Lucid Facilitator's Guide

LATTE AND LEARN

Latte and Learn sessions help team members to learn together by reflecting on recent experiences as they share with others.

It is also an informal way of spreading knowledge through a team and nurturing creativity, as team members discuss topics outside of their day-to-day tasks.

Latte and Learn sessions remind us that our team members are a learning resource and that there are a range of ways of learning.

Use this template as a starting place when planning your team's next learning session.

Contents

OVERVIEW

A Latte and Learn meeting gives team members the opportunity to converse about work for the purposes of learning and understanding different ways of thinking, instead of always just coordinating the work.

At each meeting, one individual (the "Learner") shares a recent learning experience with the team. It could be a conversation with a client that went differently than expected, a problem they solved, an event they attended, a book or article they read, or a podcast they listened to (for example).

The other team members are present to help the Learner reflect on their experience (through listening and asking questions) and to find out whether understanding their colleague's experience is of use to them, or to anyone else connected to the organization.

Suggested Roles

Timekeeper: You don't always need a facilitator, but somebody should be in charge of time-keeping as these conversations, once they get rolling, can spin out of control.

Learner: The person who is sharing their learning experience.

Sketcher: Notes down (in writing, drawing) the main learning points from the session.

Facilitator: if your group is large or if some of you tend to be more vocal than others!

AGENDA

GOAL

Share knowledge

DURATION

30 minutes

1. Tune in
2. Learner sharing
3. Questions, observations & recommendations
4. Summary and follow-up actions

STEP-BY-STEP INSTRUCTIONS

Before the meeting

You Will Need

For co-located teams, you'll need a table team members can sit around. Aim for a round or oval seating arrangement that encourages discussion; avoid set ups which show the Learner as a "presenter" or "expert".

On remote teams, when the Internet connection is stable, turn on the video for all participants. Use screen sharing sparingly.

When meeting with a remote team, take time during the Tune In to check everyone's sound and decide whether anyone needs muting due to background noise.

You will also need a "Learning Box" to keep the summaries of the sessions and any links, references and notes. It's a good idea to have these as "live" documents, where you can all continue adding your thoughts. You can keep all your notes and follow-up items in Lucid Meetings, or use other collaborative tools like Trello.

Learner and Facilitator Preparation

Decide before the meeting how the Learner will share with the group. See the details for item 2 below for some options.

Also, if the topic is large or the group includes more than 10 people, adjust the schedule to allow more time.

During the meeting

1 Tune In

Purpose	Confirm the topic and get everyone connected
Outcome	The group is ready to engage
Duration	3 minutes

Instructions

The tune in is a fast exercise in which everyone confirms that they have "arrived" and are ready. This reinforces the nature of the meeting; we're not there to be talked to, but as active participants.

First, introduce the topic of today's session and the person who will be sharing their learning. Then, ask everyone to confirm that they're ready by answering the question:
"What are you drinking and are you ready to learn?"

Going around the group, each person replies in turn with:

- "I have my latte and I'm ready to learn!" and
- "I have my fizzy water and I'm ready to learn!" and
- "I'm so eager to learn I forgot my drink!"

and so on. Once everyone has confirmed they're ready, move to the next agenda item.

2 Learner Sharing

Purpose	Information sharing from the presenter
Outcome	The group learns and is ready to ask questions
Duration	15 minutes

Instructions

For the next 15 minutes, most of the group will listen as the Learner shares what he or she has learned.

2 continued

Ask the group listening to make notes while the Learner shares, individually writing down:

- Similar experiences / insights they have recently had.
- Any aspect of the Learner's experience they would like to know more about.
- Whether the information/insights might be of interest to someone outside the meeting
- If the Learner would like to explore further, do they know anyone who can help them?

Then, invite the Learner to begin. Here are two possible approaches for this agenda item.

Option 1. The Learner presents to the group.

This is the most common and straightforward way to share new information with a group. That said, it also puts all the burden for preparing on the presenter and, unless the presenter is especially interesting, it can be less engaging for the audience.

Option 2. Conduct a live interview with the Learner.

This approach creates a dialogue between the Learner and an Interviewer which the other participants observe. Rather than sharing a presentation or simply talking for 15 minutes, the Learner answers a series of questions asked by an interviewer.

Some of these questions can help guide you:

- What was the experience/information you want to share? What happened?
- How were you affected by it as a participant/as an observer?
- How do you think it has changed you / it will change you?
- Has it prompted you to continue looking for learning opportunities in that area? What might they be?
- To which aspect of the team's work do you feel this is particularly relevant?

Regardless of which approach you select, keep this part of the meeting to 15 minutes or less. This will respect your observers’ need to participate and their attention spans.

3 Questions, Observations, and Recommendations

Purpose	Dig deeper into the learning and build on it
Outcome	Documented observations and follow-up steps
Duration	10+ minutes

Instructions

Ask the observers to each select one thought or question from the list they made during the presentation. Then, go around the room inviting each person in turn to ask the Learner their question.

Prompt them to be specific. For example, if someone says they thought something was “interesting”, ask them why, were they expecting something different, would they have reacted differently, etc?

Ask the Sketcher to listen closely and document any questions or ideas that require follow-up.

Continue going around the group until either there are no more comments from the team or you run out of time.

4

Follow Up Actions

Purpose	Express appreciation and confirm next steps
Outcome	Clarity and commitment to next steps, if any
Duration	3 minutes

Instructions

Ask the Sketcher to read their summary or share their notes.

Ask the Learner whether there is something they would like to add to the summary/notes.

Capture any suggestions for follow-up material that the team wants to share and, if conversation had to be cut short, whether the group would like to continue exploring some of the session's learnings at a later time.

Finally, thank the Learner for sharing with the group and the group for participating in the learning!

After the meeting

Send out the meeting record in a follow-up email, which makes sure everyone gets their action items and a full report in their inbox, even if they couldn't attend the meeting.

THE LATTE AND LEARN IN PRACTICE

Need an example?
Here's how a recent Latte and Learn session helped my team.

For our last Latte and Learn session, Sandra brought along her notes from a recent meeting with a new client, FlowerUp. She's helping them put together the content of their new podcast "In Full Bloom".

Sandra shared what she'd learned about their client's business ("Did you know how much thought goes into arranging a bouquet?!"), about their staff structure ("Nothing gets decided without Paula's approval") and about their values ("They put family first.")

Jamie's immediate reaction to Sandra's brief was "You know, I've just realized I send most of their emails to them late in the day, I'd better change that, in case they see it as a home life intrusion."

Tanya began to think out loud. "Mmmm, the other day our contact at 'Family Friendly Work' was asking me for people to feature on their site. Maybe they are a match…" Then she asked, "You know this "family first" values you're talking about? How did you pick up on it?"

"Well," began Sandra, "Mark, the person I was talking to, told me about all their company picnics, their holiday allocations…" She continued with a couple of examples of policies and behaviors they encouraged at the company.

The discussion seemed to have died down. Claire, who was facilitating, then asked, "Is there anything else anyone wants to ask Sandra?"

"Actually, said Jamie. "Did you finalize the episode content?"

"No, we still have a couple of undecided ones."

"I was just thinking, the other day, my neighbor was complaining about the state of a plant they got sent. Maybe an episode around choosing a delivery company?"

"That sounds great. You know what, why don't I create a list on Trello where we can dump any more ideas for content."

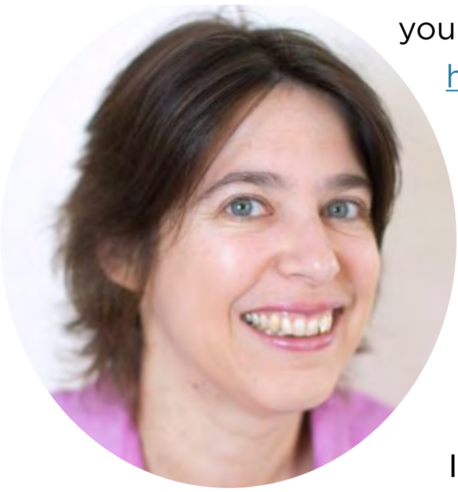
Claire saw her moment to wrap up the call. "Great. Sammie, do you think you're ready to summarize any key points/actions from today?" Sammie went through all of them.

"Anything to add, Sandra?" asked Claire.

"Just a reminder that if you have any ideas for episode content, they will be really welcome!"

ABOUT THE AUTHOR

This template was designed by **Pilar Orti,**
Director of Virtual not Distant.



If you try out this template, she would love to hear how you found it. Feel free to get in touch at https://www.virtualnotdistant.com!

Pilar designs in-person and online training programs for managers of remote teams. She also works with HR and leadership teams to help them make the transition to flexible working, through coaching, team facilitation and consulting.

In order to amplify the message, the Virtual not Distant blog is updated regularly, with thought pieces on the world of work and advice for remote teams. Pilar hosts the 21st Century Work Life podcast, which looks at how the world of work and our attitudes to work are changing, as well as Management Café.

Pilar is the author of a number of books, including **Online Meetings that Rock** (coming May 2018). She is also an established voiceover artist, voicing all kinds of products for the Spanish market and also giving voice to Xuli, the pilot in the very popular BBC series “Go Jetters”

Additional Resources Available from Lucid Meetings

Pilar Orti's Work with Lucid Meeting

- Blog Posts and Meeting Designs by Pilar Orti

Meeting School Resources

- **40+ Sample Agendas with Facilitator's Guides**
- The 16 Types of Businses Meetings
- The Meeting Performance Maturity Model
- How to structure effective meetings
- How to create meeting agendas
- How often should you meet
- How to make decisions in meetings
- What goes into a meeting invitation
- What goes into meeting notes
- Glossary of Meeting Terms