

<b>FACILITATION TECHNIQUE</b>	<b>Project Point of Departure</b>
<b>CORE PURPOSE / FOCUS</b>	#issue analysis #project planning #team-work #goal setting #group prioritization #issue analysis #collaboration
<b>PHASE</b>	#action
<b>SKILL / CONTENT</b>	#active listening #communication #evaluation
<b>TIME FRAME</b>	Up to 30 minutes; up to 60 minutes; between 60 and 120 minutes
<b>GROUP SIZE</b>	1-5 / 6-15 persons
<b>FACILITATION LEVEL</b>	Beginner
<b>COMFORT ZONE</b>	Safe

## Introduction

This is a method for individuals and teams to define the structure, direction and first steps of a project.

The individual or team works through a set of questions and documents the answers in a sharable digital format. This can either be a “living” document that develops with the project it can be left as just a clear and concise record of the starting-point.

## Necessary tools (what you need)

- Pick a videoconferencing tool of your choice.
- Pick an [online whiteboard tool](#) that allows using large, zoomable canvas.

## Steps

1. Bring the project group together. Do a short check-in to ensure that everyone is mentally as well as physically present.
2. Explain that this will be a short workshop with the purpose of creating clear structure and direction for the project ahead. It will be fast and focused. There will be nine

questions which we will discuss as a group, capture the answers on the screen, then transfer to a digital document to share.

3. Create a Parking Lot as well on the online whiteboard. Explain that this is to support us with focus. We will “park” any points or questions that do not directly contribute to answering these questions. They can be discussed or answered after the session.
4. Agree as a group how long you have to spend on this. Divide that time equally between the 8 questions: e.g. if you have 90 minutes, you can spend 11 minutes per question.

**Facilitator note:** As the facilitator your job is to keep the discussion focused and purposeful. You can take the role of scribe and timekeeper. You might also assign these roles to others in the group.

5. Write up the following questions. Address each one in turn for the allotted time.
  - **Purpose:** What is the overall purpose of the project? (express this in one sentence)
  - **Desired Outcome:** What specific outcomes should be achieved by the end of the project? (aim for 2-4 bullets)
  - **Target Group & Value:** Who are you doing the project for? And what value does it provide to those people? (aim for 3 bullets or less)
  - **Roles:** Who is involved and what are they responsible for? Here are some suggested roles:
    - Lead - leading or owning the project
    - Wingman - main support for the lead, on a day-to-day basis
    - Core - the main group of people working on the project
    - Advisory - people the core team can go to for input and feedback
    - Decision - leader or manager with the responsibility to approve the project
  - **Milestones & Budget:** What needs to happen by when? And how much money do you have? (broken down into bullet points, on a broad level)
  - **How:** How will the team work together, how will you communicate, divide tasks, collaborate, approach decision making, etc. (try to define about 5 guidelines with short descriptions for each)
  - **Success / Fiasco Criteria:** What do success look like? What does failure look like? (aim for 4-5 bullet point for each one)
  - **Connections:** What projects are connected to this one? Are there any other documents or data sources that we need to take into account? (list the connections with hyperlinks to key documents)
6. When each question has been answered and documented, decide who will take responsibility to compile all of this into a digital document to be shared with the team. Before closing the session give the project leader a chance to clarify any points that need clarifying.
7. Finish with a check-out, asking each person(s) what their next action is related to this project.

## Tips & Tricks

- If you are not using an online whiteboard, we'd recommend using a collaboration tool such as Google Docs as the parking lot.
- You can even create a parking lot document or shared board for use outside of the workshop. Great for asynchronous teams who work in different time zones.
- When facilitating group discussion, we would recommend that participants use non-verbal means to indicate they would like to speak. You can use tools like Zoom's nonverbal feedback tools, a reaction emoji, or just have people put their hands up. The facilitator can then invite that person to talk.

## Source

[Source: Hyper Island toolbox](#)