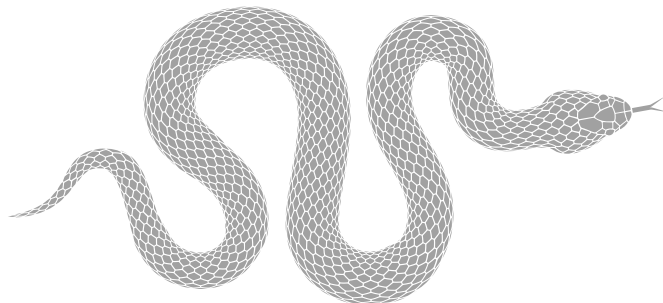




Strategic ideas-building: *Facilitation Masterclass*

From 10.30am until 4.30pm on
Wednesday, July 31st 2019



Background Paper and Agenda for our 36th Leadership Conversation

Society of Leadership Fellows, St George's House, Windsor Castle

"In strategy it is important to
see distant things as if they
were close and to take a
distanced view of close things"

**Miyamoto Musashi,
legendary Japanese swordsman**



Introduction

By Pete Ashby, Director of the Society of Leadership Fellows

I hope that you like the quote from Miyamoto Musashi on page 2!

We wouldn't be so reckless as to try to come up with a definition of what exactly we all mean by that much over-used word strategy. But there is something rather special about the idea that in a good strategic discussion what we somehow manage to do is to see “**distant things**” as if they were close, by bringing medium to longer term concerns into the discussion in a thoughtful way, whilst at the same time taking a “**distanced view**” of short-term issues so that more tactical concerns that dominate so much decision-making are kept at bay as much as possible.

Sharing techniques that have worked – AND failed!

We are assuming that those of you joining this Masterclass have already achieved a high standard as facilitators (even though you might pretend otherwise!), and that we are all up for stretching and challenging ourselves so that together we can improve our performance as facilitators.

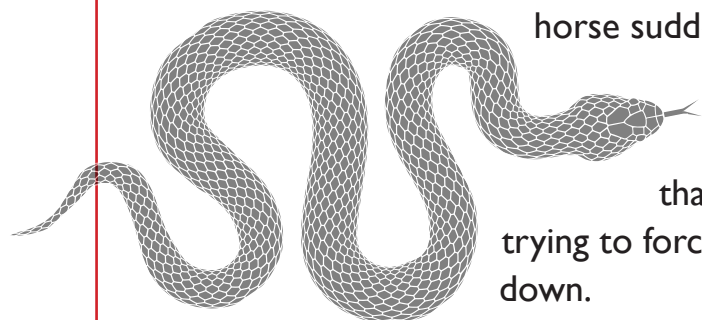
We think that this Masterclass will be most powerful if we see it as an opportunity to share:

- those techniques and approaches that have worked well for us personally, and perhaps saved our skin in difficult moments, as well as
- those techniques that didn't work and meant we couldn't quite prevent the group's energy from going into a nosedive at a moment when some lost confidence in the process and we were clearly unsure what to do.

When we talk of strategic ideas-building, we are talking of a process that we regard as **tough and challenging** for anyone who volunteers to facilitate that process.

Whenever I am facilitating a group, whether it is a Leadership Conversation at the House or a Board or team event elsewhere, I tell myself that I can't take my eye off the ball for one second.

I believe that if we let ourselves get distracted for a few seconds, the experience can be like that of a rider whose otherwise tame horse suddenly bolts after being bitten by a snake!



Groups can be very unpredictable, and become grumpy very quickly if they feel that as facilitator we are losing our way or trying to force them down a road they don't want to go down.

100% of our energy

The act of facilitating a strategic ideas-building session requires 100% of our energy and concentration from quite some time before the group come into the room until the moment we say that our allotted time is up and it's all over.

This is by no means easy!

I say this to underline our opening assumption that facilitating a strategic ideas-building session to a satisfactory standard is by no means easy. It is rather like horse-riding, for someone who is at best an amateur horse-rider!

We can very easily fall off unless we pour energy into the group in a pretty unconditional way.

This involves us spending a considerable amount of time beforehand thinking through various ways in which we might develop the agenda, with the consent of the group, as we go.

Three main themes for the day

Because this is a one-day Masterclass, we have been selective in the themes that we cover. We have opted for three:

- 1** First off, we engage with the challenge of how you might best **create a level playing field** at the outset of a strategic ideas-building process. Would it work for you to adopt some or all of the Guiding Principles that we use as a Society? If so, which ones would be best, and if not, do you need some other terms of engagement that you agree with the group right at the beginning?
- 2** Secondly, we will assume that you start off the ideas-building process with a killer question that you want them to consider. Identifying the right question isn't always easy, but it's much easier than the next challenge of *keeping the discussion open without losing focus*. A good facilitator of strategic ideas-building has to be a really good juggler in so many ways, so that everyone knows that you are listening closely to what they're saying and keeping their point in play along with all of the other contributions coming forward.
- 3** Thirdly, we will ask what is the best way of **handling disagreement among the group** and ensuring that any conflict is not a negative experience that results in some people disengaging from the entire process – as can easily happen. At the end of this Background Paper we offer some pointers to help you ensure that if and when there is some disagreement, this comes through in a way that is authentic and natural and does not turn off those who are by nature conflict-averse. During the Masterclass, we hope to develop a few more pointers of our own.

Challenge I: How do you create a “level playing field”?

In the Society of Leadership Fellows, facilitation is something of an obsession of ours. We have a format for running Leadership Conversations that has taken out the number one “prop” for so many Chairs and facilitators – and that is the opening speaker who dazzles the audience with a burst of expertise that then leads to a question and answer session that creates quite a hierarchical relationship between the experts and non-experts within the group.

We start off on this point because in our view a truly strategic ideas-building session requires us, as the facilitators, to work hard at creating a “level playing field”, with as little hierarchy as possible among the group.

Whilst our role is to acknowledge the expertise of individuals, we are careful not to focus just on a small number but to affirm the distinctive contribution of as many members of the group as possible.

Terms of engagement: do you view them as essential?

As you know, our way of trying to create a level playing field at Leadership Conversations has been through dispensing with expert speakers at the same time as developing our own Guiding Principles as the basis for all Conversations. We have worked them up with Fellows over a period of time, through a series of iterations.

Whatever terms of engagement you use, we believe it is essential to the success of any strategic ideas-building exercise that you have some terms of engagement that you share with the group at the outset and ask them to endorse.

Question for small groups

Hence our suggested questions for the first round of small groups:

- *Do you favour the idea of having guiding principles or terms of engagement when you facilitate a strategic ideas-building session? If so, what should be your two or three most important principles/ terms of engagement?*

We will be very interested to hear the range of ideas that you bring back for possible guiding principles.

For those of you wondering beforehand about what the right principles might be, it would of course be good to look at [our 12 Guiding Principles](#) here and consider which ones, if any, you would want to adopt.

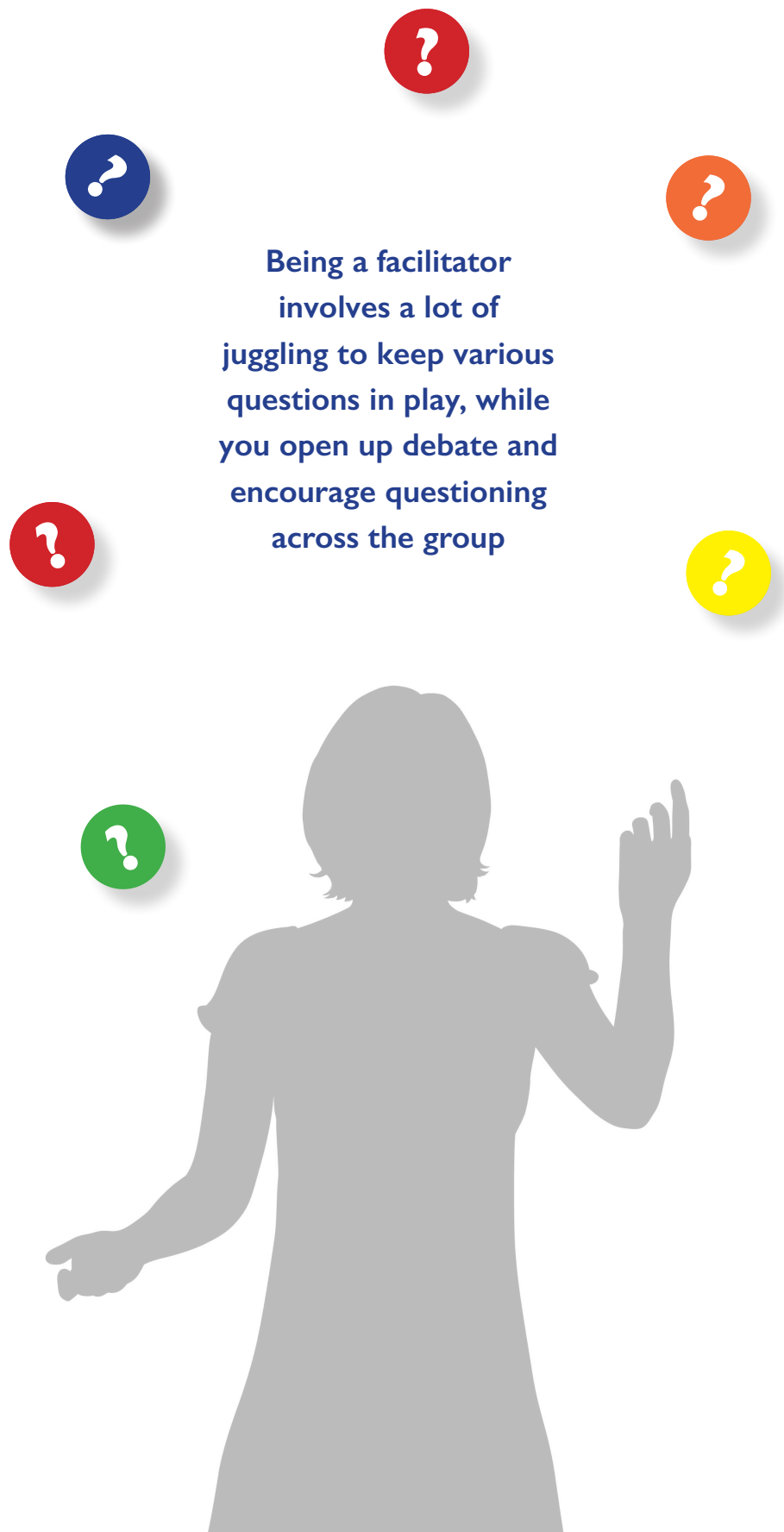
A bank of 15 possible groundrules

One of our first Leadership Conversations – facilitated by Krysia – was on leaders as facilitators, and this is written up as Chapter 7 in Volume I of Nurturing Wisdom. It contains lots of really helpful advice for facilitators, including a bank of 15 possible groundrules for groups to adopt as the basis for a high trust ideas-building process.

There is a link at the end of this Background Paper.

As part of that Chapter (*on page 76 of Nurturing Wisdom, Volume I*) we suggest three questions for you to consider when deciding which groundrules would best meet your needs and those of the group:

- I Which ones will be most helpful to you in building trust among the group?
- II What are your particular strengths and weaknesses as a facilitator, and which groundrules will best help you to increase in self-confidence?
- III Which groundrules will best help to ensure that everyone takes part in the discussion?



Being a facilitator
involves a lot of
juggling to keep various
questions in play, while
you open up debate and
encourage questioning
across the group

Challenge 2: How do you open up debate without making it so open that you lose focus?

This is a really tough one, isn't it. We could spend two days on this challenge alone, and still not have enough time!

To a large extent, your answer will depend upon your personal style as a facilitator. Some of us love a process that we regard as risky!

It is the riskiness of not knowing exactly how we will take forward the first round of discussion that not only gives us a really good adrenaline surge, but also helps a lot with building trust with everyone involved in the ideas-building process.

This is because they can see that we haven't come with a fixed agenda and are listening really hard to what people are saying so that we can take our cue from them.

Using the group's words rather than yours

Some facilitators insist on converting whatever is said into their own words, without appearing to realise that some people interpret this as their desire to take back control from the group.

If you want the group to have a sense of **shared ownership** of the process with you, it is incredibly important to use their language at key stages when you are drawing on the ideas they have come up with to help shape the next stage in the agenda.

It is the very transparency of this process that helps to build trust, too.

How much do you want the group to share ownership of the process with you?

Possible questions for the next round of small groups

We will agree the challenge for our round of small groups at this stage in light of our discussion as a group (and, of course, being careful to use your words, haha!) At this stage our thinking is as follows:

- *In small groups we want you to IMAGINE that you have asked a general question about your future strategic direction and in giving their personal answers to this question three members of the group have offered very different approaches. You want to create the time for the group to consider these approaches whilst making sure that no-one tries to close down any one of them too quickly.*
- *What technique or approach will you adopt, as facilitator, to try and keep these ideas in play and promote some real curiosity and challenge in the debate?*

It will be really interesting to hear what ideas you come back with, and especially the stories that we hope some of you will share about how you have developed your role as a “juggler facilitator” in the past, to keep various ideas in play. Just to offer two examples here:

a One idea is to ask one person who is a keen advocate of a specific idea what they regard as the **No.1 argument against their idea**. Just having to capture the case against their favoured idea helps to get them out of any possible trench that they might be about to dig!

b Another idea is to ask each of the three advocates of different ideas to **capture their idea in a relatively short phrase**, and write these phrases up on a flipchart or whiteboard. You then address a question to those who haven’t yet spoken in the debate:

- *“As you look at these 3 ideas, can you say which one attracts you the most, and why? If none of them quite works for you, can you share with us any thoughts about the sort of idea that you would like to see underneath the other three, as No. 4?”*

Engaging with those who are defaulting to spectator mode

It's incredibly important at this stage that you engage directly with those who are defaulting to a spectator mode and could quickly disengage from the conversation unless you involve them.

As you do so, remind yourself not to give any signal that you are trying to close down ideas that you don't particularly favour.

Even though you might later come down firmly in favour of one idea in particular, at this stage when you are opening up the discussion it's very important that you genuinely keep it open and are careful to want to hear more about any and every idea that is suggested.

Some people are always on the look-out for signs of the facilitator trying to curtail debate about ideas that they are believed not to favour.

This not only stifles creativity but also makes some people **behave defensively** because they feel they're being railroaded by you towards a pre-determined conclusion.

Hence the importance of holding back from closing discussion down too quickly whilst at the same time trying to retain a sense of focus. As we all know, this can be a **tricky balancing act!**


Pressing other people's buttons

However hard you try to keep the discussion positive and amicable, we know how easily some people can **take things personally!**

So often, those moments when someone becomes visibly bugged by what someone else has said are caused by that other person having "pressed one of their buttons".

Once this happens, others in the group feel that there is now "conflict" in the room, and their response is to want to **disengage emotionally**.

Our third challenge is all about how best to avoid this.



It is a real achievement
to create an atmosphere
in which there can
be creative conflict
WITHOUT unhelpful
polarisation

Challenge 3: How do you ensure that disagreement is creative and respectful and doesn't drive away those who are conflict-averse?

For this third challenge, we will engage with one of the most difficult challenges facing us all in leading any strategic ideas-building process, and that is managing conflict among the group.

We will ask you to skim the report *Creative Conflict* that is on the Insights page on the House website.

A link is at the end, and we hope you will find it helpful for thinking through how you can best manage conflict within a group so that:

- You are **careful not to close down any idea too quickly** and to retain the space for minority ideas to be explored by the group
- You **reassure those who find conflict difficult**, telling them that it is an important and creative part of the process and stressing the importance of **assuming the best** of each other and being as open-minded towards other ideas as possible (this is where your original terms of engagement/ Guiding Principles are so incredibly important)
- You **gently restrain any who become over-zealous** in arguing for their own position, being generous yourself in how you engage with them – for example, in admiring their advocacy of their case – whilst saying that they have great passion and energy and you are sure they wouldn't want anyone else to feel overwhelmed or perhaps even “flattened” by the way they have argued for their position.

Managing conflict with care

Managing conflict better within teams

Following an overnight Conversation at the House, we always ask members of the group to let the rest of us know, three months after the session, how they have been getting on in taking forward their end-of-Windsor resolves.

In February, members of last November's Creative Conflict group shared some very thoughtful emails with each other about a number of practical ideas that they had been taking forward to help manage conflict better within teams and reframe the experience so that team members view it as a natural part of the creative process.

We were so struck by how powerful some of these ideas were that we thought it would be useful to put them together within one overall commentary. We share this on pages 16 to 20 as "**Eleven steps to manage conflict better within teams**".

We hope you feel there are some useful "nuggets" here that can support you in developing your own thinking about how best to handle disagreements when they emerge during an ideas-building process.

Practical strategies

One of the insights that we took away from the Conversation on Creative Conflict was that it doesn't serve us to talk simply about disagreement – and not use the seven letter C word!

It is a simple truth that a significant number of leaders can quickly be alienated by what they regard as conflict. They really don't appreciate it if the attitude of those of us who are quite comfortable with conflict, and really rather enjoy it, is that they need to **get over themselves!**

We need practical strategies to support them in **checking themselves** once they begin to **disengage emotionally**.

This is what the eleven steps following the agenda seek to offer.

Agenda

Wednesday, July 31st 2019

10.15am+	Coffee and light refreshments served in the Vicars' Hall
10.45am <i>Prompt, please</i>	We welcome you to the Masterclass and invite you to agree on the Society's Guiding Principles as the framework for our discussions. We then break into small standing groups of 3 or 4 for 15 minutes to consider our first challenge, as set out on page 7 . (Refreshments available)
11.15am	We hear your key conclusions about the terms of engagement that you would expect to agree up-front with a group. We then agree on our challenge for our second round of small groups (suggestion on page 10)
11.45am	2nd round of small groups (refreshments available)
12.10pm	Back in the circle in new seats, we capture the key messages coming forward from this round of groups. At 12.50 we change gear and think our way into our third challenge around managing conflict
1.00pm	Lunch is served in the Vicars' Hall. Over lunch, working groups engage with the challenge. At the end of lunch, each group nominates one of their number to share their exciting idea (deemed by the table to be the most exciting idea to come out during lunch!)
1.50pm	We draw inspiration from these ideas before breaking into our next round of small groups (in 2's)
2.30pm	Small groups (refreshments available) in which we ask you to focus on your top two stretching personal take-aways from the discussions so far. Please make them stretching and not easy wins!
2.50pm	Back together again as a single group, we hear your personal take-aways. We then split into 2's again for our final round of small groups in which we ask you to identify one idea that someone else shared that you can build on and adapt to support you in facilitating strategic ideas-building events
3.25pm	Final round of 2's (refreshments available)
3.45pm	Final session together. We each capture one idea that someone else has raised and say how we might adapt it to make it really work for us. We draw out the main themes of this part of the Masterclass and bring it to a close on the dot of 4.30pm .



Eleven steps to manage conflict better within teams

- 1 If it's a key meeting that could be controversial, plan the time to prepare properly!**

When you have a tough meeting coming up, every second given to planning is time well spent, especially if you think about the tricky moments that cause you concern.

Live them in your mind and picture yourself behaving in the way that you would like. It's so much easier to live this on the day if your brain has been on a journey down that path beforehand.

If there's a sniper in the meeting, picture yourself thanking them for their contribution and then asking others to comment on it, on the basis that you intend to be calm and courteous with them however much they might bug the sh*t out of you.

- 2 Right at the beginning, be clear about the rules of engagement**

Be explicit and up-front, and run through what you regard as the unspoken rules of engagement as well as the spoken rules.

If you fear that there will be pushback from some, say that you are always happy to discuss the rules of engagement – and in asking them to go with these rules for now, you're happy for them to come to you and discuss them at any time.

- 3 In the moment, think of the power of being UNpredictable!**

So often in meetings, we're so much more predictable in our behaviours than we acknowledge. Think of all that you could gain by being that bit more unpredictable!

For example, if you are by nature consensual and keen to please, how about starting a sentence in a more directive way than others expect, with words like "I need you to..."



4 Look for chances to recognise the strengths of others

As you lead the team through discussion, and have a chance to recognise someone's special strengths, perhaps through a recent achievement of some sort, use that chance to acknowledge their specialness.

As part of your prepping beforehand, can you think of everyone in on the meeting, in turn, and ask yourself what you see as their most special strength?

If you can capture some of their strengths as you go through the meeting and genuinely appreciate them, you will blow them away – and as they feel more “seen” by you so are they likely to be more relaxed and confident in managing conflict with each other.

5 When there is a disagreement, make sure you focus on WHAT IS RIGHT rather than WHO IS RIGHT

If this succeeds for a while and someone then begins to over-personalise the argument, ask them to capture the key principle that they favour as a way of refocusing on the **what** rather than **who**.

In this way, you're playing the ball and not the player.

6 Use creativity to make the very concept of conflict less daunting

Conflict IS an ordeal for many of us because we spend so much time trying to avoid it. This is why it can be so good to normalise conflict by making it less of a “thing” to be avoided.

If there is disagreement, affirm it as healthy and keep the discussion warm and relaxed. At the first sign of anyone digging a trench, ask them what they see as the main argument against their position.

They will have to get out of the trench to tell you!



7 When you think of the word challenge, link it to another C word: compassion

When we challenge others, we can go dry and cold in our tone. It's almost a pre-emptive defensiveness; we're backing out emotionally in case they shoot back at us with something that could sting.

How about making a point of letting some warm compassion come through in your tone?

A compassionate challenge is so much easier to embrace than a cold and clinical challenge.

8 If you find yourselves going into a spiral of negativity, consider a pre-emptive act of kindness

Sometimes conflict in teams is part of an old pattern playing out time and again. Once it starts, it's the familiarity of who is being wound up by whom that helps to trap people in it.

If you feel that the team is about to go into one of these old patterns, think of how you might pre-empt it. An act of kindness, or some sort of recognition?

You eyeball one of the people about to start a "dust-up" with someone else, and surprise them by saying something really kind, or offering some sort of recognition of an achievement of theirs.

If this is warm and sincere, it can change the atmosphere in seconds.



9 Be prepared to restart the discussion - in a different place

Suppose this doesn't work and you feel you're still heading on down the usual road that will end in a destructive row.

How about telling the team that you all know you are limbering up for some more of the "same old, same old" and instead of slipping back into some of the familiar old negativities it would be really good to focus on the values that you want to guide you more in the future?

However you do it, the aim is to deflect the team from slipping into a familiar pattern of negativity either by disarming a protagonist through unexpected kindness or by trying to take the discussion onto higher ground though focusing on core values.

10 Don't let a sniper push your buttons

If you feel this beginning to happen, how about trying out something that you've settled on in your mind before as a way of letting them know that you refuse to be bugged by them.

How about catching their eye and then giving them a big smile? You might feel massively re-empowered!

This can help us a lot with viewing those who get under our skin not as irritants, but as a gift.

They sense our weak spots and ferret around for the right buttons to push.

If we don't let them trip us up, think how we grow through the experience.



II After conflict within a team, your chance to learn lessons is maximised

Once there has been some conflict, some people try to move on as quickly as possible - as if they want to forget about what has just happened.

Instead, how about saying, 15 minutes or so before the of the meeting,
“We had a difficult conversation earlier on that ended up fine, but I know that it threw some of us. Let’s think about our positive take-aways from that... what can we learn?”

Sometimes the best chances for shared learning and creativity come **after** there has been some conflict.

In asking the question in an open and fairly soft way, we can make conflict that much more manageable for those who see themselves as conflict-averse.

In reassuring them afterwards, we can also point to the positive and tangible take-aways that the conflict made possible.



Background reading

