
Case: **Online Staff Workshop**

(120 participants in full participatory process)

Context

The client was an organisation with around 200 staff member and management working with processing knowledge and delivering a specific service. A majority of staff are highly educated and key to the organisation is the staffs' ability to well-functioning collaboration, coordination and communication.

Management wanted to address mutual issues with staff around the organisational development in the organisation with the intention to strengthen the engagement of staff and nurture the strategic direction of the core business in the organisation.

Management chose to seek professional coaching of how to engage the entire organisation in an online development process and as an outcome it was decided to do a 0,50-day online staff workshop with all staff, but without management.

Purpose

The purpose of the staff workshop was 3-fold:

- to analyse the current situation in the organisation.
- to explore the future direction for the organisation.
- to develop concrete ideas and actions for the organisation to move from current to future situation.

Process design

The process was designed accordingly to the purposes of the workshop where each purpose was integrated in a round of conversation addressing concrete questions that would serve the purpose. Furthermore, the process design needed to reflect 100% participatory design in order to meet the requirement of real involvement and engagement of all participants.

By this the workshop had the following structure and process (World Café style).

- **Welcome:** Director and Facilitation team
- **Check-in of staff:** Full group engaged by responding to a few questions on Sli.do with end result displayed as a WordCloud.
- **Work Group Conversation Round A** - analyse the current situation in the organisation: Groups of 6 participants addressing 2 questions and documenting the result of the conversation in a word-template.

- **Convergence in plenary of Round A:** A few participants share the result of their conversation (Pop-core style).
- **Work Group Conversation Round B** - explore the future direction for the organisation: Groups (new) of 6 participants addressing 2 questions and documenting the result of the conversation in a word-template.
- **Convergence in plenary of Round B:** A few participants share the result of their conversation (Pop-core style).
- **Break**
- **Work Group Conversation Round C** - develop concrete ideas and actions for the organisation: Groups (new) of 6 participants addressing 2 questions and documenting the result of the conversation in a word-template.
- **Convergence in plenary of Round C:** A few participants share the result of their conversation (Pop-core style).
- **Closing and next steps:** Director.
- **Check-out of staff:** Full group engaged by responding to a few questions on Sli.do with end result displayed as a WordCloud.

Tech design

In order to facilitate the process with the use of both plenary and breakout rooms for the full group and smaller work groups and on the same time meet the online safety requirements of the client we chose to use the Zoom application from Zoom Video Communication. The client was quite new to the application but had purchased a setup allowing +100 participants. Internal staff from the organisations HR department was the “tech host team” in the preparation and during the workshop.

For the documentation of all 3 rounds for all 20 work groups word-templates for each round was uploaded to the organisations internal SharePoint system. Each document for each round (A, B and C) had been given a number that was corresponding with the breakout room that each work groups was having their conversation in.

Outcome

The outcome of the staff workshop was two-fold:

- Tangible outcome
 - Focus areas and subtopics describing the current situation split into “main challenges” and “main opportunities” for the organisation.
 - Detailed descriptions of future scenarios for the organisation including clear statements of direction.
 - Lists of concrete ideas and construction actions for organisation to decide and implement grouped around “main topics”. The ideas and actions are furthermore being prioritised by timing and organisational anchor.

- Intangible outcome
 - A real engagement and clear ownership of the outcome of the staff workshop.
 - A stronger social fabric across (horizontal and vertical) the organisation.
 - A nurtured sense of belonging and identify with the present and future of the organisation.

Key success factors

- Well planned preparation is the first key success factor. Besides the preparation of the clients “ready’ness” to fully involve and engagement staff and the actual design of the process and invitation of participants - a lot of attention was given to the technical side of the workshop.
 - We developed and distributed a full “Guide to Participate in the Online Staff Workshop” so every participant knew both the facilitated process and technological process step-by-step.
 - As part of the “Guide to Participate in the Online Staff Workshop” we developed and included a specific “Support to use Zoom” and “Support to use SharePoint”.
 - Before the workshop the organisations HR department as the “tech host team” had arranged two 1h timeslots where participants could participate in a online call with questions or any unclarity of how to participate using Zoom and SharePoint. Furthermore, during the workshop the “tech host team” had created a help-desk option for participants to contact via chat, email or phone if support was needed.
- Secondly, despite the use of technical online solutions and the preparation of participants for the use of them, we kept giving full attention to the purpose and the content of the workshop - both as preparation by a well described invitation created with the director and management of the organisation and as part of the framings during the workshop of both director and facilitation team.
- Lastly the documentation of the outcome of the workshop and how it is planned to be processed and used afterwards is a key success factor. As mentioned, we had created a “documentation platform” by the use of pre-made word-templates and SharePoint that made it possible to compile a master-document of all qualitative data for further processing. As part of this it is crucial that the management and staff of the organisation are dedicated to the post-process of progressing and implementing the outcome.

Recommendations

- Ensure full support from client in the involvement and engagement of participants and in the post-process of outcome. Online processes require more dedication of participation from all involved than onsite events.
- Do not underestimate the concerns of using online communication and collaboration tools but deal with them pro-actively by ensuring all know what to do when and how. Preparation is key and make sure this part is led by someone who know how this works for participants in a facilitated workshop and not “just” the technical part of it.

- When not underestimating the concerns of working online, then do not let it take over the attention of the workshop. The purpose and the content of the facilitated process of the workshop is still the first in focus to achieve qualitative outcome.
- Realise that planning and delivering an online workshop need a professional team - and that working fully online can require more preparation than working onsite.

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