

"Jonathan Courtney is a facilitation genius who designs and runs workshops for the coolest companies on the planet. This book contains his secret formula —so don't just stand there, read it!"

- JAKE KNAPP -

THE **WORKSHOPPER** PLAYBOOK

How to Become a
Problem-Solving and
Decision-Making Expert

JONATHAN COURTNEY

THE
WORKSHOPPER
PLAYBOOK

JONATHAN COURTNEY

Copyright © 2020 by Jonathan Courtney

All rights reserved. No part of this book may be reproduced or used in any manner without written permission of the copyright owner except for the use of quotations in a book review. For more information, email support@ajsmart.com

FIRST EDITION

www.workshopper.com

www.ajsmart.com

Workshopper

[work·shop·per]

noun

A problem-solving and decision-making expert that can guide a team through a structured step-by-step process that ensures **solid outcomes**

CONTENTS

ACKNOWLEDGEMENTS	9
WHY READ THIS BOOK?	11
INTRODUCTION	13
The missing piece of the puzzle	16
SECTION I: BECOMING A WORKSHOPPER	23
WHAT IS A WORKSHOPPER?	25
The essential workshop principles	27
The 4 Steps to becoming a Workshopper	29
SECTION II: THE PERFECT WORKSHOP FRAMEWORK	33
THE 4C'S FRAMEWORK	35
THE BRIEF	39
WORKSHOP SUPPLIES	41

COLLECT	43
Prep Step: Draw the Sailboat	46
Step 1: What’s Moving Us Forward?	46
Step 2: What’s Holding Us Back?	48
Step 3: Categorize Challenges and Issues	50
Collect Phase Summary	52
CHOOSE	55
Step 1: What’s Causing The Most Trouble?	57
Step 2: Prioritize The Challenges	58
Step 3: Create an Opportunity Question	59
Choose Phase Summary	61
CREATE	63
Step 1: Generate!	65
Step 2: Curate!	67
Step 3: Vote!	68
Step 4: Arrange!	70
Create Phase Summary	71
COMMIT	73
Step 1: Create the Effort/Impact Scale	75

Step 2: Add Solutions/Ideas	76
Step 3: Turn Ideas into Actions	78
Step 4: Document and Assign Tasks	80
Commit Phase Summary	80
SECTION III: YOU'RE A WORKSHOPPER	85
WELCOME TO THE WORKSHOPPER CLUB	87
WHAT TO DO NEXT	91
SPEAK TO US	93
ABOUT THE AUTHOR	95

ACKNOWLEDGEMENTS

I'm not a writer. I hate sitting down to do any task for more than a few minutes. That's why I love running Workshops! Still, this book was an absolute pleasure to write thanks to the support from the amazing AJ&Smart & Workshopper teams.

I want to give a particular mention to Laura Faint who turned my rushed, barely interesting stories in this book into something actually worth reading, and who actually writes in my voice better than I do!

I can't not mention the lovely Jake Knapp for writing Sprint in the first place and for welcoming me into the GV office back in 2017. That trip to San Francisco completely transformed my career.

I want to give a special thanks to all our fans online. Your support means I can keep running my dream company!

I also realize I couldn't have done any of this without the tireless love and support of my wife, Marina. Her patience while I build

the Workshopper movement is amazing. Thanks for putting up with my late-night rants about sticky notes!

Finally, love and thanks to all the families and partners of the AJ&Smart team, who need to travel the world and work late nights to spread the Workshopper word.

Cheers and love from Berlin,
Jonathan



WHY READ THIS BOOK?

Learning to create and run workshops completely changed the trajectory of my career. It might sound cheesy, but it also changed my outlook on life. Now I want to share the secrets and formulas I've learned over the past decade with you so you can get a feel for the power of workshops and understand what it means to become a Workshopper. Workshopping is a skill that you can apply in any company, in any role. No matter what you're doing, becoming a Workshopper will massively upgrade your skillset and value, and this book will show you exactly how to get started.

I created this book to demonstrate the incredible power of workshops but, more importantly, to show you exactly what you need to do to start leveraging them to your advantage -

Workshops will become your superpower!

I'm a pretty practical person and appreciate when people cut to the chase and tell me the important information I need to start taking action, so I've aimed to do just that with this book.

The first part of the book will introduce you to the mindset needed to really understand what it means to become a Workshopper, and the second part will go into hyper-practical mode and will start introducing you to the tools you need to put this into action today. I'll actually be teaching you one of my favorite workshops in this book and encourage you to start using it (or parts of it) right away!

My goal for this book is that you'll finish it feeling confident about **your** ability to play your part in turning away from the broken, 'busywork-fueled' mess that we call work today, and instead turn towards the new way, the Workshopper way. By the end, you should know exactly what to do next, equipped with the beginner's 'starter kit' needed to start making real change today.

INTRODUCTION

I was one of the lucky people that managed to land their dream job straight out of college. It was 2011 and I was working as a User Experience Designer at a well-respected company in Berlin. I remember my excitement at the opportunity to create innovative products that were beautiful and usable, and I was hungry to learn. Within the first six months, I had read every book, taken every course, and attended every conference I could possibly afford. Still, the biggest challenge wasn't the learning curve, **it was navigating office politics and team dynamics.**

Meetings often devolved into endless discussions that were capped by scheduling a follow-up meeting. Instead of getting clarity on a project, I was often assigned tasks that lacked purpose or a clear direction. I felt I had a lot of good ideas, but I wasn't taken seriously. Ok, fair enough, I was a junior. But even if I *had* been taken seriously, my ideas would just have gotten lost in the mess of meetings, documentation, process, and politics.

I vividly remember feeling excited and energized at the start of projects, enjoying the initial momentum, but seeing that excitement quickly turn into frustration when the momentum would inevitably halt because our team couldn't work together effectively. No matter what the project, or who was in the team, issues *always* came up.

I felt my dream job had turned into a nightmare. Over time my youthful enthusiasm faded until nine months later, tired and frustrated, I decided to leave the company.

I left that job alongside my colleague and friend, Michael – because we believed we could build something better. We started a 2-person UX Design agency called AJ&Smart. We believed that we could establish a company where endless discussions and pointless meetings would be replaced with pure productivity.

We were naïve . . .

Slowly but surely, through a lot of hard work and a bit of good old-fashioned luck, Michael and I managed to grow a steady client-base as we built our boutique design agency. Over the next five years we worked with some of the biggest brands in the world. This was equal parts amazing and frustrating. Each company we went into – whether they were a startup, a small business, or a large corporation – had the same problems, no matter where they were located. No, Silicon Valley was *not* an exception!

So, what were the problems that kept recurring?

First of all, their teams **didn't seem to know how to best start projects**. There was never any consensus about what projects or initiatives to work on; no one was able to agree on what to prioritize.

Second, **there was no clear, unified system in place for the actual running of a project** or initiative, which resulted in misalignment. Discussions about how to run a project often took up more time than actually *doing* the project.

Third, **poor communication during the project stifled creativity and progress**. Politics and hierarchy always got in the way of doing the work. The by-product of this was a lot of wasteful, frustrating, open discussion that went nowhere.

We were being paid a lot of money to either consult or be embedded full-time in companies that didn't know how to use us because so much of the time was spent on busy work. Sounds a lot like my first job, right?

Years after my first experience being disheartened by the corporate working world I was, yet again, feeling zapped of creativity and completely frustrated by not being able to make real progress in my work. My feeling that almost 90% of what happens in companies is actually just busywork was stronger than ever. Even the best companies were spending at least 50% of their time and capacity on this busywork. In most companies, people are doing what they're actually *paid* to do 10% of the

time and 90% of the time they are responding to the messiness of poor teamwork, bad planning, and strained team dynamics.

By 2016, Michael and I were sick of it. We learned everything we could to improve the product process, move past company politics, and facilitate alignment so that we could do our work and the teams could deliver. Yet, no matter what we did it still seemed to end in open, unstructured, endless conversations that built up a lot of frustration. Something was missing – we just had to figure out what that something was.

The Missing Piece of The Puzzle

Sometimes there are moments in life that completely change our course of direction. Moments that, at the time, feel insignificant but that actually end up changing everything by shaping and defining who we are and how we operate. I had one of these moments when I was on a flight to meet with one of our clients in March 2016. I vividly remember feeling anxious about this client meeting. We had been involved with the client for months and we'd been going back and forth constantly where they'd tell us internal priorities had changed and therefore our work had to change direction. They'd asked me to fly there for an in-person meeting, and I had no idea what to expect – would they tell me to start from scratch and toss out all my work from the last months? Would they tell me priorities had changed *again* and they no longer wanted to work together? Would they tell me

they hated working with me?! I had no idea. I remember getting ready to leave for the airport and honestly having regrets about starting my own agency. The enthusiasm and drive I had to change the way people worked had well and truly been drained out of me. I felt powerless.

I decided that after this client visit I'd spend some time re-evaluating things and maybe even close down my agency and go back to the corporate world again (*if you can't beat them then join them*, I thought to myself). I reluctantly packed my bag and called a cab to the airport, when I realized I hadn't packed something to read on the plane. I picked up two books that had been lying around on my desk for months – one was fiction and one was non-fiction. At the start of my career I had been a total learning-junkie and would normally have been more than happy spending the whole flight in learning mode, but based on my frustrated mental state at the time, I was tempted to sway towards the escapism of a good fiction novel to take my mind off things. Now we're getting to the insignificant-yet-incredibly-significant moment that really changed everything. I went to pack both books in my bag, only to realize the fiction book was too bulky to fit in my carry-on. At that very moment I heard my taxi outside and, in a flurry, I threw the non-fiction in my bag and dashed out the door.

Yielding to my boredom on the plane, I got out the book and forced myself to start reading. That book was *Sprint: How to Solve Big Problems and Test New Ideas in Just Five Days*, by Jake Knapp. What started as me reluctantly beginning a new

non-fiction book (when I *really* wanted to indulge in some escapism) ended in me reading a book that would ultimately change everything about my business, and my life.

I read that entire book in one sitting. I devoured it. By the time the plane landed my mindset had completely shifted, my mind was blown, and I'd had a major "aha" moment, realizing what the problem had been all along.

The problem was that *we* (me, my clients, my previous employer, and virtually every company I'd ever come into contact with) didn't have a recipe for starting projects, structuring discussions, and committing to a plan of action to get meaningful work done.

This might sound like a small thing, but it's an absolutely essential component in effective teamwork and in making progress without all the usual blockers. It's what holds everything together and ensures things run smoothly and, to my surprise, virtually *no one* I had come into contact with was talking about this. No one had a recipe.

Up to that point, myself and my co-founder had lots of random individual exercises, systems, and toolkits we'd try out with clients, but there were no systems for making big decisions, no systems for getting people to collaborate in a way that doesn't make everyone want to kill each other.

The moment I had this realization I felt my energy surge and, for the first time in what felt like years, I was excited about

work again! When I arrived back home to Berlin, I couldn't wait to get to work and see if my hypothesis was true: that this was the solution to all the problems I had been seeing and experiencing throughout my entire working life.

My co-founder and I decided that we'd change the next scheduled client kickoff workshop to a Design Sprint. Although it took some convincing to get the client to agree to a different arrangement, one that involved them working with us very collaboratively at our office for 4 days, the Design Sprint went off without a hitch. Taking turns facilitating, Michael and I followed the recipe step by step and by the end of the week the entire team was aligned on the direction they wanted to take – something they said had previously been impossible to achieve. They were shocked.

I was euphoric. Once this project wrapped up, we decided to use a Design Sprint for every client engagement going forward.

Everything had changed. **I felt I was equipped with a 'secret weapon' that enabled me and my clients to do our best work.**

The work that used to feel like pulling teeth (endless conversations, unhappy clients, no progress, projects dragging for months and months) was now enjoyable, exciting, and stress-free. We were delivering successful outcomes for our clients in record time, and they couldn't have been happier. I finally started to feel like I had created the business I set out to create, and little by little I fell back in love with work.

Over the next few months and years we became known as *the* “Design Sprint Agency.” We were booked up back-to-back with Design Sprint engagements for a whole year in advance, and after a project finished the client never failed to ask us the one question we *never* got asked in our pre-Design Sprint days, “*when can we work together again?*”. Our struggling boutique agency had transformed into a Design Sprint powerhouse that was gaining attention across the globe.

What people didn’t realize however was that, behind the scenes, we were designing custom workshops for our clients that didn’t have time to run Sprints. We were tinkering away and creating workshops, recipes, that could **replace all scenarios where open discussions, or team collaborations**, were happening. We were on a mission to eradicate ‘busywork’, and creating workshops, or recipes, was the solution.

Since March 2016, we have been running workshops for almost everything we do that involves a team coming together and making big decisions, and that’s the next big thing that completely changed everything for me and for my business.

Learning the Design Sprint was *huge* for me and, as I said, it completely changed my life by showing me there was a new, and much better, way to work. What the Design Sprint did for me beyond this was open my eyes to the world of workshops.

It showed me a fantastic *recipe* (workshop exercises strung together) and from there I realized that I too could create my

own workshop exercises, and recipes, and even a recipe to create recipes (the mother of all recipes that I'll teach you in this book!). Having this 'recipe-to-create-recipes' (we'll call it a framework to make things easy!) means you can take any exciting concept/book/idea out there, regardless of your niche or industry, and turn it into a workshop (a good example of this is where we took the book *Good Strategy, Bad Strategy* and turned it into a strategy workshop using our framework!). The possibilities are endless and all you need is the Workshopper mindset, and the right toolkit.

SECTION I

BECOMING A WORKSHOPPER

WHAT IS A WORKSHOPPER?

While the Design Sprint process was extremely powerful, I recognized there was one critical factor in the success or failure of a Sprint: the facilitator. Without a facilitator, the Design Sprint is like an orchestra without a conductor, like a recipe for a complicated meal, without a chef to cook it. The facilitator's role in a Design Sprint is to be the guide – to be the person to run teams through the exercises in the Design Sprint, and take all the weight of the small decisions off their shoulders. Only then could they single-mindedly focus on solutions.

Over time, I realized where I could add the most value was in assuming this role of the facilitator, and over the next few years my role changed from being a hands-on designer to a workshop facilitator. This enabled me to jump into almost any project, for any company, on any topic and with very little preparation. I didn't have to understand how a specific medical device worked to facilitate a group of people in making decisions about the product. I didn't have to spend *months* doing user research to understand how to help a team make a new social media app.

This was another huge ‘aha’ moment for me. In my previous work, I needed to spend months researching the product and company I’d be working with, fully immersing myself in their industry; it was all-consuming. Being a facilitator meant I didn’t need to be a product or industry expert – I just needed to be good at facilitation; something that transfers to any industry, company, or project.

At AJ&Smart, we began calling this role the “Workshopper.” This coveted title describes someone who can **create and facilitate any type of workshop**. Our in-house team of Workshoppers can work with just about any client who has a challenge, design a custom workshop for them, and walk them through it.

Really, the singular goal of a Workshopper is to unlock people’s superpowers. When people don’t have to think about *how* to do something, which process to use, how team dynamics *should* work, and how *not* to step on someone’s toes, they can do the work they were meant to do (and are paid to do). Being a Workshopper means you can come into a company and turn a dysfunctional team into a powerhouse. Being a Workshopper is one of the most satisfying jobs you can have. Seeing the expression on people’s faces when they run through workshop exercises and make more progress in hours than they’ve previously made in months, or *years*, is both unforgettable and irresistible.

Over the past 8 years, I've run hundreds of workshops for thousands of people worldwide, and I never get bored of it. Being a Workshopper is a calling. Workshopppers help others to unlock their superpowers. They change lives. And the best part? **Anyone can be a Workshopper!**

How exactly? Keep reading!

The Essential Workshop Principles

There are a few essential, tried-and-tested, principles that make any workshop a success. These principles guide us when we're designing a workshop. First, we act on the principle of **"together, alone."** Philosophically speaking, even though a team of people are sitting together at the same table, they're essentially working individually. They're not discussing or brainstorming steps. They're working towards a common goal, but they're not speaking to each other and negotiating how best to move forward.

Although this might seem counterintuitive, it's one of the best ways to avoid some of the major issues that pop up in team dynamics and that create inefficiencies. Often, what happens in open discussions is, the person with the most energy, or the one who has the most decision-making authority ends up influencing everybody else. The group's tendency is to adopt and run with that person's opinion, or, worst case scenario, not go with any opinion at all. When you work "together, alone," you're not

being influenced by your colleagues. In turn, this leaves you with the time and space to work through a solution.

Second, **everything is anonymous**. Similar to the “together, alone” principle, this has the advantage of removing any bias team members might have towards a piece of the solution and it allows participants to be more adventurous. How this works in practice is, for example, after a “together, alone” sketching exercise, each participant will submit their sketches anonymously, and the team will vote on these without knowing who did what.

Third, **creativity is nice to have but it is not essential**. A lot of workshops, especially in the design thinking space, talk about the merits of creativity. This turns people off who do not consider themselves to be designers or artists, and these people happen to be most of our clients. That’s why our workshops are designed in such a way that participants do not need to *be* creative to produce creative, interesting, and innovative solutions. The workshop effectively replaces the *need* to be creative, by providing an environment and step-by-step system that allows people to experiment with ideas, while being guided every step of the way by the Workshopper.

The 4 Steps to Becoming a Workshopper

Aside from understanding these principles, there are really only 4 keys you need to become a successful Workshopper:

1. Mindset and theory

The understanding of the Workshopper mindset combined with the theory behind how to create your own workshops.

2. Facilitation skills

The ability to lead any team of any size through a workshop confidently. This also requires the skill of improvisation and team dynamics/energy management.

3. The Toolkit

Having dozens of exercises to choose from with the understanding of how to combine them is a killer advantage and allows you to create even the most complex workshops.

4. Battle-tested workshop recipes

Sometimes there's no point reinventing the wheel. There are already some amazing workshop recipes out there (like the Design Sprint). Having a few flexible recipes up your sleeve means you don't always need to design

custom workshops – but you can also use these recipes as starting points.

The focus of this book will be on showing you how to master Step 1, but you will learn a little of each step throughout the book and in some extra bonuses I've provided toward the end. Well, let's jump right into helping you with Step 1!

SECTION II

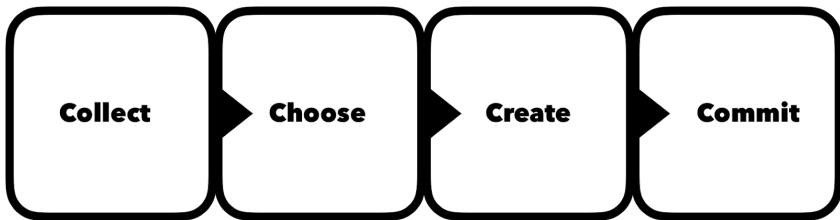
THE PERFECT WORKSHOP FRAMEWORK

THE 4C'S FRAMEWORK

It took me years to realize that there was a clear pattern to all the workshops I was running. It didn't matter whether the focus was Innovation, Brainstorming, Design Thinking, Design Sprint, Strategy or something else, it all came down to what I now call the **4C's Framework**. It's a framework that, once I tapped into it, was like rocket fuel for my Workshopper capabilities, and this book is one of the first and only places I teach it.

The 4C's Framework can be used to design **any type of workshop** regardless of topic, length or outcome.

Let's take a look at the 4C's Framework, then I'll break down how it actually works. Later in this book I'll show you how the 4C's was used to create one of my most well-known and successful workshops!



1. **Collect**

Every workshop needs to start with a phase of information collection. This can be where a team comes together to collect challenges, ideas, data, inspiration, or anything that could come up in an open conversation.

The data collected then needs to be visualized for all participants to see. The Collect phase is where the scope of work for a project or challenge is defined.

2. **Choose**

Once enough content and data has been collected, it's time to *Choose* what to focus on and what to ignore. It's important that the entire team really knows exactly what they're working on so they don't create solutions for the wrong or irrelevant challenges. The Choose phase of the workshop gives clear direction and acts as a foundation for everything else.

3. Create

Once the team has collected and shared the relevant information and everybody's on the same page with the "scope of work", it's time for team members to *Create* solutions. Solutions don't need to be final, or even well thought-out – at this point it's more about creating multiple potential solutions.

4. Commit

A workshop is useless without actionable takeaways, unless the goal was purely about inspiring the team. In the commit phase, the Workshopper helps participants to commit to a small number of solutions that will be executed on and discard/de-prioritize others, while also helping the team define the next steps

Some key terminology I want to make clear here is this:

- **Workshop:** A combination of exercises that work together within a framework
- **Exercise:** An individual exercise that can be combined with others to make a workshop

In the next chapters we'll run through each of these phases using a fake brief. This will allow you to see a workshop being practically designed using the 4C's Framework.

THE BRIEF

I want to illustrate this framework as tangibly as possible, and I think seeing it in action is the best way to do that. So for the next few chapters I'm going to take on a fake brief from a pretend client, and build a custom workshop for them using the 4C's Framework!

So here goes . . .

I've been asked to design and run a 1.5 hour problem-solving workshop for a marketing team at a company called BigMarketing (I know, great name right?). I was booked by the manager of the marketing team, she's been noticing that general team productivity and happiness seems to be on the decline, but every time she brings the team together to solve their issues, the meetings devolve into a frustrating open-ended discussion with no resolution.

Here's a quick summary of the brief:

Summary: Run a 1.5 hour workshop that helps me solve some of my team's biggest issues

Amount of participants: 7

Location: BigMarketing HQ

Side note: Although we're focusing on employee productivity and happiness here, this brief could really be anything. I could have been called to help a team:

- Brainstorm new product ideas
- Come up with a company vision and values
- Design their new homepage
- Create a compelling Facebook ad campaign
- Get to know each other better
- Redesign their office space
- Fix a product feature that nobody can agree on

I could go on forever! With the 4C's Framework at your disposal you can design **any** type of workshop for **any** type of problem.

With all that in mind, let's get back to focusing on our brief and let me show you exactly how I would design this workshop.

WORKSHOP SUPPLIES

I'm a stationery nerd, so buying workshop supplies is one of my deep passions. That being said, it's best to keep it simple. Here's what's inside the standard AJ&Smart workshop supply case which we bring with us to every client project:

- Square Sticky Notes (2 different colours, preferably recycled paper)
- Rectangular Sticky Notes (Yellow, preferably recycled paper)
- 1.5 large black markers per participant (Sharpies or Neuland markers work great). Why 1.5? It's better to bring more than you need!
- 2 different colours of sticky dots for voting
- One empty sketching notebook per person
- A block of plain printer paper

- Adhesive Whiteboard Roll (we the use Leitz brand "Magic Paper")
- Whiteboard markers
- A Time Timer clock

That will pretty much cover all your workshop needs, even if your client or company doesn't have the perfect space!

Want to see the exact brands we use? **Go to workshopper.com/supplies for our full list.**

COLLECT

Imagine how a normal meeting would start – if our client decided to just hold a 1-hour meeting to “solve some of the team’s biggest issues”.

Well, I don’t have to imagine, because I’ve been in countless frustrating, pointless meetings, and I’m sure you have too.

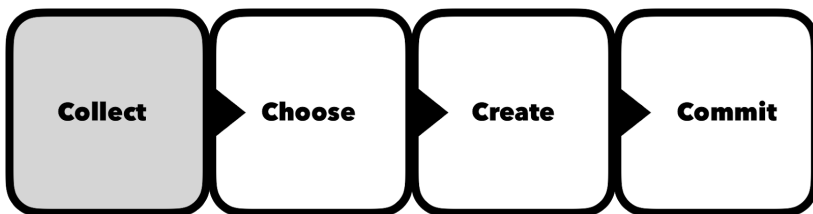
Without a framework, without a guide, problem-solving meetings usually follow the same pattern:

- Participants start to talk about their issues or challenges.
- The loudest/most extroverted ones speak the most (or those with the highest position on the team).
- The less extroverted people try to chip in but are often ignored because the louder people are more persistent.
- Multiple participants are talking about different issues and topics but there's no way to really get a grip on how many issues there really are.

- Solutions are talked about at random, before the team really knows what the core issues are.
- The meeting ends with the need for another meeting rather than actionable solutions.
- The members of the team lose trust in each other and in the concept of coming together and solving problems.
- People start to hate meetings, and maybe even each other.

But it doesn't have to be this way. With a solid framework and a willing Workshopper, pointless meetings can turn into highly productive workshops!

So let's instead kick this meeting off with the first phase of the 4C's Framework: Collect.



The goal of the Collect phase is to collect challenges and data from a team, then visualize it in a way that's easy for everyone to understand. This allows everyone on the team to be on the same page before deciding exactly what to work on, without any pointless discussion.

So let's snap back into the room where I've been asked to run a workshop for 7 team members who've got some not-so-clear issues to solve. Remember the brief I got was fairly vague: "solve some of the team's biggest issues".

My first task here is to get an idea of what sorts of problems and challenges we should actually focus on and solve. So my goal is really just to Collect as much relevant information as possible.

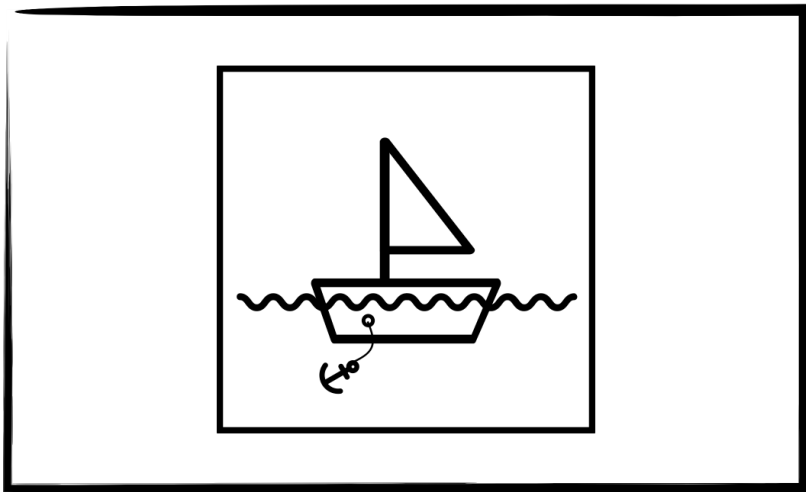
To do this, I could pull from dozens of exercises from my Workshopper Toolkit labelled under "Collect" (I'll talk more about this toolkit at the end of the book). These exercises are not from just one source, but broken out of other workshops from the worlds of Design Thinking, Agile, Design Sprints, Scrum, Business Model Validation and many more. The exercise I'm going to use in this example is a great multi-purpose Collect exercise called the "Sailboat". Here's exactly how it works:

- **Exercise name:** Sailboat
- **Exercise outcome:** A categorized but non-prioritized list of challenges and issues
- **Time:** approx 30 minutes
- **Materials needed:** A whiteboard or a flipchart + A block of square sticky notes per participant + 1 sharpie per participant + Voting dots

Prep Step: Draw the Sailboat

This exercise starts with me as the Workshopper drawing a simple sailboat on either a whiteboard or adhesive paper. A flipchart will also do just fine. The drawing should also show the water line, an anchor and of course, a sail.

Here's how it should look:



Step 1: What's Moving Us Forward? (10 minutes)

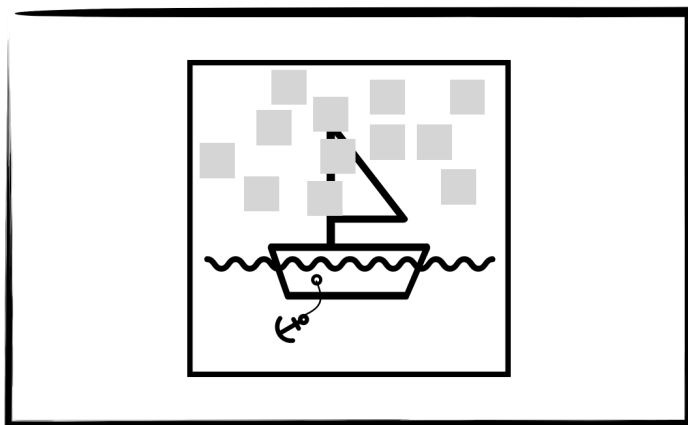
The sailboat is a nice metaphor to help us, as a team, figure out what's moving us forward (the wind in the sail) and what's holding us back (the anchor) when it comes to the challenge presented in the beginning of the workshop. Remember, in this case, the problem or challenge in the workshop is relatively

vague – but that's ok! You can view Step 1 as a warmup, as a nice way to kick off the Collect phase before focusing on the challenges.

1. Give each team member a block of square sticky notes and a sharpie.
2. Ask them to silently write 3 things that they feel are moving the team forward when it comes to the challenge we're working on. Since our issue here is broad, relating to general issues built up in the team, you as a facilitator would say: "When it comes to working in this team, what's moving us forward? What positive things are happening?" Give the participants 3 minutes total to write.
3. They should write simple statements, one per sticky note. Here are some examples of what the team members might write:

Office is beautiful	Good Education Budgets	Talented Team-mates!
Amazing Brand	Cool Clients	Our tech is top class

4. Once the time is up, you as the facilitator will ask each participant, one by one, to stick their sticky notes to the top part of the Sailboat drawing and read them aloud to the group. The goal here is not for each person to explain each sticky in detail, simply read what's on the sticky note. Give each person 1 minute to stick up and read all their sticky notes.
5. Once everyone is finished presenting, this part of the exercise is complete and the Sailboat will look something like this:



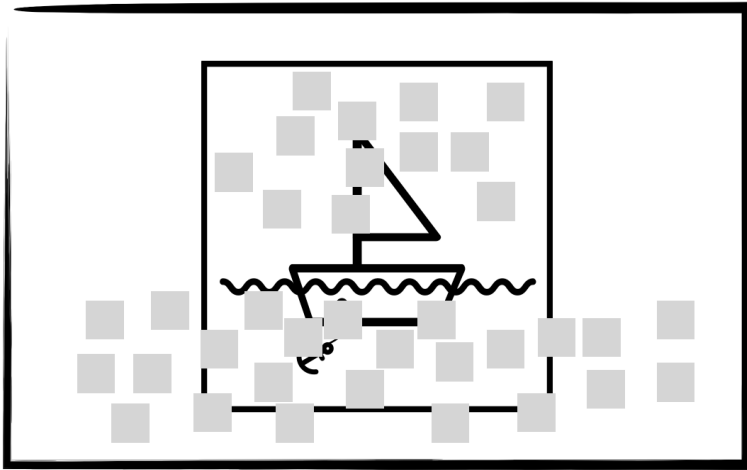
Step 2: What's Holding Us Back? (10 minutes)

Now we're moving onto the more negative part of the exercise and the rules for presenting change here, too. In fact, there will

be no presenting at all! This is a completely anonymous round which will allow people to be more honest.

1. Ask the team to write as many sticky notes as they can in 8 minutes on "What's holding us back". In this case, "When it comes to working in this team, what's holding us back? What's hurting us? What's slowing us down?". Clearly state to the participants that their stickies **will be anonymous this time**, so they should write whatever they like.
2. Once the 8 minutes are up, ask everybody to stick their stickies to the bottom part of the Sailboat. They should do this fast and randomly without discussion. If there isn't enough space underneath the sailboat, simply have them spread them out.
3. As quickly as you can, remove duplicates from the board. Just you, no-one else, and no discussion.

Once Step 2 is complete, you now have a visual overview of the challenges that the team is experiencing.



Step 3: Categorize Challenges and Issues (10 minutes)

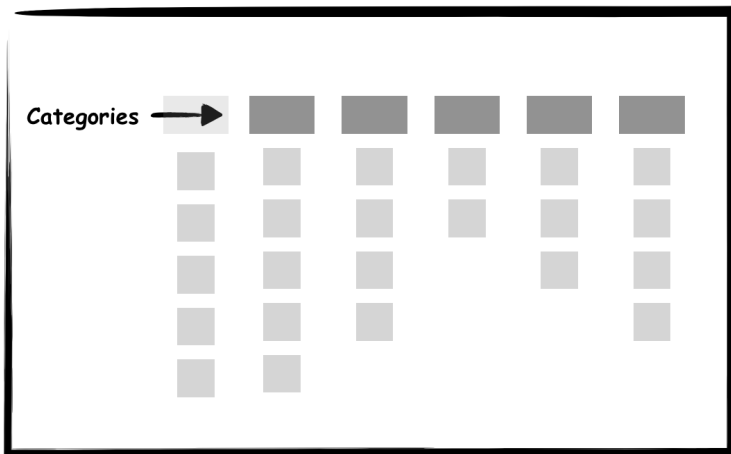
As we're still in the Collect phase of our workshop, we will not yet be choosing what to work on. That's, you guessed it, for the Choose phase. Right now all we're trying to do is collect challenges and give the team a clean, visual overview of what could be worked on. The final step here then is really just to tidy things up. You could skip this step if you're short on time, but it is a great way to give everyone a super clear overview of where most the challenges lie.

1. Grab a block of rectangular sticky notes and a sharpie.
2. Skim through the challenges that are under the Sailboat and choose one category that you think a few of those challenges could fit under. For example, in this case, it

looks like "Office Environment" is a category. So in this case, simply write "Office Environment" on the sticky note and put that sticky note on a new, empty surface close to the Sailboat.

3. Now spend a few minutes asking your team to call out what other categories they see. Write these as they call them out and start creating a horizontal list of categories. (These categories don't need to be perfect and don't need to be super specific.)
4. Once you feel there are enough categories, give the entire team 5 minutes to create vertical stacks of challenges underneath each category until the challenges are arranged neatly like you see in the image below.

Remind your team: This is not a prioritized list!



Once the 5 minutes are up, you've got yourself a clean, easy to scan, categorized list of challenges. You've collected everything you need to move onto the next step which will involve choosing which challenges to actually work on. Have everyone in your team give each other a high-five, maybe take a short break, then move onto the next phase of the workshop: Choose.

Collect Phase Summary:

- The Collect Phase is all about collecting data, challenges and inspiration from a team.
- The exercise we used here was solely focused on collecting challenges the team is facing, but there are many other exercises you could have used to collect in this scenario, and there are lots of exercises that could have been used in the Collect phase if the brief or challenge was something different
- The Collect phase is about quantity over quality – we want to generate a large volume of information here. You might need to remind your participants of this so they don't get stuck!
- The end goal of the Collect phase is to visualize the information collected in a way that's easy for the team to scan and understand.

- Don't worry about prioritizing at this phase – encourage your participants to trust the process, prioritization will come!

CHOOSE

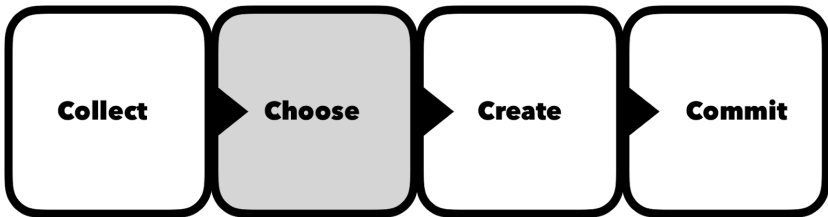
One of the most difficult things for a group of people to do is to choose what to do and what not to do. We've all sat around with a group of friends feeling growing frustration as a discussion of where to eat or where to drink drags on . . . The problem is, without a clear framework for making choices, endless conversation will *always* happen.

I see this happening in my company even today! Yes, we're all experienced Workshoppers, but occasionally a pointless discussion breaks out and we end up getting stuck in a loop just as our clients do. Luckily for us, there's always someone who'll eventually call us out and break out an exercise - but what still surprises me is that most companies don't even know things like this exist.

Alright, back to the workshop!

Now that you've collected the team's challenges and made them visual and easy to scan, it's time to help them choose what to work on, which problems to solve. And that's really the simple

goal of the Choose phase of a workshop: **To help a team choose what to work on, what to focus on and what to ignore for now.**



For the Choose phase of this workshop, we're going to use 2 exercises: Dot Voting and Opportunity Statement Creation. You'll see how these work as I walk you through them. Let me just remind you of our brief for this workshop before we move on:

Summary: Run a 1.5 hour workshop that helps me solve some of my team's biggest issues

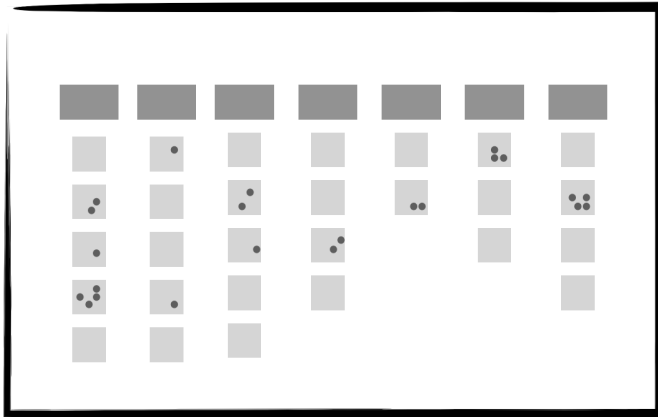
- **Exercise name:** Dot Voting
- **Exercise outcome:** A first pass, prioritized list of challenges or ideas
- **Time:** approx 10 mins
- **Materials needed:** 8 voting dots per person

Step 1: What's Causing The Most Trouble? (8 Minutes)

This is a relatively simple exercise but you can use it in almost any workshop. The idea here is to give participants time to consider which challenges they would like to work on *without* them having to discuss with each other. This is another silent, anonymous exercise. The team is working toward a shared goal, but working alone to achieve it.

1. Give each participant 8 voting dots
2. Set the timer to 8 minutes and tell them to vote on what they consider to be the biggest issues holding the team back when it comes to the problem we're tackling. They are voting on the challenges, NOT on the categories. Tell them to focus on their own personal opinion of what the biggest issues are. Remind them of the voting rules.
3. Some voting rules: They can vote on their own stickies, they can put as many votes on one sticky as they like, they need to use all their votes. And remember: NO TALKING!

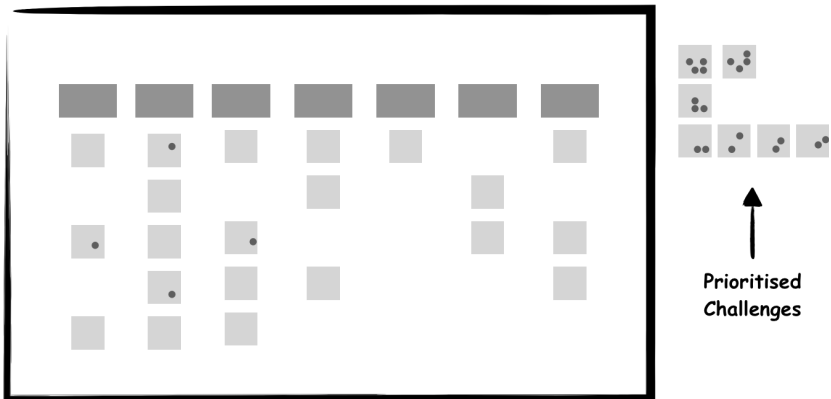
Once voting is complete, your categorized wall of challenges will look something like this:



Step 2: Prioritize The Challenges (2 Minutes)

Once the 8 minutes are up, tell everybody to sit down and you create a vertical stack of the stickies in order of most votes to least, ignore anything with 1 vote or less.

It should look something like this in the end:



And now for something that people find painful – but it's your job as the Workshopper to ease them through this. Everything that has one or no votes (all the stickies that aren't in the prioritized challenges list) get removed and forgotten about. The goal here is to ruthlessly prioritize and having too many ideas to bring forward will complicate things. Plus, anything that falls into this category that actually *is* important, but didn't get prioritized this time round, will bubble up again in a future workshop.

Now let's move onto the second exercise of this Choose phase: Opportunity Question Creation

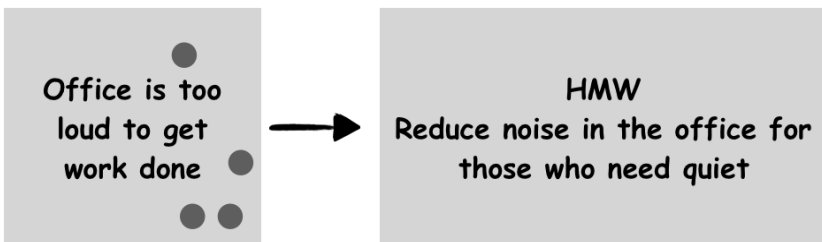
- **Exercise name:** Opportunity Question Creation
- **Exercise outcome:** Turning issues, problems and challenges into actionable, opportunistic questions.
- **Time:** approx 3 mins per challenge
- **Materials needed:** 8 voting dots per person

Step 3: Create an Opportunity Question (5 minutes)

At this point in the Choose phase we're very easily able to see what the team really believes the most pressing issues are. But seeing the most pressing issues doesn't necessarily mean we're ready to create solutions for them just yet. First we need to

re-write these top-voted challenges as Opportunity Questions (or “How Might We’s”).

1. Take the top voted sticky from the prioritized list. If there are more than one on the top level, simply start with the top left one. **This is about progress, not perfection.**
2. Let's say this sticky note says: "The office is too loud to get work done".
3. Now, "The office is too loud to get work done" is not really something we can work on, it's not an opportunity, it's just a negative statement. What you're going to do now is turn this into a positive, opportunistic "How Might We" question. Instead of "The office is too loud to get work done", you're going to change it to "How Might We reduce noise in the office for those who need quiet". That's our challenge. That's what the team should be working on. We've found it!



So this is the challenge the team is going to work on. But what about all the other top voted issues? Well, that all depends on

how much time you have for the workshop. Since we only have one hour, we're only going to focus on one challenge, but if we had more time, we could choose multiple.

The great thing here is that we now have a backlog of Opportunity Questions, so that next time we work with this team we can skip the Collect and Choose phases!

Once you've gotten to this point in the workshop, you've now helped the team to "Choose" what to work on and what to ignore (for now at least). This is where it gets a little more fun for the team: it's time to create!

Choose Phase Summary:

- The Choose phase is all about prioritization and selecting a challenge: choosing what to focus on, and what not to focus on.
- While the Collect phase is about quantity and volume, the Choose phase is about narrowing down and refining, so no new ideas or concepts should be generated or introduced here.
- The second part of the exercise, creating the opportunity question, is a reframing exercise. We're turning the problems into actionable opportunities we can work on.

- The Choose phase is often the part of the workshop where participants (especially the managers or louder people in the room) will want to start talking and debating about what should be focused on and ignored – it's your job as the Workshopper to guide the participants back to the workshop principles of "together, alone".
- As with all the phases, there are many workshop exercises that could have been used here, but this one suits the overall brief well.

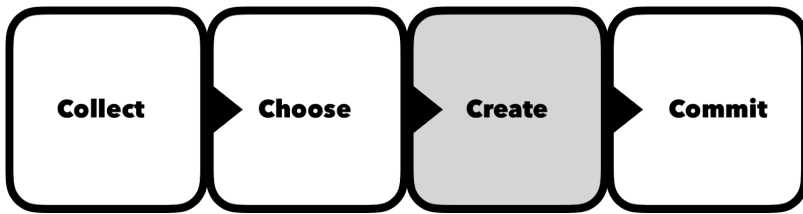
CREATE

One of the biggest myths of creativity is that only designers and “creatives” can do it. As a creative who’s worked in the design industry for over a decade, I can tell you it’s absolutely not true.

Sure, when there’s no Framework for creating solutions, that’s when the creatives thrive. But in the last 4-5 years I’ve seen workshops democratize the creative space in ways I never thought imaginable.

Some of the best solutions, concepts and ideas I’ve seen in the last 10 years have not come from designers but from some of the most unlikely members of teams. The marketer, the sales intern, the IT admin . . . This is one of the main reasons that many creatives hate the idea of “non-creatives” learning how to run workshops. If non-creatives learn the secrets of being creative . . . what will their job be?

Enough of my ramblings, let’s jump right into the Create phase!



The goal of the Create phase of a workshop is to generate lots of solutions to the prioritized problem. This is where the team gets to flex their solution-producing muscles! At this point in a workshop, the team has collected and shared the relevant information and everybody's on the same page with the "scope of work". It's now time for team members to *Create* solutions. Solutions don't need to be final, or even well thought-out – at this point it's more about creating a mass of solutions.

First, a quick reminder of our brief, and the "Opportunity Question" we'll be focusing on:

Summary: Run a 1.5 hour workshop that helps me solve some of my team's biggest issues

Opportunity Question: "How Might We reduce noise in the office for those who need quiet".

To produce solutions (or answers) for this Opportunity Question we're going to use an exercise called 10 for 10. This exercise is going to combine a lot of the ideas you've seen in the previous steps, including working "together, alone", voting anonymously, and creating a prioritized list. You'll notice that, even though the focus of this phase of the workshop is to Create, we will still

need to steal some techniques from the previous phases to narrow down our solutions.

- **Exercise name:** 10 for 10
- **Exercise outcome:** A prioritized list of solutions and ideas for an Opportunity Question
- **Time:** 10 mins
- **Materials needed:** A block of Square Sticky Notes per person (any colour) + A sharpie per person + Voting Dots (any colour)

Step 1: Generate! (5 minutes)

This step is all about Idea Generation and nothing else. It's not about good ideas, it's about having a lot of ideas. Yes, it's about Quantity **NOT** Quality! It's important to repeat that to your team members as they go through this section.

1. Give each team member a block of sticky notes and a sharpie.
2. Tell each member to write as many ideas as they possibly can for the HMW challenge. **One idea per sticky note and with legible handwriting.** Tell them that their ideas are going to be completely anonymous, so they shouldn't feel worried about writing bad ideas. They must write a minimum of 15 ideas but up to 20 is

preferable. That might seem like a lot but remember
QUANTITY NOT QUALITY.

3. Set the timer to 5 minutes and let everybody write ideas in silence.
4. BONUS facilitation tip: when you see any members getting stuck (look for people stopping writing and looking like they're thinking too much!) encourage them to keep on writing even if they don't have any new ideas – something will come eventually!

As the silence tends to cause discomfort for some participants who are used to talking, I like to play some music in the background as ideas are being generated. We've created a playlist on [Spotify](#) that's perfect for these moments, just search for "AJ&Smart Workshop".

Once the 5 minutes are up, tell everyone to stop what they are doing.

Let's take a look at some of the things participants might have written:

Sound Proofing

**Noise cancelling
headphones**

Bigger office

More quiet rooms

No talk days

**Sales people get
phone booths**

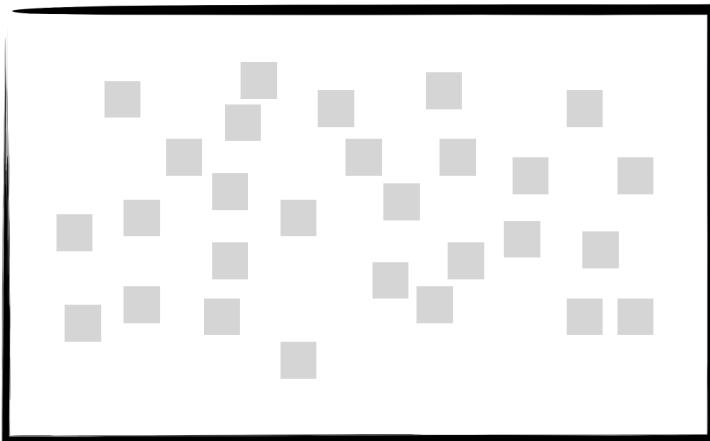
Step 2: Curate! (1 minute)

Each team member should now have a juicy stack of ideas in front of them, since we went for quantity over quality, at least 50% of these ideas won't even be usable. The next step will be the first pass at finding the most promising ideas. Here are the next steps:

1. Ask each member to choose their favorite 10 ideas from their stack of ideas.
2. Each member should now discard all their non-chosen ideas . . . as in, throw them out!
3. Once each member has chosen their 10, they should stick them up on a wall/whiteboard/whatever surface is

available. Everyone sticks their sticky notes to the same surface at random, do not try to group them – in fact, mix them up as much as possible. To be clear: everyone's favorite 10 ideas will be mixed together randomly on the same surface.

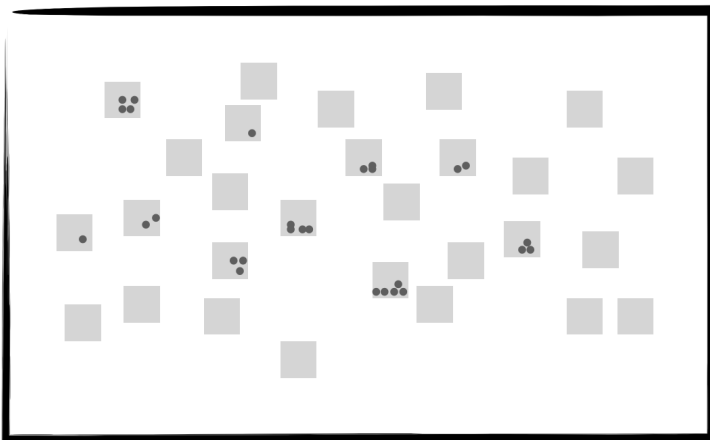
4. The participants should NOT group or arrange the sticky notes. Just stick 'em up!



Step 3: Vote! (3 minutes)

Now let's try to figure out which ideas the team thinks are the most promising. In a normal brainstorming process this would be a circular discussion with no end-point. In 10 for 10 it's just part of the process.

1. As the facilitator, remove duplicates from the surface.
No discussion required, just remove them.
2. Give each team member a strip of 10 voting dots.
3. Tell them to silently vote on the ideas they think are the most promising, reminding them of the HMW challenge.
Voting rules: Participants can put as many dots as they like on one idea. They can vote on their own ideas. They cannot ask for further explanation of an idea – if it doesn't make sense, skip it.
4. Participants must also use all their 10 dots in the 3 minutes, so tell them to go with their gut feeling rather than scrutinizing every idea.



It's important to point out that this voting process is NOT about accuracy. Of course, there is a bias to put your dots where other dots are already. The point here is to force people to actually

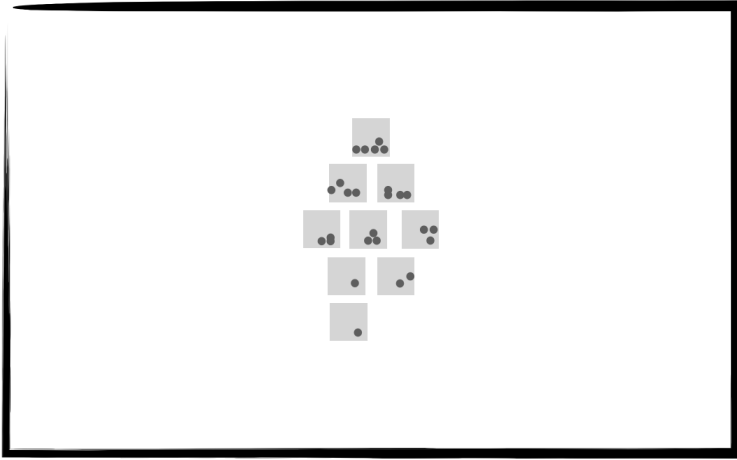
read the ideas by having them focus on voting. The voting also gives us a loose idea of which ideas the team members like the best. It's not scientific, but it reduces the need for conversation.

Step 4: Arrange! (1 minute)

The final part of 10 for 10 simply about visualising the results of the voting.

1. Remove all sticky notes with zero votes. Throw them out.
2. Arrange the remaining stickies vertically in order of votes (most votes on the top, least on the bottom).
3. A maximum of 10 ideas can remain at the end, so if there are more than 10 ideas, start removing them from the bottom.

What you now have visualized in front of you is 10 (or less if you're lucky!) solutions that your team thinks have a good chance of answering the opportunity question set at the beginning of the exercise.



You're now at the point where you're going to need to decide which of these solutions the team will commit to testing.

Create Phase Summary:

- The goal of the Create phase of a workshop is to generate lots of solutions to the prioritized problem.
- Although there are many exercises that could be used in the Create phase, it's good to use something that resembles the structure we used in this example: first mass idea generation, then a prioritization step.

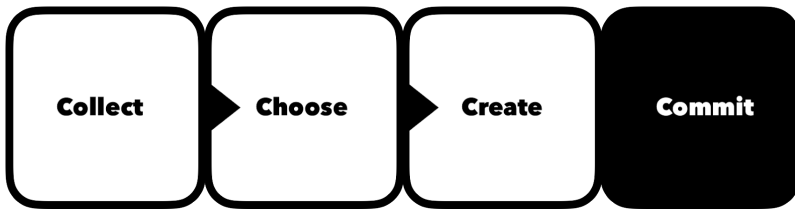
- By the end of the Create phase you want to have a handful of prioritized solutions to take into the next phase: the Commit phase.

COMMIT

In one of my favorite books *Anything You Want*, author Derek Sivers writes that “Ideas are just a multiplier of execution . . . Ideas are worth nothing unless they’re executed.”

Companies don’t have a problem coming up with good ideas, no, companies have plenty of ideas! The problem is that they can’t choose which ones to commit to and execute and which ones to ignore. They don’t have systems for committing to ideas and really seeing them through, they often try to do every idea at once and never do any of them well.

The Commit phase of the 4C’s Framework is built to solve that exact issue. Sure, we can be happy with ourselves that we’ve got a list of interesting and potentially great solutions in front of us. But unless we can commit actually executing a few of these solutions, they were pointless to come up with in the first place.



We've gone from a broad set of issues and challenges to a point of focus. We then created and curated multiple possible solutions to help us solve our focus challenge, now we need to wrap things up and commit to a plan of action. Welcome to the final step of the workshop: Commit.

The goal of the Commit phase is to take our prioritized solutions and create a plan of action for actually making it happen.

To figure out exactly which solution or solutions are worth testing and executing, we're going to run an exercise called Action Board.

Action Board takes an extremely powerful decision-making tool: The Effort/Impact Matrix and combines it with a simple system for creating actionable tasks. It's likely that you'll have seen the Effort/Impact Matrix during your time at work as it's a super common tool used in management consulting and agile projects. It's a very simple and effective tool that you should definitely be aware of.

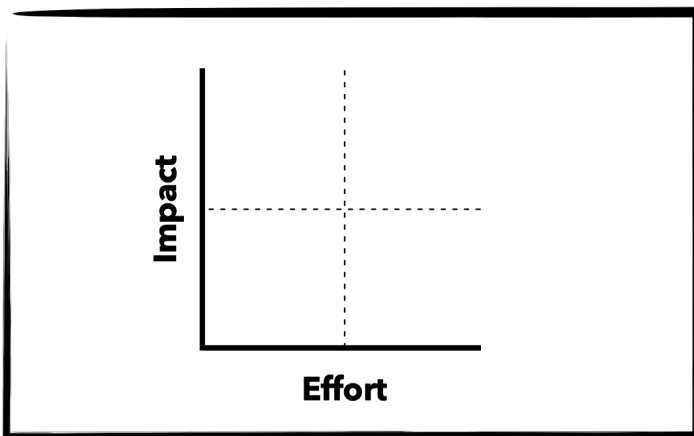
Before you start an Action Board session, you must have some ideas or solutions to bring to the session. These ideas/solutions

may have come from something like 10 for 10 or a similar Idea Generation Workshop.

- **Exercise name:** Action Board
- **Exercise outcome:** A prioritized list of solutions and actions with clear next steps
- **Time:** 25 mins
- **Materials needed:** A whiteboard or a flipchart + One block of rectangular sticky notes + 1 sharpie

Step 1: Create the Effort/Impact Scale (1 minute)

Simply draw the Effort/Impact scale below on a whiteboard or a flipchart. That's it!



It's pretty self-explanatory what each quadrant means: top right is high effort, high impact and bottom left is low impact, low effort, etc.

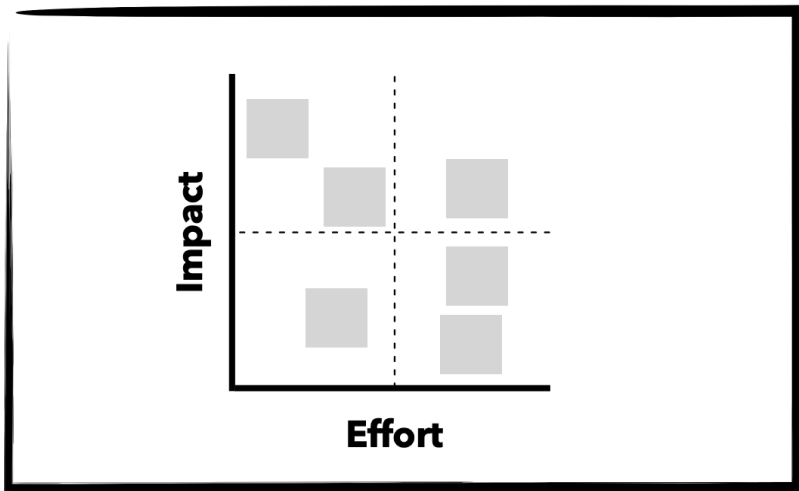
Step 2: Add Solutions/Ideas (5 minutes)

Now we're into the real stuff . . . We're going to take our ideas and solutions from whatever previous exercise we used to produce them and add them to the Effort/Impact Scale.

This step could be a nightmare if we allowed everyone on the team to talk, but we're going to control the discussion by reducing the options for the team. Here's how it works:

1. Take the top voted sticky note from your ideation session
2. Hold it in front of the center of the Effort/Impact scale and ask and use this sentence: "For the challenge we're trying to solve, do we think this solution has Higher or Lower impact?" Only allow the participants to say "Higher" or "Lower" than the center point.
3. Once the participants agree on an "Impact position", you now do the same with "Effort". "For the challenge we're trying to solve, is this solution Higher or Lower effort?"
4. Once you have one sticky note on the scale, the next ones will be easier.

5. Add up to 10 ideas/solutions to the scale
6. At the end of the exercise, your scale should look something like this:



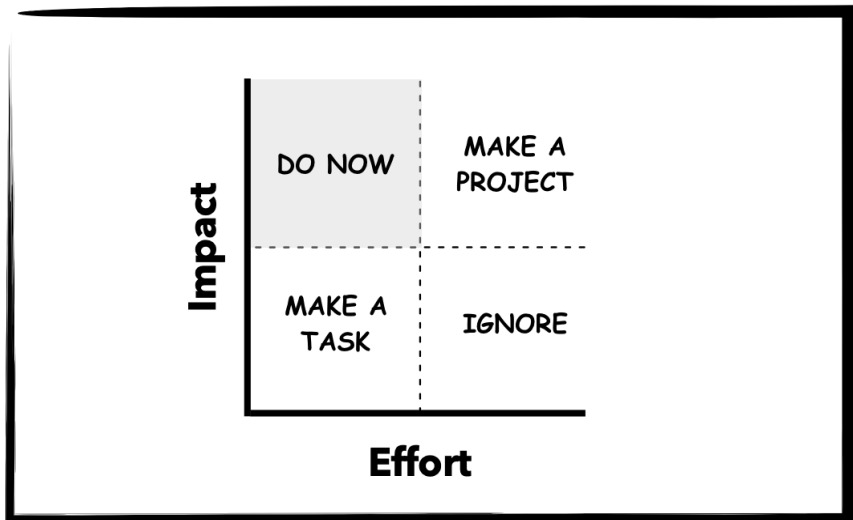
Once all the solutions are on the scale, you now have an excellent visual overview of two critical things:

1. How impactful each idea is according to the team.
2. How difficult each idea will be to implement.

A great way to understand the scale is to look at each of the 4 quadrants as having specific labels that will make the next step much easier.

As you can see below, the top left quadrant is “Do Now”, meaning any task in this quadrant is both high impact and low effort, this is usually as simple as a 1-3 week experiment.

Top right is “Project”, this means that anything we want to execute in this quadrant will likely need to be turned into a longer-term project.

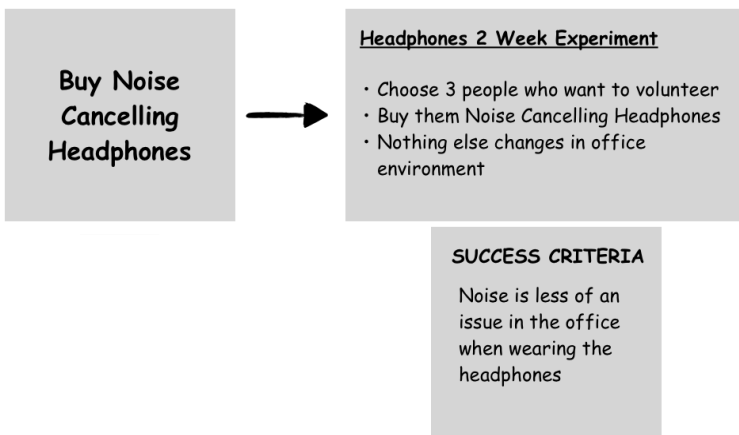


Step 3: Turn Ideas into Actions (15 minutes)

Any ideas that fall into the “Do Now” quadrant will now be turned into actionable experiments and assigned to somebody on the team or in the company. As each experiment can take up to 5 minutes to craft, I recommend focusing on getting 1-3 of these

Actions created for an Action Board session. Let's create an Action:

1. Take a sticky from the "Do Now" quadrant. The first one you should take is the sticky closest to the top and closest to the left of the "Do Now" quadrant. This is the highest impact and lowest effort idea.
2. Considering we're still solving for the challenge "How Might We reduce noise in the office for those who need quiet". Let's say that the first idea sticky we take off says "Buy Noise Cancelling Headphones"
3. Next, you as the facilitator, are going to turn this idea into something actionable. A plan for someone to execute. To do this you're going to create a simple "2 Week Experiment" based on the idea and you're also going to add simple "success criteria" on a separate sticky note. Here's an example:



Step 4: Document and Assign Tasks (5 minutes)

Once you've created 1-3 of these Actions, you're going to document them in whichever task tracking software your company uses and you will assign these tasks to individuals on your team. That's it!

With Action Board, you can turn what could be a nightmare of subjective conversations about what's important and what's not into an efficient, even enjoyable 25 minute prioritization session. Ideas mean nothing without action, and Action Board is the perfect way to make sure your team's ideas don't get lost.

And with that exercise the workshop is complete! The team can now leave the room satisfied that something will actually happen! A productive meeting?? They never thought they'd see the day!

Commit Phase Summary:

- The goal of the Commit phase is to take our prioritized solutions and create a plan of action for actually making it happen.
- This phase is where you'll really get to flex your Workshopper muscles, as it's often a phase where participants want to discuss and debate. Keep bringing

them back to the workshop principles and encourage them to trust the process!

- There are many exercises you could use in the Commit phase – the one we picked here works well for this particular topic, but others would have also brought us to this point.
- You want participants to leave this phase with tangible next steps and expectations.
- Since this is the last phase you really want to end it on a high. Give everyone a big high five and reflect on how much progress you made together. Maybe even ask the question "when was the last time a normal meeting was this productive?!"

You did it.

Give yourself a pat on the back,
Workshopper!

**(Keep reading to learn
what to do next...)**



SECTION III

YOU'RE A WORKSHOPPER

WELCOME TO THE WORKSHOPPER CLUB

There you go! You've been through a full problem-solving and decision-making workshop from start to finish! You've seen what it's like to help a team unlock their true superpowers without them having to get frustrated by broken team dynamics.

The 4C's Framework you just experienced is simple, but it's the framework I've used to design every workshop I've given since 2016. In fact, the combination of exercises you just read through is a workshop I designed called "Lightning Decision Jam", which has become one of my clients' go-to meeting replacements!

My goal with writing this book was to help you get started on your journey to becoming a Workshopper. Earlier in the book, I mentioned the 4 Keys to becoming a Workshopper:

1. Mindset and theory

The understanding of the Workshopper mindset

combined with the theory behind how to create your own workshops.

2. Facilitation skills

The ability to lead any team of any size through a workshop confidently. This also requires the skill of improvisation and team dynamics/energy management.

3. The Toolkit

Having dozens of exercises to choose from with the understanding of how to combine them is a killer advantage and allows you to create even the most complex workshops.

4. Battle-tested workshop recipes

Sometimes there's no point reinventing the wheel. There are already some amazing workshop recipes out there (like the Design Sprint). Having a few flexible recipes up your sleeve means you don't always need to design custom workshops, but you can also use these recipes as starting points.

If you've gotten this far in the book, then you've just completed Step 1 and gotten a start at seeing inside the toolkit. You've also seen your first recipe: Lightning Decision Jam!

In 2015, I was building a successful design career while hating every single meeting I had to be part of. I dreaded entering the room for a one hour meeting that I knew would drag on for two and get us nowhere. I felt dejected, like this was just how it was always going to be.

In 2016, I became a Workshopper. A facilitator that helped people (and myself) cut through the busywork and broken team dynamics to make working in groups more enjoyable and more productive. Years later I'm a workshop evangelist, so convinced of the power of having a system and a guide that I want everyone to know about it. There's really nothing quite like the feeling you get when a team tells you they've had the most productive and enjoyable hour or day or week of their career because of the simple framework you were able to bring to them. Let's not underplay it: we spend the majority of our time, a huge portion of our life, at work (or thinking about work) so surely it's worth trying to make it as exciting and enjoyable as possible for ourselves and those we work with?

Take back control of your work and help people unlock their real superpowers with workshops. All it takes is a few sticky notes.

WHAT TO DO NEXT (YOUR FREE TICKET!)

Becoming a Workshopper is one of the most powerful things you can do for your career, business (if you have one!) and life. It's the ultimate transferable skill-set that, once you master, unlocks a world of opportunities and potential. It's the way you can easily gain respect at your workplace and with your clients, it's the way you can take control of any situation at work, and it's the way you can become the expert in any room (without needing to be a subject matter expert in anything!)

If you're excited to become a Workshopper and start running and designing workshops, then you'll love the free 1.5 hour training I put together to accompany this book.

You can watch it right now by going to:

ajsmart.com/free-training

This training will really dive into the other 3 keys you need to become a Workshopper: Facilitation skills, the toolkit and the recipes. The training has been viewed by thousands of people

already and it's really starting to create a movement around workshops – join us!

Just go to ajsmart.com/free-training to access it!

Really hope you love it!

SPEAK TO US

My company, AJ&Smart, offers corporate team training and consultation around the topics of product design and innovation workshops.

If you'd like to ask us something or get us to visit your company, just email hello@ajsmart.com and we'll get right back to you!

ABOUT THE AUTHOR

Jonathan Courtney is the CEO and founder of one of the most well-known innovation agencies in the world, AJ&Smart. He and his company have helped companies like Twitter, Google, P&G, Lego, Mercedes-Benz, the UN and 100s more to solve problems and innovate faster using the power of workshops.



