

Hello Krakow!

Lets begin

Erm... what IS facilitation?



PROCESS

FACILITATION IS...

(PLEASE WRITE A DEFINITION OF FACILITATION)

And how can I make today useful for you?

Your hopes and learning objectives from the workshop



LEARNING

NAME:

MY LEARNING OBJECTIVES TODAY ARE...

2 MINS - REALLY THINK ABOUT IT



PROCESS

MY OTHER HOPE FOR TODAY'S WORKSHOP

IS...

Are these three overarching objectives right?

To understand facilitation as the way of a participatory leader

To explore different approaches and frameworks to facilitating strategy

To understand the importance of learning in ‘living strategies’

Workshop Objectives

AM Part 1

Common understanding on what strategy is

Key questions on facilitating strategy

(I'm interested about the Polish context)

I'll advocate: people want outcomes not strategies

Four good questions to ask when a strategy workshop is asked for

Workshop Objectives

AM Part 2

The participatory leadership paradigm

The meeting excellence model

4 phases of meetings

What do these ideas mean in facilitating strategy?

Workshop Objectives

AM Part 3

Review of strategy and change frameworks.

Kotter, Bridge, Business Model Canvas

Seeing case studies of these ideas from my work

Workshop Objectives

PM

Learning and inquiry as a central survival strategy in a fast moving world.



PROCESS

STRATEGY IS... (DEFINE IT)

Strategy - 1 Google definition

noun: strategy

1. a plan of action designed to achieve a long-term or overall aim.

Example: "time to develop a coherent economic strategy"

synonyms: master *plan*, grand design, game *plan*, *plan* of action, *plan*, policy, proposed action, scheme, blueprint, programme, procedure, approach, schedule;

Strategy - 2 <http://www.businessdictionary.com/definition/strategy.html>

noun: strategy

2. A method or plan chosen to bring about a desired future, such as achievement of a goal or solution to a problem.

3. The art and science of planning and marshalling resources for their most efficient and effective use.

Is strategy is about...

goals

plans

methods

and 'organising' resources

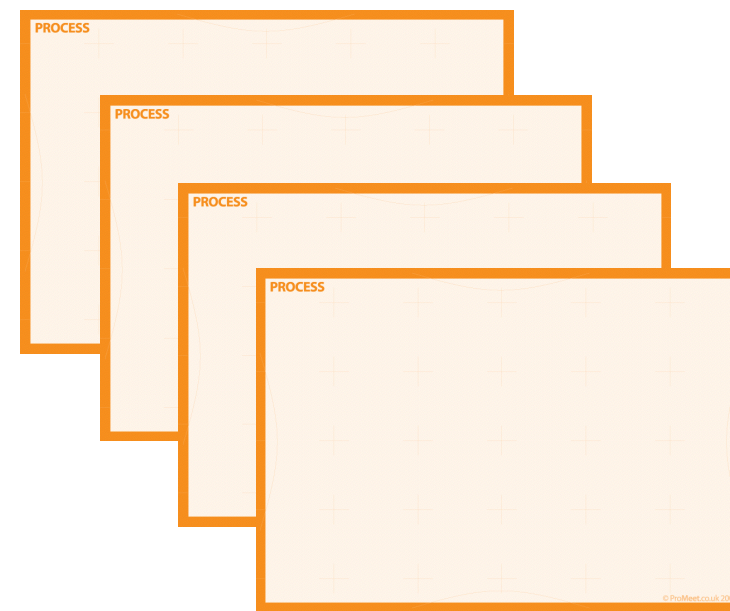
Is that what you understand?

Workshop Objectives

Key questions on facilitating strategy (in Polish context)

- Why do **you** want (to be able to facilitate) strategy?
- Why do **others** (workmates, clients) want a strategy?
- What are the key **blocks or barriers in creating** a strategy?
- What are the key **blocks or barriers to implementing** strategy?

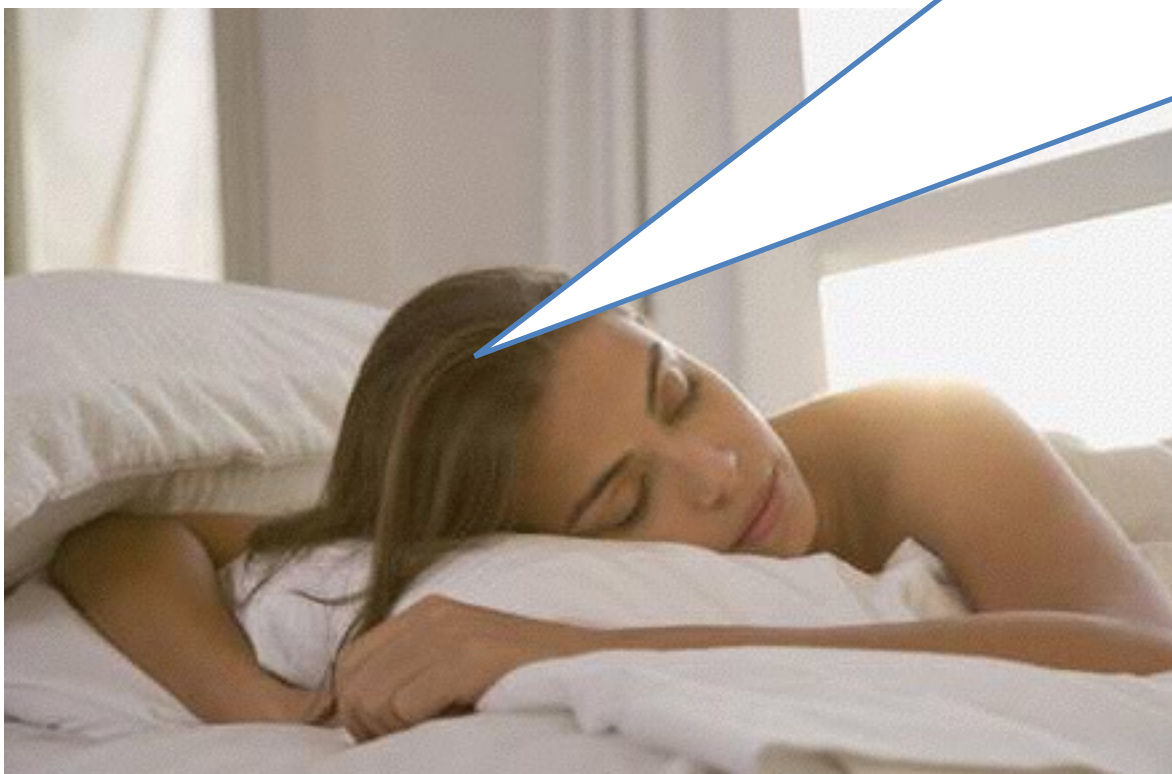
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Groups of 4 / 10 minutes / Write in English please / One card per question

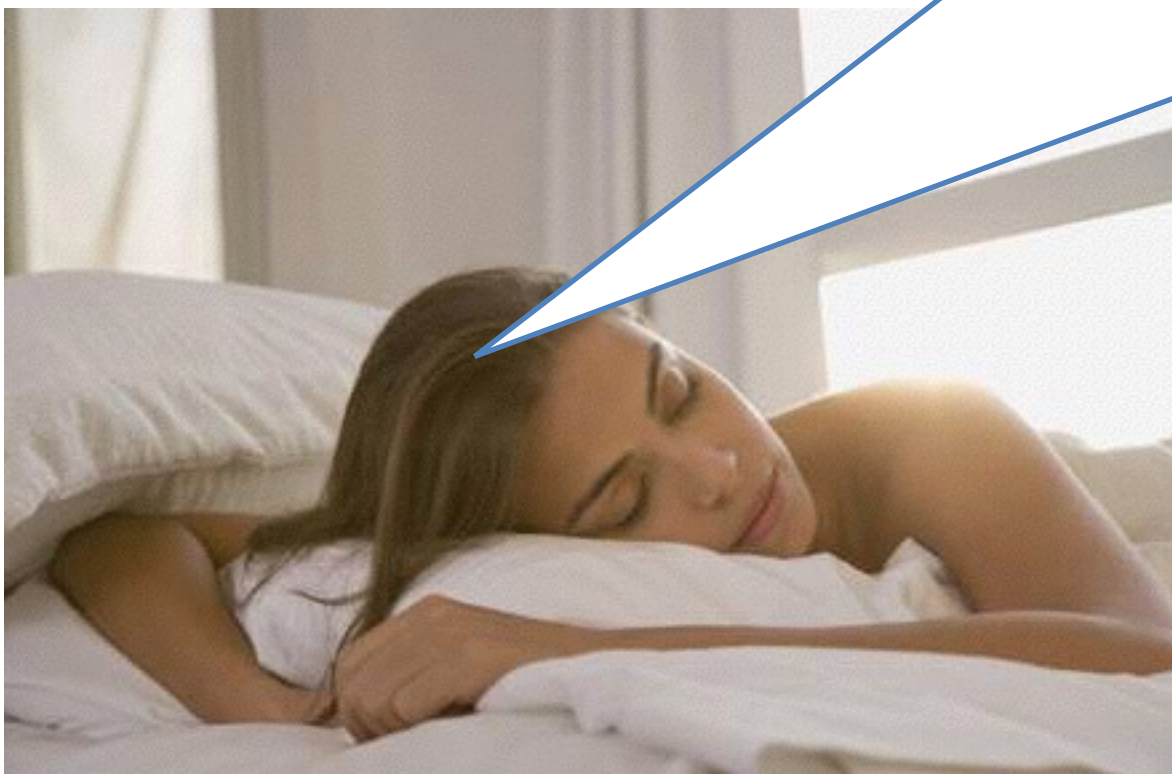
Do you ever wake up and think to yourself...

***What I really want
today is a strategy***



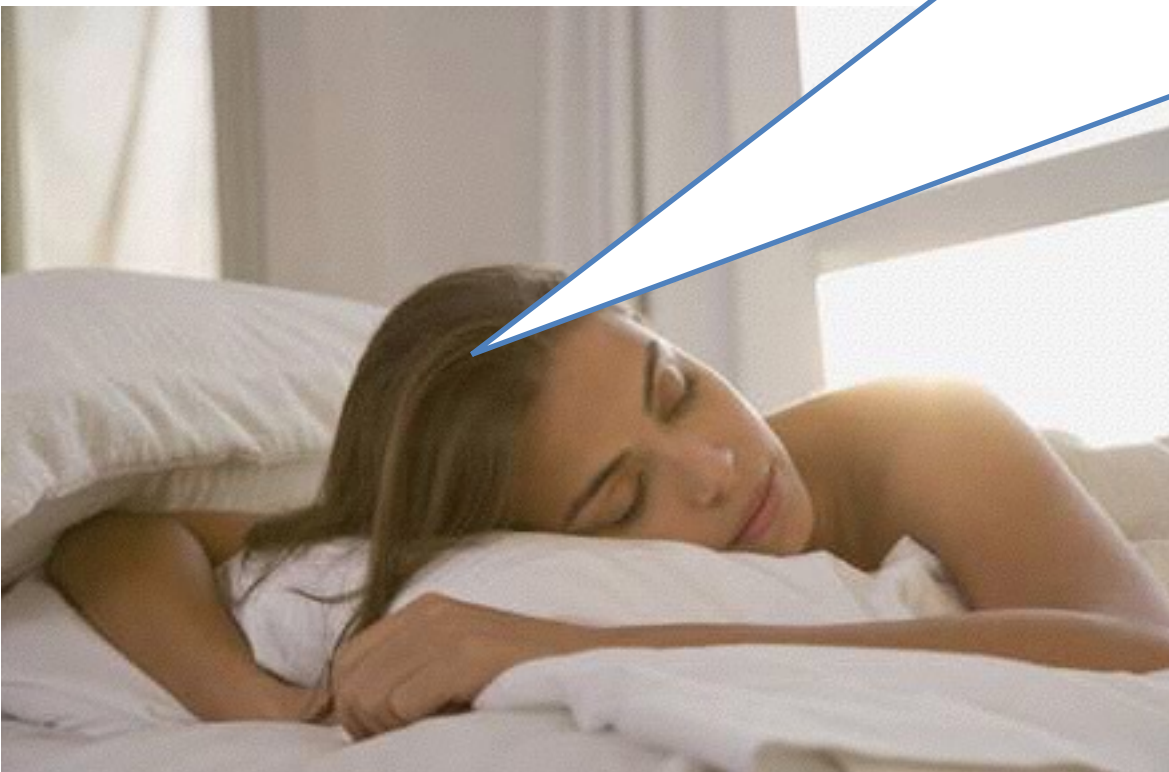
Do you ever wake up and think to yourself...

*What I **X** really want
today is a strategy*



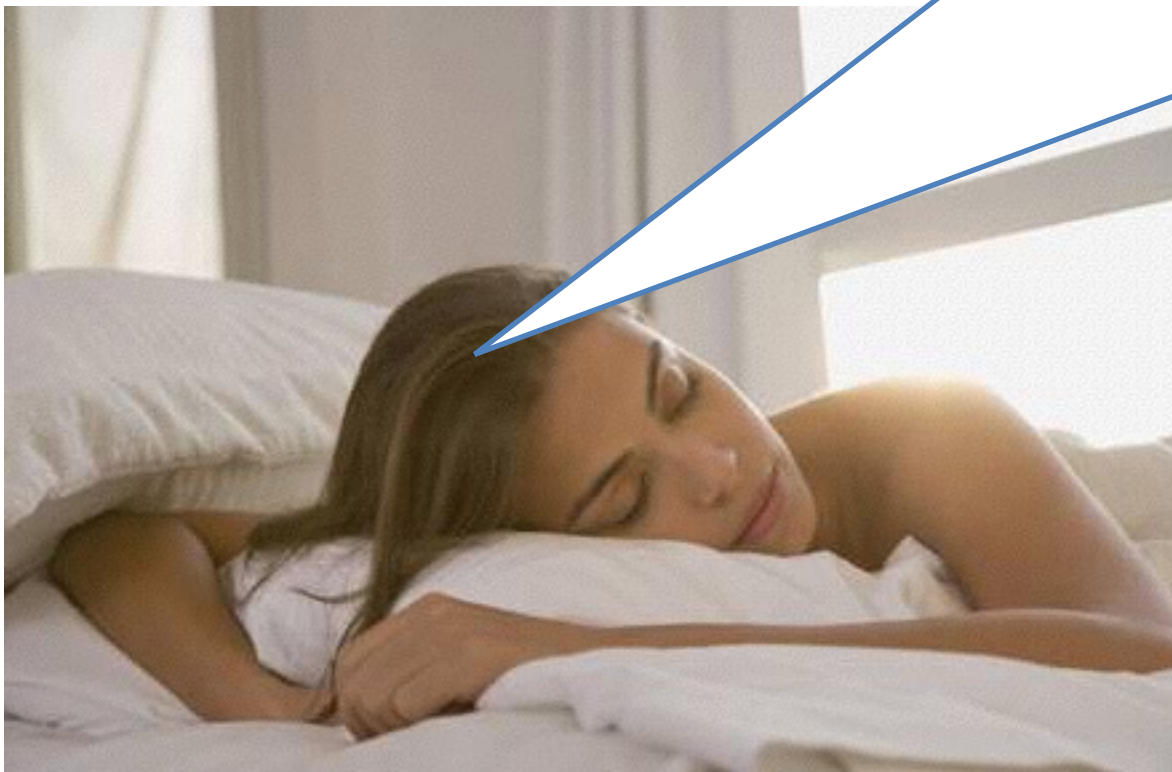
Do you ever wake up and think to yourself...

***What I really want
today is a meeting!***

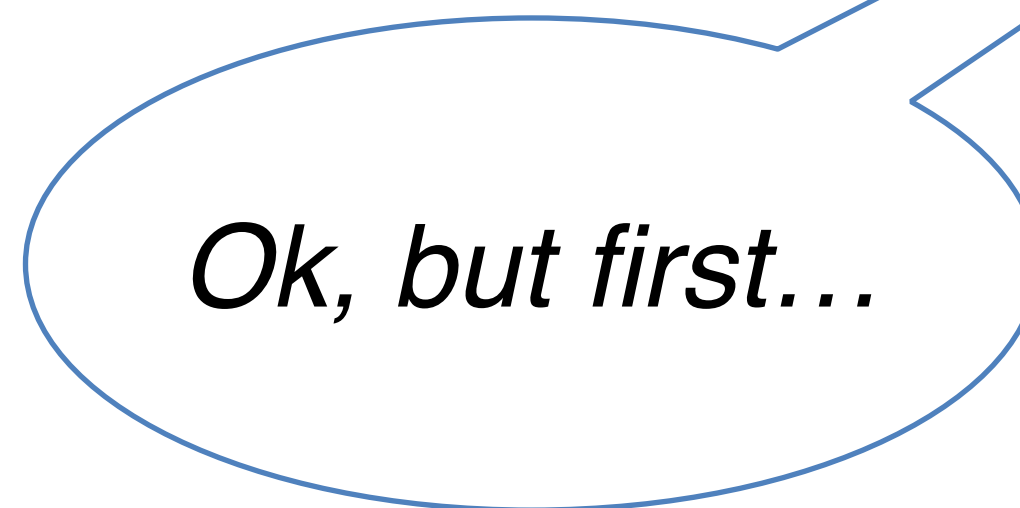


Do you ever wake up and think to yourself...

*What I **X** really want
today is a meeting!*



So here are 4 questions I ask at the outset...



**OBJECTIVES**

**By the end of the work,
what would be the
best outcome you'd
hope for?**

**OBJECTIVES**

Imagine the work has
been widely successful,
**what will have
changed for the
better?**

**OBJECTIVES**

Suppose we look at the work as a step in a larger initiative, **what's the ultimate goal?**



OBJECTIVES

Is there **anything else**
you'd like the work to
achieve?

No one 'wants' a strategy...

What you and others really want is:

outcomes,

solved problems,

change,

better relationships,

trust...

Do you see it that way too?

Workshop Objectives

AM Part 2

The participatory leadership paradigm

The meeting excellence model

4 phases of meetings

What do these ideas mean in facilitating strategy?

Are these useful?

Towards a participatory paradigm

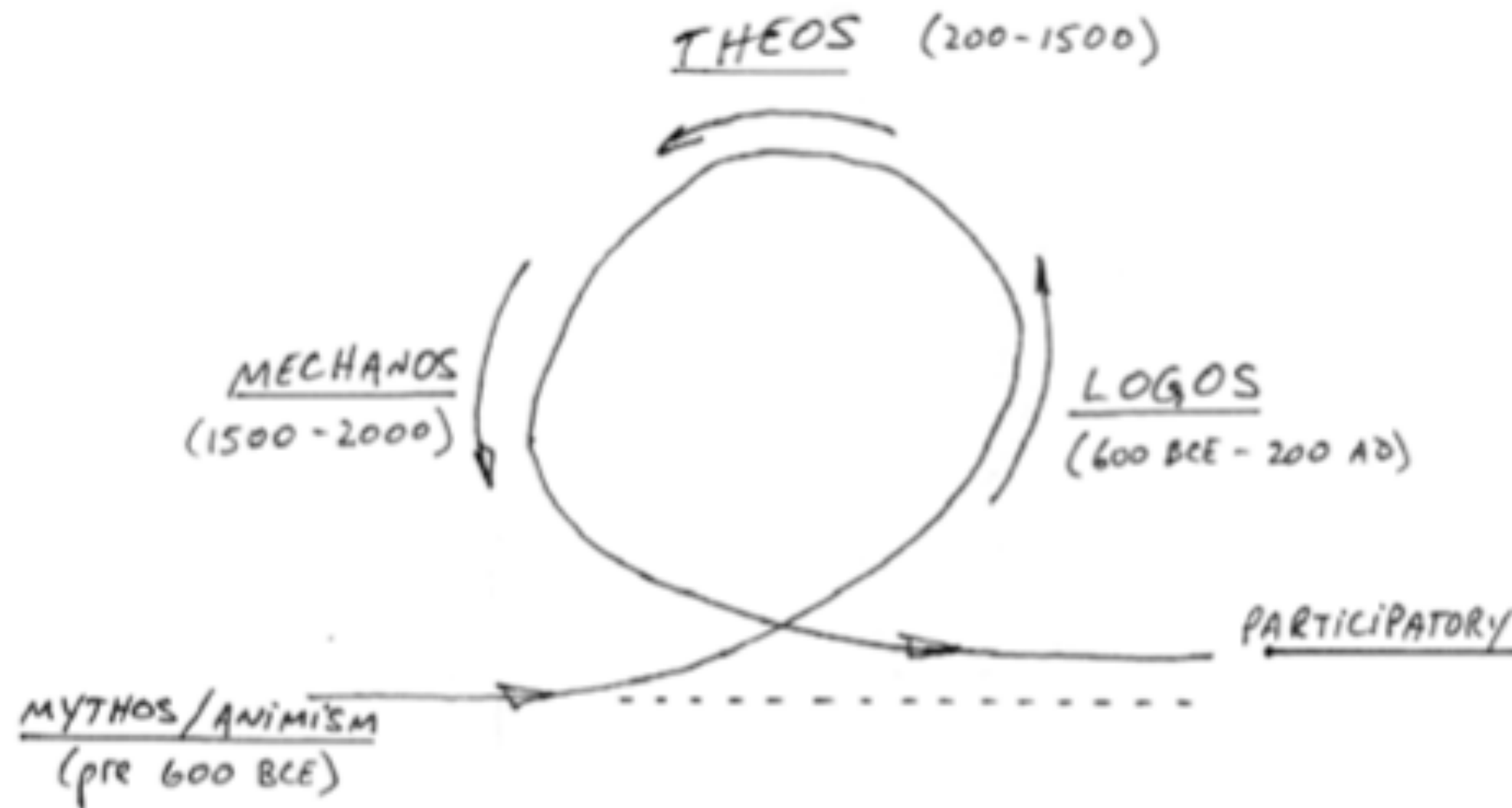


Figure 1 – Five Phases of Western Civilization

A definition of Participatory Leadership

“The participatory leadership paradigm is based on **respect and engagement**. It **constructively focuses** energy in every human to human encounter...

A definition of Participatory Leadership

An advanced, democratic and effective model of leadership, it **harnesses diversity, builds community, and creates shared responsibility for action...**

A definition of Participatory Leadership

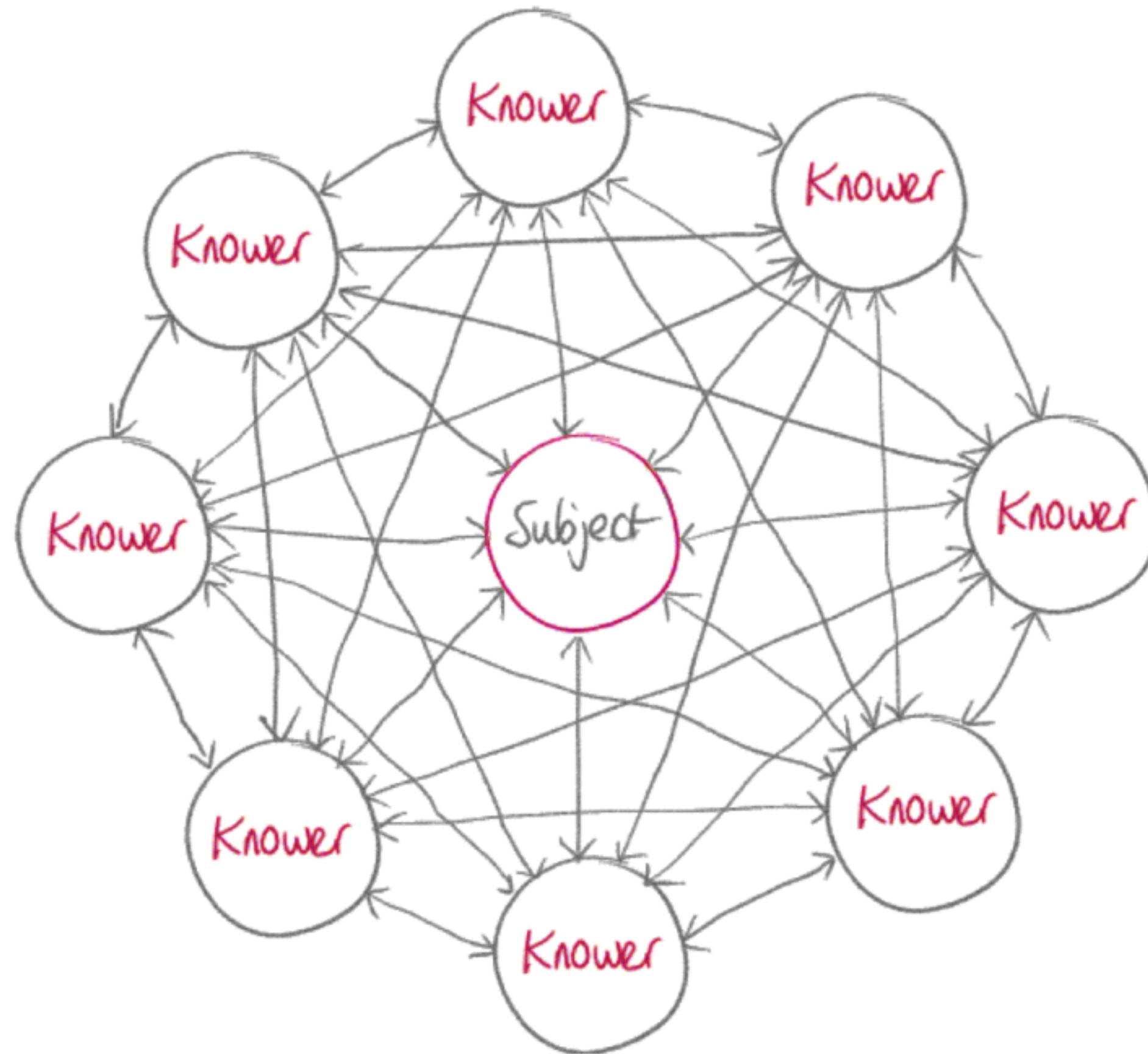
Because it deepens **individual and collective learning**, yielding real development and **growth**, it is a leadership paradigm that is particularly effective in enabling change within organisations.”



PROCESS

WHAT ARE THE PRINCIPLES OF MEETING
EXCELLENCE?

PAIRS - 5 MINS TO DISCUSS & DRAW/
DEFINE



Does this happen in excellent meetings?

Meeting Excellence Model

Participative

beliefs underpinned by the Participatory worldview
yield intellectual, emotional and energetic engagement.

Participation is the core principle



Key Learning

Participation must be a **deeply held value**,
of the meeting leader (facilitator)

Meeting Excellence Model

Participative

beliefs underpinned by the Participatory worldview
yield intellectual, emotional and energetic engagement.

Participation is the core principle

Healthy

meetings create:

- authentic human respect
- deep, multi level learning
- an energetic, vibrant culture



Purposeful

meetings have:

- a compelling overarching intention
- clear, specific meeting objectives
- focus, to achieve common objectives

Visibility

creates:

- aligned energy
- collective wisdom
- clear action and clear learning

Process

designed to:

- achieve objectives and get results
- maximise energy & participation
- harness diversity



PROCESS

WHAT ARE PHASES OF EFFECTIVE
MEETINGS? (DRAW IT)

Four phases of effective meetings

Define

Design

Release

Unlock

Objectives

Process

Actions

Learning

Define the objectives
you wish to achieve in
this meeting

Design a process that
will allow the right
people to participate
in creating its success
in the right way

Release the passion
people have for the
action that they know
is needed and want to
take

Unlock levels of
learning at every
opportunity.

Me - triple loop
It - the subject
Us - the people



Objectives

Process

Actions

Learning

PROCESS

WHAT DO THESE IDEAS MEAN IN
FACILITATING STRATEGY WORKSHOPS?

What do they mean?

In my experience meetings work!

www.ProMeet.co.uk



PROCESS

STRATEGY MODEL... (DRAW IT)

Strategy models or frameworks

Come in lots of shapes and colours...



strategy frameworks



Sean



Web

Images

News

Videos

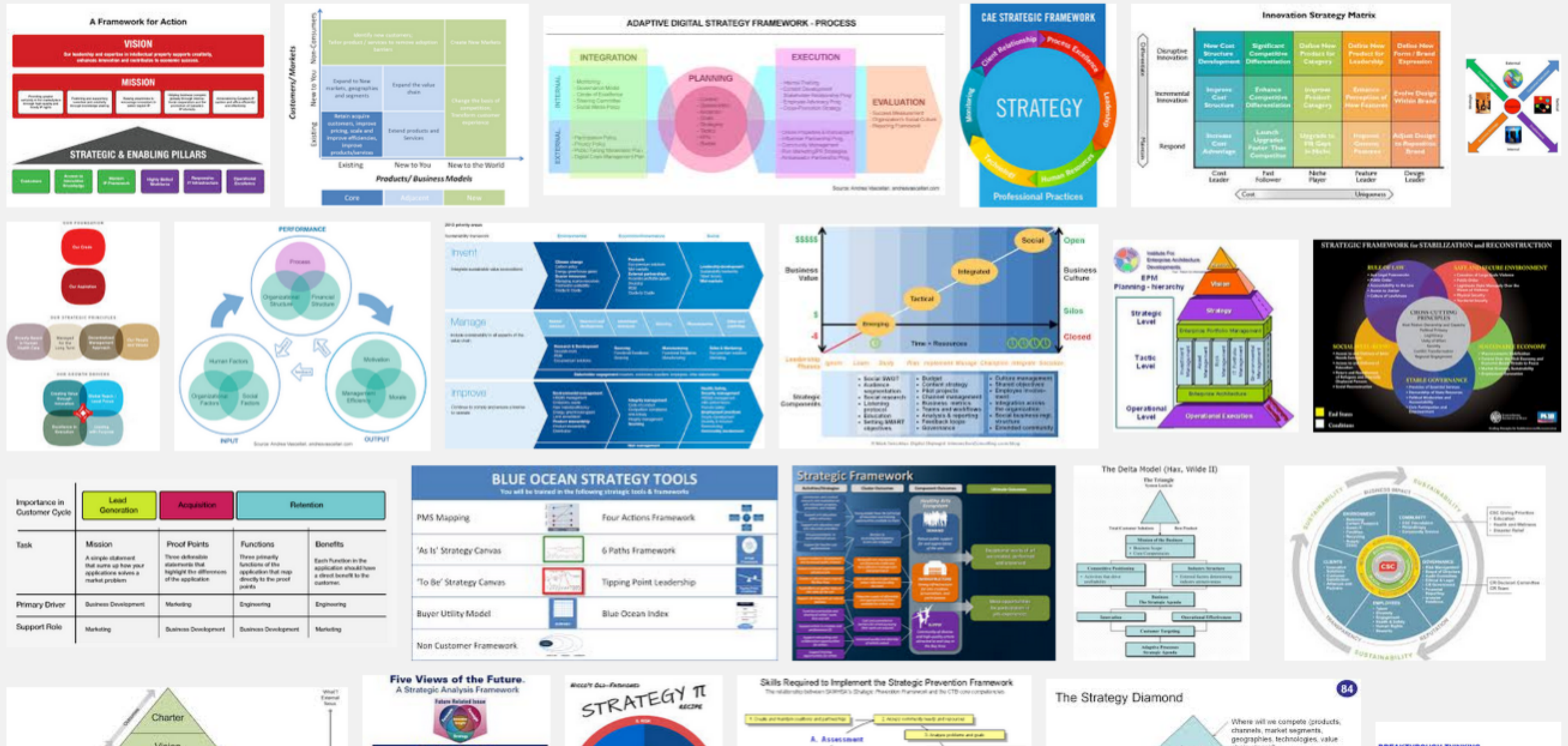
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Strategy models or frameworks

Three that I use...



@ProMeetings

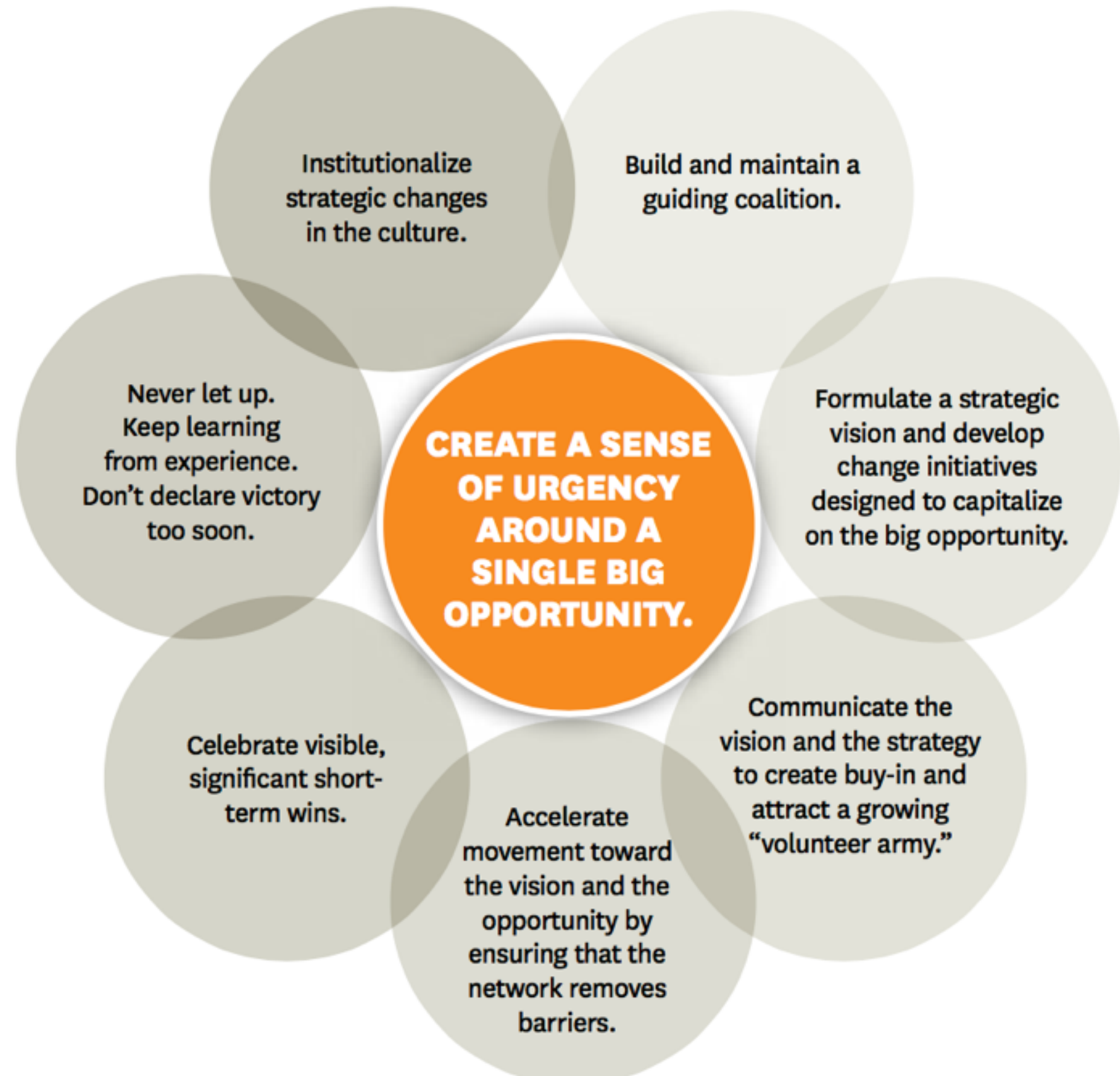
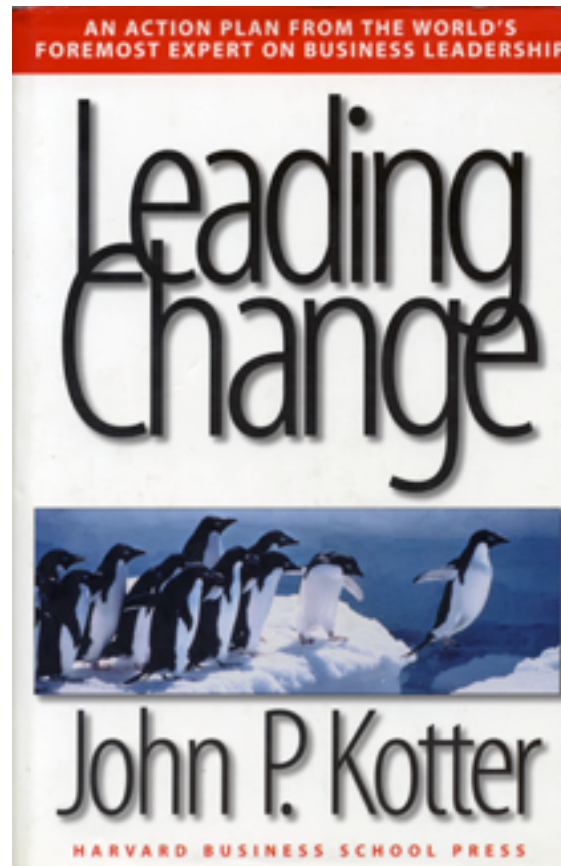


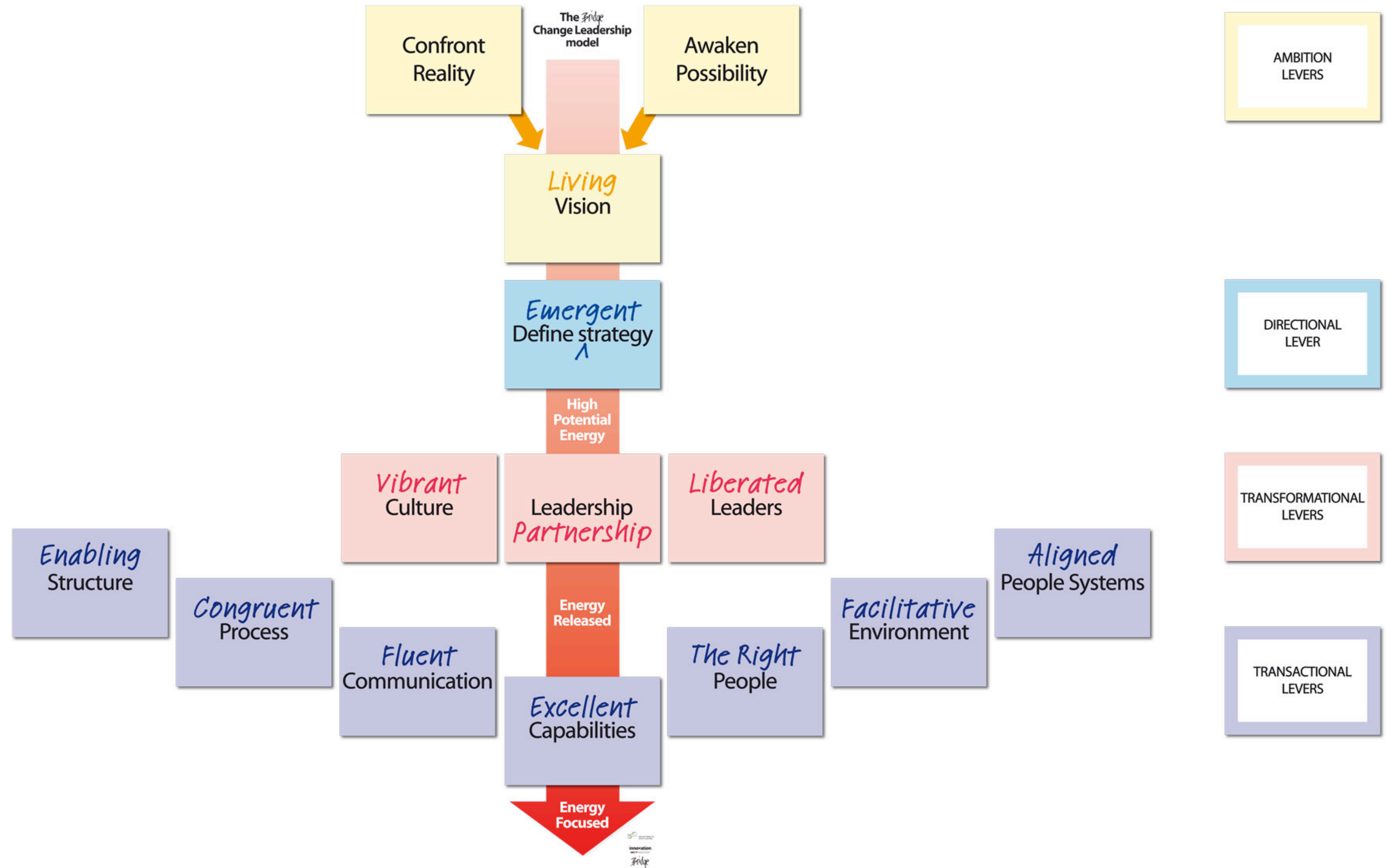
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The Eight Accelerators

The processes that enable the strategy network to function






The Business Model Canvas

Designed for:

Designed by:

On: Day Month Year
Iteration:


Key Partners



Who are our Key Partners?
Who are our key suppliers?
Which Key Resources are we acquiring from partners?
Which Key Activities do partners perform?

RELEVANCE FOR PARTNERSHIP:
Optimization and economy
Reduction of risk and uncertainty
Acquisition of particular resources and activities


Key Activities



What Key Activities do our Value Propositions require?
Our Distribution Channels?
Customer Relationships?
Revenue streams?

CATEGORIES:
Production
Problem Solving
Platform Network


Key Resources



What Key Resources do our Value Propositions require?
Our Distribution Channels? Customer Relationships?
Revenue Streams?

TYPES OF RESOURCES:
Physical
Intellectual (brand, patents, copyrights, data)
Human
Financial


Value Propositions



What value do we deliver to the customer?
Which one of our customer's problems are we helping to solve?
What bundles of products and services are we offering to each Customer Segment?
Which customer needs are we satisfying?

CATEGORIES:
Novelty
Performance
Customization
"Getting the Job Done"
Design
Brand Status
Price
Cost Reduction
Risk Reduction
Accessibility
Convenience/Usability


Channels



Through which Channels do our Customer Segments want to be reached?
How are we reaching them now?
How are our Channels integrated?
Which ones work best?
Which ones are most cost-efficient?
How are we integrating them with customer routines?

CHANNEL PRIORITIES:
1. Awareness
How do we raise awareness about our company's products and services?
2. Evaluation
How do we help customers evaluate our organization's Value Proposition?
3. Purchase
How do we allow customers to purchase specific products and services?
4. Delivery
How do we deliver a Value Proposition to customers?
5. After sales
How do we provide post-purchase customer support?


Customer Relationships



What type of relationship does each of our Customer Segments expect us to establish and maintain with them?
Which ones have we established?
How are they integrated with the rest of our business model?
How costly are they?

EXAMPLES:
Personal assistance
Dedicated Personal Assistance
Self-service
Automated Services
Communities
Co-creation


Customer Segments



For whom are we creating value?
Who are our most important customers?

MARKET SEGMENTS:
Mass Market
Niche Market
Segmented
Diversified
Multi-sided Platforms

Cost Structure




What are the most important costs inherent in our business model?
Which Key Resources are most expensive?
Which Key Activities are most expensive?

BY HOW IS BUSINESS MADE:
Cost Driven (lowest cost structure, low price value proposition, maximum automation, extensive outsourcing)
Value Driven (focused on value creation, premium value proposition)

SAMPLE COST STRUCTURES:
Fixed Costs (salaries, rents, utilities)
Variable costs
Economies of scale
Economies of scope

Revenue Streams



For what value are our customers really willing to pay?
For what do they currently pay?
How are they currently paying?
How would they prefer to pay?
How much does each Revenue Stream contribute to overall revenues?

TYPES:
Asset sale
Usage fee
Subscription Fee
Lending/Renting/Leasing
Licensing
Brokerage Fee
Advertising

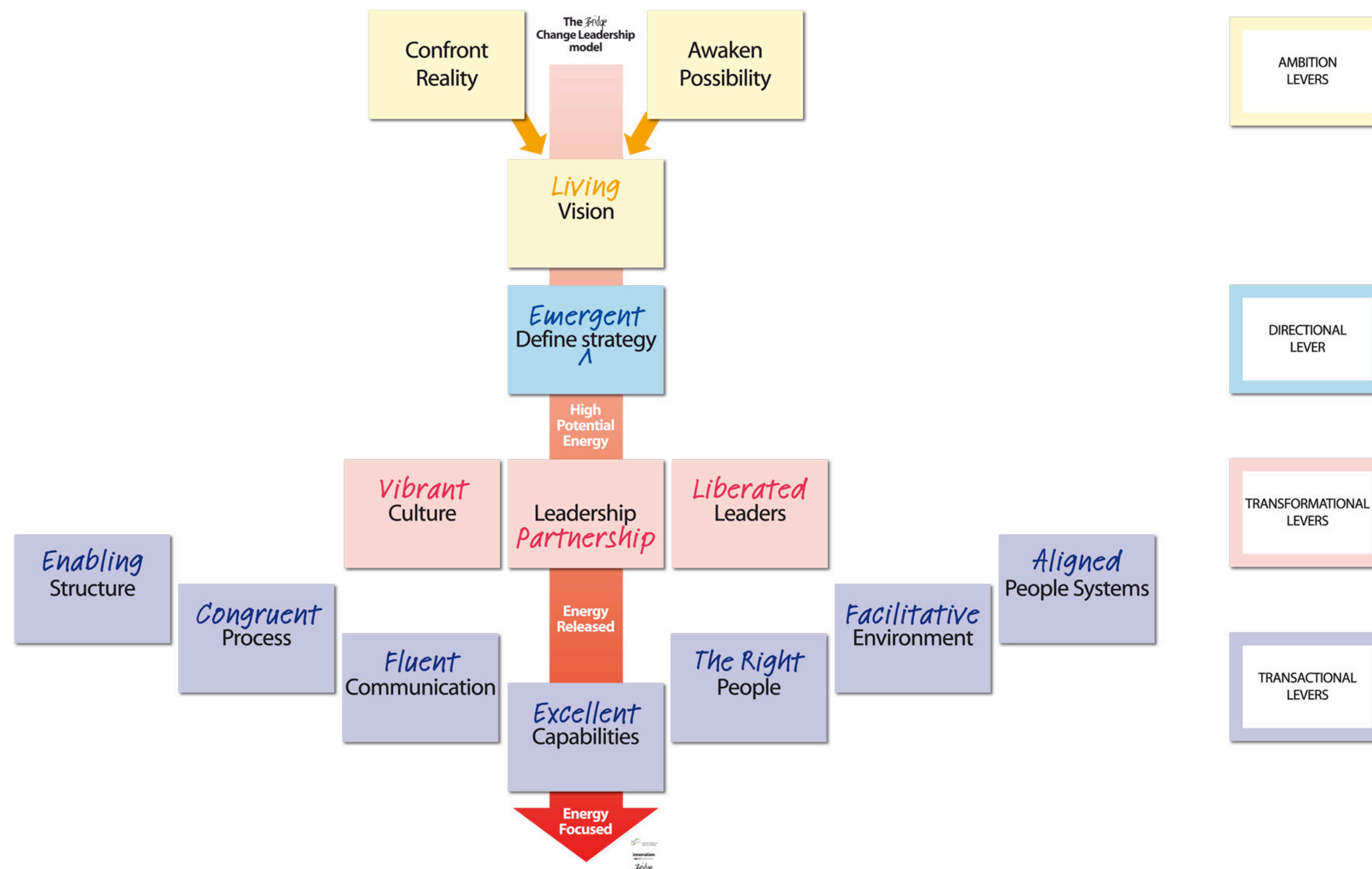
FIXED PRICING:
List Price
Product feature dependent
Customer segment dependent
Volume dependent

HYBRID PRICING:
Negotiated (bargaining)
Yield Management
Real-time Market

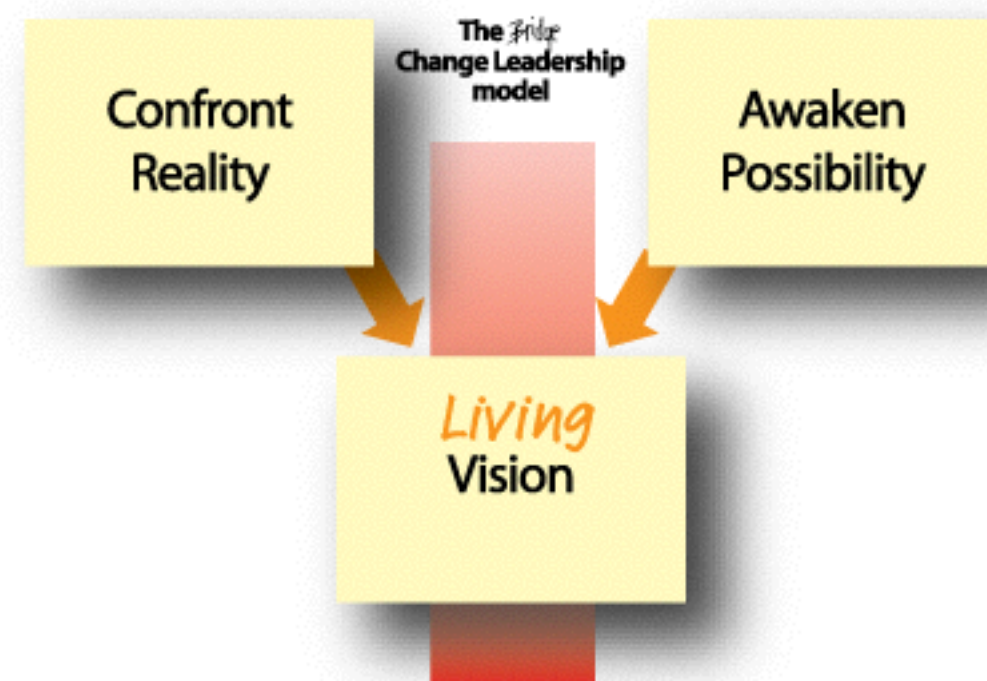
www.businessmodelgeneration.com

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Case Study: Use of this framework with a client



Case Study: Use of this framework with a client

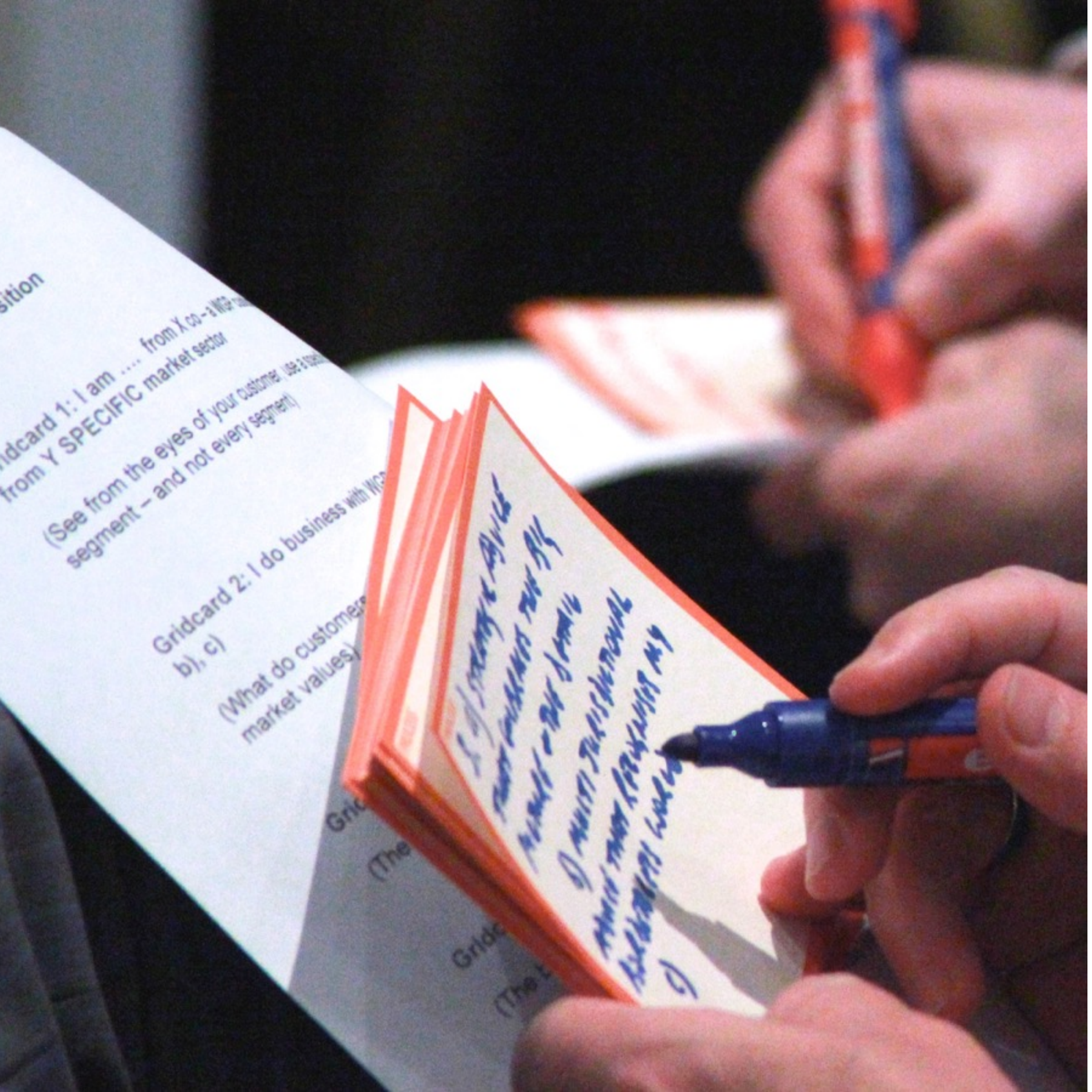


Case Study: Use of this framework with a client

Two day strategy workshop for London based firm of corporate financiers.

Day 1 - the six board members

Day 2 - The team of 10



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PROCESS

Confronting Reality

1

PROCESS

1. What's wrong with status quo?

TOO MUCH 'LUCK'
NOT ENOUGH
ORGANISATION

2

PROCESS

1. What's wrong with status quo?

- DISCIPLINE.
- Focus. = ^{Pro}Business
- Not Concise.

3

PROCESS

1. What's wrong with status quo?

• MANAGEMENT SYSTEMS V. POOR
• TOO MUCH RELIANCE ON
TOO FEW CLIENTS
• BECOME V. 'FLABBY' AS
RESULT OF REVENUES
BECOMING TOO 'EASY'!

4

PROCESS

2. What's got to change?

• NEED PROPER MANAGEMENT
DISCIPLINES
• NEED MORE 'REGULAR'
CLIENTS
• NEED TO WORK AFTER
SMALLER CLIENTS BETTER.

5

PROCESS

2. What's got to change?

- CULTURE.
- Focus

6

PROCESS

2. What's got to change?

MOVE FROM SERENDIPITOUS
WORK TO PLANNED +
TARGETED WORK

7

PROCESS

Planning in
Place to target
New clients

8

PROCESS

WHAT'S GOT TO CHANGE ...

WORK ON THE BUSINESS
BALANCE OF ON & IN

9

PROCESS

3. What are the brutal truths that are easier to avoid than own up too? What are the uncomfortable truths about today's situation, internally or externally?

• THAT PRESENT MANAGEMENT
IS WOEFUL AT SOME
OF THE THINGS IT DOES/
OR DOESN'T DO!

10

PROCESS

3. What are the brutal truths that are easier to avoid than own up too? What are the uncomfortable truths about today's situation, internally or externally?

- LACK of Focus
& CLOSING.
- LEADERSHIP

11

PROCESS

3. What are the brutal truths that are easier to avoid than own up too? What are the uncomfortable truths about today's situation, internally or externally?

IT HAS MOSTLY COME
ABOUT BY LUCK NOT
JUDGMENT

12

PROCESS

DISCIPLINE
esp. Mgt systems

13

PROCESS

CULTURE OF
ACCOUNTABILITY.

14

PROCESS

4. If there is an 'elephant in the room', what is it?

• DJS: TOO 'INFLUENTIAL'
• WOEFUL LACK OF
MANAGEMENT DISCIPLINE/
CAPABILITY: POOR
CLIENT SERVICE.

15

OBJECTIVES

PROCESS



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Overarching Objective To build a strong, focussed and well led business, respected by peers and customers for delivering excellent value	To agree an 'in meeting' set of behaviours that might allow a disciplined and structured way of working	Working Together What are three behaviours that will help us work well together (and how will we know when they show up?)	What are three behaviours that will stop us working well together (and how will we know when they show up?)	Confronting Reality		Ambition		Purpose
Ambition: To understand current reality and new possibility and define a living vision and that all partners in WGP can use to drive the business forwards	To understand our current reality. What is it about status quo that is not working. What must change?	Be a Boss Be a Slave	INTERRUPTING/ TALKING OVER	YOU MEAN 'LIVE' NOT THROUGH DEFINITION	MANAGEMENT EVERYONE TOO MUCH RELIANCE ON TOO MUCH RELIANCE RELATIONSHIP 'FAMILY' AS RESULT OF RELATIONSHIP RELATIONSHIP TOO 'CLOSE'	HIGH LEVELS FROM LEGITIMATE BUSINESS WITH LOW OPERATIONS	NOT OF THE SAME	SEEDS ASPIRE RESULT FROM CHANGING HANDBOOK FOLLOWING THE NEEDS SENSE.
Direction: To develop a clear proposition and strategy that responds to market needs, and that can align WGP sales, marketing and operational development	To awaken possibility. What is a level of ambition that binds? What does under or over ambition look and feel like?	FOCUS	RESPECT FOR OPINIONS	DISCIPLINE - FOCUS - NOT CONGRUENT		WORKING RELATIONSHIP IN CLOSED MARKET AND TECHNICAL ADVANCEMENT AND GROWTH RELATIONSHIP - FOCUS ON GROWTH BUT ADVANCEMENT	LEADERSHIP GROWING IN BUSINESS LEADERSHIP RELATIONSHIP LEADERSHIP GROWING IN	EMERGING QUESTIONS - FIRST GROWTH OPPORTUNITIES - FIRST GROWTH OPPORTUNITIES - FIRST GROWTH OPPORTUNITIES
Transformation: To nurture a corporate leadership culture & partnership that develops values & behaviours that WGP leadership team want	To share insights on an appealing picture or vision of future we wish for	DISCIPLINE	NOT LISTENING			- CORRUPT SENSATION - INTERESTING / FUN - 9 OFFICES / PROPERTIES - WORKING RELATIONSHIP		EXAMPLE: IN STRUCTURE AND IN GROWTH ADVANCEMENT / GROWTH ADVANCEMENT
Transaction: To develop and align practices to support the strategic intentions the leaders of the business have	To draft value proposition	RAY HOLE	LISTENING!	NOT LISTENING	NOT LISTENING			EXAMPLE: - INNOVATION - A FINE POINTS LAW - TO GROW - TO GROW
	To identify the key strategies to needed to realise the vision, and bring the value proposition to life		LET EVERYONE SPEAK. NO TALKING OWN OWN OWN. LEADERS GROWTH HOLE	NOT LISTENING	NOT LISTENING			A GROWING TEAM THAT MAKE A DIFFERENCE IN IT'S GROWTH HOLE ADVANCEMENT
	To identify and agree what a vibrant leadership culture at WGP might be		LISTENING TO EACH OTHER'S IDEAS FOR GROWTH HOLE	NOT LISTENING	NOT LISTENING			YOUR PART OF A GROWTH TEAM MAKING A DIFFERENCE
	To identify the leadership partnerships that are vital to creating success, and establish a plan to strengthen current or establish new partnerships.	NAPPING/ BULLSHITTING	TALKING OVER EACH OTHER. LEADERS DISCIPLINE HOLE.	NOT LISTENING	NOT LISTENING			LEADERSHIP LEADERSHIP LEADERSHIP
	To understand how WGP can fully liberate its leaders and establish what needs to change	JOKING. (TOO MUCH!)		NOT LISTENING	NOT LISTENING			LEADERSHIP LEADERSHIP LEADERSHIP
		FUN/HUMOUR		NOT LISTENING	NOT LISTENING			LEADERSHIP LEADERSHIP LEADERSHIP
		CREATE		NOT LISTENING	NOT LISTENING			LEADERSHIP LEADERSHIP LEADERSHIP
		HONESTY		NOT LISTENING	NOT LISTENING			LEADERSHIP LEADERSHIP LEADERSHIP
		KNOWING TWO ANSWER ALWAYS		NOT LISTENING	NOT LISTENING			LEADERSHIP LEADERSHIP LEADERSHIP
Be appreciative	INNOVATE	TRUST		NOT LISTENING	NOT LISTENING			LEADERSHIP LEADERSHIP LEADERSHIP



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RELIANCE

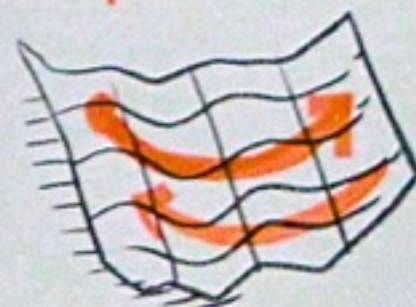
CURRENT
REALITY

Luck!

Target
NEW
CLIENTS

Reliance
in few
clients

Succession
PLAN



Case Study: Use of this framework with a client



Workshop Objectives

Learning and inquiry as a central survival strategy in a fast moving world.



PROCESS

DEFINE PROFESSIONAL LEARNING



PROCESS

WHY IS LEARNING AN IMPORTANT PART
OF STRATEGIC PROCESS?

ProMeet and Learning: deepening the value, performance and effectiveness of meetings

“those who are in love with learning are in love with life”

Charles Handy

The fourth phase of excellent meetings

Define	Design	Release	Unlock
Objectives	Process	Actions with Passion	Learning
Define the objectives you wish to achieve in this meeting	Design a process that will allow participants to participate fully in achieving the meeting objectives	Release the passion and plan the actions for the work that follows the meeting, in the meeting	Unlock levels of learning everyday. Learn about actions, thinking, being. Learn about self, subject and others.

Learning organisations - 1

Learning organizations are where people continually expand their capacity to **create the results they truly desire**.

Where new and expansive patterns of thinking are nurtured.

Where collective aspiration is set free.

And where people are continually learning to see the whole together.

Learning organisations - 2

Real learning gets to the heart of what it is to be human.

Developing an ability to learn, grow and re-create ourselves, both as individuals and organizations.

In a learning organization, survival learning or “adaptive learning” is joined by “generative learning”, **learning that enhances our capacity to create.**

Mental models - 1

Mental models are ‘deeply ingrained assumptions, generalizations, ideas or images that influence how we understand the world and how we take action’.

We are often not that aware of the impact of these assumptions etc. on our behaviour.

So a **fundamental part of learning** is to **develop the ability to reflect in-and-on** action.

Mental models - 2

Understanding mental models starts with turning the mirror inward; learning to unearth our internal pictures of the world, to bring them to the surface and hold them rigorously to scrutiny.

It also includes the ability to carry on ‘learningful’ conversations that balance inquiry and advocacy, where people expose their own thinking effectively and make that thinking open to the influence of others.

Learning organisations work to transcend the sorts of internal politics and game playing that dominate traditional organizations.

In other words it means fostering openness.

A definition of Participatory Leadership

“The participatory leadership paradigm is based on **respect and engagement**. It **constructively focuses** energy in every human to human encounter.

An advanced, democratic and effective model of leadership, it **harnesses diversity, builds community**, and creates **shared responsibility for action**.

Because it deepens **individual and collective learning**, yielding real development and **growth**, it is a leadership paradigm that is particularly effective in enabling change within organisations.”

Learning alone and in groups

First-person : Individual. First-person inquiry and learning address the ability of individuals to foster an inquiring approach to their own lives.

Second-person: Small groups. Second-person action research/practices address our ability to inquire face-to-face with others into issues of mutual concern, usually in small groups.

Third-person : Large Groups Third-person research/practice draws together the views of large groups of people and create a wider community of inquiry involving persons who cannot be known to each other face-to-face.

Triple loop learning and you

Single loop: Actions

What can you learn about your actions?

Your behaviours, skill, performance or inactions...

Double loop: Thinking

What can you learn about your thinking or operating assumptions?

Your mindset, strategies, tactics, schemes, ploys, game-plans

Where was your thinking... the subject, relationships, dynamics, self, others???

Triple loop: Values

What can you learn about your principles or values?

Your principles, intentions, purposes, intuitions, vision..

*... and the consequences or results of any of these, **for you and others?***

Triple loop learning and you

LEARNING

Single loop: Actions

What can you learn about your actions?

Your behaviours, skill, performance or inactions...

Triple loop learning and you

LEARNING

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Triple loop learning and you

LEARNING

Triple loop: **Values**

What can you learn about your principles or values?

Your principles, intentions, purposes, intuitions, vision..

Questions?

Twitter @ProMeetings

<https://www.linkedin.com/in/seanblairlinkedinprofile>

Thank you