Deliberate Innovation Training

We Are Your Shepherds!

Dan

CEO of Deliberate Innovation
25+ Years of Life Science Industry
Experience

Layston

Operations and Production Lead
Over 65+ Projects Supported
Trained and Experienced Facilitator

Mary

Facilitator & Innovation Coach
25+ years in Healthcare and
Life Sciences

Energizer

Rules of the Game

Goal:

To complete an entire row first

How to Play:

1. Find colleagues who match the description within the square (One person per Box <u>and</u> One person CANNOT be used for more than one box)

2. Have the person sign or initial their name in the fitting box, on your card

3. Yell "BINGO" when you complete a full row (vertical, horizontal, or diagonal)

Ideation. Warm-Up.

Round 1

You have 60 seconds to <u>individually</u> record as many alternate uses as possible for the shoes

Round 2

You have 60 additional seconds as a <u>TEAM</u> to generate as many alternate uses as possible for the shoes

SECRET WEAPON

YES,
- Appreciation
- Acknowledgement
- Heard
- Validation
- Encouragement
- Acceptance

AND...
- Adding
- Building
- Collaborating
- Connecting
- Inspiring
- Creating

How Might We

integrate Artificial Intelligence into our communications and daily work

to improve efficiency and effectiveness across the team?

Rules of the Game for Jeopardy

- Each team must "Ring" in to Answer a Question (note: you have to wait until the **question has been fully read to ring in**).

- Questions are a mixture of **multiple choice** and **open-ended.**

- The team with the most points wins (FYI - **you can lose points** or win points)

- After questions are answered, our **experts** will share some **additional context**.
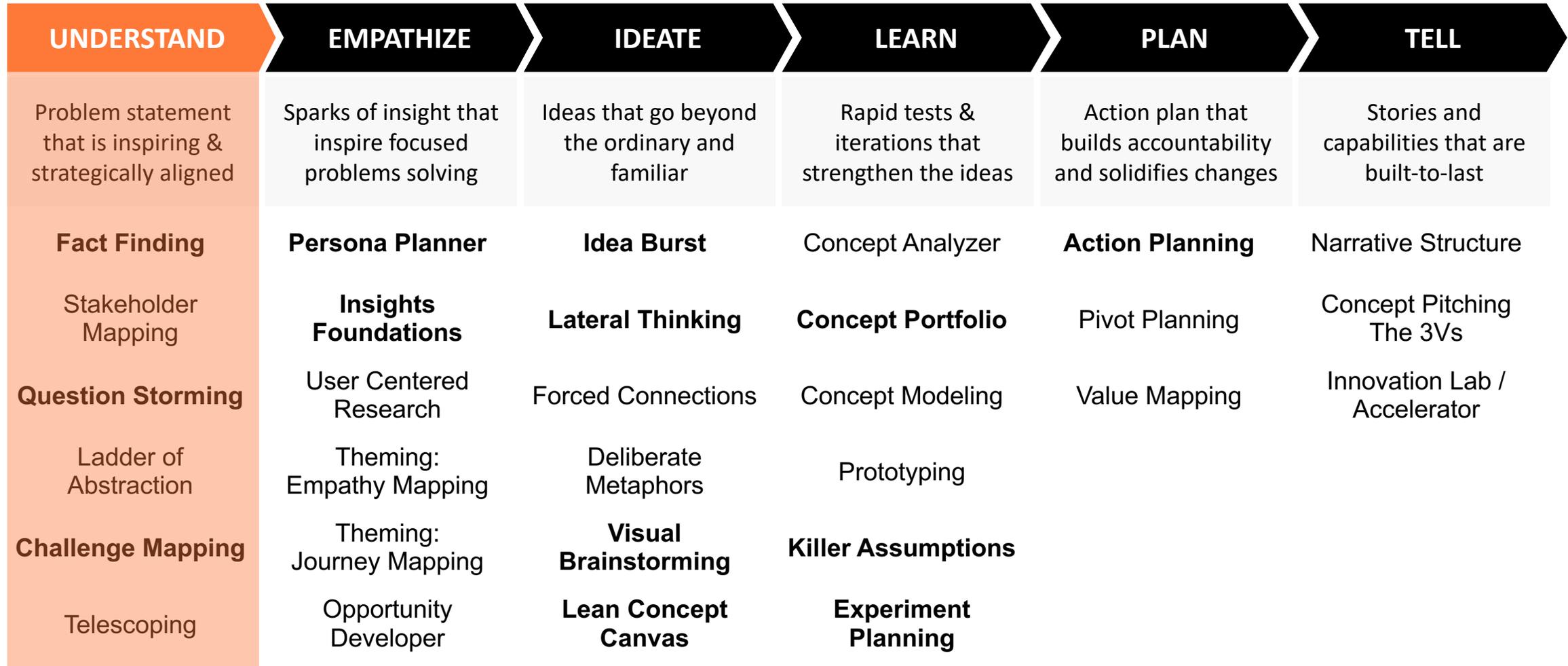
Deliberate Innovation Training

Our Plan for Today

ACTIVITY	
Welcome Back and Warm-Up Fact Finding / QuestionStorming	**8:30 am**
BREAK	**9:45 am**
Understand Phase (continued) Challenge Mapping	**10:00 am**
LUNCH	**12:00 pm**
Empathize and Insight Phase Insights 101 and Persona Planning	**12:45 pm**
BREAK	**2:30 pm**
Ideas Phase	
Ideation Fundamentals + Idea Burst Visual Brainstorming & Modeling	**2:45 pm**
END OF SESSION	**5:15pm**

The Deliberate Innovation Framework

UNDERSTANDING is the First Step in Our Teaching Framework

UNDERSTAND	EMPATHIZE	IDEATE	LEARN	PLAN	TELL
Problem statement that is inspiring & strategically aligned	Sparks of insight that inspire focused problems solving	Ideas that go beyond the ordinary and familiar	Rapid tests & iterations that strengthen the ideas	Action plan that builds accountability and solidifies changes	Stories and capabilities that are built-to-last
Fact Finding	**Persona Planner**	**Idea Burst**	Concept Analyzer	**Action Planning**	Narrative Structure
Stakeholder Mapping	**Insights Foundations**	**Lateral Thinking**	**Concept Portfolio**	Pivot Planning	Concept Pitching The 3Vs
Question Storming	User Centered Research	Forced Connections	Concept Modeling	Value Mapping	Innovation Lab / Accelerator
Ladder of Abstraction	Theming: Empathy Mapping	Deliberate Metaphors	Prototyping		
Challenge Mapping	Theming: Journey Mapping	**Visual Brainstorming**	**Killer Assumptions**		
Telescoping	Opportunity Developer	**Lean Concept Canvas**	**Experiment Planning**		

Fact Finding

It is a method for gathering facts about our "fuzzy problem", building deeper insight into our challenge and gaining alignment by asking and answering a series of questions.

Fact Finding Questions

Purpose and Goals

- Why is it important to tackle this challenge now?

Problem Context

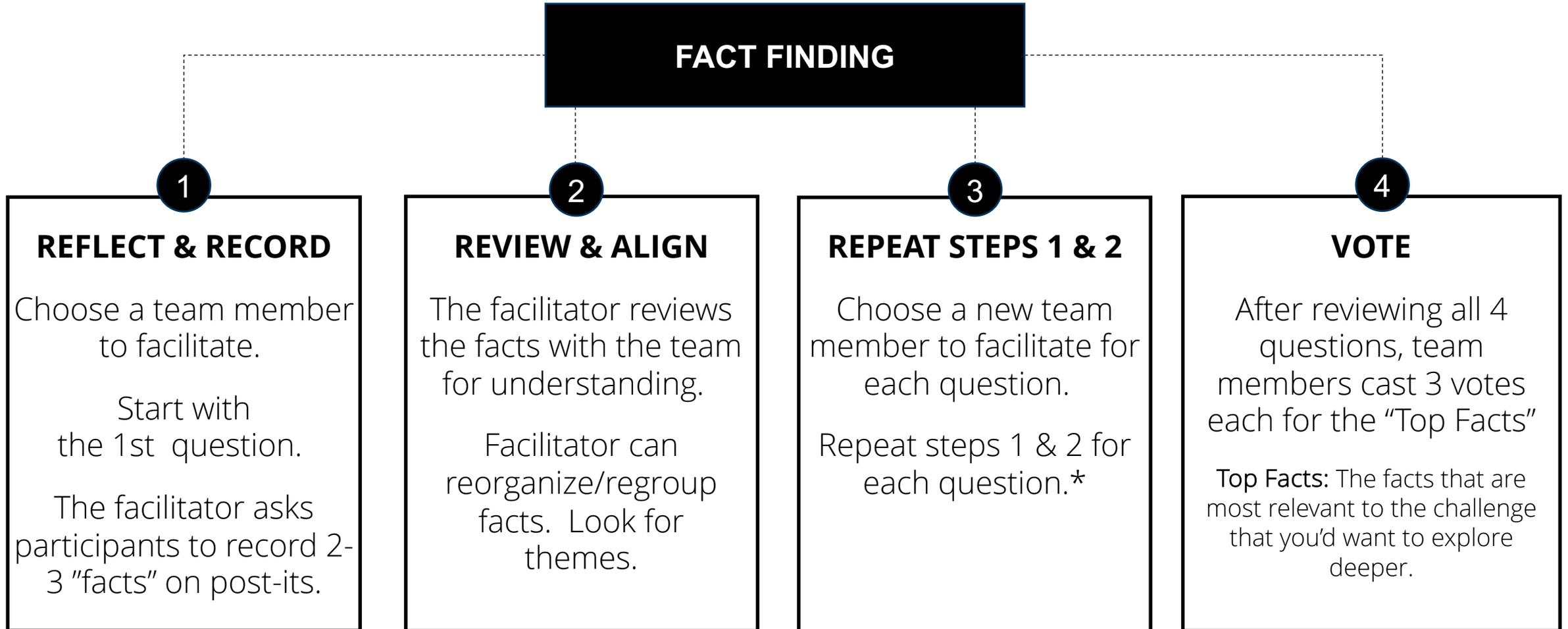- What has been tried before?

Barriers & Resources

- What's one thing that is stopping us from integrating Artificial Intelligence into our communications and daily work?

People & Perspectives

- Who might be able to help/enable our efforts?
- Who might be a derailer?

Exercise Overview

FACT FINDING

1. REFLECT & RECORD

Choose a team member to facilitate.

Start with the 1st question.

The facilitator asks participants to record 2-3 "facts" on post-its.

2. REVIEW & ALIGN

The facilitator reviews the facts with the team for understanding.

Facilitator can reorganize/regroup facts. Look for themes.

3. REPEAT STEPS 1 & 2

Choose a new team member to facilitate for each question.

Repeat steps 1 & 2 for each question.*

4. VOTE

After reviewing all 4 questions, team members cast 3 votes each for the "Top Facts"

Top Facts: The facts that are most relevant to the challenge that you'd want to explore deeper.

* Teams should spend 6-8 minutes per question/quadrant

Top Tip: What Makes a Good Fact?

1 **Easy to understand** – Be simple, concise and clear - an unknowing bystander would understand the gist. Try to minimize tribal language.

2 **Robust** – The fact answers the question in a complete way - you should be able to understand what it meant in 2 weeks.

Example:

*Weak idea***:** Paperwork.

*Robust Fact***:** The amount of paperwork traffic creates confusion and disorganization.

3 **Concise**: Record one fact per submission.

If you're not sure if it's 2 separate thoughts…*"when in doubt, split it out"*

What would success look like to you if you could solve the problem?

Success would be winning over the hearts and minds of colleagues that don't believe we can make a difference

4 **Be Careful of Assumptions**

5 **Avoid Negativity and Fatalism**

Top Tips

- **Fact Finding Mindset** – Remember this is an expansive exercise – Don't Judge the Facts

- **Beware of assumptions** – It's easy to skip over the facts when we hold a position

- **Remove the emotion** – It's easy to have a negative attitude towards a problem

- **Space Constraint** – Don't let space constrain the number of facts! You can always add more post-its

- **Capture verbatims** – Opinions are OK. Need to source them (e.g., Dan thinks: "The Company is a great place to work.")

QUESTIONING

is the practice of constantly asking the right questions, instead of providing the right answers, to challenge common wisdom and deepen understanding.

Question-Storming

is a design and innovation technique that focuses on generating questions rather than ideas in the early phases of a project.

The method turns your key facts into a series of HMW questions that enables the reimagining and reframing of the challenge.

Question Storming Method

Step 1

Step 2

Step 3

Step 4

Step 5

START

With one individual fact
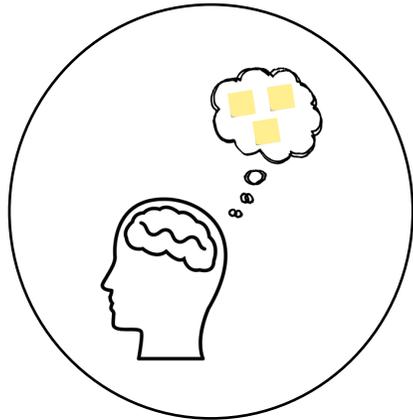
DIVERGE

Independently to produce as many questions as possible
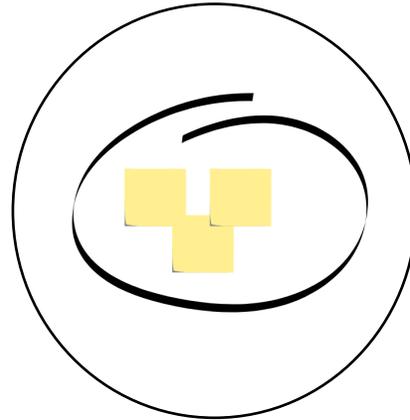
CONVERGE

Independently to shortlist a few quality questions
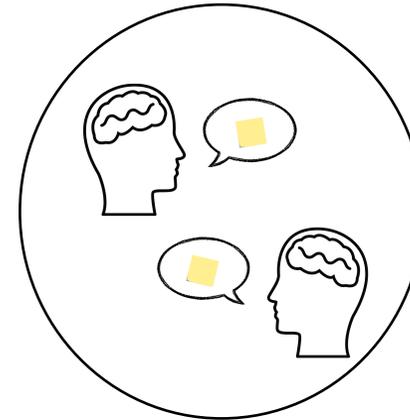
SHARE & ORGANIZE

The questions as a team
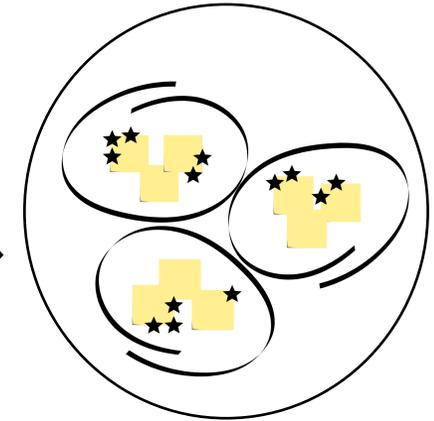
SELECT

the most compelling questions to deeper explore

Exercise Instructions

Question-storming

1 DIVERGE

Bring over your top 3 Facts from Fact Finding

Question burst for 2 minutes individually on one fact

* Remember to start your questions as *"How might we…"*

2 CONVERGE

Individually select your favorite 1-2 questions from the round.

REPEAT FOR EACH FACT

3 DISCUSS & VOTE

Facilitator invites participants to share their questions.

Facilitator should help organize the questions.

At the end, the group votes for top 2-3 questions.

------------- REPEAT STEPS 1 & 2 FOR ALL 3 FACTS -------------

Top Tips

- **Quantity over Quality:** Quantity begets quality in the long-run. Diverge on the questions. Focus on authoring and at a later point editing.

- **Defer Judgment:** Don't judge the questions until later.

- **Avoid Answering Questions:** Our tendency is to try to answer questions as soon as we pose them. Hold off on trying to answer, or solve, the question now.

- **Questions with Answers Embedded:** Try to avoid asking questions that include the idea inside the question. (e.g., How might we make a smoothie that hides the taste of vegetables?)

- **Don't Justify Why You're Asking the Question:** Do not feel as though you need to explain why you're asking a question. Stay neutral.

- **Provocativeness:** The questions should be increasingly more surprising and provocative as you go along.

Challenge Mapping

is a visual method of broadening and narrowing the problem statement in order to conduct deeper exploration so that we focus on the right problems to solve.
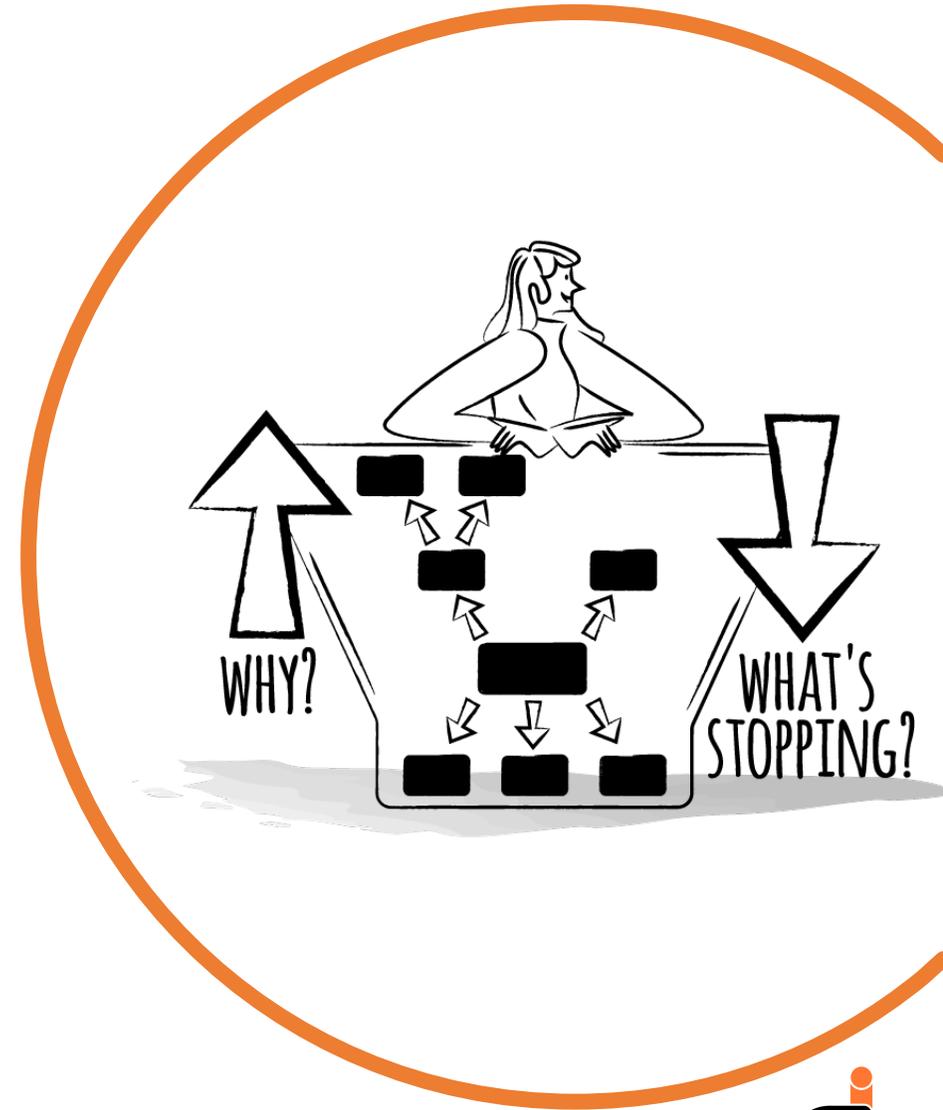
> *When faced with a difficult question, we often answer an easier one without noticing the substitution.*

- Daniel Kahneman

WHY? Ask *WHY* to push the challenge *UP* the funnel and broaden your scope
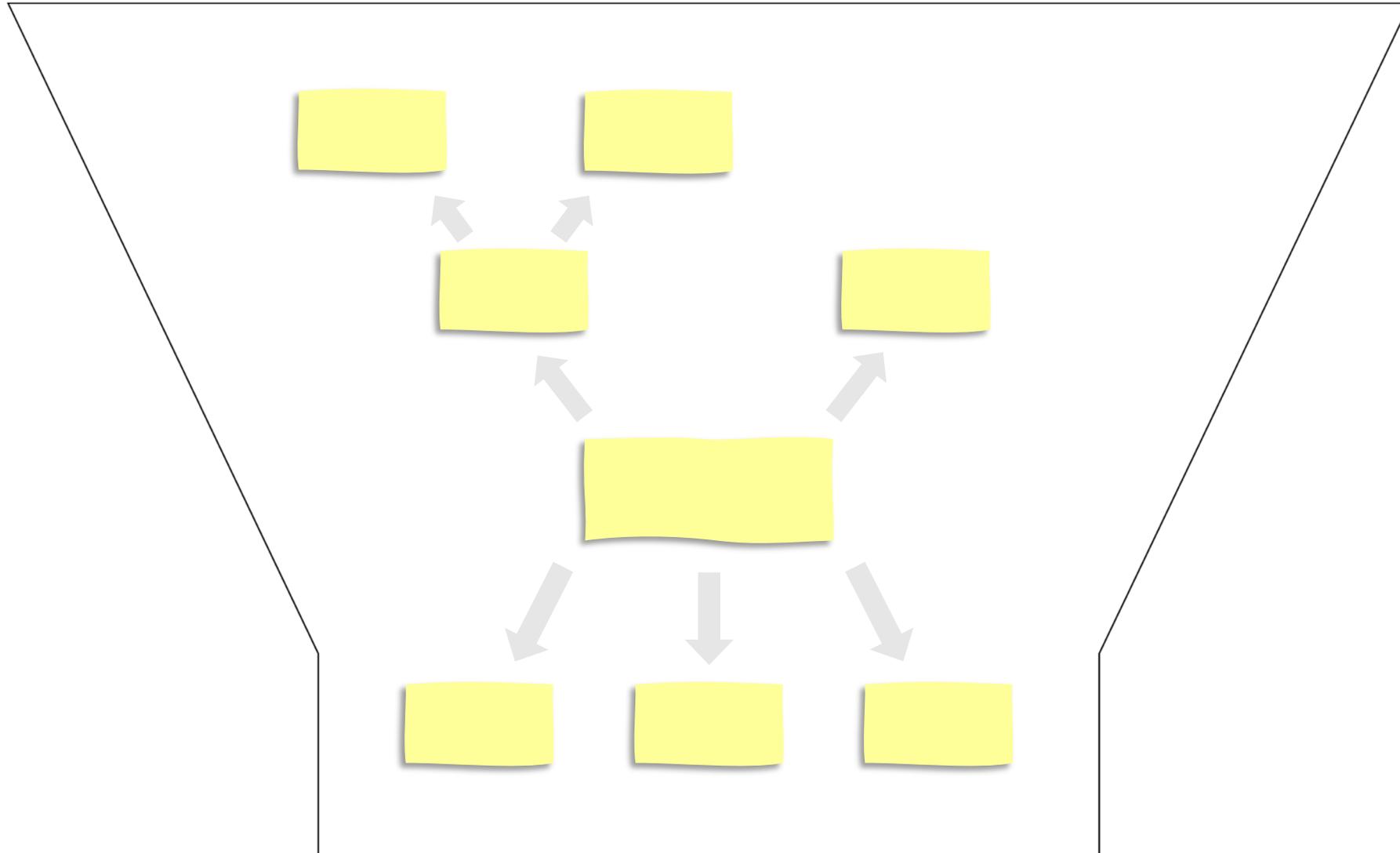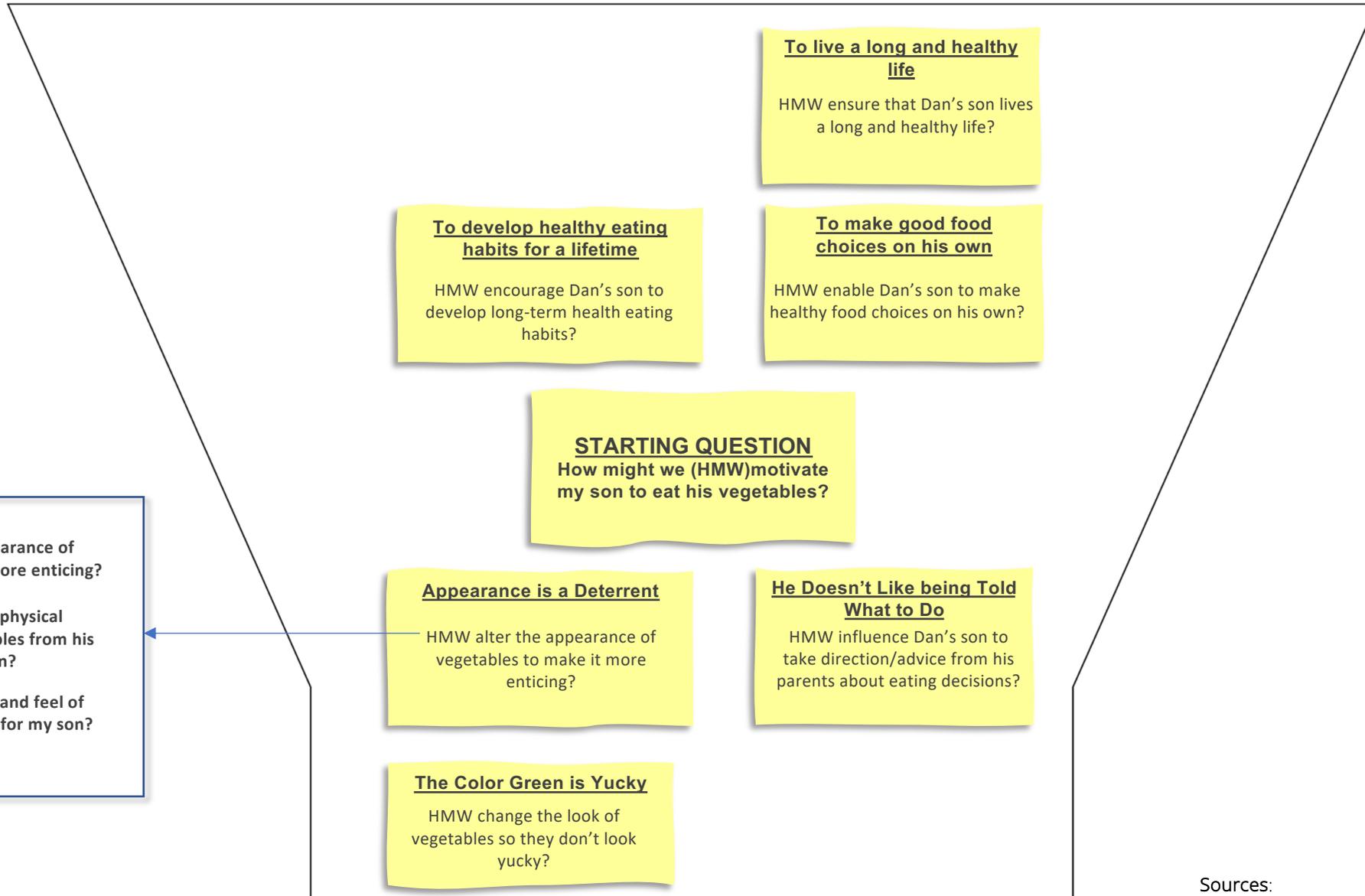
WHAT'S STOPPING? Ask *WHAT'S STOPPING* to push the challenge *DOWN* the funnel and narrow your scope

Exercise Overview

Challenge Mapping Exercise

1 — The Why

Start with the WHY

Each team member, records 2-3 "Why" cards

Facilitator leads the discussion & maps the cards (Try to go up 2-3 levels)

2 — The What's Stopping?

Repeat process with a new facilitator

Each team member, records 2-3 "What's Stopping" cards

Facilitator leads the discussion & maps the cards

3 — Review the Map

As a team, review the different cards on the map.

Add / reorganize the cards on the map.

4 — Revised Question

As a team, review the different questions.

Make a decision if you will select/restate your challenge question.

* Note: This is an opportunity to reuse your fact finding and questionstorming outputs

Challenge Mapping Top Tips

- **Converging vs. Diverging** – The exercise starts as a divergent exercise and then becomes a convergent exercise.

- **Let the Facilitator Facilitate** – One person must lead the exercise; allow for the facilitator to ask questions and in return the facilitator will ask participants to help him/her place the post-its on the map.

- **Patience** – Take time to explore and ask questions before recording –be careful not to ignore participant input

- **Move the Map!** – We use post-it notes to record the barriers because they will likely need to be reorganized. It is normal to have to reorganize your map and move the post-its around as discussion progresses.

- **Double Barreling** - Don't solve multiple issues for multiple stakeholders.

- **Prioritization** – You will likely identify more than one challenge – prioritize which one(s) you want to solve imminently.

Empathize & Insight

Is about building a deep understanding by "walking a mile in their shoes." By understanding their deeper beliefs, needs and wants we can both delight our customers AND unearth opportunity areas for the business.

A Framework for Insight
The Insight Ladder
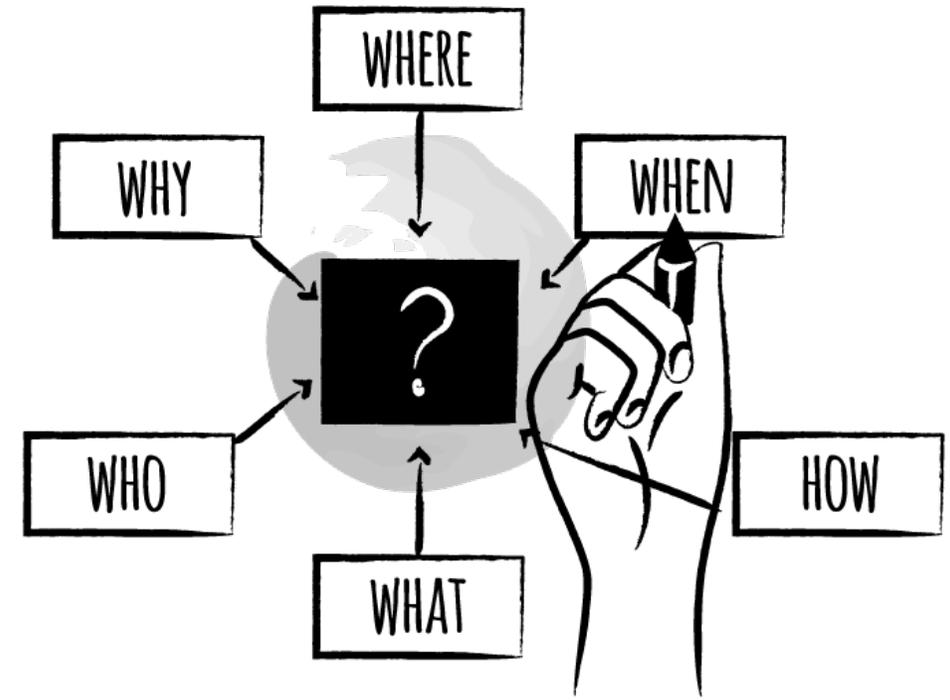

WHO
Identify **who** you need to learn about

HOW
Determine **how** you can learn about them

WHAT
Decide **what** to learn and how to record the findings

WHY
Synthesize the findings into themes and decide **why** those insight themes matter to your customers and to your business

Persona Planner

is a method for identifying WHO we need to learn about and HOW we can learn about them.

The result is a User Centered Learning plan that will guide us in uncovering customer insights.
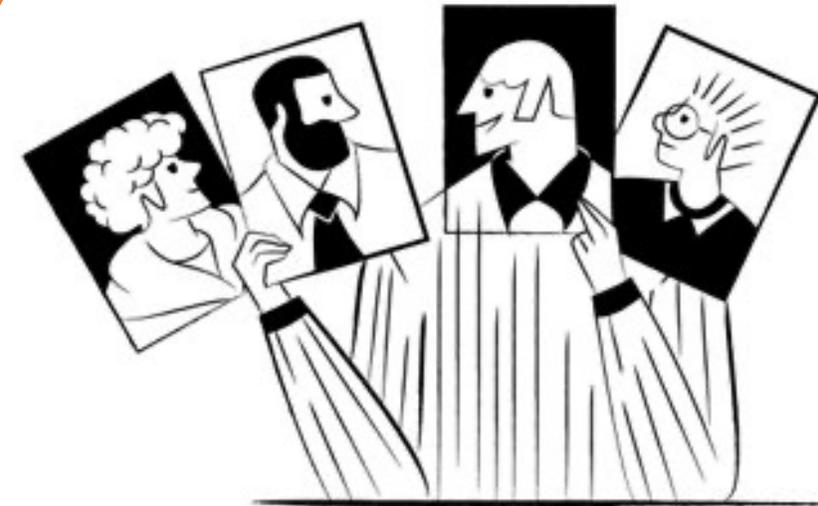
Persona Planner – The WHO

People

Description

The EVERYDAYS

Everyday people have an ordinary, day-to-day relationship to the challenge. Often tracking their actions and behaviors yields deep insight into the challenge area.

The EXPERTS

Experts have a subject matter expertise or deep relationship related to the challenge area. They are fewer and are often on the leading edge and have strong beliefs.

The EXTREMES

Extremes have an indirect, or adjacent relationship to the challenge. We identify them by asking "where else" do people face this challenge.
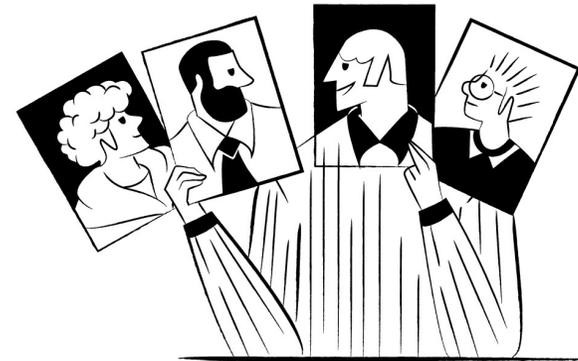
Persona Planner – The HOW

Method

RESEARCH	
SURVEY	
INTERVIEW	
OBSERVE	
EXPERIENCE	

Description

SECONDARY RESEARCH is information that may be in the team's possession or can be readily acquired through desk or data research.

SURVEYING is a form of primary (or original) research and typically provides a limited amount of information from a large group of people.

INTERVIEWING provides deep and intimate insight by exploring a topic with an individual or small group of subjects.

OBSERVING requires high involvement but can yield rich information because behavior reveals more than words. There are several ways to observe, including: Studying, Shadowing and Ethnography.

EXPERIENCING is the most direct and highest form of engagement when it comes to research. This is literally "walking a mile in another's shoes." This can be either: Experience Simulation or Direct Immersion.

Secondary Research: The What

Secondary research, also known as desk research, is a research method that involves compiling existing data sourced from a variety of channels.
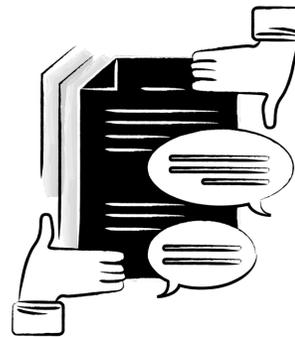
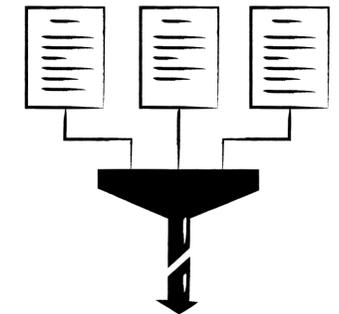| Research Studies	Government Data / Statistics	Customer Feedback Reports	Syndicated Data	Content Analysis Data

3 Types of User Interviews

Bootstrap User Interviews

In-Depth Interviews

Focus Group Interviews

3 Types of Observation

Naturalistic Observation

Shadowing

Ethnographic Research

Naturalistic observation is observing behavior in the environment in which it typically occurs.
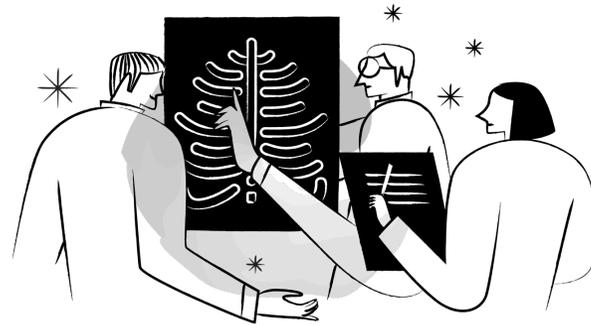
Shadowing is following and observing of a subject during their normal activities.

Ethnography involves direct observation as well as participant interviews over a period of time.

3 Types of Experience

Simulation

Immersive Experience

Disguised Participation Observation

Simulations model the live experience in an experimental environment.

Immersion is the researcher being inserted directly as a participant in a live experience.

Disguised participant observation has the researcher pretending to be a member of the social group they are observing.

Instructions

Persona Planner
THE HOW

1

The WHO

List people for each of your 3 categories.

Select one subject for each of the three categories

2

The HOW

DIVERGE on the HOW you will learn about each of the selected subjects

3

The Plan

Select 1-2 research options for each of your users.

Persona Planner (The WHO) Top Tips

- **Start with the WHO**

- Your people plan should be **balanced amongst the groups**.

  – **Everyday** (60%)

  – **Experts** (30%)

  – **Extremes** (10%)

- **Solicit input** from people outside of the challenge

- **Be expansive** when you list out the WHO and HOW

- **Don't ignore the Extremes**!

- **Don't be afraid** to go outside of your office and talk to people!

- **Define clear responsibilities** for who is doing what to execute the plan

# Persona Planner (The HOW) Top Tips

- **Don't Be in a Hurry**: Putting together a research plan takes practice, and it starts with the ability to slow down, stop, and think.

- **Start at the Desk…But Don't End There:** There is a wealth of information just a few internet searches away. Don't ignore what's already been discovered. That said, don't rely entirely on other people's research and opinions. Formulate your own to complement others.

- **Go Outside of Your Personal Experience:** We bring our own experience and bias when researching. Try to consciously focus on other people so you can plan to learn about them.

- **Diversity of Perspective:** Building your plan on HOW you will research will be greatly augmented when you invite other colleagues/team members to brainstorm with you for each category.

- **Meta-Research:** Search out examples of how other people have researched about your subjects. Sometimes the most creative research method doesn't need to be your own.

- **Create Some Collisions!:** The best way to learn is to create situations in which you "collide" with other humans. Don't be afraid to go outside of your office and talk/observe people!
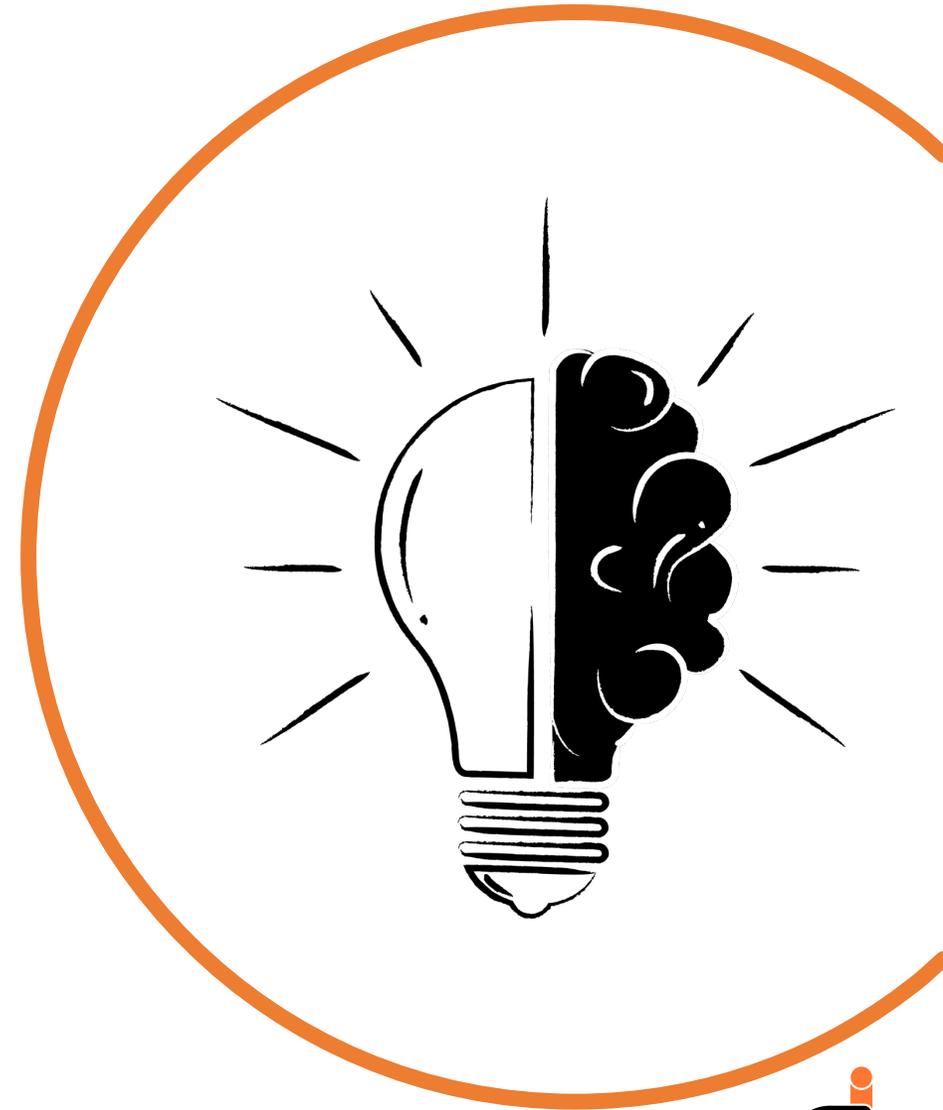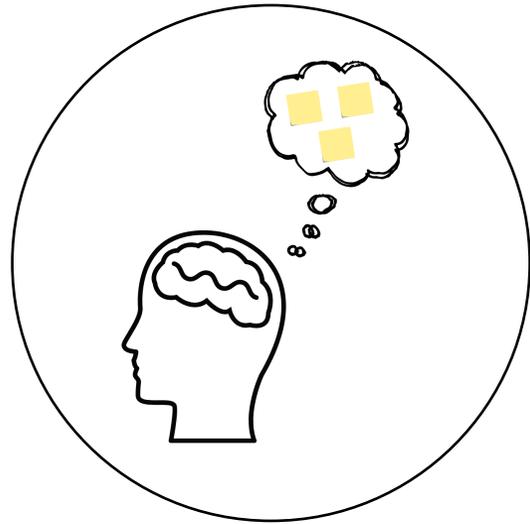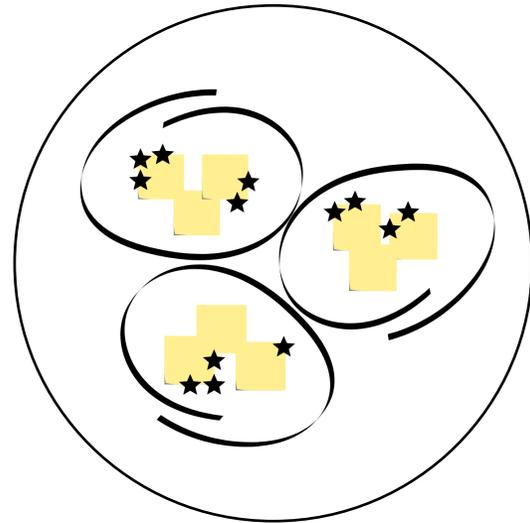
Idea Burst Method

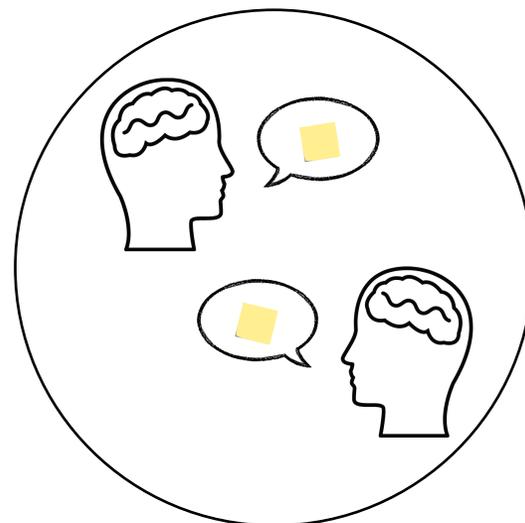**Step 1**

DIVERGE

Ideate Independently

Step 2

CONVERGE

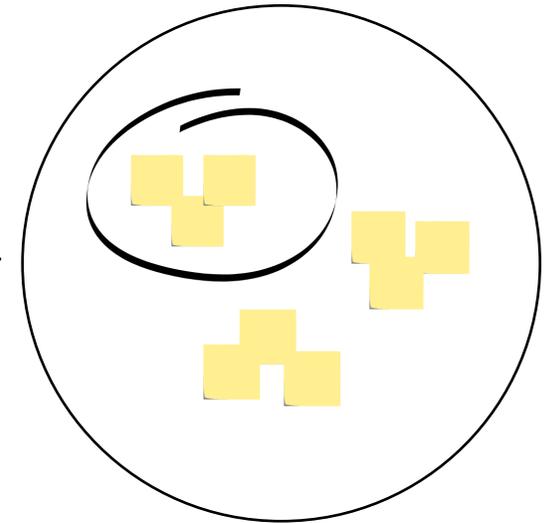Independently Select **TOP 2** ideas that have possibility

Step 3

CLARIFY

Share, explain and connect the selected ideas

Step 4

BUILD

Using "Yes...And" we nurture the starter ideas

How to Write a GOOD Starter Idea

The Challenge: How might we **motivate Dan's son to eat vegetables?**

Vegetable Point System

Each time he tries a different vegetable at dinner, he earns points which can be exchanged for screen time, rewards and prizes.

3 Give a catchy title

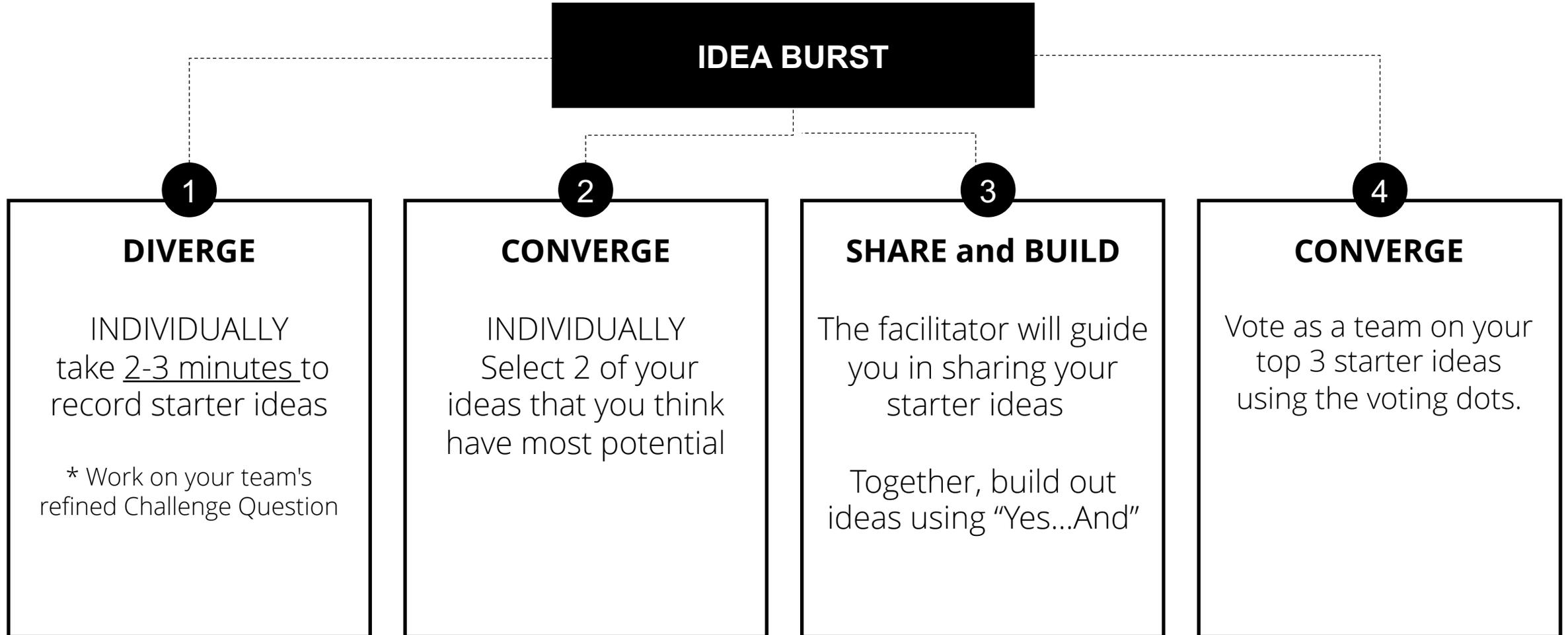**2** Each idea should be a complete thought

1 One idea per post-it note

Participant Top Tips

- Don't **self-edit**
- Write a **complete thought** but not multiple paragraphs

- **Maintain Momentum** – More Time Can Be Less!
- **Over-Synthesis** – Be careful to not over group your ideas – Let Good Ideas stand Alone

Exercise Overview

```
                          ┌─────────────────┐
                          │   IDEA BURST     │
                          └─────────────────┘
```

1

DIVERGE

INDIVIDUALLY
take 2-3 minutes to
record starter ideas

* Work on your team's
refined Challenge Question

2

CONVERGE

INDIVIDUALLY
Select 2 of your
ideas that you think
have most potential

3

SHARE and BUILD

The facilitator will guide
you in sharing your
starter ideas

Together, build out
ideas using "Yes...And"

4

CONVERGE

Vote as a team on your
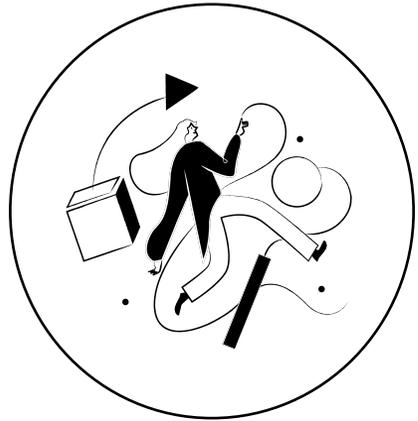top 3 starter ideas
using the voting dots.

Visual Brainstorming

is an alternate method of collaboratively generating ideas without using the spoken or written word.
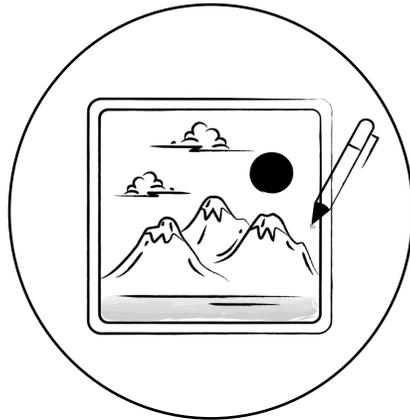
Visual Brainstorm Method

Step 1	Step 2	Step 3	Step 4	Step 5
REFLECT	**DRAW**	**DESCRIBE**	**SHARE & BUILD**	**VOTE**
Reflect on the question and allow your mind to wander	Sketch the essence of how the idea might work	Give your drawing a headline and a short description	Summarize for the group your drawings and "yes…and" the descriptions	On the top ideas
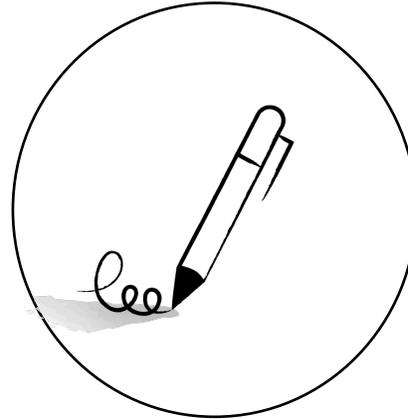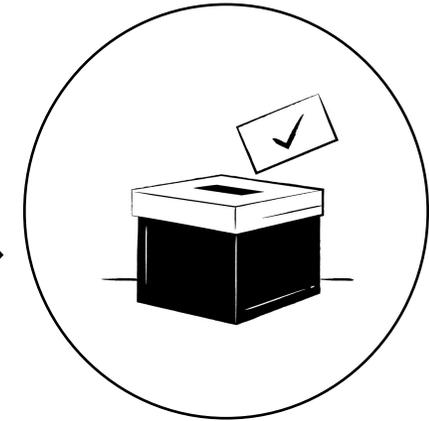
How to Facilitate It

Visual Brainstorming

1

DRAW

Each team member
INDIVIDUALLY
takes 5 minutes to draw 3 - 4
ideas

2

CONVERGE

Each team member takes a
moment to reflect on and review
their drawings and give each
picture a headline and
description

3

SHARE & VOTE

Exercise facilitator invites
participants to share their
favorite idea.

Facilitator adds a post-it note
with an explanation

Vote on the top ideas
(3 votes per participant)

Visual Brainstorming Top Tips

- **Don't Self-Edit**

- **Don't Have a "Meeting with Yourself" –** Allow your hands to work in parallel with your mind

- **"Don't Aim for Perfection" –** Nobody in the room is Picasso

- **Keep It Simple -** Stick figures are cool!

- **Push Your Thinking** – Strive for radical and far-reaching ideas – Think about the basic truths and challenge it by asking…. "What If?"

- Focus on the **Storytelling**

Deliberate Innovation Training

Our Plan for Today

ACTIVITY	
Welcome Back and Warm-Up **Ideate Stage (Cont)** Lateral Thinking	**8:30 am**
BREAK	**9:45 am**
Concept Evaluation / Portfolio Lean Concept Canvas	**10:00 am**
LUNCH	**12:00 pm**
Learn Stage Killer Assumptions Experiment Design	**12:45 pm**
BREAK	**2:30 pm**
Everyday Innovation Discussion Panel	**2:45 pm**
Action Planning Closing / Takeaways	**3:30 pm**
END OF SESSION	**4:30pm**

Lateral Thinking

helps you to take an indirect and creative approach to looking at your problem in a new way.

By asking "**provocative questions**", we push our powers of imagination to produce new and unexpected ideas.
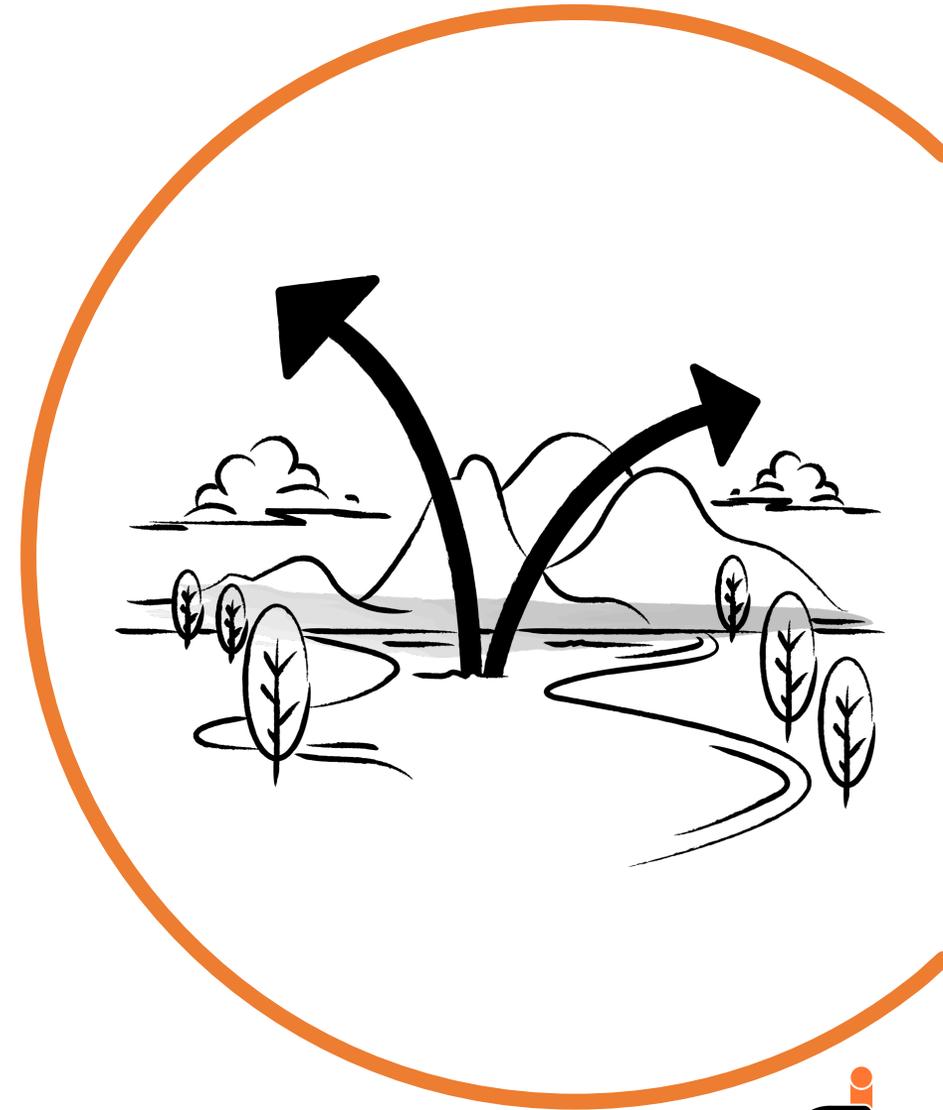
HOW IT WORKS

1. **List** the Basic Truths

2. **Ask** Provocative Questions

3. **Challenge** Yourself To: Find a Way to Make this Possible

Whiskey is Made for Drinking

Whiskey is Aged in a Barrel

Requires ONLY Oak Barrels

Barrels are Stored in Warehouses

Alcohol Evaporates as it Matures

Good Whiskey Takes Years to Make

HOW IT WORKS

2 Provocation

Whiskey is Made for Drinking

Whiskey is Aged in a Barrel

What if you did NOT have to age whiskey? ← **Remove**

What if barrels did NOT exist? ← **Eliminate**

What if the whiskey distilled itself? ← **Exaggerate**

What if you put the barrel in the whiskey? ← **Reversal**

Requires ONLY Oak Barrels

Barrels are Stored in Warehouses

Alcohol Evaporates as it Matures

Good Whiskey Takes Years to Make

Exercise Instructions

Lateral Thinking

1

BASIC TRUTHS

Individually, **DIVERGE** on the "basic truths"

As a team, share/discuss your Basic Truths

Select 2 Basic Truths

2

PROVOCATIONS
Individually, Diverge on the "What if" questions

As a team, share/discuss your "What If" Questions

Select 2 "What If Questions"

3

IDEA BURST

Idea Burst on each of your 2 "What If" questions

*Focus on 1 Question at a time.

4

SELECT

Select Top 3 Ideas for further development

Concept Portfolio

is used to compare and assess your ideas and build a portfolio of ideas for further development.
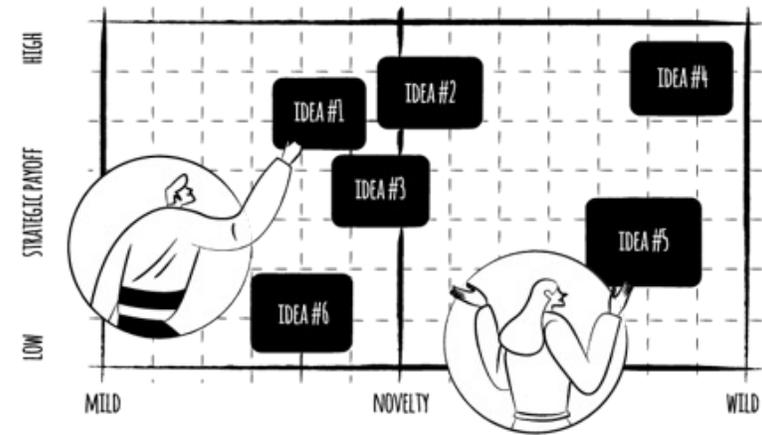
Concept Evaluation Chart
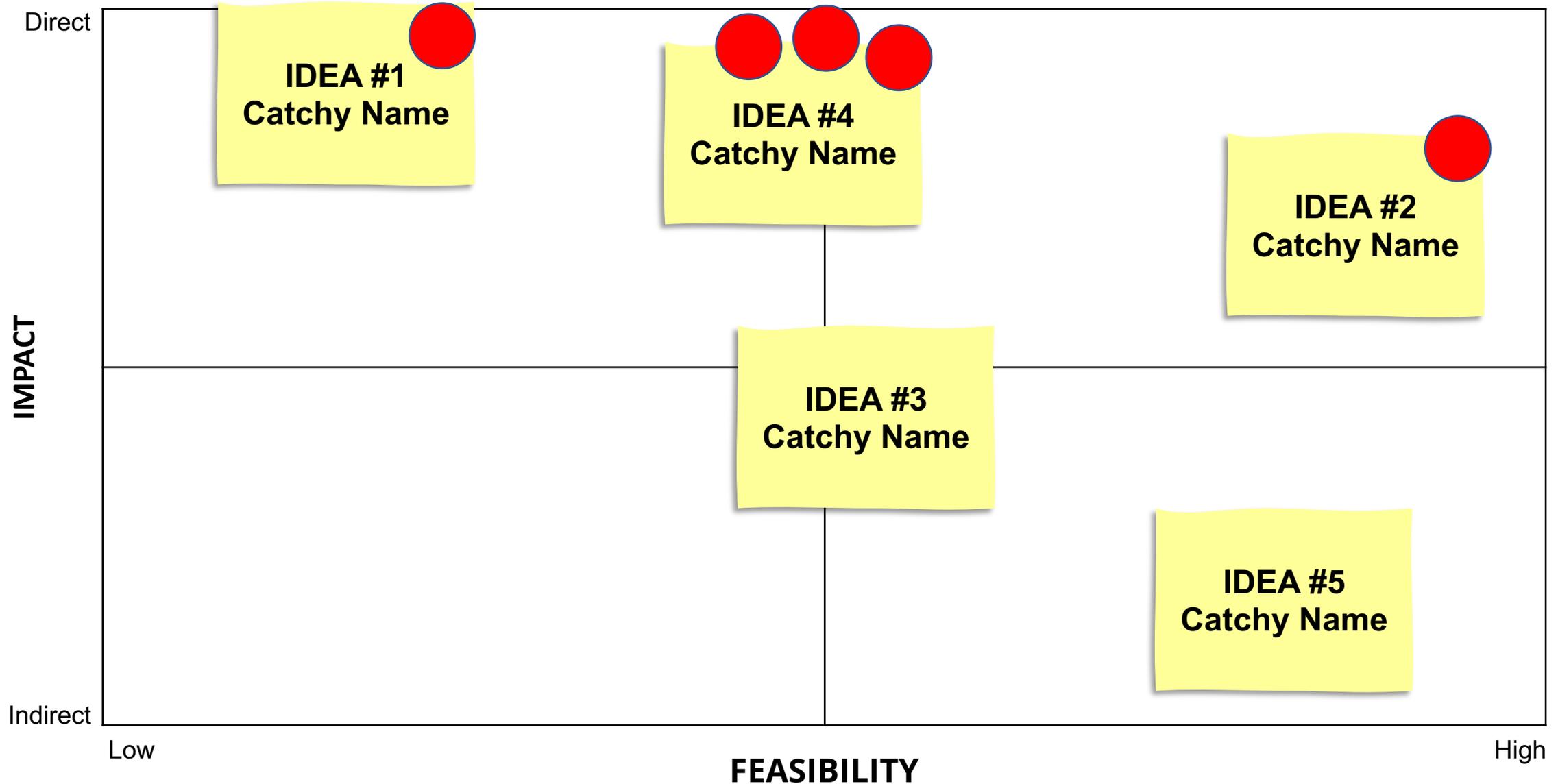
Evaluation Criteria of the Challenge Questions
Consider 3 criteria when evaluating the question options

Criteria	Description and Range
Impact	The degree of impact that the idea will have on solving the challenge **Range: Indirect Impact to Direct Impact**
Feasibility	The likelihood that our organization will be able to execute this concept **Range: Low to High**
Team Passion	Level of interest you and your team have to work on the development of this idea **Range: No Passion – Super Excited to Execute It!**

Exercise Overview

Concept Evaluation

1 RECAP

Recap the "converged ideas" (top starter ideas) from each of the ideation rounds

2 PLOT

After recapping each top starter idea, the team will plot the ideas on the 2x2 chart using the two primary evaluation criteria

3 DISCUSS

Team will discuss which of the concepts they want to further develop and are MOST PASSIONATE about developing

3 dots per person to vote for MOST passionate

4 SELECT

As a team, select your

TOP 2 Concepts

for further development

Lean Concept Development

Leverages the power of co-creation to ensure you are building actionable ideas rather than starter thoughts.

1– The Starter Idea <u>INSERT YOUR POST-IT(s)</u>

Starter Idea

Catchy Name for The Concept

The name should be memorable AND relevant. It should also be the last thing you add to your concept

2 – Detailed Explanation How the Concept Might Work

This is the detailed steps and features of the idea. It brings to life how the idea might work.

Think about a chain of activities and components of the concept.

3 – Key Stakeholder / Customer

Who is the primary beneficiary or user of this concept? Focus on the primary beneficiary first.
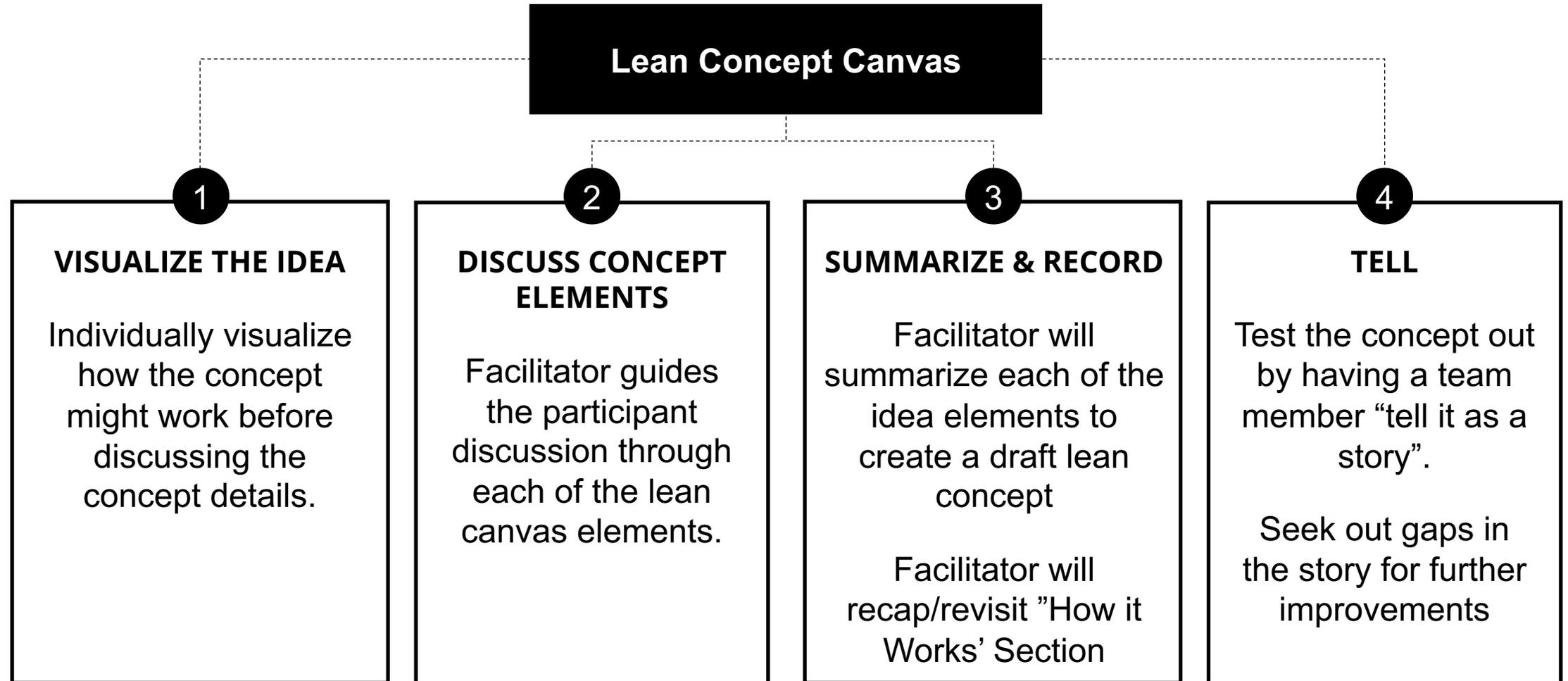
4 – Why Stakeholders Will LOVE This Concept

What are the value proposition(s) to the key stakeholders.

What are the value propositions to your company to invest in this concept.

5 - Success Criteria

Define the measures of success. What are the metrics and KPIs that this concept is a winner.

Exercise Overview

Lean Concept Canvas

1

VISUALIZE THE IDEA

Individually visualize how the concept might work before discussing the concept details.

2

DISCUSS CONCEPT ELEMENTS

Facilitator guides the participant discussion through each of the lean canvas elements.

3

SUMMARIZE & RECORD

Facilitator will summarize each of the idea elements to create a draft lean concept

Facilitator will recap/revisit "How it Works' Section

4

TELL

Test the concept out by having a team member "tell it as a story".

Seek out gaps in the story for further improvements

CHALLENGE: COMPLETE AT LEAST 1 CONCEPT CANVASES

Top Tips

Visualization: Before you start ideating/writing…take a few moments to imagine in your mind what the concept looks like, feels like

Process: Follow the numbers and let the facilitator direct you

Take Your Time on "How the Idea Works", really build it out

Who is it for: Keep checking back in to remind yourself that you're building an idea for a customer/stakeholder person
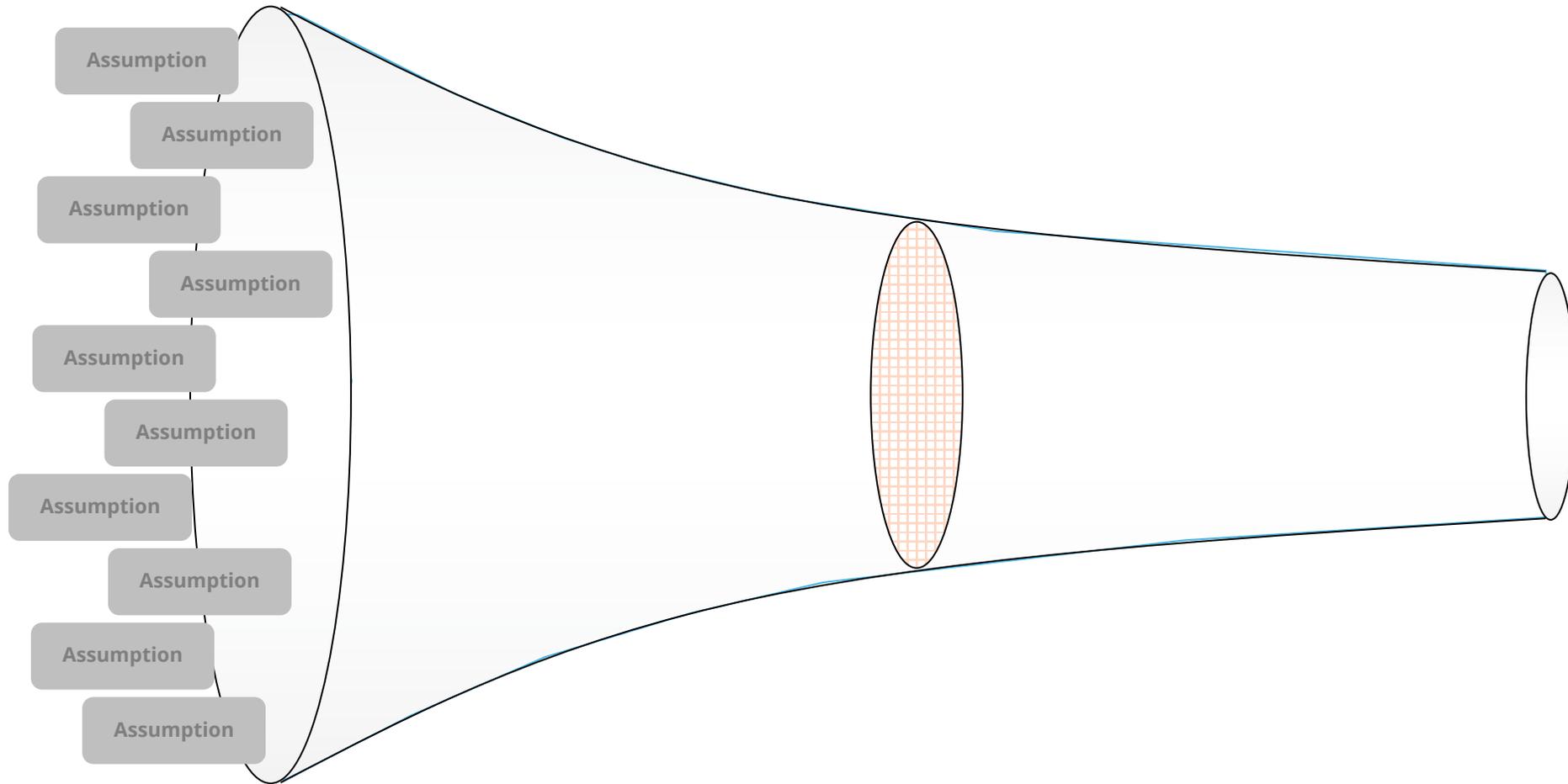
Storytelling: When you get to the end of the idea, each team member should be able to play back the idea as a story
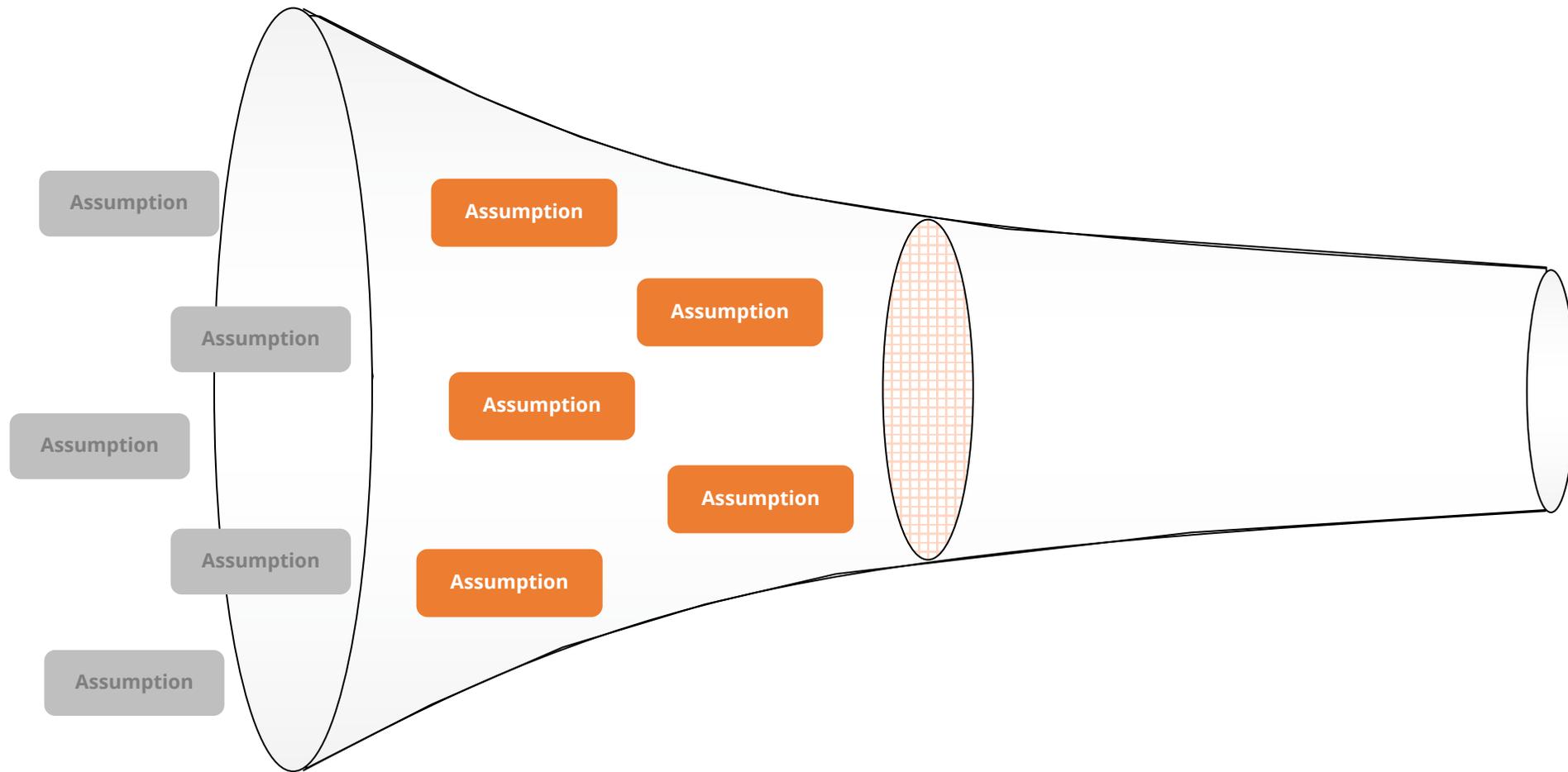
Killer Assumptions

is a stepwise process that inventories and prioritizes the MOST important, or KILLER, assumptions, that we must action plan for in order to be successful.
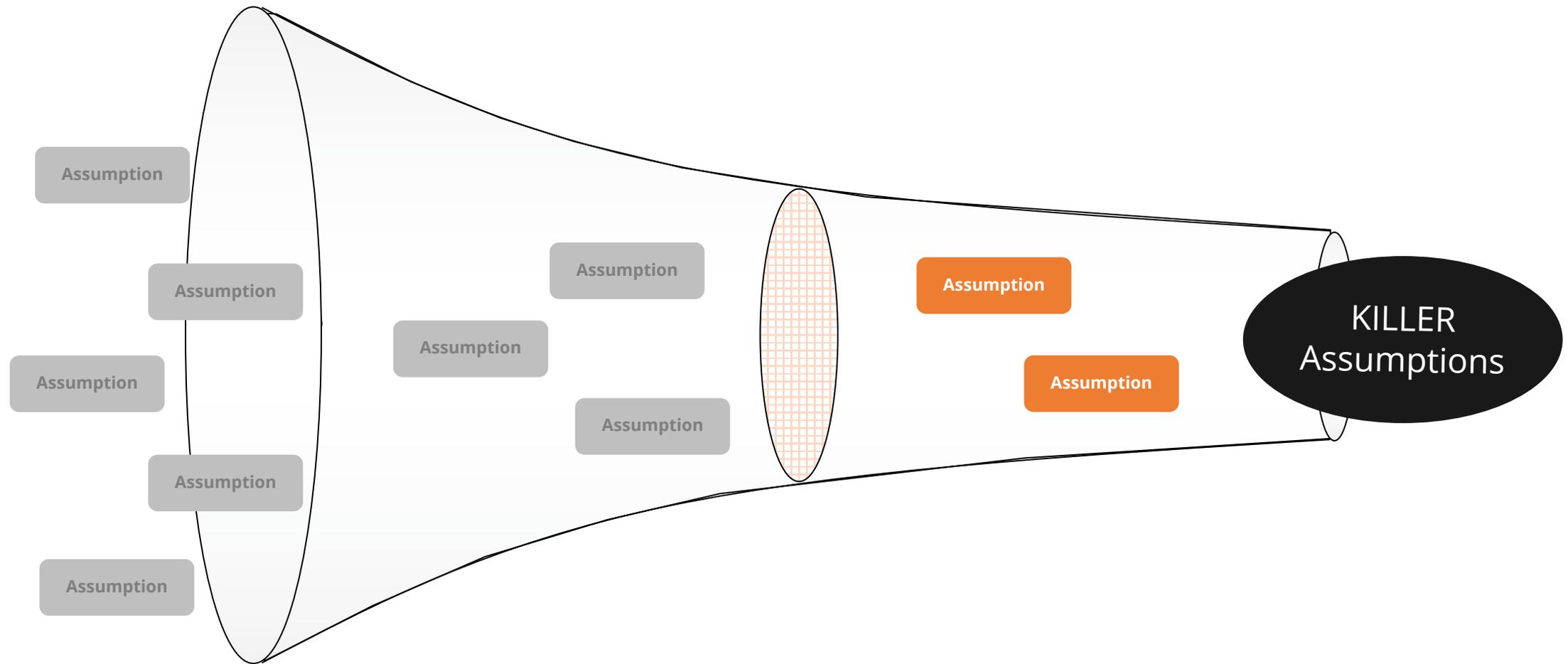
Which assumptions must hold true for the idea to be successful?

Which of these assumption will have the highest impact?

Which high impact assumptions are the most uncertain?

Exercise Overview

Killer Assumptions

1 MUST HOLD TRUE

Facilitator leads a "burst" of assumptions that must hold true for the idea to work.

* Make sure to "trim" duplicate assumptions before progressing to the next step.

*List assumptions one at a time on virtual post-it notes

2 HIGH IMPACT

As a team, judge each assumption on the degree of "Impact"

*Move the "High Impact" assumptions into the 2nd column

3 HIGH UNCERTAINTY

As a team, judge the high impact assumptions on the degree of "Uncertainty"

*Move the assumptions into the 3rd column

4 KILLER ASSUMPTIONS

As a team, decide which are the top 2-3 KILLER assumptions you need learn about and plan for in your action plan.

Top Tips

- **List assumptions one at a time** – one per post it note

- **Be expansive** - don't Judge in the First Round

- Ensure **everyone understands each assumption** before making a decision on it

- If you get stuck, **think about categories**:

  - Here are some useful categories to consider: Financial, Operational, Strategic, Customer, Internal Politics, Legal/Compliance/Regulatory

- Facilitator should **"trim" duplicate assumptions**

- When deciding if an assumption should be moved forward, **if there is disagreement, move it forward** – even if you believe it's easy to learn

- Teams can have multiple "KILLER" assumptions (but **not every one should be a KILLER!**)

Experiment Planner

helps you manage risk by rapidly and inexpensively testing the killer assumptions on a small scale so you can accelerate learning and ultimately iterate on your concept.

Experimentation Principles

Test most risky elements (vs. the entire concept)	Rapid and low-cost tests	Learn from experience	Validate, iterate or kill

Creating a Fast Learning Plan – 3 Step Plan
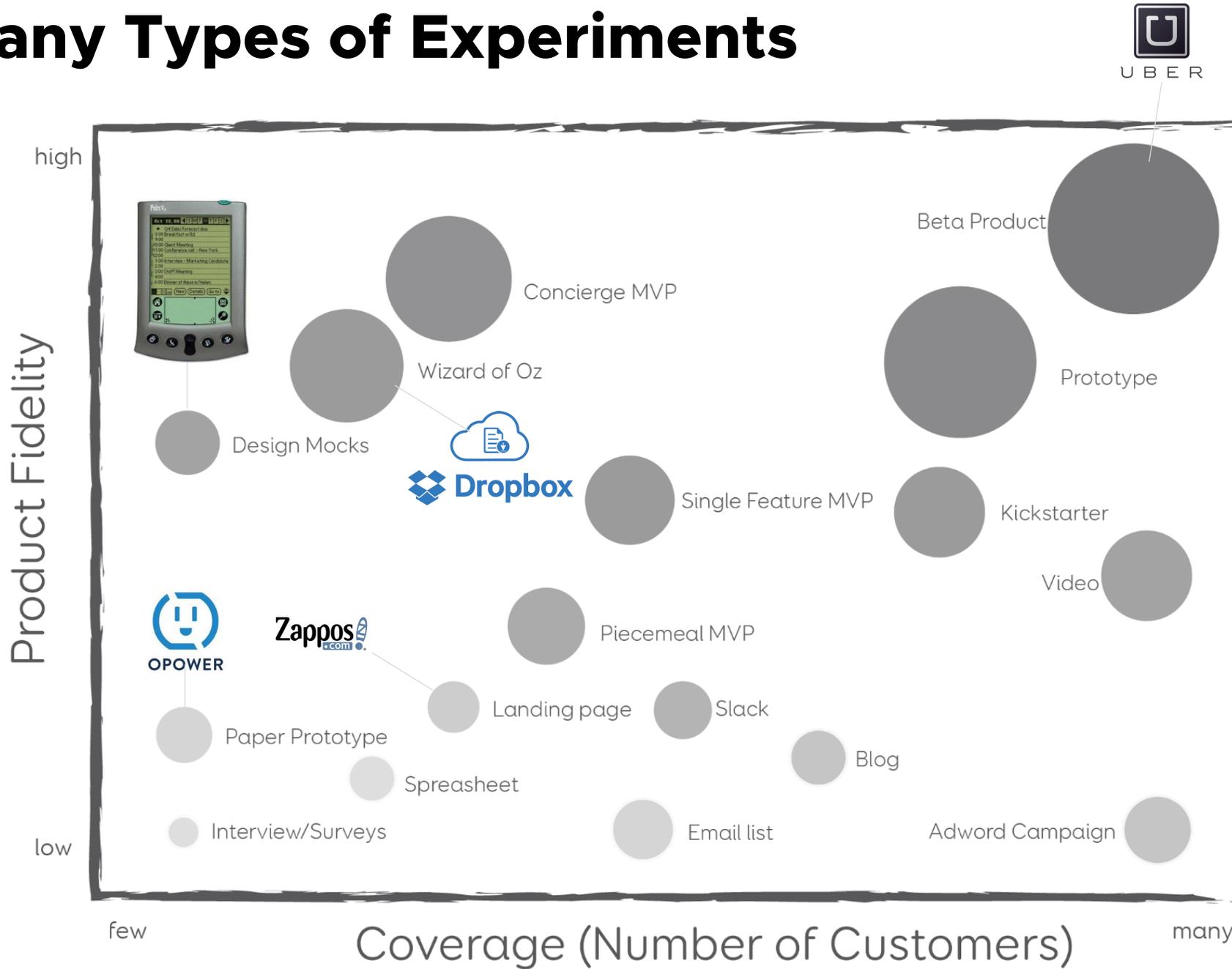
1

What do you need to learn?

2

What small scale experiments can you design to effectively learn?

3

What do you need to measure to determine if you are successful?

The Many Types of Experiments

Product Fidelity (vertical axis: low → high)

Coverage (Number of Customers) (horizontal axis: few → many)

UBER

Concierge MVP

Beta Product

Wizard of Oz

Prototype

Design Mocks

Dropbox

Single Feature MVP

Kickstarter

Video

OPOWER

Zappos.com

Piecemeal MVP

Landing page

Slack

Paper Prototype

Blog

Spreasheet

Interview/Surveys

Email list

Adword Campaign

Exercise Overview

Experimentation Plan

1 Killer Assumption

Review your killer assumptions.

Select one killer assumption

Set your learning objective

2 Design

Ideate on creative ways you can design a fast/inexpensive experiment to help you answer your learning objective

3 Metrics

Set your learning goals, metrics and thresholds for success.

4 Review

Review your plan as a team and ensure that your test is feasible and goes beyond market research

Top Tips

- **Ensure** experiments are testing the killer assumptions

- **Remember** that we are testing parts of the idea, not the entire idea

- **Include cross functional creative thinkers** when designing rapid and low cost experiments

- **Include early metrics** in your experiment design and track progress frequently

- **Scale quickly -** when assumptions have been validated & uncertainty resolved.

- **Fast fail the idea** if a killer assumption fails and there is no other adaptive pathway forward

- **Incorporate the learnings** into your concept and share learnings broadly

Action Planning

is a project management driven process that ensures that you turn your ideas into measurable actions to ensure the team maintains momentum after the workshop has finished.

Action Planning for Momentum

What — Generate the actions that must be taken to quickly test, learn and accelerate the project from concept to reality

How — Bring realness to the actions & propose HOW you will approach each WHAT

Who — Start assigning accountabilities:
- Who is taking care of what?
- Who is the owner of an action and accountable?
- Who is supporting?
- Who needs to be informed?

When — Formalize the commitment by aligning actions and deadlines with team diaries

Divergent

Convergent

Exercise Overview

Action Planning

1

"The WHAT"

Individually, diverge on what you need to personally do over the next 30 days to make these skills permanent.

Focus on 5-7 actions you can take.

2

"The HOW"

Individually, list out HOW you can make the WHAT happen.

3

"The WHEN" and "The WHO"

Arrange all your actions in order of completion from soonest to latest

Estimate time and responsibility / accountability so that there is ownership and action.

Top Tips

- Start by making an **expansive list of WHAT you need to plan and HOW you will accomplish it**

- Only after you have created the WHAT and HOW, **assign accountability to WHO and WHEN**

- **Plan for the next 30-45 days**

- Think about (1) what you need to **learn** (2) what **logistics** need to be addressed and (3) who you need to **communicate** with

- Bring in **different perspectives** and expertise to help detail the action steps

- If you want to **ensure that action happens**, incorporate the commitment contract to have colleagues hold you accountable