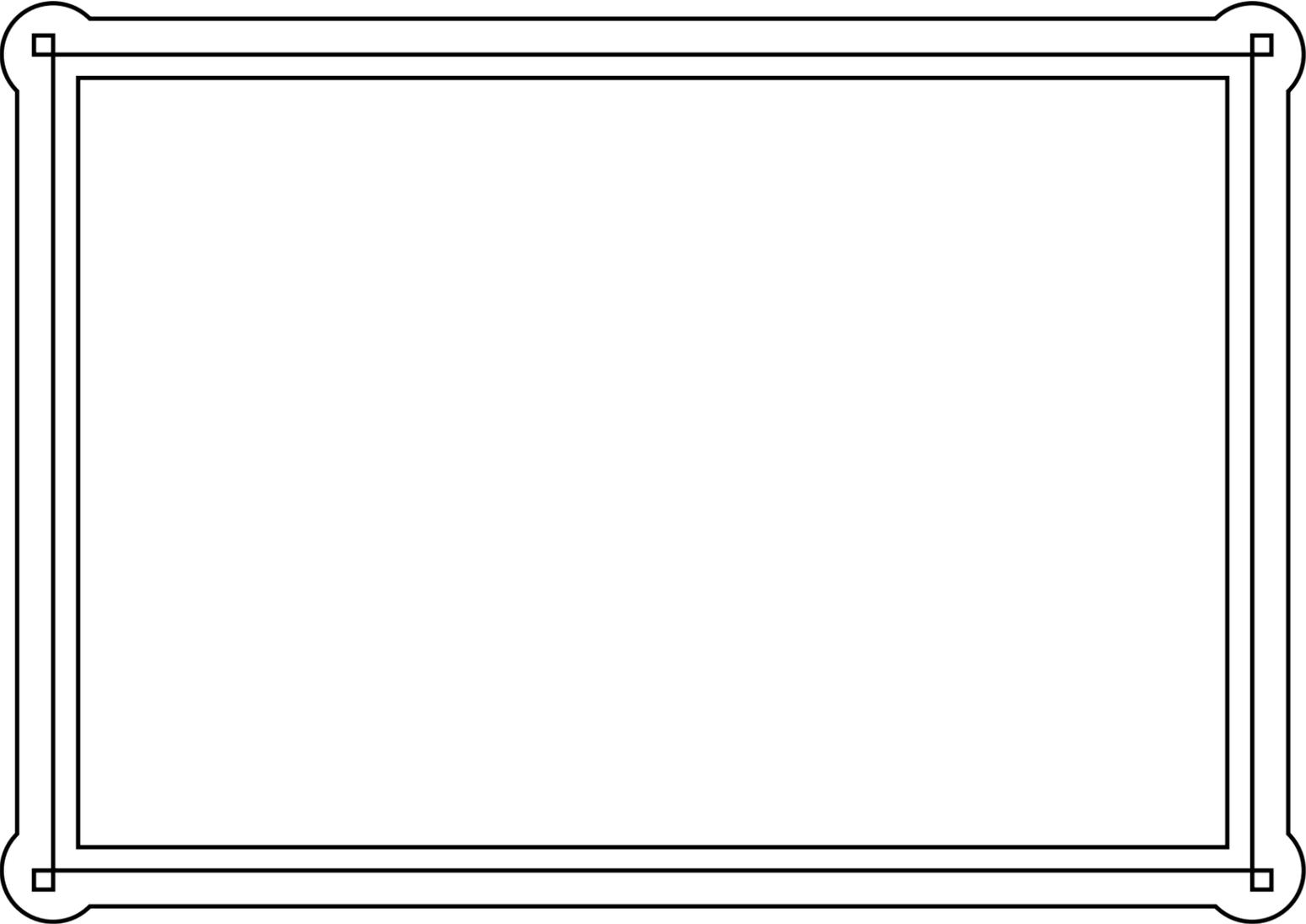
Ask participants to brainstorm ideas and write them on sticky notes—one idea per note. Give them 5–10 minutes to generate as many ideas as they can.

4

When they are ready, ask participants to place their ideas inside, outside, or on the frame. Use the location of their notes to indicate how strongly they feel (a note placed in the middle of the frame signifies a strong sense that it is within scope, while one placed near the border indicates questionability).

5

As a group, review the placement of each note, and discuss and resolve as necessary.



Start Stop Continue

Examine aspects of a situation or develop the next steps.

1

Ask the group to consider the current situation or goal and individually brainstorm actions in these three categories:

- **Start:** What are things that we need to START doing?
- **Stop:** What are we currently doing that we can or should STOP?
- **Continue:** What are we doing now that works and should continue?

2

Have individuals share their results, and affinity map if needed.

VARIATION

This exercise could be used as a follow-up to a who/do. What do you want your audience to do (start, stop, continue)?

START

STOP

CONTINUE

Who/What/When Matrix

Focus next steps discussions with a simple and useful matrix. Connect people with clear actions they have defined and have committed to.

1 Draw three columns and label each with Who, What, and When.	Who	What	When
2 Add every participant's name into the Who column in the matrix. Although instincts may be to start with the What (the tasks and items that need to be done), this approach starts with the Who (the people who will be taking the actions).			
3 For each participant, ask them what concrete next steps they can commit to. Fill this in the What column. Participants may each have a number of next steps that they think are required or feel strongly about.			
4 For each item, ask that person When they will have the item done, and fill in the final column.			