



ART OF FACILITATION

UX Research & Strategy Meetup



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- User Researcher
- Facilitator
 - Design Thinking Workshops
 - Design Sprints
 - Ideation/ Planning/Transition Sessions
- Director of Design Thinking Solutions @ Usability Sciences

WHO'S HERE?



Raise your hand if you are or want to be a Design Thinking facilitator?



Why?

WHY I DO THIS WORK?

Decision makers are still guessing/ wondering who their customers are and what they want

Teams are still building solutions without problems

Internal teams are siloed

UX Designers are asked to push pixels, not create experiences

Users are being replaced with proxy users

Researchers are always figuring out "how do we make this work?"

Many orgs are still symptom solvers, not problem solvers

Everyone assumes someone, somewhere validated this solution with an actual user

Research is perfectly positioned to ensure the working teams keep the user top of mind

FACILITATOR IS...


- Dictionary.com
 - A person or thing that makes an action or process easy or easier.
- See also...
 - shepherd of thoughts and ideas
 - strategic instigator of productive discord
 - UX Strategist, therapist, story teller, teacher and referee



BASICS OF
FACILITATION

MOMENTS TO FACILITATE

- Planning Meetings
- Grooming Sessions
- Usability Interviews
- Focus Groups
- Sales Calls
- Innovation Workshops
- Design Thinking Workshops



Though most of this presentation will apply to all of the various meeting types, we will focus on Design Thinking & Innovation workshops

1 - LEARN

- Read books &/or go to training
- Crawl before you walk
 - Unbundle the activities
 - Increase workshop duration over time
- Ask for feedback from people who love you enough to give it to you

#2 - ASK

- What problem are you trying to solve?
- How do they know it's a problem?
- Who's problem is it?
- How do we know they have a problem?
- What do we know about their problem?
- Who are the stakeholders?
- What do they want/ need/ do?
- What does success look like?
- How will this work make their lives better?

#3 - PREP

- Location
- Materials
- Snacks!!!
- Identify the skeptics, talkers, persuaders
- List out workshop milestones
- If you have more than 7 ppl, pre-group them
- Schedule a research read out 2 to 3 days before workshop

#4 - MANAGE

- Insist on FACTS, not conjecture
- Establish an agenda ground rules and stick to them
- Recognize and course correct unproductive behavior
 - Group think
 - Big egos
 - Non-participants
- TIMEBOX- Use a timer and be consistent, yet flexible
- Select framework for critiques and decision making
- Teach behaviors you want to see
- Empower everyone to share their thoughts and perspectives
- Know and explain why the group is doing a particular activity

4 – TELL THE STORY

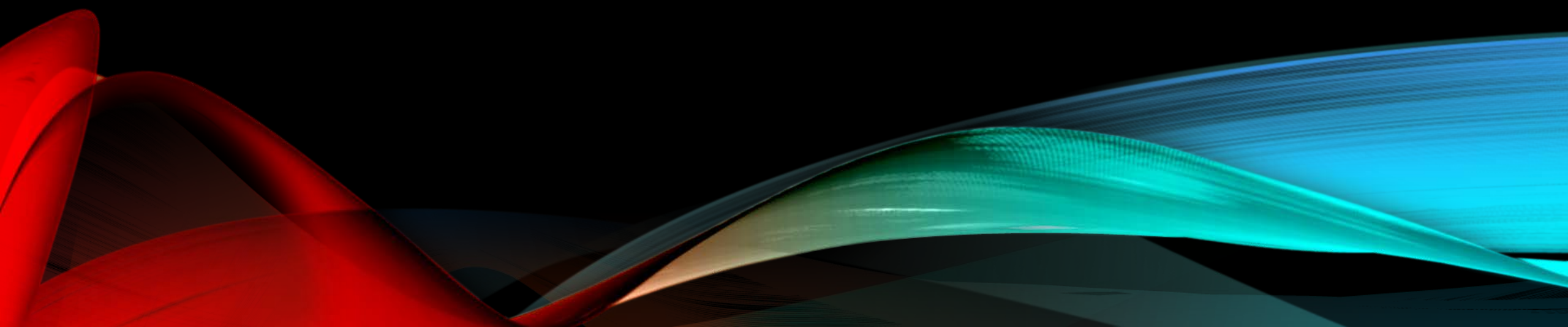
- Summarize learnings
- Take pictures of people and artifacts
- Collect and document participant quotes
- Share out periodically to sustain momentum and engagement
 - Initial research read out
 - Post workshop
 - Design iterations
 - Finished design
 - Development iterations

IF NOTHING ELSE...

- Remain objective
- Be patient
- Don't zone out
- Don't pass up teachable moments
- Learn to call audibles

Make processes EASIER

TRUE ART OF FACILITATION



BONUS ROUND

- Facilitators are supposed to make things easy
- Demystify and simplify complicated activities using fun activities

BEHAVIOR: BREAK DOWN THE SILOS

- For a variety of reasons, your attendees may not know each other
- Use icebreakers to get them talking to each other and start to build comradery amongst the team

Activity: Which team has the most in common?

- At your table, make a list of as many things you can think of that each of you has in common.
- In 15 minutes, each team will read off their list of commonalities. If a group says it, every group has to cross it out.
- Group with the most unique commonalities wins!

BEHAVIOR: CONVERT LEARNINGS TO INSIGHTS

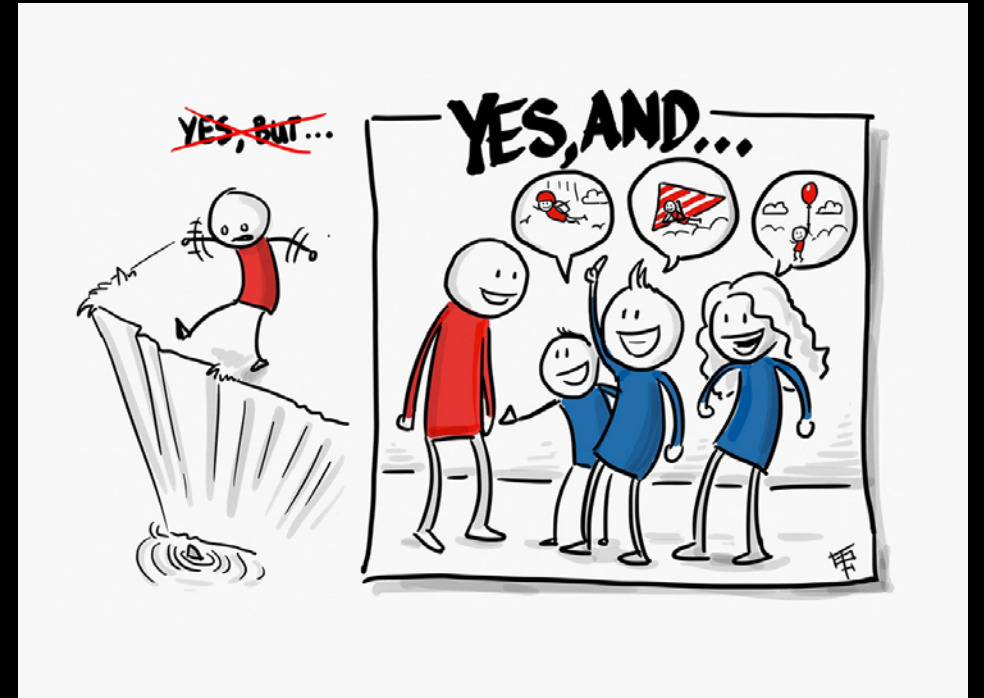
- In many instances, your research is the closest many will come to a real user
- Teach them what research is and how to articulate observations as actionable insights

Activity: OXO Pouring Exercise

- Get a volunteer from the workshop
- Have the other participants take notes while watching the person attempt to fill the cup with water.
- Create an empathy map and plot what the user was thinking, doing, feeling and saying.
- Have the team brainstorm ways to improve the experience.

BEHAVIOR: BUILD ON EACH OTHERS IDEAS

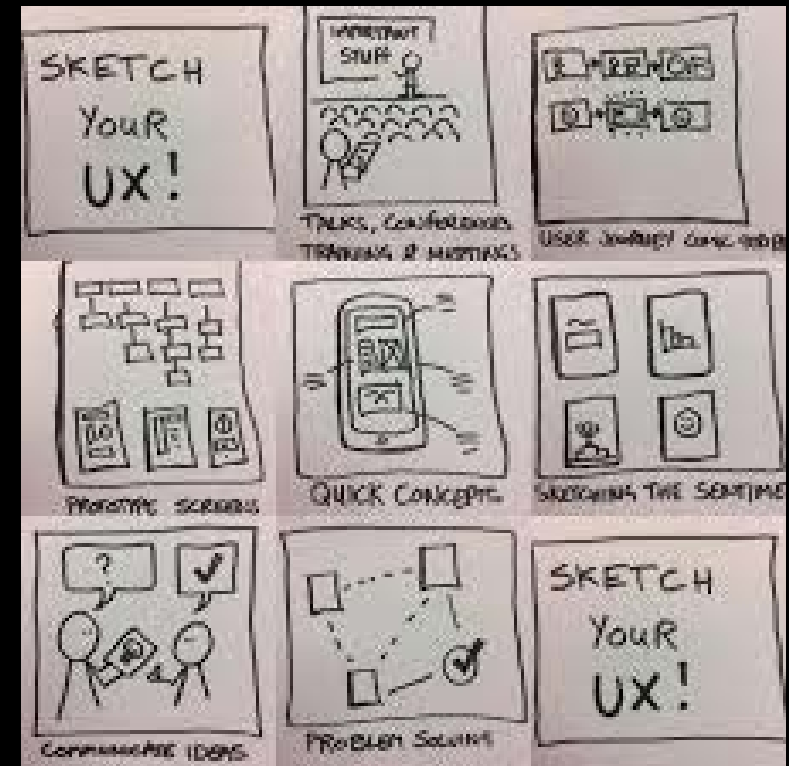
- If you've been in an ideation workshop, sometimes participants struggle to think outside the box...
- Volunteers come to the front...



[How Improv can open up the mind to Learning in the classroom & Beyond](#)

BEHAVIOR: COMMUNICATE VISUALLY

- Empower you participants to share their ideas by sketching
- Everyone get a sheet of paper and a sharpie



[7 reasons for sketching in UX Design, InVision](#)

BEHAVIOR: DISAGREE & MAKEUP

Activity: Rock, Paper, Scissors WAR!

- At some point we have to start making tough decisions...
- Some ideas will "lose"
- Get back on one accord to carry the experience to the next level
- Starting in pairs, play rock, paper, scissors with one another.
- The winner moves on, the loser, becomes the winners "biggest fan."
- By the end the two people will play for the title each with a massive cheering section.

ALWAYS

- Pilot the activity with your internal team before trying with a client
- Insert activities like these immediately before you doing the exercise
- When giving directions for the design thinking exercise, refer back to the fun activity to help participants make the connection
- Keep a few activities in your back pocket to increase energy in the room or to change a tone in the room



dschool.stanford.edu

Improv activities for Design Thinking



Contact Me

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ADDITIONAL RESOURCES