

GUIDELINES FOR CONDUCTING WORKSHOPS

WORKSHOPS, NOT MEETINGS

For a plan to come to life it needs to be actionable. Actions are not defined by having an untold number of “meetings.” Think in terms of workshops, not meetings. What’s the difference? A meeting may be appropriate if all you are trying to do is communicate information. But often, you don’t get much more than that accomplished at a meeting. A workshop has a deliverable and a different tone. In a workshop, which should have a time limitation, you go beyond communicating. You robustly debate; you make decisions and leave with a set of actions everyone is aligned to.



In a workshop, you gather ideas; you write them down, hang them on the wall and debate and agree on actions to be taken when you leave the room. Having a clear set of actions validates what you want to achieve but more so, because it is based on reality, it indicates what you are likely to achieve. It takes the vision and brings it down to earth.

Your goal should be to complete your workshops in no more than two to three hours. Workshops lose effectiveness if they last more than three hours. People get burned out and tend to start losing focus after two to three hours. When facilitating a workshop focus on three things:

- ≡ Avoid Information Overload
- ≡ Develop Relationships
- ≡ Get Agreement on Next Steps

AVOID INFORMATION OVERLOAD

There will be a lot of information pouring out in these workshops. You can manage this by setting an agenda and time limits. Don't let conversations go on and on. If necessary, keep a side board. If you get stuck on something, write it on the sideboard so that it can be addressed later. Perhaps schedule a "meeting" after the workshop to find out what all the fuss is about. It may or may not be important to the team. But clearly the person who brought it up thought it was important so you should at least address it. Try to keep the group moving towards its workshop deliverable.

GET AGREEMENT ON NEXT STEPS

First, everyone needs to realize that you value different points of view but at some point within the time limit of the workshop you need agreement on the next steps. If the group cannot come to a consensus, the champion of the action or the business owner has the final decision. As the owner, you may overrule the champions but be careful. If you find yourself constantly overruling the champion, you probably have the wrong champion or you are a control-freak. Both are bad. One of the ways I test myself is by what I call the "50% Rule".

My management team knows that as the owner I reserve the right to make the final call on priorities. However, if we disagree and I am overruling you more than 50% of the time when we disagree, I probably have the wrong person as the champion or I am over-controlling. It's one or the other. I either have confidence in my staff's decisions or I do not. So, I monitor this. I'll ask myself, when I disagree with the staff, have I been overruling them more than 50% of the time? If I am, I need to reflect on why and make a change.

Over the years this rule has challenged me to trust the staff's decisions. At least 50% of the time, often it's much higher than that, I'll run with their point of view whether I agree with it or not. Of course, I won't let them walk off cliff. But I am willing to live with a few ill-advised decisions if they learn from it. In fact, this is a great way for them to learn. They are not always right as they don't have the wisdom and experience I have. I realize and accept that I am not always right either. Most of the time they are right and it has allowed me to feel more comfortable not being involved in every decision. This has allowed me more time to work on my business instead of in it. At the same time, it has helped them think more like owners versus employees, work better as a team, back each other up, and accept the consequences of their decisions.

DEVELOP RELATIONSHIPS

These workshops allow your organization to develop respectful relationships by practicing emotional and social intelligence. By respectful I mean appreciating different points of view. The staff will not always agree because they have different points of view on the same subject. Uncle Freddie, my mentor at Sherwin Williams, called this "functional myopia." That's more than ok if you channel it correctly. Everyone looks at the world from their point of view – their paradigm. Most of the time there is not a right or wrong answer. The key to effective relationships emotional intelligence. Open up your mind and see things from others points of view. I call this "stretching the rubber band." Who wants a bunch of people who think alike? What you want is diverse points of view and people who are willing to stretch the rubber band and consider solutions from different viewpoints. This is the beauty of having a diverse management team.