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| <b>FACILITATION TECHNIQUE</b> | <b>3 Action Steps</b>  |
| <b>CORE PURPOSE / FOCUS</b>   | #discuss challenges #goal setting #vision #team-work<br>#team-alignment #collaboration #group prioritization #group commitment |
| <b>PHASE</b>                  | #action #closing   |
| <b>SKILL / CONTENT</b>        | #communication #evaluation #leadership #active listening   |
| <b>TIME FRAME</b>             | #> 120   |
| <b>GROUP SIZE</b>             | #1-5 #6-15 #16-30 #<30   |
| <b>FACILITATION LEVEL</b>     | Skilled  |
| <b>COMFORT ZONE</b>           | Stretch  |

## Introduction

This is a small-scale strategic planning session that helps groups and individuals to take action toward a desired change. It is often used at the end of a workshop or program. The group discusses and agrees on a vision, then creates some action steps that will lead them towards that vision. The scope of the challenge is also defined, through discussion of the helpful and harmful factors influencing the group.

## Necessary tools (what you need)

- Pick an online whiteboard tool that allows using large, zooming able canvas.
- Use a video conferencing tool where you can assign the participants into breakout rooms (eg. Zoom).
- Each participant needs: pen, paper.

## Steps

1. Explain the purpose of the session. That the individuals are going to set a vision of the near future, then discuss and define action steps to reach it. Sitting comfortably, with notebooks or paper and pens, say something like this to the group:

Close your eyes and imagine it is 6 months from now. *Imagine you have accomplished everything you set out to accomplish. Think about what you have made and done over the six months. What work is like? What your relationships are like. What makes you happy?* Participants now draw their vision of the future on the right-hand side of the paper. Restrict them to 4 or 5 different themes that make up this vision, using few words but as many visuals as they like.

2. Across the top of the page, ask them to write at least 5 helpful factors that will support them to realize their vision. These might be people, opportunities, technologies, situations, etc.
3. Across the bottom of the page, ask them to write at least 5 supporting factors that will support them to realize their vision. Again, these might be people, opportunities, technologies, situations, etc.
4. Now the individuals are going to discuss and define the action steps. Ask them to draw three boxes from the left of the paper to the vision on the right. This will be the three big steps they need to take to reach their vision. Then divide the participants into pairs to discuss their steps and assign the breakout rooms to them. They write a step in each box, concisely, but with as much detail as they need to make it clear to themselves and others.
5. To close the session go around the group asking everyone to state their vision and one (or all three) action steps. Ask each person: What is the first thing you are going to do when you get back to the office.

## Tips & Tricks

- If participants are working individually, they can complete the tasks in a Google Doc or on paper. Paper is great if you need to change things up and get users away from the screen; Google Docs is great for sharing and record keeping.
- You can also run the session in groups using the breakout rooms.

## The exercise is successfully completed when? Conclusion?

The exercise should help individuals to take action toward a desired change.

## Source

<http://toolbox.hyperisland.com>