Matrix Workshop Session Facilitation

University Process Innovation

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UNIVERSITY OF MARYLAND

Introduction

You will let the participants vote on the top problems, then create and prioritize solutions for these top issues. This will be done in an engaging group setting allowing everybody to bring up their ideas in an open environment.

When to use this method

This method is great to use when you have discovered many problems/ problem areas during your interviews and you are looking to find a few areas to focus on. Ideally you would solve every problem you came across, but due to the nature of limited resources you will have to prioritize to maximize your return on investment. This method engages the stakeholders to develop priorities, which reemphasizes stakeholder buy-in. By utilizing this method, you are taking the problems from your stakeholders and giving them the power to create and prioritize solutions. This sense of ownership will pay off during implementation since a core group of people working in the process have created and vetted the solution.

When to not use this method

This method relies heavily on your stakeholders to make a difference. If they are not engaged, resistant to change or feel that they don't have the power to make a change this method should not be used. Also if there are a limited number of problems than there is not really a need for prioritization.

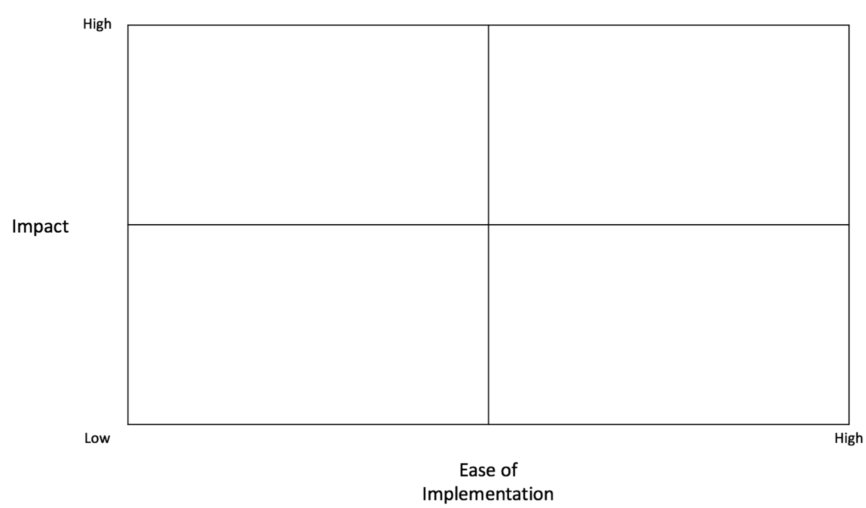
Summary

This facilitation method can be extremely useful to engage participants and allow stakeholders to prioritize recommendations for you. In order to properly introduce and run this activity you will need between 90 minutes and 2 hours. If you leave more time at the end you will be able to get even more detailed information from your group. This method is only as strong as the diversity of stakeholders in the workshop; participants are typically drawn from people you have been previously engaged with in the interview process.

Steps

Before the Workshop

1. Synthesize information for a diverse pool of individual interviews
2. Create a list of the top problems/problem areas you have heard throughout your interviews
3. Create a list of key stakeholders that you feel need to be present at your workshop
4. Initially plan around these few people's schedules and then be sure to invite the rest of your interviewees as well as anybody who would provide valuable feedback
   NOTE: Anyone can attend, but all attendees must participate. There is no observing because it can be seen as intimidating, especially since higher level managers tend to ask for this option.
5. Gather Supplies:
   a. 3-4 different color Post-It Notes (Super Sticky variety suggested)
   b. Pens for everybody in the workshop
   c. Flipchart paper
   d. 3 Stickers per person
6. Use four piece of flipchart paper to created a 2x2 matrix. The X-axis is "Ease of Implementation" from low to high while the Y-axis is "Impact" from low to high. The ideal solution is in the top right quadrant meaning it will have a high impact, but also be easy to implement.



During the Workshop

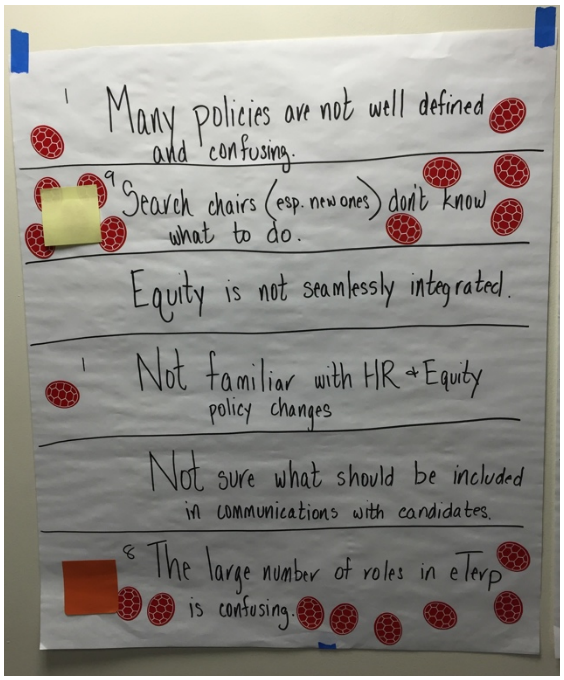
1. Conduct introductions to break the ice. If there is time, you can have them share something related to the project in addition to their personal introduction. For example, you may ask them to explain what they hope to learn from the workshop or what is their biggest frustration with the current process.
2. Start off by explaining to the participants the steps that you have taken that have led you to the workshop. These include data analysis and individual interviews with different stakeholders.
3. Explain the intention for the workshop and key takeaways. The workshop is a way for you to engage with many stakeholders at once, present what you have been hearing in interviews and get feedback. You will also get further input on the changes they would like to see and the priority of implementation.
4. Present the top 7-12 issues that you heard from the individual interviews and be sure nothing major was overlooked. Present the issues on large poster to help facilitate the next steps.
5. Give each person 3 stickers to use as votes to allow the biggest issues to rise to the top of the pool.
6. Identify the top 3 -4 issues based on the votes and assign each a different color.
7. Explain the six enablers (Process, Motivation & Measures, Policy, Training, Facilities and Technology) and the various stakeholders to make sure everybody understands "impact" in the context of this project. It is often helpful to step through each enabler individually to focus on solutions that just include policy as an example. This also helps to avoid too much focus on IT systems.
8. Explain the impact verse ease of implementation graph to the participants and then give them 10 minutes to create idea sticky notes of specific solutions and add them to the impact vs. ease of implementation graph.

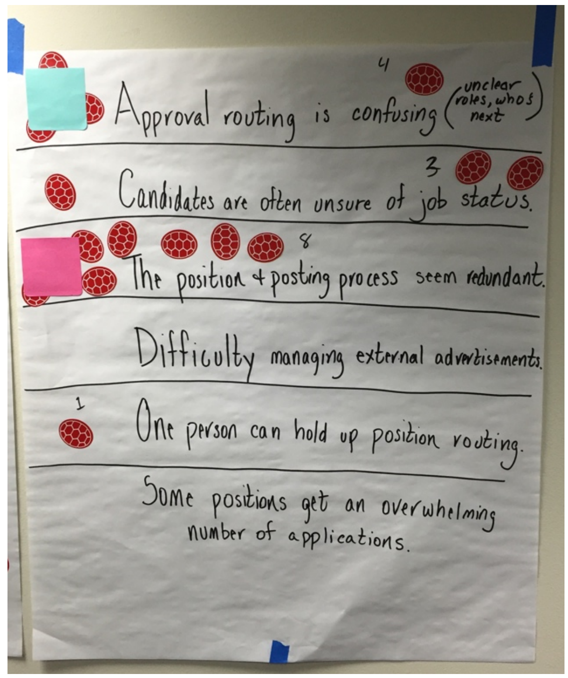
1. NOTE: Don't let participants get caught up on difficulty of implementation, just have them use their best guess

9. After people have had time to individually write down their solutions and add the notes to the graph, begin to cluster similar ideas.
10. Share the ideas with the group to facilitate discussion –group similar ideas and validate with the group to ensure that you understand each note on the chart.
11. If time allows take a few ideas on the high impact side of the graph and start to discuss what would be needed make the solution happen.

Specific Example

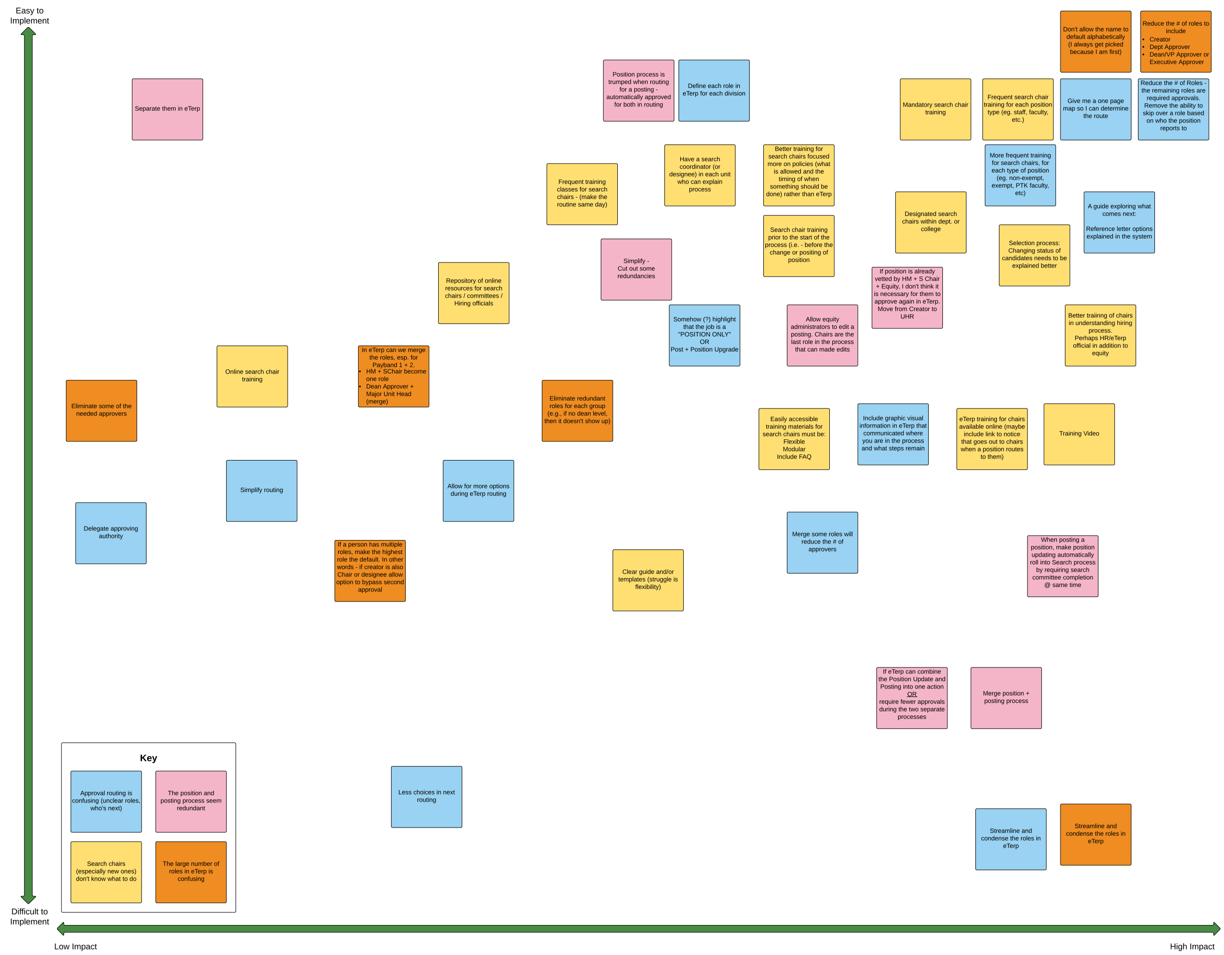
This method was used in the Hiring process to develop a list of priorities. The red stickers are the votes and the colored squares are the colors we assigned to the top 4 issues.





Below you can see the actual graph from this workshop. You will see that the ideas are really spread all over the place which is one of the reasons we discuss the graph with everybody in the group.

Below is a digitized copy we made after the workshop that can be incorporated in later documentation.



Conclusion

This method was extremely effective to engage a group of stakeholders and facilitate discussion about ways to go about fixing the hiring process. From this session we moved in the direction we had expected, but were able to get some helpful suggestions and details from the experts that participated. We ended up looking at and considering all of the notes on the graph since the impact and ease of implementation were assessed in very different way by different people. This emphasizes the importance of a diverse group. We were able to discuss many of the solutions to get an idea of which placement was most accurate, but at the end of the session each idea was considered. From this point you are likely ready to take this information and present it to your client as support for proposed changes. For more information regarding developing interview questions, and conducting interviews, reference Chapter 5 of "Workflow Modeling" by Alec Sharp and Patrick McDermott.