

# SMART INDUSTRIAL INNOVATION AS ENABLER TO DRIVE NEW VALUE CHAINS FOR TEXTILES AND AEROSPACE

Grant Agreement number 872336

D1.1: Preparation activities - Coaching guidelines

Lead partner:

Science Park
The High Tech Incubator
Graz





This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 872336



| Project acronym:       | GALACTICA   |
|------------------------|---|
| Project full title:    | Smart industrial innovation as enabler to drive new value chains for textiles and aerospace |
| Grant agreement no.:   | 872336  |
| Author(s):             | SPG, EBAN   |
| Reviewer(s):           | AEI Tèxtils   |
| Nature:                | Report  |
| Dissemination level:   | PUBLIC  |
| Total number of pages: | 17  |
| Version:               | 1.0   |
| Publication date:      | 21/12/2020  |

GALACTICA has received funding from the European Union's H2020 research and innovation programme under grant agreement no. 872336

## **DISCLAIMER:**

The content of this report represents the views of the author only and is his/her sole responsibility; it cannot be considered to reflect the views of the European Commission and/or the executive agency for small and medium sized enterprises (EASME) or any other body of the European Union. The European Commission and the agency do not accept any responsibility for use that may be made of the information it contains.

© 2020-2023 GALACTICA Consortium Partners. All rights reserved. All trademarks and other rights on third party products mentioned in this document are acknowledged and owned by the respective holders.



| TABLE OF CONTENTS                             |    |  |  |
|---|----|--|--|
| 1. CONTEXT                                    | 4  |  |  |
| 2. WORKSHOP DELIVERY                          | 5  |  |  |
| 2.1 GENERAL APPROACH OF THE GALACTICA PROJECT | 5  |  |  |
| 2.2 GENERAL WORKSHOP CONTENT                  | 6  |  |  |
| 2.2.1 TECHNOLOGICAL WORKSHOPS                 | 6  |  |  |
| 2.2.2 NON-TECHNOLOGICAL WORKSHOPS             | 7  |  |  |
| 3. METHODOLOGIES AND TOOLS                    | 8  |  |  |
| 3.1 WORKSHOP METHODOLOGIES                    | 8  |  |  |
| 3.1.1 DESIGN THINKING                         | 8  |  |  |
| 3.1.2 CIRCULAR DESIGN                         | 9  |  |  |
| 3.1.3 TRIZ                                    | 10 |  |  |
| 3.1.4 SCAMPER                                 | 10 |  |  |
| 3.1.5 LEGO® SERIOUS PLAY®                     | 11 |  |  |
| 3.1.6 BLUE OCEAN STRATEGY                     | 12 |  |  |
| 3.1.7 WHICH ONE TO CHOOSE?                    | 12 |  |  |
| 3.2 USEFUL TOOLS                              | 13 |  |  |
| 3.2.1 RESOURCE KITS                           | 13 |  |  |
| 3.2.2 VIDEOCONFERENCING                       | 14 |  |  |
| 3.2.3 COLLABORATION                           | 14 |  |  |
| 3.2.4 DIGITAL POLLING                         | 14 |  |  |
| 3.2.5 KNOWLEDGE SHARING                       | 14 |  |  |
| 4. BEST PRACTICES                             | 14 |  |  |
| 4.1 FACILITATION TIPS                         | 14 |  |  |
| 4.1.1 PREPARATION                             | 15 |  |  |
| 4.1.2 STARTING OFF                            | 15 |  |  |
| 4.1.3 DURING THE DISCUSSION                   | 15 |  |  |
| 4.1.4 TROUBLESHOOTING                         | 16 |  |  |
| 4.1.5 WRAPPING UP                             | 17 |  |  |
| 4.2 DEMOTE EVENTS                             | 17 |  |  |



# 1. CONTEXT

Together with the Industrial Learning Expeditions, the matchmaking and networking events, and the Hackathons, the **Cross-sectoral Fertilization Workshops** are part of the **Cultivation Stage** of the GALACTICA project, which aims at fostering synergies, identifying common pain points, needs and opportunities for jointly developing new value chains across the **Aerospace**, **Textiles** and **Advanced Manufacturing** sectors.

The 8 Cross-sectoral Fertilization Workshops will build on the cross-sectoral mapping and analysis (Task 1.1.1.), which includes a survey to identify "hot topics" and identify barriers for the creation of cross-sectoral project ideas. Workshops may be designed in parallel with the coaching and training webinars delivered by the project under Task 1.3.1. In this case, the webinar will serve as a theoretical lecture, while the workshop will target a smaller audience and focus on practical applications.

The objectives of the Cross-sectoral Fertilization Workshops are to:

- 1. Gather existent and new companies, R&D organizations and clusters from the Aerospace, Textiles and Advanced Manufacturing sectors
- 2. Facilitate know-how transfer between these sectors on technology, operations, and other innovation mechanisms
- 3. Seed cross-sectoral collaboration for innovation, thereby reducing silo-like boundaries
- 4. Facilitate cross-sectoral idea generation, and thereby the flourishing of new value chains
- 5. Generate of blue ocean strategies for growth (vs. cost-driven and fierce competitive red ocean strategies)
- 6. Stimulate the participation in the GALACTICA calls for proposals

As a result of the workshops, it is expected to:

- Identify untapped opportunities arising from the crossing of the sectors, both in terms of technological cooperation and innovation (e.g. development of new materials, processes and products), but also in terms of non-technological innovation (e.g. business models, marketing tools, management systems, processes, creativity, industrial design), and regarding to the development of both latent or new value chains
- Support overcoming information and market failures by gathering together companies, R&D organisations and clusters from the mentioned sectors, by bringing to life a set of tools, instruments to trigger collaboration that will create a basis for the establishment of new value chains. The workshops aim at engaging at least 15 SMEs participants per workshop, in total at least 120 participants

The implementation of the Cross-sectoral Fertilization Workshops (included in Task 1.3.2. Onsite activities) is led by NTT under the coordination of EMC2 (leading Task 1.3 Galactic activities). Nevertheless, all consortium partners are involved in this activity as each will contribute to those workshops according to their own expertise (survey of areas of expertise in progress by EBAN). In addition, each cluster in the consortium will organise at least 1 of 8 workshops.

With this setup, it is deemed crucial to ensure the delivery of the workshops follows a harmonized and productive process across the GALACTICA consortium partners. In this light, the current **Coaching Guidelines** define a common sense of methodologies and best practices to be used.

The objectives of the Coaching Guidelines are to:



- 1. Support consortium partners in identifying critical topics concerning cross-fertilization across the textile, aerospace and advanced manufacturing industries
- 2. Support the consortium partners in the process of delivering the workshops to SMEs;
- 3. Summarize a set of useful methodologies to be used during the workshops;
- 4. Become a code of conduct for all the GALACTICA consortium partners regarding the implementation of the workshops

# 2. WORKSHOP DELIVERY

## 2.1 GENERAL APPROACH OF THE GALACTICA PROJECT

The different tools and methodologies used in the workshops will be directed to promote an active participation of SMEs. Each session aims to stimulate dialogue between experts and attendees, as well as between attendees operating in different industries. To facilitate the interaction, participants will be given challenges and brief assignments to be solved applying cross-sectoral tools and concepts.

Preferably, workshops will be held in an inspiring atmosphere, e.g. on the shop floor of manufacturers, in maker spaces or technological centres, where attendees can have a first hand experience of how technologies are applied by industry players. If in-person gatherings should not be possible, workshops will leverage on digital tools to showcase applications, either through case studies or remote visits.

Workshops should provide straightforward tips on how a given business may approach the use of new technologies, for instance guiding SMEs in forecasting the size of the market opportunity, the need for upfront investment as well as in drawing a roadmap for execution. Moreover, workshops should use innovation-focused dynamics based on user-centred design to facilitate the flourishing of new value chains that build upon advanced manufacturing in the textile and aerospace sectors.

Each workshop will be fine-tuned based on the learnings from prior workshops in the project in order to continuously improve the innovation facilitation.



#### 2.2 GENERAL WORKSHOP CONTENT

The content of the workshops is to be defined by each partner depending on its own expertise and on the needs identified through the cross-sectoral mapping and analysis (Task 1.1.1.) circulated by the consortium among stakeholders. The content of the 8 workshops can be classified either as technological or non-technological.

## 2.2.1 TECHNOLOGICAL WORKSHOPS

Technological innovation refers to the introduction of new or improved products or processes whose technological characteristics are significantly different from before and deliver specified advantages to the enterprise and users.

#### **KEY CONTENT**

This set of workshops focus on the process that organizations embrace to exploit technology to introduce new products or systems, tackle new market segments, improve operations and competitiveness. The workshops highlight lessons learnt within one industry that may be successfully applied to another industry, outlining validated use cases and encouraging connections among players operating in different domains.

- Advanced Manufacturing workshops will focus on technologies able to bring major improvement to industries, training manufacturing SMEs on advanced manufacturing potentialities
- Aerospace workshops will focus on technical challenges and opportunities from the aerospace sector that could be effectively tackled by textile companies in collaboration with advanced manufacturing technologies
- Textile workshops will focus on industry-specific technologies with the potential to be adapted by aerospace or advanced manufacturing companies as well as on challenges inherent to the textile industry that can be tackled through advanced manufacturing

## **KEY TOPICS**

Based on the expertise of the consortium, the Coaching Guidelines pre-identify relevant topics to foster cross-fertilization and technology transfer. The list is not meant to be exhaustive and the final content of the workshops will be defined by each partner based on the accessible knowledge and resources. Moreover, the partner identified as an expert should be regarded as a source of knowledge and use cases rather than the one in charge of delivering the workshop.

| Technical Innovation  | Expert partners |
|---|-----------------|
| Technology trends and opportunities for the textile sector                          | ATEVAL          |
| Use cases and opportunities in the manufacturing industry                           | EMC2            |
| Technology transfer   | NTT             |
| Innovative production systems: adaptive, intelligent and networked. Optimization of | PRODUTECH       |



| production systems  |                                |
|---|--------------------------------|
| Product-service-system development  | PRODUTECH                      |
| Robotic advanced systems  | PRODUTECH                      |
| Operations management and logistics   | PRODUTECH                      |
| Resource efficiency, sustainability and circular economy practices for the textile industry | AEI TEXTILE, ATEVAL, PRODUTECH |
| Lean Manufacturing  | ATEVAL                         |
| Testing activities in Lab and industrial facilities   | NTT                            |

#### 2.2.2 NON-TECHNOLOGICAL WORKSHOPS



Non-technological innovation refers to the introduction of new organisational, marketing and management methods. Technological and non-technological innovations are highly interconnected as the development and commercialization of new solutions usually requires adapting the organizational model as well as communication and promotion strategies.

## **KEY CONTENT**

This set of workshops focus on the introduction of new organizational and marketing methods to support product and process innovation.

- Open innovation workshops will share best practices for building an agile business. They
  will possibly be held within larger events to bring together a variety of experts for raising,
  discussing and facilitating innovation ideas
- Entrepreneurship workshops will share insights on business validation, business development, fundraising and investment readiness

# **KEY TOPICS**

Based on the expertise of the consortium, the Coaching Guidelines pre-identify relevant topics to support innovative projects to be evaluated, launched and scaled. The list is not meant to be exhaustive and the final content of the workshops will be defined by each partner based on the accessible knowledge and resources. Moreover, the partner identified as an expert should be regarded as a source of knowledge rather than the ones in charge of delivering the workshop.

| Non-technical Innovation     | Potential partners |
|------------------------------|--------------------|
| Defining R&D strategies      | СТА                |
| Intellectual property rights | SPG                |
| Public procurement           | ATEVAL             |



| Collaborative working environments   | CORALLIA                                 |
|--|--|
| Networking for tech-transfer and identification of solution/technology providers | EMC2                                     |
| Human-centric factory  | EMC2                                     |
| Development of soft-skills (human factor)  | EMC2                                     |
| Value of diversity in companies' teams and processes for implementation          | ATEVAL                                   |
| Access to private funding and pitching business projects                         | EBAN, CTA, SPG                           |
| Access to public funding   | AEI TEXTILE, ATEVAL, CTA, EMC2, NTT, SPG |

# 3. METHODOLOGIES AND TOOLS

#### 3.1 WORKSHOP METHODOLOGIES

The different methodologies envisioned here below include creativity tools and brainstorming in combination with the design methodologies for driving innovation such as design thinking, gamification tools and creative-thinking approach. A short description, key steps and pros/cons are provided for each methodology.

#### 3.1.1 DESIGN THINKING



"Design thinking is a human-centered approach to innovation that draws from the designer's toolkit to integrate the needs of people, the possibilities of technology, and the requirements for business success" (Tim Brown, IDEO). Even if many different definitions exist, IDEO is often credited to effectively put in practice design thinking and its principles. Through its Design Kit, the firm made publicly available multiple methods which can be applied to stimulate inspiration, ideation and implementation of new concepts.

## **KEY STEPS**

- 1. Frame a design challenge, tackling a wicked problem to be addressed by participants
- 2. Identify the most suitable <u>Ideation method</u> for the selected challenge, such as:
  - Brainstorm to incentivise knowledge sharing and creativity processes
  - Role Play to explore challenges from other points of view, e.g. users
  - Storyboard to quickly prototype new processes and identify strong/weak spots
  - Rapid Prototyping to make ideas tangible and easier to investigate
- 3. Follow the Design Kit guidelines to implement the selected method in the workshop



#### **PROS**

- A lot of hands-on publicly available material provided by IDEO
- Adaptable to both in-person and online sessions
- Duration can be flexible depending on challenge and method adopted
- Does not necessarily require a trained facilitator

#### CONS

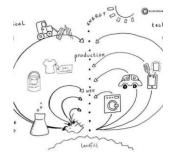
• Participants might find this method redundant as they are likely to have already tried it

#### LINK

https://designthinking.ideo.com

 $\checkmark$  In person  $\checkmark$  Online  $\checkmark$  Technological  $\checkmark$  Non technological

#### 3.1.2 CIRCULAR DESIGN



Circular Design was co-developed by IDEO and the Ellen MacArthur Foundation to specifically tackle the challenges connected to the transition to a circular economy. While having its roots in the previously mentioned Design Kit, this approach is mostly focused on the redesign of existing products and processes by fostering collaboration between different sectors and value chains. The methods here proposed heavily rely on a holistic approach to change perspective.

#### **KEY STEPS**

- 1. Identify a challenge related to either a broad or specific innovation problem
- 2. Allow time for participants to analyse the problem with a systemic approach, utilising the Understand methods and the related toolkit
- 3. Once the problem has been reframed, utilise <u>Define and/or Make methods</u> and tools to make participants identify solutions to tackle it through new models or value chains

#### **PROS**

- A wide library of methods and tools made publicly available by IDEO
- Adaptable to both in-person and online sessions
- Does not necessarily require a trained facilitator
- Good to encourage redesign through cross-sectoral collaboration

# CONS

- Might be harder to understand for participants from traditional industries
- Increased complexity could result in longer times to come up with solutions

## LINK

https://www.circulardesignguide.com

√ In person 
√ Online 
√ Technological 
√ Non technological



#### 3.1.3 TRIZ

TRIZ is a problem solving technique based on logical processes and data gathering rather than spontaneous intuition as it happens adopting other techniques, such as brainstorming. The core idea here is that any problem can be solved through investigation of its root causes and comparison with similar problems that already had a solution in another field. TRIZ also looks at technical or inherent contradictions within most problems, offering principles to overcome them.



#### **KEY STEPS**

- 1. Identify a specific problem for participants to analyse and solve
- 2. Encourage them to find a general problem that resembles the specific one and then to identify the general solution that is usually provided for that
- 3. Try to apply the general solutions to the specific problem to find the specific solution
- 4. Analyse the result, looking for technical and inherent contradictions and ways to solve them through TRIZ Contradiction Matrix and Inventive Principles

#### **PROS**

- Structured method, ideal for technological innovation purposes
- Good for highlighting positive and negative aspects of proposed ideas
- Provides a framework to analyse the problem and look for specific solutions

#### **CONS**

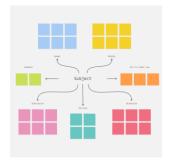
- High fragmentation in publicly available material to prepare the workshop
- Complex method that would be probably better managed by a certified facilitator
- Potentially difficult to manage via online workshops

#### LINK

https://www.triz.co.uk



## 3.1.4 SCAMPER



SCAMPER is a creative brainstorming technique developed in 1971 as a framework to unlock innovative solutions for existing problems. The name is an acronym representing the key phases of the method: Substitute, Combine, Adapt, Modify, Put to another use, Eliminate, Reverse. These phases can be followed in a non-linear way during workshops, flowing from on to another depending on participants' approach to the challenge.

## **KEY STEPS**

1. Define the challenge and align participants on that



- 2. Initially guide the discussion through the 7 phases, utilising dedicated <u>questions</u> to create a basis to solve the problem. Samples of questions include:
  - S: what other product or process could you use?
  - C: what could you combine to maximize the uses of this product?
  - A: what other products or ideas could you use for inspiration?
  - M: what could you emphasize or highlight to create more value?
  - P: can you use this product somewhere else, perhaps in another industry?
  - E: what features, parts, or rules could you eliminate?
  - R: what would happen if you sequenced this process differently?
- 3. Let participants freely flow from one phase to another in order to refine the solutions

#### **PROS**

- Focuses on coming up with innovative ideas without reinventing the wheel
- Provides a list of questions to be used to stimulate participants' discussion
- Easily adaptable to online workshops as well

#### **CONS**

Training material is less structured compared to others

#### LINK

https://miro.com/templates/scamper

 $\checkmark$  In person  $\checkmark$  Online  $\checkmark$  Technological  $\checkmark$  Non technological

#### 3.1.5 LEGO® SERIOUS PLAY®



According to LEGO®, "SERIOUS PLAY® Method is a facilitated meeting, communication and problem-solving process in which participants are led through a series of questions, probing deeper and deeper into the subject. Each participant builds his or her own 3D LEGO® model in response to the facilitator's questions using specially selected LEGO® elements. These 3D models serve as a basis for group discussion, knowledge sharing, problem solving and decision making".

#### **KEY STEPS**

- 1. A certified facilitator poses a challenge to participants
- 2. Participants build a LEGO model representing their reflections on the building challenge
- 3. Participants share the meaning and story that they have assigned to their own models
- 4. The "challenge-building-sharing" sequence is repeated multiple times in the workshop

#### PROS

- Easy to understand and good to foster creative thinking
- Uses play to level up differences between people from different backgrounds
- Flexible timing: sessions can last anything from 3 hours to 3 days

#### CONS

Not suitable for online workshops



- Requires a dedicated LEGO® SERIOUS PLAY® certified facilitator
- Might look a bit less serious to some participants

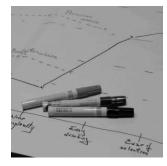
#### LINK

https://www.lego.com/en-us/seriousplay

 $\checkmark$  In person  $\times$  Online  $\times$  Technological  $\checkmark$  Non technological

## 3.1.6 BLUE OCEAN STRATEGY

Blue Ocean Strategy is a differentiation strategy based on creating new markets rather than trying to compete in existing, crowded ones. The focus is here placed on identifying new market spaces, thinking at new solutions where competition would not be a relevant factor for the time being. This strategy is composed by a defined method and some guiding principles (e.g. reconstruct market boundaries, focus on the big picture, reach new market spaces).



#### **KEY STEPS**

- 1. Identify an area to explore for potential innovation and business opportunities
- 2. Ask participants to identify unexplored areas adopting Blue Ocean tools such as:
  - Four Actions Framework to create a new value curve across the industry
  - Three Tiers of Noncustomers to think at potential clients for new applications
  - Six Paths Framework to reflect on commercial possibilities that exist within and outside current market boundaries

#### **PROS**

- Blue Ocean differentiation strategy can stimulate new point of views from participants
- Good for stimulating innovative ideas in areas yet to be explored

## CONS

- A full publicly-available full methodology is not available
- A certified practitioner is not mandatory, but could be preferable

#### LINK

https://www.blueoceanstrategy.com

√ In person 
√ Online 
√ Technological 
√ Non technological

## 3.1.7 WHICH ONE TO CHOOSE?

- **Design Thinking** is best for **all kind of workshops**, especially if you are not willing to have a trained facilitator because of the well-defined **publicly available material**
- Circular Design is best for triggering discussion among participants from different industry sectors, but it might result a bit more complex to grasp



- TRIZ is best for offline, technological workshops with a sufficient amount of time to embrace its high complexity (trained facilitator preferred)
- SCAMPER is best for all kind of workshops, both as a stand-alone technique and as a guide to stimulate discussion using other methodologies
- LEGO® SERIOUS PLAY® is best for offline, non-technological workshops with attendees coming from highly diverse background (trained facilitator mandatory)
- BLUE OCEAN STRATEGY is good for all kind of workshops, but its underlying differentiation strategy can also be taken in account when adopting other techniques

As a **final recommendation**, Design Thinking is probably the most indicated tool in general because of the broad material available and its flexibility. However, always keep in mind that - no matter the chosen methodology - the role of the facilitator is key to ensure a productive workshop. It would be ideal to have an expert and proactive facilitator in order to maximise attendants' contribution and final outcomes. Also consider that these methodologies are not meant to be strictly applied in each part of workshops, but rather as facilitation techniques for those moments (entire workshops or parts of them) where it is important to stimulate creativity among participants.

#### 3.2 USEFUL TOOLS

The following sections include recommended tools to be utilised for workshops. Other options can be considered as well depending on the setting and the methodology adopted. However, the following ones are highly suggested especially to host virtual workshops.

## 3.2.1 RESOURCE KITS



**Design Kit** (<a href="https://www.designkit.org">https://www.designkit.org</a>) is a collection of methods publicly released by IDEO to put in practice its Design Thinking methodology. However, these can also be used as stand-alone techniques in a combination with other methods



**Hyper Island Toolbox** (<a href="https://toolbox.hyperisland.com">https://toolbox.hyperisland.com</a>) is a resource kit to look for alternative stand-alone innovation exercise, with step-by-step guides on how to put them in practice



**Session Lab** (<a href="https://www.sessionlab.com">https://www.sessionlab.com</a>) offers a library of facilitation techniques for workshops, with multiple filtering options to find the ideal exercise for the session



### 3.2.2 VIDEOCONFERENCING



**Zoom** (<a href="https://zoom.us">https://zoom.us</a>) is a video conferencing tool which is ideal for online workshops for its ease of use. It allows the host to quickly separate participants in sub-groups by creating new rooms - either permanent or temporary ones



**Microsoft Teams** (<a href="https://teams.microsoft.com">https://teams.microsoft.com</a>) is a business communication platform that enables easy video conferencing. It is a valid option especially for organisations that already utilise Microsoft 365 suite and want to use an already built-in solution

#### 3.2.3 COLLABORATION



**Miro** (<a href="https://miro.com">https://miro.com</a>) is an online visual collaboration platform that provides multiple tools to replicate typical workshop activities, such as brainstorming via post-its or sketching processes



**Mural** (<a href="https://www.mural.co">https://www.mural.co</a>) is another digital workspace for visual collaboration, offering easy-to-use tools for virtual workshops, thus enabling planning, brainstorming and related activities

## 3.2.4 DIGITAL POLLING



**Mentimeter** (<a href="https://www.mentimeter.com">https://www.mentimeter.com</a>) is an interactive presentation tool that enables meeting hosts to instantly collect and save polls, data and opinions from participants using smart devices - thus making the presentations more interactive



**Slido** (<a href="https://www.sli.do">https://www.sli.do</a>) is another platform that empowers the audience to ask questions, vote in polls and be a part of the discussion by using a simple Q&A tool. Also in this case, data can be saved in order to be analysed afterwards

## 3.2.5 KNOWLEDGE SHARING



**Notion** (<a href="https://www.notion.so">https://www.notion.so</a>) is a knowledge sharing platform. It can be used to make documents and other material easily accessible by participants, either before or after the workshop takes place

## 4. BEST PRACTICES

## 4.1 FACILITATION TIPS

Useful suggestions to facilitate workshops can be found here below. The tips were adapted by the Facilitator Guidelines developed by Stanford University (A. Porteus, N. Howe, T. Woon).



## 4.1.1 PREPARATION

- **Decide who should facilitate the discussion**. Consider who knows the topic, can assume an "objective" role, will be accepted by the group and has group experience
- Consider co-facilitating with another person whenever possible
- Identify the goals of the session and plan the format of the discussion
- Schedule tentative time blocks, so that key points will be covered before the end
- Plan the physical (or virtual) environment so that participants can talk to each other
- Plan for any materials or help you will need. If you will need to record information, choose someone else to do it - it is hard to both facilitate and recorde the discussion

## 4.1.2 STARTING OFF

- Introduce the purpose of the discussion and ensure that everyone understands it
- Explain the structure of the discussion and your role as facilitator a person
  whose role it is to remain neutral or objective, to keep the discussion focused and
  energized and to create an environment for all to have a chance to participate
- Do introductions and establish ground rules for the discussion so that the
  participants feel the environment is safe to speak about their ideas and feelings
- **Pose an interesting question or set of questions**. Remember to come to the discussion with some prepared questions:
  - open questions generate discussion and stimulate thinking (keywords: "how",
     "why", "what", "what if", "tell us about")
  - o group oriented questions encourage group participation ("who", "anyone")
  - individual oriented questions encourage individual response (but may put people on the spot) and can tap known resources of a "expert" in the group
  - o factual questions seek information ("what", "which", "how much")

## 4.1.3 DURING THE DISCUSSION

- **Remain neutral**: this does not mean that you don't have opinions, but facilitators usually do not offer their own views they help group members share theirs
- Stay off the soapbox: successful facilitators listen rather than talk
- Avoid being put in the position of the "expert" when someone looks to you to provide the answers to challenging questions or situations
- Acknowledge contributions, validate people's ideas, and give credit where it is due
- Try to keep the discussion as much concrete as possible rather than abstract
- Keep the focus on the subject without restraining free expression of ideas
- Summarize or synthesize statements as a way of keeping track and bringing focus
- **Be patient with silences**. Don't jump to fill in silence because it can be an important time for some and may spur others to talk.
- Read non-verbal cues. Are a few people dominating the discussion? Are there many interruptions? Observe who is participating and who is not? Are people looking bored? Angry? Impatient? What is the level of energy in the discussion?
- **Pose disagreement constructively**. If there is disagreement and the discussion is stuck, have the participants agree to disagree and move on to another subject
- Minimize attacks. Protect individuals and their ideas from attack by other members
- **Minimize disruptions** such as inappropriate humor, people walking in and out, private/side conversations, etc.



- Set and reinforce a pattern for participants to talk to each other, not to you
- Call attention to alternative viewpoints. Beware of "group think" Sometimes a group will discuss a topic without awareness of a different approach to the same problem

#### 4.1.4 TROUBLESHOOTING

## • No one responds:

- Ask for any comments
- Suggest an answer and ask for agreement or disagreement

## • Someone doesn't take the discussion seriously or gives silly comments:

- Find something in their answer that is close to a serious answer and in a serious tone repeat it to the group
- Ask them if they can think of another answer
- Compliment them when they give a serious answer

## • People monopolize the discussion:

- Say "I'd like to hear what the rest of the group has to say"
- Ask another person a question just as soon as they pause
- Ask for agreement or disagreement from others

### Someone keeps changing the subject or goes on tangents:

- Say "That is very interesting but how do you feel about...?"
- Say "In order to accomplish our goal today, we really need to move on. Perhaps we can go back to this topic later"

## People keep interrupting:

 Say "Could we remember just to have one person talk at a time and let people finish their statements"

#### • Hostile or belligerent group members:

- Keep your cool. Try to incorporate negative comments in a positive way
- If they continue, use a break to confront them on their behavior

#### You are running out of time:

Prioritize questions/points and try to address the important ones

#### Conflict occurs:

- Don't take sides and remind people of the areas of agreement
- Remind people that they are not there to judge others or to persuade others of their views, but to further mutual understanding.
- Acknowledge the disagreement and agree to move on. Tell the group that conflict is a healthy part of group dynamics, and can enhance learning

# Inability to move to another topic because people are overly engaged in a lively discussion:

- Try to be flexible about time. If something good is happening, assess the value of leaving that discussion in favor of completing an agenda
- Give a two-minute warning to prepare the group to change direction

## Something inappropriate is stated, i.e., something offensive, misinformation:

 Legitimize dissenting opinions/ideas but don't let misinformation, offenses or inappropriate humor stand



## 4.1.5 WRAPPING UP

- **Keep to the committed time:** ending a little soon is better than discussing a topic to death. Ending on a high note will encourage discussion to continue at a later time
- Summarize (or have a participant summarize) the major thrust of the discussion
- Comment on (or have the group comment on) how the discussion went
- Thank everyone for the discussion...for their honest participation, etc.
- After the discussion is over, take a few minutes to reflect on the content and process of the discussion; a few written notes for future reference might be helpful

#### **4.2 REMOTE EVENTS**

While general facilitation principles apply to both in-person and virtual workshops, additional factors should be taken in account when organising remote events. Some key tips are listed here below, also referencing the <a href="Remote Facilitation Guide">Remote Facilitation Guide</a> published by Remote7.

- Keep online workshops shorter than physical ones as it is harder to maintain attendants'
  attention and engagement. As a general, 4 hours should be considered the maximum
  length of online workshops, with at least a 10-15 mins break in the middle
- Have both a content and a technical facilitator for the workshop. The technical facilitator
  will take care of aspects such as breaking video conference rooms, allowing the content
  facilitator to fully focus on running an effective workshop
- Pick the online tools and try them in advance, both from the facilitator's and the users' perspective, to ensure that everything will work smoothly during the live event
- Set up your workspace for the event, preferably using two monitors (one for the videoconference, one for other tools) and preparing everything you need - from files to software - so that you can quickly access everything during the workshop