Lucid Facilitator's Guide

DISCOVERY WITH A GROUP

This template provides an excellent format for a consultant's first meeting with a new client group, helping consultants better understand the organizations they serve. Use this template to setup and run a group discovery in the early stages of your next project.

The process outlined here helps the client group explore the circumstances surrounding the new project. They get to share their insights and knowledge.

The profile that emerges from the conversation is one that everyone at the meeting has helped to build. **This creates group synergy.** It also reinforces the notion that the consultant is really interested in understanding client views.

Starting a new project with a group discovery will create both energy and buy in. That makes this meeting agenda an excellent way to get off on the right foot!

Contents

INTRODUCTION

Nothing is more important than truly understanding your clients: their history, their goals, their challenges and their management philosophy.

Discovery is the process used to learn more about a client at the start of a project. Usually, people do discovery through research and one-on-one interviews. Even if you do background research and conduct one-on-one interviews, it may be a good idea to also have a discovery conversation with a group of stakeholders.

The Benefits of Group Discovery

When discovery is conducted in a group setting, people are stimulated by the comments of their colleagues. This results in **a more detailed and nuanced profile of the organization**.

Your goal in this meeting is to gather information; there are no decisions to make here. That means that while you can take the pulse of the group to determine the extent to which people share the same views, there is no need to reach a consensus.

This meeting is designed to help you understand the organization. You may need other discovery sessions to help create the vision or set objectives for the assignment.

The ideal group size for this conversation is eight to twelve participants.

AGENDA

PURPOSE

To engage key stakeholders in a discovery conversation to build a picture of the organization's history and culture.

ABOUT

The online agenda includes several recommended discovery questions as agenda items. If you will be meeting in-person, you'll go over all questions during the second agenda item.

1. **Welcome** (5 minutes)
   - Describe the purpose of the meeting.
   - Review the agenda.
2. **Sequential Questioning** (60 minutes)

   Ask questions and record key points.
3. **Meeting Closing** (10 minutes)
   - Share insights.
   - Decide how to communicate information from the meeting.

STEP-BY-STEP INSTRUCTIONS

Before the meeting

Select and prepare the questions you want to ask.

You'll find several recommended questions on page 7.

If you will be meeting in person, write the selected questions or statements on a pad of flip-chart paper. Write one question or statement at the top of each sheet, leaving room to record comments.

If you will be using Lucid Meetings, update the agenda with the questions or statements you've selected. Create one agenda item per question, so you can easily focus the group on one question at a time.

Schedule the meeting and invite the participants.

DO NOT inlcude the questions you'll be asking in the invitation. Participants are more engaged when they don't know which questions come next.

During the meeting

1 Welcome

Describe the purpose of the meeting and review the meeting agenda.

When you're ready, **click "Next >"** to begin asking the group questions.

2 Sequential Questioning

Explain that you will be presenting a series of statements and then selecting one person to respond to each one. **Only the person whose name is drawn gets to respond at first.**

After you've finished discussing a question with the selected person, you may open the floor to anyone else who wants to add their thoughts.

For each question:

1. Read the question or statement aloud.
2. Pause to allow time for reflection.
3. Ask a specific person to respond by calling on that participant by name.
4. Ask probing questions.
5. Record the person's key points.
6. Open the floor to anyone else who wants to add their thoughts.
7. Once all key points are recorded for the first question, read back a summary of your notes before moving to the next question.
8. Repeat this process for each question until everyone has been called on to respond at least once. You can go around more than once if you have a small group.

2 continued

How to Facilitate These Steps for an In-Person Meeting

- Ask group members to write their names on slips of paper. Collect the slips and place them in a pile in front of you.
- Flip the sheet on the flip-chart you prepared in advance and read the first question/statement. Call out the first name, then set that name aside in a new pile.
- Record key points on that flip-chart.
- When ready, flip the sheet to the next question and repeat the process until you've gone through all the questions or all the slips of paper.

How to Facilitate These Steps in a Lucid Meeting

LUCID

- **Click "Next >"** to go to the first question you added to the agenda.
- Using the **Attendees** list as a guide, call on one person to answer the question.
- **Add a Note** for each key points on that question's agenda item.
- After completing the first question, **click "Next >"** to move to the next question and repeat the process until you've gone through all the questions.

3

Meeting Closing

Go around the group and **ask each person to share at least one major insight** that they gained from the discovery discussion.

Discuss whether the information from this conversation should and will be shared. Decide on how to communicate the information.

THE QUESTION BANK

The "Question Bank" in chapter 2 of *Facilitation Techniques for Consultants* includes over 150 of the most useful questions you can ask, organized to fit 15 different consulting contexts.

The following questions/statements are suggested for this meeting. You can, of course, pose other questions. Most should be open-ended, but a few closed-ended questions should always be included since they stimulate a definitive response.

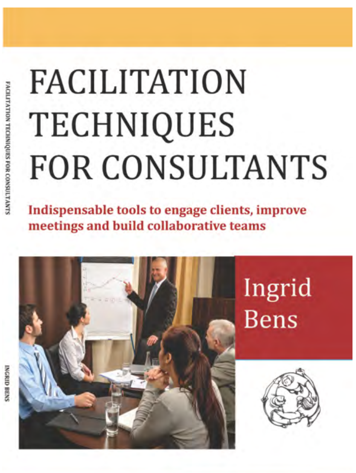
Recommended Questions for Group Discovery

- What has been the most outstanding achievement of the organization, and what conditions made it possible?
- If I were to interview your most satisfied customers, what would they say about your products/services?
- If I were to interview your competitors, what do you think they would tell me was the thing that scares them most about you?
- Rate the current organizational state on a scale of 1 to 10, in which 10 is perfection. Explain your rating?
- If you could turn back the hands of time, what one event would you go back and change?
- Our organization is horizontally integrated. We are not trapped in silos: true or false?
- Our organization is very adaptable and responsive to change: true or false?
- Our upper management group regularly seeks out employee input on matters that affect the organization: true or false?

RESOURCES FOR ACHIEVING MEETING MASTERY

On the Web

FacilitationTutor: Ingrid Bens
http://www.facilitationtutor.com/



Books & Online Training

Ingrid Bens,
"Facilitation Techniques for Consultants" 2016
https://smile.amazon.com/Facilitation-Techniques-Consultants-Indispensable-Collaborative/dp/0997097000

The Facilitation Tutor Core Skills Program
http://www.facilitationtutor.com/online-facilitation-training-course/

Related Templates for Consultants

The Essential Project Kickoff
http://www.lucidmeetings.com/templates/essential-project-kickoff-meeting

Gathering Productive Feedback
http://www.lucidmeetings.com/templates/rick-gathering-feedback

All of Ingrid's Work with Lucid Meetings

http://www.lucidmeetings.com/templates/designers/ingrid-bens

ABOUT THE AUTHOR

This template was designed by Ingrid Bens.

Ingrid Bens is a consultant and trainer with a Master's Degree in Adult Education. She has over 25 years experience as a professional facilitator. As a consultant with expertise in Organization Development, Ingrid has designed and led numerous large-scale strategic change efforts for Fortune 500 companies, government departments and non-profit organizations.

Ingrid is recognized as a leading expert on facilitation skills. Her book "Facilitating With Ease!" is a worldwide best seller. Her other books include "Facilitation at a Glance!", "Advanced Facilitation Strategies" and "Facilitating to Lead". She is also the author of the "Facilitation Skills Inventory" (FSI), an instrument to assess facilitator competency.

Over the last two decades, Ingrid has trained thousands of people to be facilitators through her popular workshops. Recently, Ingrid created the first and only online facilitation skills course in existence. This program covers the essential core practices at the heart of facilitation through lectures and video taped demonstrations.

Ingrid's latest book, "Facilitation Techniques for Consultants", provides detailed templates that bring structure to the essential conversations that all consultants need to be able to facilitate.

For more information about Ingrid Bens, her publications and her online facilitation skills course go to: www.facilitationtutor.com