

FACILITATION TECHNIQUE	Remote Note and Vote
CORE PURPOSE / FOCUS	#decision making #problem solving #idea generation #goal setting #discuss challenges
PHASE	#opening #action
SKILL / CONTENT	#evaluation #communication #big picture
TIME FRAME	Up to 15 minutes; up to 30 minutes; up to 60 minutes
GROUP SIZE	6-15 / 16-30 / more than 30 persons
FACILITATION LEVEL	Beginner
COMFORT ZONE	Safe

Introduction

Use a remote-friendly version of the classic note and vote exercise to generate ideas quickly, vote on the most suitable, and turn them into “how might we” statements your group can move forward with!

Generate ideas individually before voting as a group and turning abstract statements into actionable opportunities.

The note and vote exercise is a facilitation staple and can be adapted for many purposes. It is especially effective during the discovery stage of a problem-solving process, for generating ideas quickly and bringing a group towards consensus.

While this exercise might traditionally be run in a live setting with post-its, pens, and a whiteboard, this version is designed for remote settings.

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. Create an online whiteboard and invite participants to join. Using a whiteboard with an in-built timer and dot voting tools is recommended but not integral.
2. Designate a decision-maker for the purpose of breaking ties and having the final say on decisions. The democratic nature of this exercise often means that consensus is reached but it is useful to have someone with the final say to ensure things keep moving. At this stage, you may also want to create a part of the online whiteboard for individuals to work in separate from the main space. Think of it as a personal workspace akin to working on your desk in a live workshop before adding notes to a shared whiteboard. This can be especially effective in helping participants focus on their own suggestions, rather than get bogged down looking at what other people are writing.
3. Set up an online whiteboard and write a question on the board. For this example, we will be approaching solving problems, so our question might be "What's holding us back as a company?" You can use this remote note and vote in any scenario where you want a group to flush out ideas and align on a particular direction - you might ask people what their long-term goals for the team are or their ideal feature set for an app. It is up to you and the needs of your workshop!
4. Invite your participants to write down as many answers to your question on virtual post-its as possible in five minutes.
 - Where possible, give each participant a different colour post-it so you can track these easily.
 - We recommend having each person create their post-its in their separate working space without looking at other people's suggestions at this stage.
 - Use a timer - in-built tools such as Mural's timer are effective at giving visual feedback for everyone and a chime when the time is over.
5. Once everyone has created their post-its, invite them one by one to add them to the main whiteboard and give a brief statement on why they wrote each post-it. As a facilitator, judge whether particular statements require additional context. It is vital that all suggestions are clear to everyone for the next step.
 - If your group is familiar with this technique, invitee them to cluster their post-its while adding them to the board. This can help save time later.
6. If the group has not yet clustered post-its, do so now. Here, you will want to group duplicate ideas together and cluster similar and related post-its close to one another so it is easy to survey and get a sense of all the ideas.
7. Next, we dot vote. Give each participant 5 dots to vote on their favourite ideas or solutions, or if voting on problems, which is the biggest problem, from those on the board. Give 2-3 minutes for this. If using a whiteboard with in-built tools use these to allocate votes - it's useful to see who is yet to vote and give them a push if low on time.
 - If you do not have in-built dot voting tools, allocate simple dot shapes for participants to indicate their votes. Create a set of five and cut and paste to ensure accuracy.
8. Tally up the votes and rank the ideas based on the number of votes. Be sure to check for votes spread across duplicate ideas - you will want to ensure these are counted together. Move the virtual post-its with votes to the side and rank them top to bottom. If your original statement or question was designed to generate ideas rather than

solve problems, congratulations, you are done! You now have a prioritized list of ideas that you have worked on as a team. We would recommend following up this method with an impact/effort matrix to judge which ideas to move forward with or start to allocate tasks.

- If your original statement was regarding organizational problems, we have a final step to turn these problems into opportunities you can use as the basis for action.
9. Next, we are going to turn the highest voted problems/challenges into “How Might We” statements.
 For example, if the problem was, "We get all our clients through word of mouth" the How Might We would be: "How do we find alternative ways to find clients?"
 Do this as a facilitator while giving your team a chance to reflect and contribute if they feel it necessary.
 The important thing here is to turn challenges and problems into opportunities or questions you can then work on solving. Once written, place the How Might We next to the relevant challenge.
10. Next, we have a final round of voting: each person places a single vote on the How Might We, they think the group should work on. In the event of a tie or indecision, the decision-maker can make an executive decision on which How Might We the group will move forward with. Now you have a single How Might We that you have voted on together, the next step is to approach solving this challenge and figuring out how to take advantage of this opportunity. Remember that, as a group, you have decided that this is the biggest challenge whose solution will have the greatest impact on the organization - awesome stuff!

Tips & Tricks

- We would recommend following this activity with further idea generation exercises or move towards creating prototype solutions. Remember that these other How Might We statements are likely still useful and could be worked on at a later date. Do not delete or remove anything from your online whiteboard!

Source

<https://www.sessionlab.com/library?>