

# Learning from Experience

## Workshop Leader's Guide

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*The aim in a workshop is to create an environment where the information that will provide the material from which to learn will be revealed.*

*The essential ingredients for this are that participants are the key relevant people from all levels and they:*

- *have confidence that revealing detail on problems will not lead to discrimination, censure, disciplinary action, etc*
- *are given an opportunity to speak and know that that in a review everyone has an equally valid opinion or point of view — status is left outside the room*
- *understand that the aim is to seek positive guidance to assist in the future and not to allocate blame and consequently contribute with a desire for success.*

*Overall success depends to a large extent on the ability of the facilitator. This guide is written to assist facilitators. To do the job well a facilitator must understand people's motivations — where they are coming from — as these drivers can strongly influence the learning process.*



### Before the event

#### Act Quickly

If organising a hindsight review, act quickly. Project teams frequently break up immediately the project ends. As people gain new responsibilities it is hard for them to justify attending a meeting on a project that is no longer income-producing. This will particularly be the case if the project to be discussed is considered to have been a failure. In many instances valuable learning will be possible at any time near the end of a project. Whatever the circumstances, it is preferable to have the workshop no longer than a month after the end of a project.



#### Prepare well by having everything ready in advance

Good preparation gives confidence and this allows the facilitator to adapt style or role during the workshop according to need. The following list is iterative, as later items on the list may alter decisions about earlier items and that can happen wherever on the list you start.

- Arrange the date and time. Ensure that the duration of the workshop will be long enough for the event to be successful. Calling people together but not allowing adequate time for discussion is very wasteful.
- Book the room. A good location can make the process very much easier. The ideal meeting place would hold the numbers you need, with all supporting technology, in comfort and without distractions. Usually it is better to use a location that is politically neutral. Some find that a location away from the project site encourages reflection. As far as possible select a location with easy travel arrangements for participants — particularly for those whose attendance is vital.
- Take care to invite the required people and check that the key ones can manage the date and time.



- Organise refreshments, flip charts and pens, white boards and pens, laptop, projector and screen (or OHP projector and screen), paper, pens, Post-Its and so on. Make sure there are adequate surfaces where post-its can be used. Know whom to contact, and how, should there be any problem once the workshop has started.
- Plan the framework for the workshop. Decide on the best activities to draw out the information in ways that create variety and keep the participants fresh. Different levels of activity or process will generate different information and points of view.
- Decide who is to take notes during the workshop. The information gleaned needs to be well documented so that it can later be disseminated. Some information will probably be recorded on flipcharts and Post-Its but this may be of limited help later — so a good note taker is needed. This person should also be capable of writing up the final report. As a structural engineer pointed out this is not a skill all in the construction industry need or have.

### Take it seriously for good results

Creating the techniques and organising a learning opportunity so that it is relaxed and enjoyable will assist the success of the final outcome. The thinking behind the event needs to be tight without losing flexibility — not that easy!

## Initial facilitation methods

### Getting results

You can just get everyone together and say 'So, what will be/are/were the problems?', then sit back and let the noisy people speak but the results will be second rate. Instead:

- Divide the workshop into at least three or four sessions and address the issues from a number of different ways. Provide for refreshment and comfort breaks.
- Make sure that everyone gets an opportunity to participate and make a worthwhile contribution.

### Using Post-its

A good starter is to give everyone a pack of Post-It notes and ask them to put a couple of words about an issue (problem, difficulty or proposal for change) on an individual Post-It and to repeat this until they can think of no more issues. Then ask one person to put their post-its well spread out on a wall. Then ask one or two other people to put their post-its on the wall adjacent to any that are similar to theirs or to place different ones in their own space.

Next the remainder of the group add their Post-Its. The facilitator should then be faced with a few groups of several Post-Its and some smaller groups with a few Post-Its plus a few very individual Post-Its. The groups will indicate topics that concern many people. Tell the group what these are and make a list. Suggest that these then become the main topics for the workshop. Then run through the smaller groups and individual Post-Its to find ones that come under these main topic areas. Finally make a list of the remaining points. These should be tackled by the workshop at a later stage.

This is one of the best ways to start because everyone puts forward their ideas before anyone speaks. Many other methods mean that the ideas of the first person to speak tend to dominate the discussion, at least temporarily, and sometimes to the total exclusion of other matters.

### Brain-storming

Similar information can be gleaned by having a brain-storming session with all the points raised being recorded on a flipchart or white board. It is not quite so easy to group the points unless a large white board or several sheets of flip-chart paper are available at once and there is plenty of room to write.

### Pre-set topics

Another way of breaking down the workshop into discussions on manageable amounts of information is for the facilitator to pre-set some topic areas. These could be topics that are known to be causing problems. Or the themes could be based on measurable performance indicators, around strategic themes or even the different stages of the project or process. This is an ideal way to start if a decision has been made to focus certain aspects. Some organisations with large project programmes will focus on specific aspects across several projects at the same time, so as to focus on improving that particular component of project work.

## Once the key topics are decided

When the key topics are decided there are various ways to seek information:

- Focus on people who indicate they want to talk.
- Ask everyone to speak in turn on the subject and limit each person to two minutes (at least for the first round of comment).
- The facilitator asks specific people to speak on the topic.

## Depersonalise

Whatever method is used the facilitator needs to keep the flow of the discussion smooth and pleasant. It is important to ensure the quiet people get an opportunity to speak. Discourage any comment that seems to be focused on the weaknesses of any particular person whether a participant or not — get everyone to convey such information in a depersonalised way.

## Allow time

This is a subtle point about giving people time to express their views. However intricate the issues, however long the review, it is important to listen with courtesy and patience to everyone who speaks — even the quietest or most hesitant. At the start, the attitude of the facilitator will set the tone to be followed by the others.

Don't allow voices to be ignored or cut short unless the predetermined facilitation method for a particular session is to allow only a limited time for each participant. Later in the discussion you might need to draw out people who haven't spoken much. It is essential that every point of view can be heard in full — but repetition should be discouraged, as should straying from the matter being discussed.

## The time line

Early in the workshop proceedings a time-line is probably going to be needed just to link timing, key events and major players. Attempting to set this up can be the start of the workshop but it is probably better to get started by highlighting the key issues and for the facilitator to be ready to establish a time line as soon as the need becomes apparent.

Where some information is available to the facilitator (from a desk review of project records) a basic written chronology can be prepared before the workshop. This can be confirmed or changed as agreed by the participants. In some cases this will be non-controversial and in others agreeing a chronology will reveal difficulties faced by the project team.

Another way used is to ask all participants to draft out their own reviews before the workshop and to either submit them to the facilitator (who can note where there is agreement before the meeting) or the participants can bring them to the workshop as individual aide-memoires.

Space should be available at the workshop for recording the date relevant information without disturbing any current activity. Using Post-Its that can be moved around is probably the best way of recording key date-related information.

## Facilitation to dig deeper

### Specific issues

Once the first session has defined the key points and discussed them to some extent the workshop should move on to specific issues and the structure of the workshop should change. This will provide variety but it should also allow discussion at a greater depth. For example:

- Small groups reporting back on specific issues.
- People turning and talking with the person next to them about one or two points also helps change the flow and helps quiet people make a contributions. If it will aid the discussion the facilitator can indicate who should pair with whom. The groups can extend to three or four people. Small group discussion is reported back to all participants.
- The facilitator can keep asking *What?* and *Why?* or other questions. This can generate unexpected information.

Questions can be used as a prompt throughout to pull the discussion back into focus. Regular summaries, such as checking everyone agrees with the list of issues on a flip chart, will also help.

An effective review cannot be a one-person — or one company — show. It is really important that the discussion doesn't become 'them' and 'us'. A light touch should be enough to keep people focused and within the framework of the review process. Adapt your own style to fit the flow of talk and the way the group is working together.

## Being constructive

### Seeking solutions

The review is seeking to find constructive solutions to problems and ways to do things better. Most time should therefore be focused on this. Turn the questioning to draw out views about how things should be done in the future. Try to find specific solutions to difficulties rather than the 'don't do this way' approach. When solutions are proposed ask the group to test them against different scenarios to ensure that the 'solution' does not give rise to new problems.

There can be a tendency to highlight on project difficulties related to people and process and overlook technical and design issues. The facilitator should ensure a balanced review of all aspects of the project.

A workshop could include a session on future dissemination of the learning gained but if this is not an expressed intention the time available should be used to gain as much constructive learning as possible with discussion about dissemination being discouraged.

### Be rational

Some issues that are important at one operational level might be irrelevant at another. Sometimes actions that are perfectly rational in one area can have a negative impact in another — bureaucratic processes come to mind. Is the lesson to be learnt universal to all construction business or specific to certain specialist activities? Is knowledge hidden between groups? Where are the gaps?

It can be quite difficult to disentangle *what* happened from *why* it happened, particularly when everyone is fully engaged in the discussion. People will also start throwing in useful ideas for improvements.

### Keep the flow going and maintain control

As the review uncovers all kinds of interesting things, there is a tendency for smaller conversations to break out within the group. Adapt your style of management to suit the circumstances, stand back or take control as needed. Try to maintain a balance between obtaining useful detail, keeping the review structure and staying within the available time.

### Record the discussion

However the discussion is managed ensure that the key points, issues and insights are written down for all to see at the time. Afterwards they can be recorded and used for sharing the knowledge gained with a wider audience. Have a note-taker if necessary.

### Don't expect miracles

Not every project has endless problems, especially when projects are part of a series. It may well be that the amount to be learnt is limited.

### Strategic review

When projects are part of a series the way to significant improvement may be by considering the overall structure of the programme. So if the amount of learning that the project team can find is limited, it may be time to take a strategic review not of each contract but of the overall programme.

## Interviewing

While the focus of this toolkit is workshop facilitation, information can also be gleaned from interviews. This can be a useful source of information when people have left a project, for example when they change employment, or if some people find it difficult to attend a workshop. Interviews can also be used to gain learning from key participants of small projects that do not warrant the expense of a workshop.

The insights that come from interaction between workshop participants will be missing but other information and reflections can be captured. Experience suggests that the use of interviews is most effective when a

specialist researcher and report writer undertakes the task.

Information from interviews can be fed into a workshop, or interviewees can be asked to comment on the results of a workshop as part of the interview process.

It is generally found easier if interviews are taped, a transcript produced and an edited unbiased report is produced to reflect the themes and trends of the interview.

Some facilitators have interviewed individual participants after a workshop. These tend to provide a richer picture but no new issues, so in most cases they are probably not cost-effective.

## Re-capping

### Suit the circumstances

The level of recapping will depend on circumstances. For an insight review where people are likely to implement change immediately, a recap of the issues raised is probably sufficient. If a report is to be written and the results disseminated then the recapping has to ensure adequate records of the information have been made and maybe more time will be needed.

### Minor points

Before the workshop ends allow time to go back and look at items that were mentioned early on but which did not reach the main agenda of the meeting. For example points on 'post-its' that no one else raised, or points from the brainstorming session that dropped by the way-side. Put them back in front of the group for consideration. Most will have been covered by the discussion but there may well be one or two items that in the light of the discussion look more interesting than previously. Encourage brief discussion that will lead to any extra learning.

### Time-line

Run through the 'time-line' details and make sure everything that needs to be included is recorded.

## Share knowledge

### Participation

The process of participation is probably one of the greatest benefits from a learning review. People come to appreciate issues with greater breadth and depth and they can take home an effective method to learn from shared experience.

### Reports

How is the knowledge to be used in the future? An insight review might lead to immediate change within a project or management process. Oral reports to key persons might be sufficient.

Hindsight reviews, which may be considerably larger and more labour intensive probably need a more permanent record, such as a learning history. ICT is faster, easier to update and potentially more accessible to a greater number of people than paper reports.

### Outcomes

The more people can see a beneficial link between knowledge gained through a learning review and the job they do, the more effective the learning process. Each person has the potential to become an advocate for learning.

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