

Chapter 3 – Planning for Design

*“What else, when chaos draws all forces inward
To shape a single leaf.” Conrad Aiken*

When the word design is mentioned, it often produces a glassy-eyed stare with a statement like, “Design? Sure.” So, let’s begin by telling you what we mean by this word ‘design.’

If you were to think about designing a car, you would envision someone laying out engineering diagrams of the parts or modeling the body in clay. The design of a car can help to sell the car to a market concerned about fuel economy by making sure the engineering keeps fuel efficiency in mind. If you were to think about designing a house, you might envision an architect’s drafting table with blueprints showing the layout of rooms. The design of a house can help a family of six be more comfortable by making sure that the hallways are wide enough to allow for more than 2 people to pass one another. If you were to think about designing a meeting, you might have a bit more difficult time envisioning anything – which is why eyes glaze over when managers are asked about designing a meeting. Yet the design of a meeting helps achieve the intended purpose through careful selection of activities that will appeal to those present. Just because we can’t see the act of designing doesn’t mean that there are not real factors where choices are to be made that will impact final effectiveness. In this chapter we will explain and explore the critical factors involved in making your choices. And that is what design is all about – making choices in order to have a successful distance event.

A Story -- Face to face techniques must be revisited

It was my first class teaching to eight sites via a video conference. I had taught the class for years to 20 to 30 students per class getting highest accolades for what and how I was teaching. Students particularly liked that the class was so interactive and that they were able to test things out right in the classroom and share experiences. Now, I was doing it to a similar sized audience that were located in various Latin American countries. I began as I always did by asking them what they wanted to get out of the session. About a third of the way through my queries to the sites, the answers began to move to a related but different question of ‘what do I need to do my work’. Both questions were of interest, but it took longer to answer the second question. Time slipped by, participants at the other sites were becoming bored, we were not progressing according to my schedule, and I didn’t know how to shift the responses back to the original question without feeling rude. I suddenly realized that the techniques that were so useful in the classroom were not possible to me now. I couldn’t interrupt the responses as I could face to face where I would simply turn, nod to the next person, and silently indicate it was time to wrap up the answer. There were too many sites, and they couldn’t know that I was looking consciously at the next person. The old technique didn’t work virtually. I learned a serious lesson that day.



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In the previous chapter we discussed the importance of asking the powerful question – ‘ what are the goals and objectives for this event’. But equally important to asking this question is to create a set of criteria, specific to your needs, for assessing each of the goals and objectives you establish. . In other words, begin thinking about how you will recognize that you have achieved your goals and objectives. We call this (as do many others) **evaluation**. Now, don’t think that it is time to skip over this section, because evaluation comes at the end of an event. It doesn’t. In fact, it comes right at the beginning. Let us tell you why.

If you have a goal and a set of objectives, it is difficult to know at any point that you have achieved them—or are doing things that will achieve them—unless you spend some time thinking about how you will recognize achievement. Wow, we’re back to evaluation. So, if you are concerned with success and the effectiveness of your time and the time of your participants, read on.

. For simplification, let’s refer to the broader term that encompasses goals and objectives of the event which is the **purpose** of the event – the **purpose** you are trying to achieve. In fact, your purpose is one of the prime dimensions you must consider as you chose the details of your design. What are the other prime dimensions? Your audience actually determines the two other dimensions you must consider as you design. The first is how much does your audience know about the subject or topic of the event? We call this the **content** dimension. It makes a difference if your audience knows everything they need to know about the subject of the meeting or they know only something about it.

The other dimension of the audience is how well do the members of the event know and relate to each other and/or do they need to. We call this the **group** dimension. If the members of the group have never met before, they are going to have a more difficult time having a candid discussion. If they have been working together for weeks, they likely have developed good relationships with each other and can enter a discussion with relative ease. Now, don’t get us wrong, don’t think that we believe that all groups who work together for weeks always develop good relationships. This is but an example—one we always hope for.

Although not as directive as the purpose, the content, or the group, achieving a design that allows for flexibility within the event is essential for conducting anything at a distance. Technology is simply not perfect – just like us humans! So, a little leeway, a few backup activities, a willingness to laugh are all important when designing.

Enough of definitions. Let’s get on with it.



EVALUATION

Evaluation often is the step child of classes, meetings, or events. It's the thing that is done at the end because the sponsors insist. Facilitators often resist evaluations that are created without their input, or because the measurement is on output, not impact. Instructors often resist organizational evaluations because it means they have to save time at the end to allow participants to fill out the 'survey forms'. Managers or meeting leaders resist evaluations as they believe they will automatically know whether they got the results out of the meeting they wanted or not., And even participants will resist because evaluation so often looks like an after thought "Oh, please fill in the evaluation survey before you leave," they will hear as they are packing up their materials.

Yet, how do you, as the manager, the instructor, the facilitator, the team member, really know the intended goals and objectives have been achieved? That the event met it's intended purpose? If you are looking for buy-in to a new idea, for example, will you really know you have buy-in if you do not capture each person's level of agreement?

If you continue to think about the overall intention of the event – the purpose – while building assessment into the actual work of the session, you can create measures around the objectives much more easily. Let's look at an example.

Changing Project Norms

At Alpha International, there is a desire to help project managers learn new ways of bringing knowledge sharing into their projects. In order to make it easier for the project managers, the clients, who will be participating in project design and implementation, are invited to the learning session. It is called a learning opportunity or a workshop (not a class) as the participants are considered both the sources of ideas as well as recipients of the ideas and concepts. Participants are at several locations around the world.

The overall purpose of conducting this learning event was to help the institution build better cross-unit teams that would bring knowledge sharing into their projects.

The objectives were (a) to **promote cross-unit learning** for practitioners and teams involved in knowledge related work, (b) to **share knowledge** across units and with client counterparts on best practices in applying knowledge sharing concepts to reforms.

Learning outcomes (goals) were (a) an **improved approach to knowledge sharing related projects**, (b) a **practical** perspective through hands-on experience in client-led reforms, and (c) a **best-practice Guide** to project managers. The audience is to be made up of project managers and clients.



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The session goal was to help project managers to learn from others how knowledge sharing had been integrated into their projects. But learning alone was not sufficient to justify the session. It was essential that the participants integrate some of the ideas they learned in the session into their new projects as well. Evaluation of this event would not be complete until changes in project design were affected. The question became, how could this event be evaluated to show that such meetings would increase the likelihood of these kinds of changes occurring, and how could future sessions like this one be more effective. From the start, the purpose of the evaluation had to measure that knowledge sharing techniques were being seriously considered in the session as well as being applied after the session. The evaluation design was built on three over-riding principles:

1. Designing evaluation of an activity can involve **several levels**.
 - a. the immediate reaction of participants (useful for adjusting design),
 - b. the actual content absorbed by the participants (useful for design and content selection), and
 - c. the application of what was learned (useful for relevance of content).

Further levels of evaluation (as to impact of changes) are also possible.

2. Evaluation of an activity can be **built into the learning design** from the start of the project. As such, activities that ask for 'evaluation' information can be built in as learning activities wherever possible.
3. Evaluation is about **improvement**, not about whether things were right or wrong.

The clients who participated in this learning opportunity were to approach the design and execution of their projects in a new way if this learning project were successful. And they should be able to articulate how they used the lessons from the workshops, not assuming the lessons must be applied in the same form. Adaptations of the lessons would be considered successful as long as the lessons were used to inform the thinking process to the new design.

Looking at the objectives and expected outcomes (the application of what was learned) of the learning project, a 'perfect success' suggested several changes to have occurred. These were:



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Areas of a 'perfect success'	Points to be addressed
1. Each member of the presenting team feels his/her work has been listened to.	<ul style="list-style-type: none"> Promote cross-unit learning
2. Each participant feels they learned something new (and can identify what it is).	<ul style="list-style-type: none"> Share knowledge
3. Participants feel they understand all that was presented.	<ul style="list-style-type: none"> Share knowledge
4. Participants can articulate the practicality of the content to their own situations.	<ul style="list-style-type: none"> Improved approach to knowledge-related projects Practical
5. Participants feel the Guide is useful – specifically as well as generally.	<ul style="list-style-type: none"> Best-practice Practical
6. Participants report using new approaches in their operational work and identify which these are.	Track the adoption or change in behavior
7. Teams that use this new approach work more effectively together and more effectively with the client in KE-related work.	<ul style="list-style-type: none"> Build a better multi-unit team Improved approach to knowledge-related projects

Assuming that all of these areas are to be measured, the steps to make this happen would be as listed below—in the rough order in which they would be done.

The Steps in Roughly Chronological Order

Preparation steps

1. Agree or adjust the definition of 'perfect success' (and refine the areas for evaluation accordingly)
2. Decide which of the areas are most important to measure (or if all should be addressed)
3. Tease out the dimensions of areas **3** (content), **5** (aspects of the guide considered essential), and **7** (what does 'work more effectively' mean in terms of behaviors that can be measured).
4. Working with the instructors/facilitators, design individual activities that can capture lessons learned in a manner that complements the workshop. For example, areas **2**, **3**, and **4** can be done through a journaling type of activity that allows the participant to think through what they have just learned and capture for themselves (and for the presenting team.) This kind of exercise allows for capturing important



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evaluation data while helping each participant reinforce the lessons learned for themselves.

5. Design a simple to use evaluation form for use at the end of each session. (This should be done electronically if at all possible.)
6. Design a review form for the Guide to provide feedback(preferably electronically).
7. Design a simple process form for use at team meetings that allows members to assess how well the team is working together against the determined dimensions.
8. Determine if there is hard evidence in project documents that would capture designs that are new.
9. Design data gathering approach if hard evidence is possible.
10. Design protocol for participants to be interviewed at 6 months and again at one year after the end of the sessions.

Implementation steps

11. Participate (or observe) the workshops and give feedback to facilitators on performance and the design in relation to the pre-determined areas of interest.
12. Conduct lessons learned session with instructors/facilitators.
13. Attend at least one team meeting to observe the dynamics and the use of the process (preferably one that also involves clients.)
14. Conduct the interviews of participants.

Analysis steps

15. Gather and analyze the results from the various exercises, forms, and processes.
16. Write up findings and conclusions (short intermediate reports are likely to be more useful than a single report at the end.)

While this evaluation appeared complex, it anticipated refinements that could reduce the measures sought. This was an important early step so that the evaluation was not seen as so cumbersome to be rejected. That said, in this form, the participants should not be aware of a great deal of this evaluation.

In its present design, this evaluation could easily address three levels of evaluation: immediate impressions, content learned, and use of the lessons. Assessing impact may come out of the team assessments (impact) and the interviews of client participants (impact within the countries.)

In the end, only three steps were taken. All of them were built into the design of the session itself. Exercises were created that asked participants to: (a) create a list of new ideas each participant felt he or she had learned, (b) in small groups, describe these ideas to the group and discuss, and (c) individually, list how each idea could/would be incorporated in an anticipated project. Thus, through learning activities, the indicators of success were being measured and accomplished. Participants never felt put upon; instructors did not feel their time was being usurped; and managers got some very clear signals of effectiveness.

With only a little thought, the session became sharper in its intent by thinking about evaluation as a part of design.



Every Design Lives in a Framework of Purpose, Group, and Content

In looking at designs for more than a 100 events, we have seen that some factors influencing the design exist over a continuum of values. And while the designs needed to respond to them, the factors could exist at any point on their respective continuums with the others. We then began to think of these factors as dimensions that define a framework into which design must always fit. Let's look at each of these dimensions and how design is influenced.

DIMENSION 1 - PURPOSE

"The indispensable first step to getting the things you want out of life is this: decide what you want." -Ben Stein

Instructors plan courses, because they want to help learning happen. Managers plan events to make change happen. Each are trying to achieve specific objectives and goals and/or to create a social structure that will further support achieving something specific. The first of these, the achievement of objectives and goals, is sometimes called the set of task activities. . The second, creating a social structure, is sometimes called the set of maintenanc activities. In actual cases, both sets of activities are operating simultaneously, but to aid in our discussion, we will separate them at the beginning as each influences the design in different ways. We'll begin with the set of task activities.

As each of us prepare to do something, we call upon the knowledge and information we have at our disposal in relation to the action we wish to take. If we're trying to decide what restaurant we want to go to, we begin to think of what we might like to have to eat, which restaurants we know and like, and how much we want to spend. If the knowledge and information are insufficient, we seek more. In our restaurant case, we might check the yellow pages or the Internet for the area or we might call the Concierge in the lobby. Once the essential information is gathered, we usually choose to explore and analyze this knowledge until we are ready to make a decision about what action to take. Sometimes this is done in what appears to be an instantaneous action, but when working with groups, it is more likely that the steps are spaced out a bit more. For instance, if there are three of you off to dinner, then the information, discussion of options and preferences seems to happen all at the same time until the decision is finally made. If the group is a large one – like 15 people who have just stepped out of a conference session and decide they want to continue the conversation over dinner – the discussion can get quite confused until someone begins to separate out what is known, discussion about preferences, and the making of the decision.



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Purpose dimension is the action in context. Purpose spans many points on a continuum, but let's shorten the longer list to three. These three points – or stages – that we will consider are:

- (1) learning—to know and comprehend,
- (2) exploring and analyzing—to apply, analyze, synthesize; to solve problems; to develop strategies, to create new ideas;
- (3) decision making—to synthesize and evaluate.

Our discussion here will treat the three stages separately, because, you will want to think about these three stages as you set up the distance event you are planning. Determining where the emphasis of the event is to be placed is the first step in deciding how to construct and design the event. For instance, should the emphasis be on learning, or on exploring and analyzing, or on decision making.

Exercise 3.1

So, take a minute now and think about an example of when you would set up an event where knowledge sharing would be the focus, another example of when the event would focus on exploration and analysis, and a last example of when the group would make a decision.

Or consider the example from Xcom in Chapter 2, Exercise 3. There were several objectives set for that event which are listed below. Go through each of these and determine which are about knowledge sharing, which focus on exploration and analysis, and which is the decision step. After doing this, decide what the emphasis of this entire event is.

- State the problem from the viewpoint of headquarters (London).
- Collect the input of colleagues in New York, Budapest, and Beijing concerning the drop in sales.
- Analyze the input together and come to a common understanding of the reasons for the drop in sales.
- Have New York, Budapest, and Beijing to propose viable solutions to their respective problems.

Agree on an action plan for each location, including headquarters.

Stage 1 – Learning

If the event is about sharing information and knowledge in a learning setting or if the event is to bring more information and knowledge to the group, then there are several design options that will satisfy this need. And working over a distance can be very effective regardless of whether the group has ever met before or not or whether the group is large or small. This of course describes the classical teaching situation.



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Now, let us set some parameters. We do not consider a simple one-way transmission of data a learning event. Learning is more than getting “filled up” with information. Learning is about acquiring new information that is then related to what is already known sufficiently to allow one to apply it to one’s own situation. This is called learning in context. Anything less is not learning. So, keep this in mind whenever you design anything that is supposed to help others to learn something. We’ll come back to this later.

While learning events are often thought of as simple information transfer – ‘me telling you what I know so that you will then know it’ – we do not consider this a learning event. Information transfer is only one part of learning. Thus, when you are designing an event that is dedicated to learning, it is important to consider the levels of learning that move from information transfer to real comprehension. (See box about the four styles of learning by Kolb.) Thus the design should first give participants an opportunity to experience the information by relating it to their own work or life. Second, the design needs to allow for reflection time, through discussion, where the participants can relate their own situations to the information that has been presented. This discussion is best when it can allow the group to discuss until a generalization is achieved. Finally, time should be given to allow the participants to apply the lessons to their own situations.

When working in a distance environment, the discussion and application aspects need particular attention in the design phase. If the audience includes members of small local groups, then such a discussion can be achieved first locally and then jointly when the sites come together in a full plenary.

An example of a learning situation

We sent out one announcement of a class on the Internet and received 80 registrations from China. We were delighted. These were people who had strong technical background and very little experience with the Internet at the time. Our instructor, Bob, was available for only a short 2 hour window, and he could answer any question that might come at him. I asked him how we planned on designing the session. He said, ‘I’ll just start talking and let them ask me questions. I wasn’t necessarily happy about such a casual design and reminded him that the participants were unlikely to ask questions of him directly. This was a video conference with 80 people. He wouldn’t be able to manage the questions if they began coming in and ‘if’ was a big word. Without the questions, he would talk about what he thought was important and potentially leave his audience after about 5 minutes.

We created a simple way for participants to send in questions via email. We had more sophisticated technology, but participants did not. Using nothing more than a Yahoo account for the instructor, which I read during the video conference, Bob began the session. It took only a little while before the questions began to come in. Two hours later, Bob had answered every question, he had achieved more than his outlined objectives, and the audience was thrilled. The audience was able to work from their own knowledge to gain knowledge they didn’t have.



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Stage 2 – Exploring and Analyzing

In this case, your main objective is to bring a group together to explore and/or analyze a topic or issue or situation. The value of this session will primarily come from the discussion.

Although how well the group knows each other (relationship dimension) plays an important part in the design of any discussion, let us set this aside for a moment and focus on how to best support discussion at a distance. For that is what you will be concerned with in this stage. .

Prepare Participants

In designing for this kind of event, it is important to think through preparing the participants for the task at hand. Is there information that all the participants need to have in hand before beginning the task? If so, How do they obtain that information? Options include web site posting, or electronic file transfers, , distribution of video or audio tapes, or even postings by participants prior to the beginning of the discussion Once in hand, the participants must review these documents and postings before they are ready to begin the discussion. Local facilitators who check that participants have access to the materials and have read it can be most helpful when part of your audience is 6000 miles away. Electronic checking to see how has opened or downloaded the documents would be another indicator although not as thorough. Asking participants to answer some questions from the text is another way to encourage them to actually take the time to read the materials.

Chose Discussion Option

Discussion options are many:

Synchronous discussions:

Video and audio conference discussion can be quite effective if the group is small (between 2 and 12). As the group becomes larger, the group needs to be able to break up into smaller groups to handle the specifics. That does not preclude a plenary discussion to begin or to end the work. In most of our cases, we have seen the group begin in plenary, break up into smaller groups, and then regroup into plenary again. Much like a face to face session, this can still be done over distances. It is especially effective if the small group discussions are set up to address particular questions either the same as or different from each other. We have found it particularly effective to have the small group discussions deal with local issues in relation to a larger question or topic. This is a valuable way to gather insights that might otherwise be lost, and these local perspectives add enormously to understanding nuances of interpretation and cultural implications, each contributing to greater insights.

One of the limits of simultaneous discussion is that introverts often get less air time, and the extraverts can confuse the issue by doing their thinking out loud. This is classic and known well to any experienced facilitator who is running a meeting, but in video



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conferences, it is harder to use the normal facilitation tricks to bring everyone into the discussion and to minimize confusion. When participants are sent materials ahead of time, everyone has time to prepare their initial set of comments, and this kind of problem can be lessened. Setting ground rules at the beginning of the videoconference is very important. Adhering to them can be tricky, but creative designers have used simple interruption phrases (“30 seconds, Dave.”) or even gentle tones that are struck at the time limit – not loud enough to interrupt, only to signal the need to wrap up your comments.

Consideration of the participants pays

We had just completed six experimental projects that were using distance learning techniques for the first time. Six proud team leaders were feeling very good about what they had done. Capturing the lessons learned in this case was essential. The projects had not gone perfectly, yet they each had found solutions to the issues that were recognized mid-course. Learning how they had seen these and corrected for them was essential for the next batch of similar projects. After alerting each team leader that we wanted to do this, we asked that they come to a debriefing meeting. We said that we would bring them in via video if they were traveling at the time. We told them how much time each would have, what the agenda was to be, and the key manager who would be in the room as they told the stories of their projects. I alphabetized the list of names to call upon so that no one would feel they were more or less important. I agreed to change the order when one of the attendees was in a time zone that was 8 hours different from ours. He asked please if he could speak sooner rather than later. All the members of the ‘home’ team were also in attendance. They knew their roles, too. They were to listen attentively and ask any question they wished at the completion of each story. At the end of the two hour session, each team leader had his or her time to tell the story of the project, the ‘home’ team asked questions, the moderator orchestrated and summarized, and the key manager said some closing remarks. There was a promise that the lessons would be captured and posted on the web site. The second round of such projects were even more successful with the first round of team leaders becoming real heroes for entering this new area with such a willingness to learn.

Asynchronous discussions:

When a group is dealing with issues that require a great deal of discussion such as a design team or an integration team or a community of practice, asynchronous discussion can be quite valuable. Such discussions provide time for participants to think. In the functions of exploration and analysis, think-time is important. One of the reasons that virtual communities of practice can be so effective is because they permit large numbers of people to engage in long, well thought out, discussions.

Thus, one extreme is to have a video or audio conference of a few to grapple with an issue – just as if the group were co-located. The other extreme is to allow a very large group of people grapple with issues that can span a very long period of time where a list serve, chat room, even simple email can work very effectively.



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Example of Exploring and Analyzing

Four cities wanted to create strategic plans for their cities to become a part of the knowledge economy. The cities were in four Eastern European countries. They each had a basic understanding of what was involved in a knowledge economy (thanks to a short presentation via video conference and a web site where background materials were published for them), but the application to their local situations was the key to success. As they explored their own settings, they needed to be able to test out ideas with those who knew the concepts deeply and with those who had similar local situations. The web site began to evolve into something more. Each city could post any document they wanted to on the web site. An expert was contracted to read the postings regularly and engage in discussion with the cities. He didn't just answer questions or give critique, he encouraged and engaged them in a virtual discussion. He could spot when a city was having a problem moving forward and ask questions that would help them resolve their issues through discussion – not with him, but with each other.

Slowly over the weeks, the strategic plans emerged and were posted on the web site. In the course of only 6 months, all four cities had achieved their objectives. Asynchronous, virtual discussions gave them time to think and do their work.

A final video conference of the four cities allowed them to discuss what each had done and to express how virtual discussion had served their local tasks.

Stage 3 – Decision Making.

It is natural to think of this kind of event as the most important, as most of us think of decision makers as being very important. But, in reality each of these stages (learning, exploring and analyzing, decision making) are as important.. Without sufficient information, we make bad decisions. Without sufficient exploration and analysis into, and about, the information we have gathered and what it means in relation to our situation, we make bad decisions. And bad decisions do nothing to achieve the objectives and goals of the organization.

Thus, if you are designing a distance event for the purpose of making a decision, then the first steps are to assure that all the information that is needed for the decision is available to all of the participants and that they have had sufficient time to consider the information in relation to the decision. (This sounds so obvious, but then again, it is a step that is too often forgotten even when the decision is local and to be done in a co-located, face to face session.)

Now, you may ask, how can you be certain that all of the information is available to everyone? Well, you can't do it all of the time. The important question to ask yourself in your design is - do you and the members of the group feel they are reasonably informed to make the decision. Second, you may be concerned that part of the decision making session is going to be precisely exploring and analyzing the information in relation to the decision. You are right to think this. But if you want a decision to come from the group, some of this exploration and analysis will need to be done before the session so that the



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members know that the time in the session will be spent on **consideration of implications** (which are not necessarily part of the known information) based on the best judgment of the members. .

What does this mean in relation to the design? It means that there must be adequate time and space to allow a reasonable amount of this kind of discussion to go on during the session. If the group is meeting via video conference or an audio conference, then the length of the session must accommodate this discussion. This is simultaneous work and is very much like a meeting.

If the group is doing the decision making via an email discussion), then the time needed to make the decision is much longer. Asynchronous, virtual decision making takes time. It does not mean that the decision is a lesser decision or that the participants are not good decision makers. Rather it means that with asynchronous communication, it will simply take more time.

How F2F and Online Facilitation differ

1. Facilitation ‘duty’
 - a. F2F – on duty only during the specific session hours
 - b. Online – on duty practically 24/7 – note that research shows that the majority of online participation takes place after 6pm and on weekends.
2. Observation of non-verbal cues
 - a. F2F - non-verbal cues are expressed through body language.
 - b. Online – non-verbal cues are expressed through the tone of the message, the use of punctuation and the type formats
3. Record of the session
 - a. F2F – no permanent record unless there is a recorder or rapporteur
 - b. Online – all posts can be collected and preserved as part of a permanent record
4. Analysis of participant statements
 - a. F2F – unless recorded, participant statements cannot be analyzed after the session.
 - b. Online – participant statements can be analyzed and re-analyzed for as long as the record exists.

For one thing, the usual non-vebals are gone. For another, asynchronous communication will bring out more of the thinking of those who are often quiet in meetings but may have a great deal to say if the time is given for thought. And this takes time.

The most critical factor when designing a decision making event is how well the participants relate to one another. If the relationships between and among the members is strong with a resultant high level of trust, the technology chosen should depend mostly on the time frame in which the decision is needed. If the time frame is very short, choose a synchronous technology.



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If the group does not enjoy a high level of trust because they do not know each other at all, then you have a different problem to solve before you can get to a decision. You must (a) establish a reason for why these unrelated people must make a decision together (“This decision must be made by close of business today.”) or (b) create some basic level of connectedness and trust among the participants in order to reach a quality decision. This is expanded in the section on relationships.

There is also the issue of whether the participants are really the decision makers or are the ones who must identify and discuss the implication of various options of the decision, with the actual decision being made by another individual (either present or not). If this is the case, as it often is, then the design must support quality discussion, For this group is responsible for analyzing and evaluating and then for giving their combined advice to a decision maker.

An unusual example of decision making

The Minister had to make a decision about whether to begin a new initiative in his country to mitigate agricultural pollution. He knew that other countries had made this decision, but he had so little information on how they had done it and the possible implications, not to mention whether the initiative would really alleviate the situation.

The country project officer knew what the other countries were doing in this area and recognized an opportunity. Representatives of those countries, deep into the implementation of their mitigation programs, were having a video conference to explore some concepts and talk with an expert. These representatives were going to share their experiences and discuss what worked and what didn't, using the expert to shed light. To help the Minister make the decision, the country project officer invited him to become an observer to the video conference and its discussion.

The discussion was indeed specific to the implications such an initiative would have, but it also clarified the possible positive impact. By the end of the session, the Minister said yes.

Now, perhaps you are thinking right now that, if a learning event is when the participant acquires new information, can reflect on it, and apply it to his/her own situation, doesn't that sound a lot like information transfer, exploring and analyzing, and decision making. And if so, why should I not include all of these aspects in every design? Congratulations! you are exactly right and beginning to see a bit more about how we function as humans. No matter the main intention, or purpose, of the event, if each of these three steps are considered (even if they are not formally dealt with in the design), the better the event will be – more engaging and more effective. But remember that to learn how to integrate these in practice means learning and applying them separately - at first. So, you are on the right track.

Exercise



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Another option is to view every event as a learning experience and design for the four stages of the learning cycle: experience/observation, reflection/discussion, generalization, and application/decision making.

The Cycle of Learning based on the Four Learning Styles of Kolb

1. **Experiencing** or *immersing oneself in the "doing"* of a task is the first stage in which the individual, team or organization simply carries out the task assigned. The engaged person is usually not reflecting on the task at this time, but carrying it out with intention.

2. **Reflection** involves stepping back from task involvement and *reviewing what has been done* and experienced. The skills of attending, noticing differences, and applying terms helps identify subtle events and communicate them clearly to others. One's paradigm (values, attitudes, values, beliefs) influences whether one can differentiate certain events. One's vocabulary is also influential, since without words, it is difficult to verbalize and discuss one's perceptions.

3. **Conceptualization** involves *interpreting the events* that have been noticed and *understanding the relationships* among them. It is at this stage that theory may be particularly helpful as a template for framing and explaining events. One's paradigm again influences the interpretive range a person is willing to entertain.

4. **Application** enables taking the new understanding and translates it into *predictions* about what is likely to happen next or *what actions should be taken* to refine the way the task is handled. (Kolb calls this Planning)

Source: Kolb, David

While these are stages in the cycle of learning, it is also useful to think of them as stages in the design. For using each of the four stages, in order, in a session can lead to much higher impact.

DIMENSION 2 - GROUP

How do relationships affect the design?

The stronger the relationships among the players, the more options are available to the designer. If this suggests to you that relationship building is something that should be planned for in order to get the best out of any distant event, you are right. Once the level of relationship has been identified, setting aside a part of the design to develop relationships is never time wasted. It not only opens up more options, it overcomes limitations of the media chosen as well as weaknesses in the design itself. I call this the group dimension. Let's look at this more specifically.

Group dimension is the social dimension. The three points on the dimension are (1) the group has no relationships between and among the participants, (2) members have some relationships, and (3) members have strong relationships with each other.



Story of Making a New Group Feel Comfortable

We had no less than eight sites connected in the video conference. Too many, we were told, but there were seven project teams that needed to be a part of this discussion. I didn't know these people, and the project manager didn't either, but she knew someone who did. He had been working with the separate teams for many years. We asked him to be the moderator. From the moment he smiled at the camera, said hi to participants by first name, we knew we had a winner. It didn't matter that everyone didn't have a chance to say all that they wanted to. They knew that they could trust Vikas. The discussion was robust and covered all that needed to be covered.

Exercise 3.2

So, take a minute now and think about the groups you work with. Which of them have formed coherent relationships among each other. How do these groups differ from ones that have not done this? How did these relationships get formed? How are they maintained?

When there are no relationships between and among the participants, distance options require facilitation through a moderator or facilitator. Often, this is the situation for a class where the instructor fulfills this role. In business, the role must be assumed by one of the members or should be hired into the session. In some settings, a process can substitute for facilitation. It is a process that must be known and understood by the participants. It must include roles as well as steps. The process becomes the major part of the design for the session, but not all of it. For example, a process like Six Sigma¹ has defined steps for the process, tools to be used in it, and roles to be played by participants.

Even when there is a partial level of relationship building that has gone on, groups are likely to need some facilitation, either through a moderator or a defined process. In such situations, if the activity goes on for any length of time, relationships will increase to the point where spontaneous, asynchronous virtual discussions may take place, and moderation of synchronous events can be reduced to rotation among the members.

Once strong relationships are developed among the participants, workable options expand. Strong relationships overcome the limitations of the technology. For example, there is a private investment group whose members have known each other for years to make quick decisions via a teleconference. There is less non-verbal information than in a video conference, but less is needed due to the level of trust that has been reached.

It is not uncommon for an established team to employ virtual discussion between on-line sessions including one to one emails. Again the level of trust that all issues will be brought to the full group when it is important has been established.

¹ See www.isixsigma.com/sixsigma/six_sigma.asp



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A 90 Minute Presentation by a New Team

Karen had asked each of the three of us to participate with her at an upcoming conference where we were to present on the topic of The Use of Story in Management. We all knew each other well but had never before had to plan such an important event as a team. The importance came from the fact that this conference was a kickoff of an important new venture, and our presentation would be at the heart of it. And each of us lived in a different part of the country.

After asking each of us individually, Karen set up a teleconference to talk about how we might approach it. Our first teleconference turned out to be the last. After a short time of saying hello to each other, we finished all the tasks to be done in about 45 minutes. By the end of the teleconference, we had decided what our overall goal was to be, who would speak on what topic, how we would organize the session, and what our next steps were. No one took command of the discussion throughout, rather we shared the leadership role as one after the other said, “Now, I think it is time to talk about xxx.” Because of the strong relationships that each had with the other, there was no question about hidden intention or lack of trust. If it was the next logical thing to do, we simply moved on and did it. From here, drafts and review comments were shared via emails. By the time of the conference, we knew what we were going to do and how.

As it turned out, the session needed to be redesigned based on what we learned after we arrived. In a one hour face to face, we redesigned the approach to fit the needs of the audience, but kept the same content. The next day, we faced the audience together as a presenting team for the very first time. After the session, we received numerous comments of appreciation for our coordinated message and effective design.

Uncharacteristically, talking heads can work among those who trust each other and the speaker. A briefing by a colleague on the status of a situation, an update on findings and implications can be done directly and efficiently because the levels of trust allow the speaker to get to the point quickly and simply while communicating well. The speaker is likely to use a vocabulary that is known to everyone through earlier interactions that have built the trust which characterizes their setting.

Exercise: Think of a time when you participated in an event where the level of trust was very high. What made this possible for this group? Is what happened for this group something that can be used in other groups?

DIMENSION 3 - CONTENT:

How does the level of knowledge affect the design?

When you are designing a course, you assume that the participants have roughly the same level of knowledge on the subject. While this is never true, a good design begins with the assumption and then improves itself by designing exercises that allow those with more than the assumed level to contribute their knowledge and exercises that allow those with less than the assumed level to fill in the gaps without losing the informed among the group.



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When working with a business group, you can never assume that all the participants have the same level of knowledge on the issue at hand – and in fact, it is often desirable they do not. Knowledge of the issue at hand can be at almost any level among the group, because one person may be bringing one aspect of understanding, while another brings something else. Thus, design must allow those with relevant knowledge to share it with the group without making those who are not close to the level of knowledge needed for the task to feel they have less to offer. One way to do this is to affirm the knowledge and skills they do bring to the task.

Content dimension is the information dimension. The three points on the dimension are (1) have little information, (2) have some information, and (3) have all information. In all cases, the information dimension involves assessing the information contained in the group. The discussion of this dimension should also consider what to do if the information is evenly distributed or not within the group

Rule 1: Everyone brings something of value to the session.

As adults, we come to any situation with a vast amount of knowledge so, in general, we can say that there is no group that has no knowledge on hand. When working at a distance, it is sometimes hard to assess the exact level of knowledge that the participants bring to the event. The important aspect to design is to remember that there is real knowledge already present. The design should acknowledge and use that as much as possible. Assuming that the audience knows nothing, is a sure signal to an event failing. Unfortunately, this often happens when the participants are from developing countries. Let us reiterate that this assumption is wrong. Everyone brings something of value to the table in the form of knowledge – whether it is directly about the subject at hand or it is a local interpretation of the subject that gives unexpected insights to the other participants. Your design must begin with this in mind.

Rule 2: Quality sessions depend on participants being prepared.

The most important aspect of design in regard to the level of knowledge of the audience is the relative preparedness of the participants to the purpose and content of the event.

Exercise 3.3

Think of a time when you went into a session and were unprepared for it. How did you make up for this lack of preparedness? Think of a time when you were prepared. What was done differently to give you whatever was necessary to be prepared?

Even if a group must **make a decision** based on very little information, a ‘good’ decision can be made if the participants are highly motivated by a compelling reason for making the decision. For example, a crisis situation may be something none of the participants have experienced before, yet it will remind the participants of related experiences on which they



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can draw for a reasoned decision. While this is not the ideal situation, it does happen. But if you are planning a decision making session, one where the participants are not well-briefed or otherwise informed, you better plan on either creating a compelling reason that stands up to examination or providing background information ahead of time.

When the purpose is **exploring and analyzing**, time for sharing background information and knowledge that resides with the participants is essential. When these are combined with virtual discussions, the work can produce very high value. Time is the essential element along with the information. The design should allow for pre-session background materials, encouragement of inter-session communication among the participants, and even post session discussion. Once a quality event occurs, there are links among people that will spring up and produce unexpected results and impact (that can be of the best kind.)

Little needs to be said about the **learning** purpose when information is at a low level except to reiterate that the participants need to be prepared for the session with essential background and skills.

Let's leap to the situation where the participants have all the information they need to achieve the purpose of the session such as one where experts are making a decision about where to drill an oil well, exploring the risk of offering a reinsurance plan, reporting out findings of research or the status of a project, or sharing knowledge with peers. Here the design must focus on getting the information into the discussion, into the decision, into the application to achieve the objective being sought.

In between are those situations and events where the amount of information is somewhere between very little and complete. Design must then focus on providing the essential information that everyone must know – either ahead of time or during the session – and facilitating bringing out the information that is known by the participants during the session.

In this latter case, attention must go to assuring the relationships among the participants will allow strong sharing of the knowledge each member brings to the table. Which should lead you to ask, is building some form of relationship among the participants always part of the target? Always part of the design? The answer is yes. Attention to assuring that the individual members have reason and opportunity to get to know one another should be part of any design. Even when the relationships have been formed and are strong, the design should never work to destroy them but rather work to support them.



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Let's return to the 90 minute conference presentation example above.

There were two problems that greeted the presenters when they arrived at the conference. First was the fact that the presenters felt they needed to get all of their ideas on the table in their initial presentation and so they usually went over their time limits. Second, no time was left for the audience to join in the conversation even though the conference has been advertised as one where discussion was to be part of every presenting panel. Here was a case where the presenters did not take into account the knowledge the audience brought to the table and allow for it to be added to the content of the sessions. At the end of the first day, the team felt these two problems were so flagrant that to ignore them would be boring at best and insulting at worst to the audience. During the redesign, each of the four felt that the audience participation was something that would bring enormous value to any discussion that might occur during the session.

The decision was to limit each presentation to only 5 minutes (we had originally designed our presentations for 15 minutes each). Each of us was responsible for cutting back our initial message to what could be conveyed in 5 minutes, or 1/3 the time. Second, we decided that we would pose a question to the audience based on what we said in each of our presentations. Thus, after each of us completed our 5 minutes, we gave the audience a single question to consider. When all of the presentations were over, we then helped the audience create some level of relationship among them by dividing themselves into groups of four. We then helped the audience do a task for which they had all the information – decide which of our questions they would discuss, and to return to the main session in 15 minutes with a question for the panel.

The questions that came from the audience were deep and thoughtful – and different from the questions posed by us. And in the end, each of us was able to provide the full content we had planned on giving them from our original presentations plus much, much more. And because the information was always in response to a question, there was no limit to their absorptive capacity. While this example was face to face, it is a design that can be very easily used in a virtual setting. Short presentations are best for video conferences or for any video experience. Asking questions of the audience is always a powerful way to focus discussion. And allowing for local groups to take time to process the information and question inserts variety into the overall event. Finally returning to plenary with questions allows for a lot of sites to have voice.

Summary – Remember This

Design is about making choices in order to meet the goals and objectives of the event.

Designing **Best from the Start** events begins with thinking about how you will recognize that you have achieved your goals and objectives, in other words, **evaluation**.

Design always lives in a framework of Purpose, Group, and Content.



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Purpose dimension is the action in context. Purpose can be for (1) learning (to know and comprehend), (2) exploring and analyzing (to apply, analyze, synthesize; to solve problems; to develop strategies, to create new ideas); (3) decision making (to synthesize and evaluate). Each demands different qualities of the design. Learning is more than ‘filling up.’ Exploring and analyzing needs an environment of full discussion for good results. Decision making demands the discussion of implications and some level of trust and/or time.

Group is all about how well the members of the audience know each other. The stronger the relationships among the players, the more options are available to the designer. Harnessing what already exists or building what can be built in the time allowed must always be part of the design. Facilitation is called for when relationships are less than strong. Time is never wasted when it is used to build relationships among group members.

Content is about the audience’s underlying understanding of the issue, and design must recognize that every person brings something of value to the table. The job of the designer is to allow what is relevant to come out and be shared in a manner that respects each person’s contribution. Second, the designer must look to what preparation is needed and assure it is available to participants beforehand. Information is never evenly distributed. Focus must be placed on leveling the playing field from the start.



Steps

1. Determine the overall purpose of your event (learning, exploring and analyzing, or decision making) and write it here:

2. Select the column corresponding to the purpose for your event (learning, exploring and analyzing, or decision making) in Table 3.1
3. Select the cell that corresponds to the level of information the group has (little, some, or all) and enter in B below.
4. Select the cell that corresponds to the level of relationships (and trust) of the group (none, some, strong) and enter in C below.
5. Use the questions in A, B, and C to focus your design.

A. How will I know that I have achieved my objectives? What will show evidence of this?

B. Questions about Information/Knowledge Considerations

C. Questions about Relationship/Trust Considerations

Table 3.1: Questions to Consider when Designing within the Framework

	Purpose = learning	Purpose = exploring and analyzing	Purpose = decision making
Content			
(1) have little information	What skills do students or members need to participate?	Who needs to participate in order to have the necessary information for the discussion?	Should this meeting happen? What is the compelling reason to have this meeting? Can the group be brought to link this situation to previous unrelated ones that will bring out sufficient knowledge for the decision?



	Purpose = learning	Purpose = exploring and analyzing	Purpose = decision making
Content			
(2) have some information	What background information do members need? Who should be added to the session to assure the right information is available during the event?	Do the participants have sufficient understanding of the problem to be discussed? What additional background information do members need? Who should be added?	What additional background information do members need? Who should be added to the session to assure the right information is available or is on call?
(3) have all information	Is there background that will help members listen more effectively? Will information on backgrounds of participants add to the learning experience?	Is there a process that will help members share information? Would team building add to the result?	How long should this session be scheduled to allow the information to be considered? What kind of exercises will aid in bringing this out? Would a summary of information beforehand assist in focusing the discussion of implications?
Group			
(1) the group has no relationships between and among the participants (no established trust)	Is it necessary to create relationships between and among participants? What exercises can be designed to build relationships through them? Inside the class? Outside the class?	How much time can be set aside at the beginning to assure some level of relationship can be established? What can be done beforehand to create a level of trust among the members?	What kind of facilitation/process will assist in this decision making? What kind of relationship building exercise should be added to the agenda of the event to establish a necessary trust level for decision making?
(2) members have some relationships (marginal established trust)	What will use/enhance the relationships between and among the participants?	What can be done beforehand to enhance the level of trust among the members? How would facilitation aid the discussion? What team building activities can be used?	What kind of facilitation/process will assist in this decision making? Does this decision require stronger trust be established before taking the decision? If so, what kind of relationship building exercise should be added to the agenda of the event?
(3) members have strong relationships with each other (strong trust levels exist)	How can the exercises take advantage of the relationships?	What can be done to further enhance the relationships of the members?	Does this decision have the potential of hurting existing trust levels and relationships? If so, what can be done to heal any broken relationships as a result of this decision making event?



Table 3.2: Table of Examples within the Framework

Learning	Example	Technology Options
Little Information No Relationships	Classic learning situation/orientation Skills development Briefings on topic of common interest Film used to begin local discussions for action planning	Highly appropriate for many forms: video conference, Internet based training, computer based training
	Class Research Strategic development project where the process must be learned through doing Understanding the issues and learning options	Highly appropriate for many forms: video conference, Internet based training, computer based training; because of relationships, virtual communities may form spontaneously
Strong Relationships	Team working on a new concept or product	Telephone conference; video conference with briefing; virtual briefing on –line with follow up virtual discussion
Some Information No Relationships	Adult group where the topic will use knowledge that exists among the participants to enrich the experience of the event	Highly appropriate for many forms: video conference, Internet based training, computer based training note that more can happen outside the classroom than inside as they share their knowledge.
	Action learning event where participants relate to one another because they are of the same rank or profession and are dealing with a similar type of problem such as creating local action plans.	Highly appropriate for many forms: video conference, Internet based training, computer based training; If action learning, then local work is necessary
Strong Relationships	Setting up a briefing by an expert	Video conference, audio conference aided by presentation on-line.
All Information No Relationships	Initial CoP Chat room	Best done with some face to face even if done locally; web site that can have documents posted, discussions, threaded discussions, site individuals' areas of expertise can be posted.
	KS sharing Growing CoP	Set protocols with charters for how to work together
Strong Relationships	Reporting Sharing knowledge Mature CoP	Teleconference, virtual dialogue/presentation, video amplification of visuals.



Exploring and Analyzing	Example	Technology Options
Little Information No Relationships	A new community of directors that is developing corporate governance policy	Appropriate as virtual community with strong moderation
	Teams needing to design projects that serve a common purpose across the larger group. Designing a project	Facilitated face to face or virtual community
Strong Relationships	Research, class, briefing Beginning of a course	Asynchronous discussion on line; virtual community Video conference; virtual discussion spaces; web sites where documents can be posted and shared; audio conferencing with on-line presentation or white board.
Some Information No Relationships	Exploring the possibilities of a merger or any question that needs several people to think through the idea to see if it will work, etc. Exploring with other library professionals on how to create a virtual library Developing strategic plans in cities in different countries, mutually harnessing the ideas and approaches of the others.	
	Innovating, designing	Lightly moderated discussion that can be asynchronous.
Strong Relationships	Designing a research project	Blend of virtual discussion spaces; public posting of shared documents; video conference
All Information No Relationships	Innovating Designing	Some form of team building is necessary and is not recommended for virtual setting until there is some relationships built. Video conference at the least.
Strong Relationships	Knowledge sharing CoP Team work Community Knowledge Sharing Design Problem solving	Relationship building must be part of the design to allow the group to move to strong relationships Protocols and charters important Virtual discussion Teleconference (limited) Video of directed questions White board



Decision Making		Example	Technology Options
Little Information		Tourists who have just met who are lost and are trying to decide what the next best step would be Crisis situation when action must take place quickly	Synchronous discussion of any form
No Relationships			
		Executives deciding to participate in a joint marketing campaign	Moderated discussion; time dependency will determine if must be synchronous
Strong Relationships		Time-dependent decisions Deciding on an evacuation plan for a building under siege	Synchronous
Some Information			Note that the decision needs to be a group decision; if individual, why have a distance activity unless the members of the group (with no relationships) were giving advice to the individual???
No Relationships		Design session	Moderated discussion; time dependency will determine if must be synchronous
Strong Relationships		Innovation planning	Blend of virtual discussion spaces; public posting of shared documents; video conference
All Information			The information may not be complete if the group doesn't know what each other knows or who each other is. This must be dealt with early on. This kind of introduction can be done on-line. A process can substitute for facilitation. Similar to strong relationships except that it must also include relationship building activities
No Relationships		Deciding where to drill an oil well	
Strong Relationships		Making portfolio or other investment decisions	This can use almost any form and be effective because strong relationships support the actions. Teleconference, virtual discussion (not recommended because of the time it takes to explore options and opinions on line.) Open discussion, best done in natural discussion form. Video conference works, but teleconference would be sufficient. Synchronous is the optimal manner with instantaneous response to allow for the mind to work well.

