

Process 2.0 Facilitator Training

Text Version

Title Slide 1

Process 2.0 Facilitator Training

...Work Process Optimization

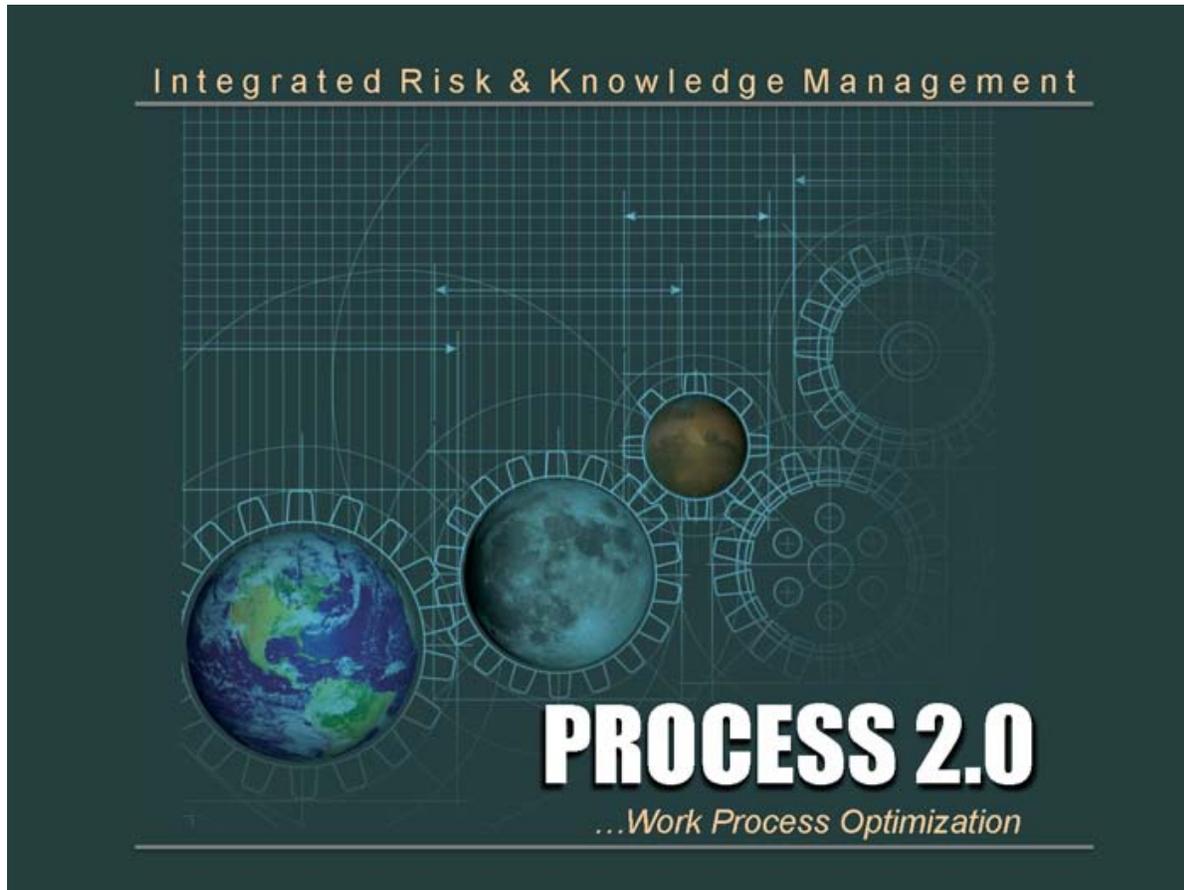


Image: This is a decorative background image of the Earth, Moon, and Mars inside gears with the text "Work Process Optimization" and "Process 2.0 Facilitator Training."

Slide 1 video transcript.

So today we are going to discuss Process 2.0. Now, what is Process 2.0? Well, take a look at your work processes. When were they developed? Perhaps months ago, maybe even years ago. It's time to take a look at those work processes. Chances are they have been serving you well and you're getting what you need out of them, but undoubtedly, there is also some inefficiency in the process. Perhaps there are some unhappy stakeholders. Maybe there's some frustration amongst the employees who are working the processes. In any case, there's likely some inefficient use of resources as well. So it's time to take a look at this version of your processes, version 1.0 if you will, and we have an opportunity to convert those to version 2.0, hence, "Process 2.0." Now, Process 2.0 is a facilitated activity involving your team to examine your processes and identify improvements in those processes. It is a very useful activity, it doesn't take a lot of time, and it has the added benefit of a team-building exercise as well. So I hope you

enjoy the session today where we discuss Process 2.0 techniques and at the end of the session, I hope you're ready to go implement these on your processes.

Slide 2

Agenda.

1. Process 2.0 Overview.
 - a. How P 2.0 fits into E S M D's Integrated Risk and Knowledge Management Approach.
 - b. Objectives of this course.
2. Process 2.0 Technique.
 - a. P 2.0 Introduction.
 - b. Event scoping and facilitator prep.
 - c. Conducting the P 2.0.
 - Facilitator approach.
 - Structuring discussion.
3. Effective Facilitator Techniques.
 - a. Effective facilitator attributes.
 - b. The Facilitator Toolbox.
 - c. The P 2 0 Facilitator "Play Book".
 - d. Using Think Tank software.



Figure: This is an image of company and organization logos that use a version of P 2 0 include NASA, U.S. Army, Shell, Harley-Davidson, Social Security Administration, I B M, Northrop Grumman, and Fidelity Investments.

Slide 2 video transcript.

Process 2.0s are not new. In fact, they have been around for some time. They originated out of the Army's after action reviews, and many other organizations use them, some of which you can see here on this page. At NASA, we call these Process 2.0 activities. The agenda for this training will include a discussion again of what is Process 2.0, what are the goals, what are the objectives, and also specific techniques that will assist you in dealing with problems that typically would occur in group dynamics, or group discussion, and further defining the role of the facilitator as the person who is quietly there, but always in charge, and always capable of resolving conflicts that may arise.

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Process 2.0 is an Element in the E S M D I R K M Program.

INTEGRATED RISK & KNOWLEDGE MANAGEMENT (I R K M).

“There are inherent risks in every process; P 2.0 is a method to identify these risks and drive them out.”

Quote by Dave Lengyel, E S M D Risk Management Officer.

...R M and K M are key enablers to effective work accomplishment.

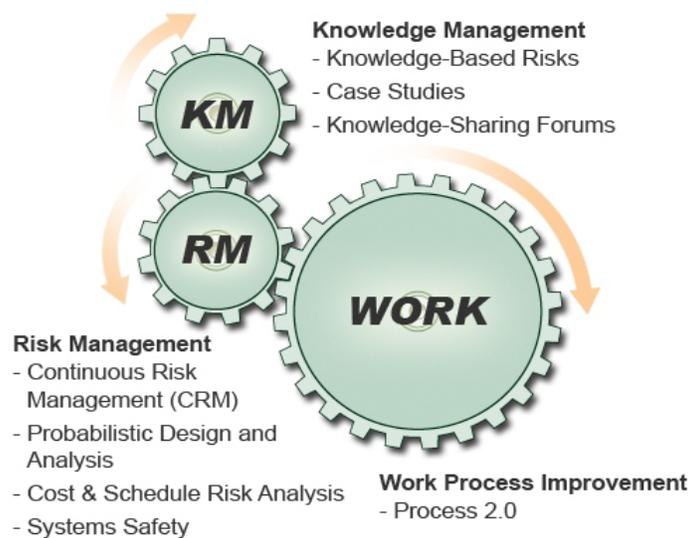


Image: This is an image of the I R K M S Gears Model.

Slide 3 video transcript.

The first small gear is Knowledge Management (K M) which consists of Knowledge-Based Risks, Case Studies, and Knowledge-Sharing Forums. The second small gear is Risk Management (R M) which consists of Continuous Risk Management (C R M), Probabilistic Design and Analysis, Cost and Schedule Risk Analysis, and Systems Safety. The third large gear is Work Process Improvement (WORK) which is Process 2.0.

Process 2.0 is an element of ESMD's Integrated Risk and Knowledge Management Program. What is integrated risk and knowledge management? Well, we all have risk management processes within our activities, but we do not always have knowledge management practices. So, integrated risk and knowledge management is just a merger of those two disciplines. So we take what we learn as we identify risk and identify risk mitigations, and we transfer that knowledge through KM to others in the

organization who may be able to benefit from that. And it's a two-way flow, so we also take risks that others have experienced and methods that they have used to successfully mitigate them, and we transfer that right back into our own organization. And that is what integrated risk and knowledge management is all about.

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Process 2.0 is an Element in the E S M D I R K M Program.

E S M D I R K M Practices Include:

- Continuous Risk Management.
- Process 2.0 - **Goal: Rapid Work Process Improvement Through Structured, Time Managed, Reflection.**
- Knowledge-Based Risks (K B Rs).
- Virtual Teams.
- Knowledge-Sharing Forums.
- Case-Based Training.

Slide 4 video transcript.

Process 2.0 is the key element in the integrated risk and knowledge management program. It focuses on work process improvement. The Process 2.0 name is derived from the idea of Web 2.0 - the next great thing, and a way to take your process to the next level.

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Desired Learning Objectives for this Course:

1. Demonstrate the benefits of the Process 2.0 and how work groups and project teams can quickly improve performance.
2. Develop the facilitator by equipping them with the required knowledge and toolset to be successful.

Slide 5 video transcript.

Our learning objectives today are simple. I want to familiarize you with the Process 2.0 techniques that you can apply to your processes, and I also want to develop facilitators by equipping them with the tools and techniques that they need to facilitate Process 2.0 sessions.

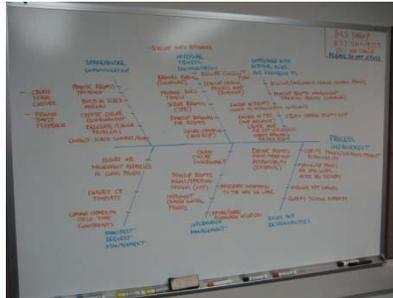
Title Slide 6

The Process 2.0 Technique Introduction

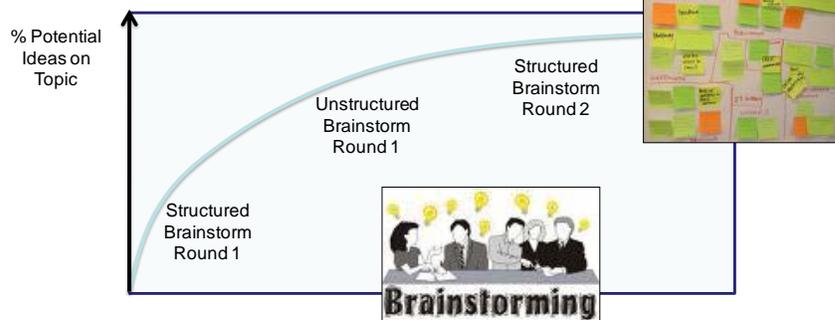
Slide 7

Introduction to Process 2.0

P 2.0 uses facilitation techniques to involve your group in improving *processes* or solving *problems*.



Brainstorm what went wrong in critical lifting process



Images: Shown are pictures of a whiteboard with a fishbone diagram, example of a Brainstorming chart with post-it notes on a whiteboard, and a group of people sitting at a large table for a meeting. These are examples of brainstorming and problem solving in action.

Slide 7 video transcript.

Process 2.0 uses standard facilitation techniques and structured logic methods to help you and your team look at the key issues within your process. It helps you work towards solutions to your problems. The method uses fishbone diagrams, which are basically process failure modes and effects analysis. It uses structured brainstorming. It uses unstructured brainstorming, as well as a number of techniques, to help the event stay focused on process improvement.

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Using P 2.0 for Processes or Problems

P 2 0's can be used for many purposes including:

Examining Processes: e.g.) The mating operation of the ARES-1 five-segment R S R B with the (J-2 X) upper stage was halted when the handling ring was prematurely hoisted by the 250 Ton crane operator.

Solving Problems: e.g.) The I S S must be resupplied beyond the planned retirement of the Space Shuttle. Develop a strategy to ensure safe, un-interrupted I S S operations.

Slide 8 video transcript.

A P 2.0 can be used to evaluate both processes and problems. A process would be an event that is recurring; something that you do many times, like a crane lift or hoist for the J2X engine. A problem would something that we are looking for a good solution to, like resupplying the International Space Station.

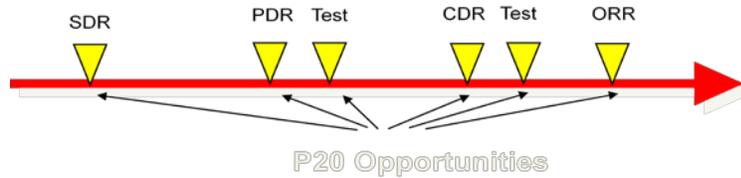
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When to P 2 0?

Examples of appropriate situations to involve the P 2 0 process:

- Program Management Milestones.
 - a. 7120.5 D Milestone Events.
 - b. 7123.1 Milestone Events.
 - c. Key Check Points in Preparation for Major Milestone Events.
 - d. Standing Review Board (S R B) events.
- Safety & Mission Success Readiness Reviews (S M S R).
- Software Development.
 - a. Software Requirements Review.
- Hardware Processing.
 - a. Critical Lift Events.
 - b. Mate Reviews.
 - c. Major T O P / W A D event (O P F roll-out).
 - d. Time Outs (K S C U S A Ground Processing).
- Operations.
 - a. Operations Readiness Review.
 - b. Range Safety Review.
 - c. Contingency Planning.
- Procurements (S E B).
- Human Capital (Selection Panel).

Consider conducting a P 2 0 event wherever critical recurrent processes are implemented or where a project team encounters key non-recurrent milestone events.



Images: This is a picture of a long horizontal arrow pointing to the right. Below the arrow is the text “P 2 0 Opportunities” with small triangles pointing to different sections of the horizontal arrow to represent project milestones at which P 2.0 exercises can be conducted. The milestones in order from left to right include S D R, P D R, Test, C D R, Test, and O R R. The purpose of this image is to convey that P 2 0 may very well be appropriate in all aspects of a program.

Slide 9 video transcript.

When should you conduct a Process 2.0 activity? As engineers, we often think of things in terms of the project life cycle and critical events in that project life cycle. For example, system design reviews or preliminary design reviews. Those offer great opportunities to go in after one of those reviews and conduct a process improvement activity. But those are not the only times when you might want to conduct a Process 2.0 activity. If you are not involved in the project development activities, whatever you are involved in will certainly offer you plenty of opportunities to examine your processes. If you are a safety person, conduct them after your safety reviews. If you are a procurement person, conduct them after your various procurement SEBs, acquisition strategy meetings, and those types of things. In any case, we can all look for the major processes within our operations and go in and examine those processes at logical steps throughout their life cycle.

Title Slide 10

P 2.0 Event Scoping and Facilitator Preparation

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Determine Scope of P 2.0

Ask the following questions:

Is the scope narrow or broad?

Is the duration a one hour session or a full day event?

Will the method consist of the use of a whiteboard/table top or a ThinkTank session?

Types of Facilitators	Benefit
Internal.	<ul style="list-style-type: none">• One of the project team members.• This will be your <u>most</u> valuable facilitator.• Enables sessions to be conducted regularly.• Provides strong internal knowledge for efficient group focus.
External.	<ul style="list-style-type: none">• Facilitator is from outside the project team.• Very useful for senior level groups or controversial issues.• Provides facilitator with impartial viewpoints.
Professional.	<ul style="list-style-type: none">• Used for very difficult, generally high-level negotiations that require a professionally schooled facilitator.

Above is a table showing Types of Facilitators and their benefits.

The benefits of an Internal Facilitator is that it can be one of the project team members, it will be your most valuable facilitator, it enables sessions to be conducted regularly, and it provides strong internal knowledge for efficient group focus.

The benefits of an External Facilitator is that the facilitator can be from outside the project team, they can be very useful for senior level groups or controversial issues, and it provides the facilitator with impartial viewpoints.

The benefits of a Professional Facilitator are that they can be used for very difficult and generally high-level negotiations that require a professionally schooled facilitator.

Slide 11 video transcript.

There are many variations of Process 2.0 activities. They can be very large or they can be very small. Small ones may only take an hour. Nonetheless, they offer a great opportunity to go in and take a quick look at a process, identify some improvements, and then move on. Other times, you may want to do a more critical examination of a larger process - perhaps a Process 360 review. In these cases, these activities can take an entire day or sometimes, even two days. These are facilitated activities using conventional facilitation techniques: whiteboards, flipcharts, markers, ranking, and those types of things. In some cases, if it is a distributed team, we use software. ESMD has purchased licenses to some ThinkTank software, which will enable distributed teams to conduct these activities from geographically remote locations. And finally, these events will require a facilitator. It can be a facilitator from within your group. It can be an external facilitator from somewhere else in NASA or, if it is a particularly difficult problem, you may want to even hire a professional facilitator. I mentioned three types of facilitators: internal, external, and professional. There are some pros and cons to each of these facilitators that you will want to consider as you choose one to facilitate your sessions. The internal facilitator can be one of your most valuable facilitators. They are internal to your team and they can be ready at a moment's notice to facilitate one of your meetings. In addition, they have a strong understanding of your work processes. The downside to an internal facilitator is that they bring some biases to the table. They are also part of your rank, your structure of your organization, and may not feel comfortable challenging some of the more senior or stronger members of the group. An external facilitator will come in. One of their downsides is they might not understand your process. Generally, a good facilitator can overcome that with a few pre-meeting interviews with your team. They will not bring biases to the table and will be able to objectively draw out the ideas of the group and are usually pretty effective in helping your group identify some strong process improvements. If you have a particularly sticky or contentious problem, you may need to bring in a professional facilitator. These professional facilitators are trained, they do this for a living, and they are very good at defining improvement activities should you require that level of facilitation.

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P 2 0 Facilitator Preparation – Interviews.

Steps to prepare for a session:

- Conduct interviews with key stakeholders.
 1. Understand desired outcomes.
 2. What contributed to outstanding process performance?
 3. What may have contributed to less than optimal performance?
 4. What are specific ideas that can improve or sustain optimal process performance?
- Understand the process or event.
- Understand governing rules and regulations surrounding the project such as policies, charters, etc.
- Understand the project hierarchy, terminology and history.
- Understand group dynamics, recognize politics.

Slide 12 video transcript.

As you prepare to facilitate a Process 2.0 activity, you will want to conduct some pre-meeting interviews with the key stakeholders in the process. It is important that you understand their likes and their dislikes with the process. What are their frustrations with the process? What is the hierarchy of the organization? Are there any political factors involved that you should understand before you step in to facilitate this session?

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Preparation & Planning One-Pager

The sections of the preparation and planning one-pager include Identify Sponsors & Process Owners, Discuss Rules & Expectations, Define Concise P 2 0 Need Statement, Conduct Stakeholder Interviews, Build Simple Process Flow Showing All Stakeholders, Identify Inputs, Outputs, Products and Services, and Build Preliminary Issue Fishbone.



» **ESMD Process-360**

ESMD "Process 360 Pal" Preparation and Planning

Objective of the PAL: Identify what worked well – what didn't and specific to improve

Rules of the PAL: Process focused, collegial, paving the path forward with all stakeholders on same page

Process, Activity, or Event: _____

Governing Agency Policies: _____

Governing Agency Procedures: _____

Governing Program Documentation: _____

Pal Undertaken at request of: _____
(typically the process owner)

Distribution & Control of Pal Documentation:

Length of PAL: _____

Narrative Purpose/Need Statement:

Key Stakeholder Map & Communication Pathways

Cost Estimation Process Stakeholders



Example from the SRB Process Stakeholder Pal. Please note that communication issues are always in the top three failure mode categories for complex system failures and indeed for the preponderance of work-process failures. The map will assist in preparing for the Pal as well as for addressing communication issues within the Pal.

Process Issue Identification – Part 1
In stakeholder interviews (pre-work) ask informally (no structure):
What happened?
What was supposed to happen?
What Worked well?
What didn't work so well?
What can be improved

Process Issue Identification – Part 2
Use the Process-360 Fishbone to probe further to ensure that all controllable process categories are explored in considering improvement opportunities

ESMD Process-360 Root Cause Fishbone

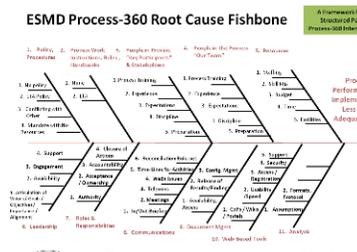


Image: This is an example layout of an E S M D Process 2.0 Preparation and Planning one-pager that includes all of the above mentioned sections.

Slide 13 video transcript.

Facilitating a Process 2.0 event, as we previously discussed, involves doing stakeholder interviews discussion. Learning about how the process works or not. Learning what the key factors are for success or failure. Learning who are stakeholders. What are linkages? How does data flow within the process? Products. Services. This chart speaks about how to pull it all together. It is sort of a one-pager, we call it, which you could really think about as a checklist. Here's where you would build your process flow diagram. Here is where you have points of contact. You have your fishbone with preliminary topics and

issues to be discussed. Here is where you pull together a listing of all the players within the process. Process, products, services. We have found it is a very effective way to verify that you are ready to move forward with a Process 2.0 event.

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P 2.0 Facilitator Preparation – Logistics

As a facilitator, it will be necessary to take a few steps to prepare for a session:

- Assess group size.
 - a. Try to control size of group to less than 10-15.
 - b. If larger group size use Café or breakout techniques to separate into smaller groups.
- Plan logistics.
 - a. Common facilitator tools that will be used such as flip charts, Post-it notes, markers, etc.
 - b. IT components that will be needed such as laptops, projector, wireless, ThinkTank, etc.
 - c. Food for members depending on the duration such as coffee and snacks if an all day meeting.

Slide 14 video transcript.

When conducting a Process 2.0, you also have to think about the logistics of the entire meeting. Two of the most important things would be the group size and also the general layout, or the logistics, of the room and how you are going to conduct it. As far as the group size goes, we have found that ten to fifteen people is about the maximum size you want, to have an effective single group type of Process 2.0. If you have a larger group than fifteen, you might want to consider using techniques like Caf techniques, breakout sessions, and things like that. As far as logistics go, you want to know the general layout of the room. Where are you going to have the people? Where are the projectors going to be? What kinds of things like flipcharts or tools are you are going to need, including IT tools such as laptops, the projector you're actually going to use to present with. Also, one of the most important things is food. If you are going to have an all day meeting, you might want to consider having coffee, or bringing lunch in, to make sure you maintain your audience throughout the day.

Title Slide 15

Conducting the P 2.0

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Process 2.0 Rules of Engagement

A few of the process 2.0 rules of engagement include:

- Process focus.
- Collegial / non-adversarial (we're all in this together).
- Objectively assess opportunities for process improvements within the span-of-control of participants and/or participating management.
- Outcome shared between participant Process Owners (limited distribution).

Slide 16 video transcript.

The Process 2.0 rules of engagement. First of all, it is process-focused. It is collegial. Never the use of ad-hominem criticism. Always the focus on the process. It is carefully time-managed. It focuses on driving out the "big verbs," I call them, that will form the basis of the action plan that the team will develop with shared ownership and provide a roadmap to future process improvements.

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Facilitator's Approach to P 2.0

1. Illustrate meeting insights and recommendations.
 - a. What worked well, and why?
 - b. What didn't work well, and why?
 - c. What should we keep?
 - d. What should we change?
2. Create real-time synopsis (by facilitator).
3. Assist team members in identifying process improvement opportunities.
4. Assist team in defining follow up actions.
 - a. Assign a note taker.
 - b. Assign actions.
 - c. Request notes / actions to be sent to project lead / team after meetings.
 - d. Discuss opportunities for next P 2 0 event.

Slide 17 video transcript.

As we start a Process 2.0 session, it's important that we set the tone. We are going to talk about the good points and the bad points of the process today. It's important that everybody understand that this is not a witch hunt. It is not a finger-pointing exercise. We are strictly here to look at the process. The facilitator should summarize the process up-front from the information that they learned in the pre-meeting interviews, and then the team should look at that process and identify the good parts of the process and identify the parts of the process that really need some improvement. Then identify ideas in ways in which those parts can be improved. Throughout the Process 2.0 activity, the facilitator should also assist the team in identifying improvement opportunities. In addition, it's important that the facilitator assign a note taker and ensure that the appropriate actions are being recorded, and at the end of the meeting, it is a great opportunity to identify the next opportunity for a Process 2.0.

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Fishbones

- Fishbones are used in Process 2.0 events as a graphical representation of Issue Categories or Success Criteria Categories.
- Fishbone Diagram infers causation between the state of a process and bones and elements within the structure.
- Fishbone provides much need structure for time limited team activity.

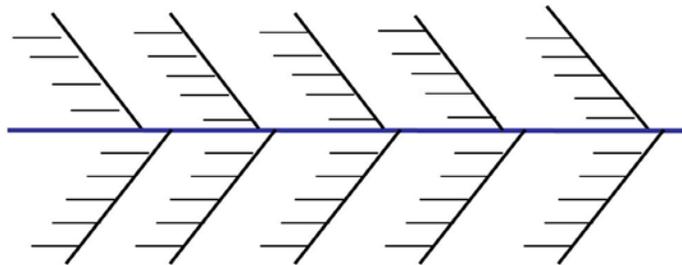


Image: This is a structural layout of a fishbone diagram. It consists of a horizontal line with diagonal branches extending outward from both sides. There are 5 diagonal branches extending from the top of the horizontal line, and also 5 extending from the bottom. There are smaller sub-branches coming off of the diagonal branches. The fishbone structure represents a logical cause and effect between the diagonal branches and the horizontal line, and also between the sub-branches and the diagonals.

Slide 18 video transcript.

One of the things that we have found very successful is using fishbone diagrams to map out those process areas where improvements can be found. Within the Process 2.0 session, the fishbone diagram is typically drawn on a whiteboard, butcher block paper, or flipcharts. This can provide a structure to manage and accelerate the discussion of issues, as well as specific "big verb" solutions. Things within the span of control of the work team that can be accomplished within the short time frame to move that process forward.

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Fishbone Technique

Some of the common fishbone techniques include:

- Use an issue/solution whiteboard technique.
 - Create Generic Process Fishbone structure (on white board).
 - Verify Fishbone Structure Reflects Key Issue Categories.
 - Implement (rigorous time management) structured brainstorming.
 - Differentiate between issues and solutions using either Two Marker Technique, or Two Color Post-It Note Technique.
 - a. Issues on left of each bone using color 1.
 - b. Solutions on right of each bone using color 2.
1. Develop prioritized action plan.

Slide 19 video transcript.

Specific fishbone techniques. You have now worked with the team. You have done pre-work. You have gotten the team engaged in defining their specific issues. You have binned into the major bones of the fishbone diagram. Now you are sitting with the team and you are prepared to further populate, to drill down, and get into specific issues. This is really equivalent to peeling the onion back another layer. We have found a very effective technique - the two color magic marker technique. We use blue to define sub-issues. We use orange to define specific control mitigation measures for the particular issues. Work with the team to layout the fishbone. You can do it on a flipchart, on the table, on butcher block paper, or on a whiteboard. We have found the whiteboard to be particularly effective. Use structured and unstructured brainstorming techniques to flesh out the fishbone. Then move to potential solutions, controls, mitigations, and you can write the potential solutions directly next to the specific issue. What we have found to be terrifically effective is to then take out your digital camera and take a photo of the whiteboard. Later on, you can sit down with the photo, build your action plan, and move forward in solving your problems within your process.

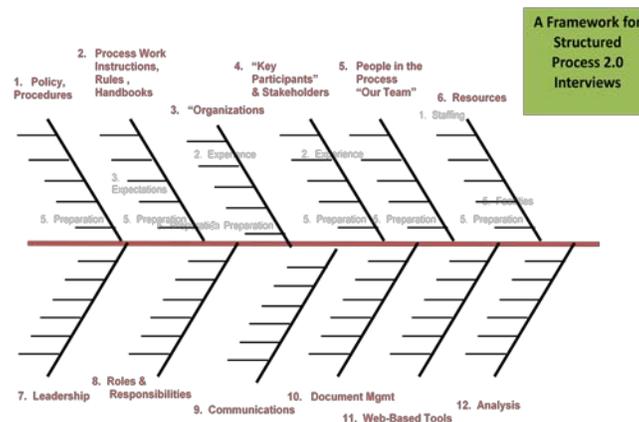
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Generic Process 2.0

Root Cause Fishbone Image

This is a picture of a fishbone diagram with 6 diagonal branches extending from the top of the horizontal line, and 6 extending from the bottom. The 12 branches are labeled as follows, each representing a category for specific issues for this generic process:

1. Policy, Procedures.
2. Process Work Instructions, Rules, Handbooks.
3. "Organizations".
4. "Key Participants" & Stakeholders.
5. People in the Process "Our Team".
6. Resources.
7. Leadership.
8. Roles & Responsibilities.
9. Communications.
10. Document Management.
11. Web-Based Tools.
12. Analysis.



Slide 20 video transcript.

We've found that sometimes teams take a little while to get started. They are a little sluggish at the outset in terms of driving out problems and working towards solutions. We've created a generic process failure modes fishbone. This has been based on having done Process 2.0 events ten, twenty, thirty times. We find that there are common process issues, and in this particular fishbone diagram, you can see it begins with rules, requirements, and policies that govern the work processes. It moves around to twelve recurrent process issue categories. Some of these may be right for your process event. Some may not be right. However, it gives you a starting point. It gets you going. It gets you started. Feel free to delete some of the bones, feel free to add bones that may be most appropriate to your process.

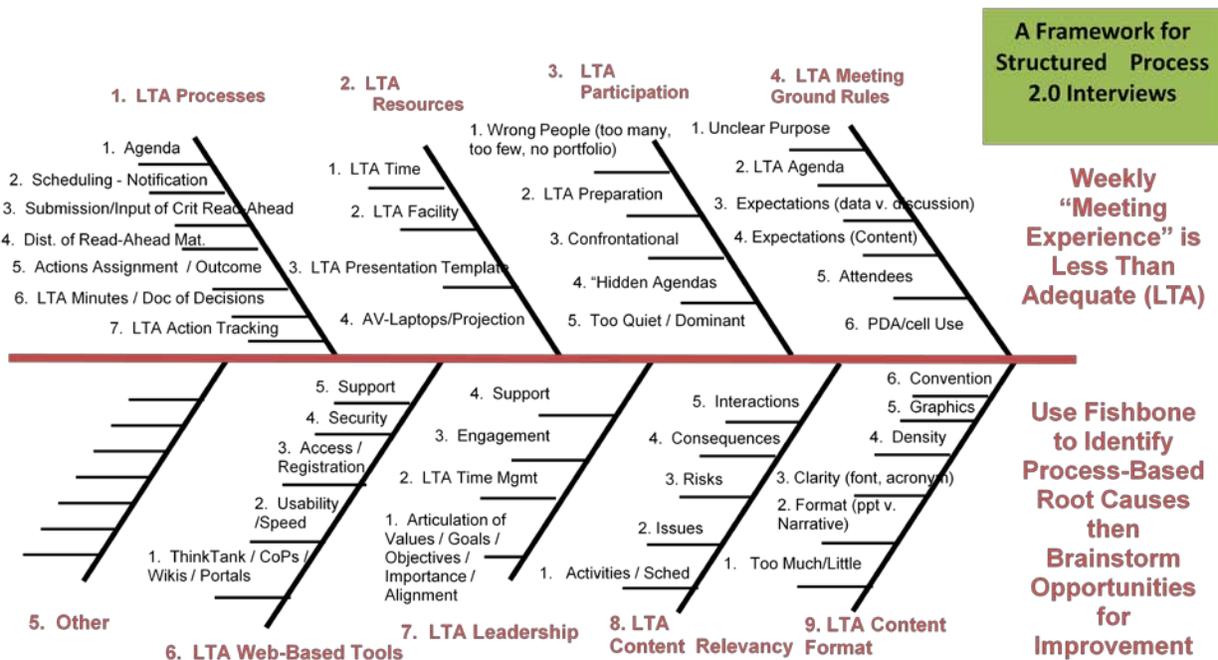
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Communication Process Improvement Root Cause Fishbone Example Image

This is a picture of an actual fishbone diagram that was developed in a P 2.0 session with the following headers for the nine branches representing the major issue categories:

1. Less Than Adequate (L T A) Processes.
2. Less Than Adequate (L T A) Resources.
3. Less Than Adequate (L T A) Participation.
4. Less Than Adequate (L T A) Meeting Ground Rules.
5. Other.
6. Less Than Adequate (L T A) Web-Based Tools.
7. Less Than Adequate (L T A) Leadership.
8. Less Than Adequate (L T A) Content Relevancy.
9. Less Than Adequate (L T A) Content Format.

You can use the fishbone diagram to identify process-based root causes then brainstorm opportunities for improvement.



ESMD Integrated Risk & Knowledge Management: Work Process Support – ARES Corporation – Dec 2008

The graphic also provides specific examples of issues within the major issues category. For example, in the Less Than Adequate Meeting Ground rules the issues are: 1. Unclear Purpose, 2. Less than adequate agenda, 3. Expectations (data versus discussion), 4. Expectations (content), 5. Attendees, 6. Cell phone

use. Another example in the Less than Adequate Participation category includes: 1. Wrong people (too many, too few), 2. Less than adequate preparation, 3. Confrontational, 4. Hidden Agendas, 5. Too quiet or too dominant.

Slide 21 video transcript.

Process 2.0 events use fishbone diagrams to characterize those key elements that will either make a process work or may be a representation of where a problem exists within a process. Fishbone diagrams infer causation where, over on one side where you start, it is either process success or process less-than-adequate. Process fishbone diagrams infer causation. The main branches of fishbone diagrams may include communication, leadership, organization, or data management. A variety of issues that typically occur within process failure.

Title Slide 22

Effective Facilitation Techniques

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P 2 0 Facilitator Attributes

An effective P 2 0 Facilitator will possess the following attributes:

- Engaging – outgoing attitude.
- Leaders who can project and control (voice important).
- Active listeners (condense and summarize).
- Independent perspective.
- Enabler skills.
 - a. Lets participants answer each others' questions.
 - b. Doesn't solve issues for them – lets them do it themselves.

Slide 23 video transcript.

The Process 2.0 facilitator is someone who obviously must be engaging, must be an extrovert, must be able to demonstrate leadership and control the discussion. Trust me - the participants will appreciate structured management of their time. The Process 2.0 facilitator must be objective, must be neutral, must have the ability and the skills to resolve conflict.

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Facilitator Tool kit

A few “tools” that P 2 O facilitators have available include:

- Brainstorming Techniques.
- The “Parking Lot”.
- Binning Ideas / Issues / Options.
- Ranking a List of Ideas / Issues / Options.
- The Facilitator “Play Book”.



Image: This is a picture of a tool kit includes common tools such as a hammer, pliers, and tape measure.

Slide 24 video transcript.

Now let us talk about facilitation techniques. The facilitator toolkit. There are a number of techniques that you are going to see in meetings that you are going to have to know how to deal with. This facilitator toolkit is going to help you learn how to deal with these things and actually lead groups productively through some of the challenges that you are going to see in these meetings.

Slide 25

Brainstorming Techniques

- What is Brainstorming?
 - Brainstorming allows your “creative juices to flow” to help solve a problem by utilizing structured, unstructured, reverse brainstorming and role playing.
- Why use this technique?
 - Brainstorming makes it possible for team members to consider all various possible outcomes and solutions to a problem.

Summation: It’s all about the BIG BRAIN. All of us are smarter than any of us.



Image: This is a picture of a large shining light bulb with its wires connecting to the brains of five heads. This image is used to illustrate the concept of the “Big Brain.”

Slide 25 video transcript.

The first thing we are going to talk about is brainstorming techniques. There are several different ways to brainstorm. The bottom line is brainstorming allows the creative juices to flow and actually helps people throw out ideas and options which may or may not lead to better ideas. What we want to do during these things is we do not want to actually shun any ideas or thoughts that anybody has, but to throw them out there for consideration by the group. We never know when one of these ideas that start

out bad may inspire someone to come up with a better idea. The reason we use this technique is to allow everyone to bring something to the table. Everyone to bring their own ideas and to make sure that all the thoughts that we are having about the process that we are evaluating are put on the table.

Slide 26

Types of Brainstorming Techniques

1. Structured Brainstorming:
 - Follows rules of giving input only at an allocated time.
 - a. Each person provides one idea and then rotates to the next.
 - 2. NO comment or discussion – only “percolating” on the ideas of others.
 - 2. Great for regaining control.
 - 3. Great for bringing out ideas from quieter participants.
 - 4. Can be used at all phases of issue identification and resolution.

Slide 26 video transcript.

Brainstorming techniques are some of the most powerful tools within your toolkit. Structured brainstorming, which has a rule set that says you go around the table or room where each individual person has an opportunity to share their thoughts and ideas on a given problem area or perhaps trying to identify potential solutions. The rule is all the others in the room listen. There is no comment or discussion, and it allows people to quietly reflect upon the ideas of others. This process is very, very powerful in developing the initial set of categories and issues. It is also a very powerful way to regain control when things are getting a little bit out of control. It is also a way to deal with a single person who tends to be dominating the discussion or at the same time; it provides a means to bring out somebody who might be reluctant to speak. It is not designed to put people on the spot. If they want to pass, they can pass.

Slide 27

Types of Brainstorming Techniques Continued

5. Unstructured Brainstorming.

- The objective is to get as many ideas out as possible.
- Managed “Free For All”.
- High energy is good.
- Debate and differences of opinion may emerge (keep discussion in bounds of P 2 0 protocol).



Image: This is a comic strip of a group of people in a meeting with a whiteboard. The leader says “We’re brainstorming here, and there are no dumb ideas. But if we weren’t brainstorming, that would have been a really, really dumb idea.” This is an example of something that must be prevented in any brainstorming activity.

Slide 27 video transcript.

The first cousin to structured brainstorming is unstructured brainstorming. This also has advantages. It is a managed free-for-all. It allows people to bring out passion and get a lot of people engaged. It is not as well-organized and rules are not enforced within the unstructured context to the extent they are in a structured brainstorming. People sometimes are talking upon each other. Sometime two or three people are talking. You want to let it go but manage it. If you hear two or three good ideas coming out at once, you might want to slow it down and get the folks to articulate each of those ideas. The whole

idea here is a managed free-for-all. It tends to generate high energy and it is a very, very good companion to the structured methodology.

Slide 28

Types of Brainstorming Techniques Continued

6. Reverse Brainstorming.
 - a. Ask questions negatively.
 - “We want to create the worst possible scenario...”.
 - b. It makes it safe for people to say things they normally keep to themselves.
 - c. There will be some worst practices already going on.
 - d. These ideas will open eyes to potential solutions.
7. Role-Playing in Brainstorming.
 - a. Ask all participants to assume the role (wear the hat) of a key player in work process success and conduct a structured brainstorming cycle.
 - Forces process participants to “walk in the shoes” of different mutually dependent stakeholders in a critical process.

Slide 28 video transcript.

Another brainstorming technique is reverse brainstorming. Basically, what you do is by going out there and throwing out the negative, i.e., what don't we want to happen, you discover the different processes you need to make sure the end result is what you want to happen. This is very, very similar to playing devil's advocate or doing something that we call "risk mitigation." Someone throws out a risk, i.e., if you are talking about trying to get an automobile from point A to point B safely, someone says, "they could crash by going through a red light." Then you would figure out different risk mitigation strategies to make sure that the car does not go through a red light. That is reverse brainstorming. The other type of brainstorming is role-playing brainstorming. You can take this from the very literal point of role-playing, where you would assign someone as Project Manager and they would go about playing that role with the other people being subordinates, or you can simply ask them "what do you think the Project Manager should be thinking about at this time?" or "what would you, as Project Manager, be thinking about at this time?"

Slide 29

The “Parking Lot”

The Parking Lot:

- Allows issues / problems that are taking too long to be “parked” and addressed later.
- Enables better time management.
- Avoids situations where heated arguments might arise.



Image: This is a picture of a parking lot.

Slide 29 video transcript.

Sometimes you are going to get problems that are too big to solve and, as a facilitator, you must recognize these and recognize them early, and put them in a parking lot. There will be a lot of passionate discussion on these problems. Some people might not like the idea that you want to park the issue, but it is important that you do so, or this issue is going to dominate the rest of discussion, and you are unlikely to identify any process improvement, because it is probably a problem that this group cannot solve anyway. When you get the big issues, the unsolvable issues, it is best to park those, deal with what you can deal with, and then if you have time after you have made some headway, perhaps you can come back to those ideas and sort through some ways you can actually solve them too.

Slide 30

Binning Ideas / Issues / Options

Binning allows us to organize listed items based on qualitative descriptors.

Why use this technique?

- The bins create a framework for discussion and analysis.
- This bins options and issues in logical categories developed using brainstorming, logical grouping, and graphical techniques.

Slide 30 video transcript.

So now that you have completed your brainstorming and you have a lot of ideas, one of the more efficient ways of dealing with these ideas is to bin them. Binning is a process of organizing ideas into logical groups. This allows you to address the interrelations between the ideas and address them all as one idea or at one time, to make you more efficient in the process of getting through the ideas and seeing how they interrelate.

Slide 31

Ranking Ideas / Issues / Options

Ranking is a simple and effective technique is to have people vote.

Why use this technique?

- Opportunity to see how team members think, as well as how important they feel an item may be.
 - a. Good tool for solution analysis – One is more effective than another solution.
 - b. You can translate ideas into actions – Which action to do first.

Slide 31 video transcript.

Ranking. Ranking again is something that we have all done either qualitatively or quantitatively in many different activities throughout our careers. We find very often that, once you have taken your issues and grouped them into clusters or bins, then you can go within those bins and create either a qualitative or a quantitative ranking of topics to be addressed by the team. Again, the structure provides the means to come away with solutions, with ideas, with options for process improvement.

Title Slide 32

An Example Brainstorming, Binning, Ranking

Slide 33

Using the Tool Set – Facilitation Example

The scenario is brainstorm what went wrong in a critical lifting process.

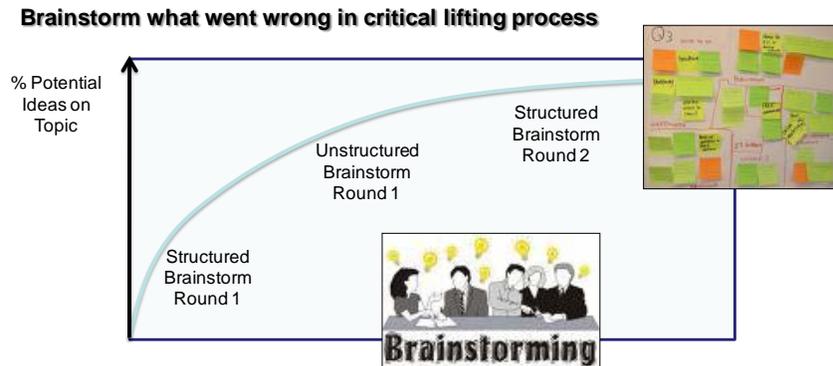


Image: This is a graph dealing with brainstorming. Y-axis is labeled Potential Ideas on Topic. The X- Axis represents time over which one round of structured brainstorming is conducted, one round of unstructured brainstorming, and then a second round of structured. A parabolic line starts at the intersection of the x and y axes and climbs rapidly as many ideas are quickly generated through the initial brainstorming activity. As you get to the second and third brainstorming sessions the line slope decreases and approaches horizontal, representing fewer ideas being generated through subsequent brainstorming.

Slide 33 video transcript.

How might you apply brainstorming techniques to solve the issue of the crane operator hoisting the part too early? Well perhaps you want to start with a structured brainstorming. You go around the room asking each participant to identify things that they think may have gone wrong with the process. After that perhaps you do an unstructured session and get the energy of the group going to identify a number of things that they think may have been a cause of that activity. And finally, after you finish, you may want to go around the room one more time just to see if there are any final thoughts in another structured brainstorming activity. In the end, you are going to have a lot of ideas on the table. You can see some of the ideas here: management was pushing us to finish by 4:30, perhaps the quality guy did not show up on time, perhaps there were garbled communications on the comm loop, perhaps the procedures were unclear. There are a lot of ideas that you are going to have on the table that could have contributed to this mishap.

Slide 34

Using The Tool Set – Facilitation Example Continued

1. Categorize the needs into a structure (bins or taxonomy) and organize the needs – The fishbone diagram approach is very useful.
2. Group the sticky notes, then transition the ideas to a fishbone.

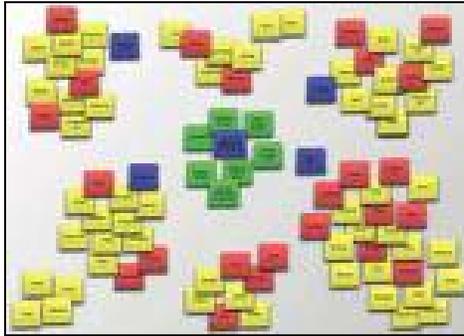


Image: This is a whiteboard with colored stickies (small pieces of paper adhered to the board) organized into logical categories. The intent is that the stickies represent the issues with the hoisting operation as identified in the brainstorming session.

In this case a functional requirement framework can be most useful!

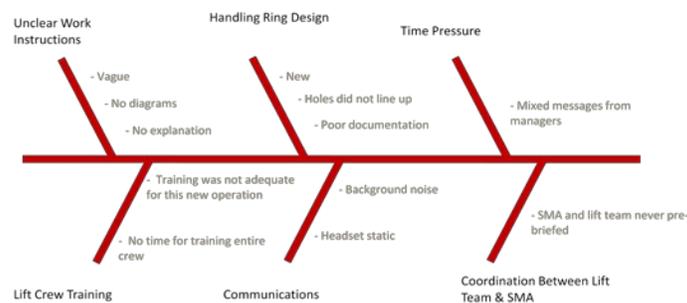


Image: These issues are organized into a fishbone diagram with the following headers for the 6 branches and their associated specific issues:

1. Unclear Work Instructions.
 - a. Vague.
 - b. No diagrams.
 - c. No explanation.
2. Handling Ring Design.
 - a. New.

- b. Holes did not line up.
 - c. Poor documentation.
- 3. Time Pressure.
 - a. Mixed messages from managers.
- 4. Lift Crew Training.
 - a. Training was not adequate for this new operation.
 - b. No time from training entire crew.
- 5. Communications.
 - a. Background noise.
 - b. Headset static.
- 6. Coordination between Lift Team and S M A.
 - a. Safety and mission assurance and lift team never pre-briefed.

Slide 34 video transcript.

As you are getting all of these ideas coming out on the table, you want to organize them in a manner in which the people or group that you are facilitating can understand them and get a clear understanding of how they are interrelated. One method that we like to use is the fishbone technique. What you do in the fishbone technique is you are categorizing all of these things and ideas into different bins. You are taking the things that are interrelated and putting them all on one bone of the fish. As you see here in this example, you have "unclear work instructions." That is one bone of the fish. Then you have a list of all the ideas that went with that. There would have someone who said that it was the instructions were vague. They might say that it would have been better if they had illustrations or figures attached with them, or that there was no explanation or rationale for the procedures. All of those would go together under the "unclear work instruction" fishbone. One thing that you may want to do in going to the fishbone and writing everything down is use stickies on a board. The reason stickies are good is that you can randomly move them around and actually change categories for some of the ideas that you get from the structured or unstructured brainstorming or the free-for-alls that you have during those when you are just gathering ideas. You can move them or group around and bin them a lot more easily sometimes than you can if you start off immediately with the fishbone. So that is one technique, is to actually use the stickies to get all the ideas on paper and move them around until you have something that looks like the fishbone, or have them in the right categories, and then transition down to the fishbone.

Slide 35

Using The Tool Set – Facilitation Example

Prioritize needs within structure (or a need category):

- a. Use a simple ranking (i.e., 1,2,3,...).
- b. Apportion ranking (distribute 100 points across the four or five candidate ideas).
- c. Multi-variate scoring & aggregation (e.g., score 1-5 each of the following attributes: Cost, Schedule, Safety, Performance).
- d. Use simple arithmetic aggregation of weighted aggregation.
- e. Anonymous scoring or with attribution and discussion.

Below is a table showing how to rank solutions to issues. It assumes that there was a subsequent brainstorming session to identify solutions to the Unclear Work Instruction category of issues as defined in the fishbone diagram on the previous page. It uses a 100 point apportionment method. Assuming there are 6 participants in the P 2.0 session, each is allocated 100 points to apportion to the 5 solutions that were identified to solve Unclear Work Instructions. The 5 solutions are 1. Add Photos, 2. Explain rationale for each step, 3. Provide technical editing, 4. Provide video, and 5. Provide Questions & Answers and lessons learned. The graphic shows how the participants apportioned their 100 points to each of these solutions, the aggregate of which provides insight into what they think is most beneficial to the process.

Participant →	1	2	3	4	5	6
Add Photos	20	10	10			
Explain rationale for each step	10	25	15			
Provide Tech Edit		45	5	etc	
Provide video	50	10	60			
Provide QA & Lessons Learned	20	10	10			

Slide 35 video transcript.

Let us take one of our bins, the "work instruction improvement bin." Through some subsequent brainstorming, let us say that we identify a number of ways to improve our work instructions. It could be better training, it could be adding photos to the work instructions, it could be introducing videos to the work instructions - all ideas aimed at improving the work process instructions. Now we can ask the participants in the meeting to rank these ideas. Let's see which ones are more important to us as a group, which ones we feel would be most effective in improving the work processes instructions. So give each of the group members 100 points, which they can go allocate to each of these ideas as they feel, giving the most points to the highest-priority idea and the least points to the lowest-priority idea. Tally these up at the end, and you will have a good feel for what the group thinks is the best way to improve the work instruction processes.

Slide 36

The Facilitator “Play Book”

- The Facilitator will need to “Quarterback” certain situations and certain types of personalities.
- Why use this tool?
 - “Reading the defense and calling an audible”.
 - You need to be able to think on your toes.



Image: This is a picture of a quarterback calling plays at the line of scrimmage.

Slide 36 video transcript.

The next thing we want to talk about is how to deal with certain situations or certain personalities when you are facilitating. The reason that this is very, very important to know and think about is because you will definitely see a lot of these come up in your facilitation. You are dealing with a bunch of individuals and you are going to come up with different personalities that you will have to deal with effectively so that the event that you are facilitating will continue to be efficient. This is very, very much like a quarterback that reads the defense and calls an audible. You have a plan. You have what you are going to do, what you plan to say, but, in certain situations, you will have to change that plan on the fly. What this part of the briefing is designed to do is to teach you how to change to the right play.

Slide 37

Scenarios

As a facilitator, you will need to know how to deal with these common scenarios:

- Engaging The Quiet Person.
- Working with The Dominant Person.
- Not Addressing The P 2 0 Objective.
- Managing Argumentative Situations.

Slide 37 video transcript.

As a facilitator, you are going to have a lot of different situations or scenarios that you may have to deal with. Some of those that are very important to know how to handle are dealing with a quiet person and trying to bring out ideas from that person, dealing with a dominant person that tends to take over the meeting at times, dealing with argumentative situations, and also making sure that the group stays on task, that they are addressing the actual objective of the Process 2.0.

Slide 38

Engaging the Quiet Person



Image: This is a picture of two silent film actors with their index fingers at their mouths implying the “shhh” action.

Question: How do we get them to participate?

Brainstorm: Take 5 minutes to develop ideas on how to solve this problem.

Slide 38 video transcript.

Engaging the quiet person. In pretty much every session that you facilitate, you are going to have one or more quiet people. It is going to be important to draw out their perspectives in this meeting. How do you do that? I would like you to take the next three or four minutes to write down some of your ideas of how you draw the quiet person out and get some of their ideas on the table.

Slide 39

Engaging the Quiet Person Continued

Suggested Solutions:

- Ask indirect and pointed questions; get them to talk.
 - a. “What do you think about that?”.
 - b. “How do you feel about this idea?”.
- Structured brainstorming.
 - a. Requires people to give their opinion.
- Seeking minority opinions.
 - a. Allows a person who feels they are “going against the grain” to speak out .
- Role play to encourage groups’ dynamics.
- Break into smaller groups.

Slide 39 video transcript.

You want to encourage them somehow to participate. In order to do that, we have a couple of different suggested solutions. First of all, ask questions. Ask a direct question to that person and get them to talk. Make them answer a question. You might also want to use structured brainstorming. Remember, we talked about structured brainstorming as giving everyone a turn to give their opinion, or state what they think part of the problem is, or some way to improve the process. So by having structured brainstorming and determining right up-front that everyone will speak and give their opinion during this, in turn, will force the quiet person to talk. Also, you might want to do it by seeking minority opinions. A lot of times this is best done by asking people to play the devil's advocate for a second. What would cause this not to work? If this person is quiet because they are very, very afraid that their idea goes against the group, this gives them the perfect opportunity to play devil's advocate and go against the grain. It is a very, very useful technique. The next one is you can role-play to see what kind of group dynamics you have. Role-playing is actually, like I said before, something that you do not have to go so far as to playing dress-up, where you assign different roles to everyone and have them act out the dynamics of the group. It can be something as simple as to say "If you were the Program Manager, how you would change this?" or asking them "How do you think a Program Manager would see this from their perspective?" That is role-playing in a different way, but it is still role-playing. Last but not least, you can break into smaller groups. If someone is very, very shy in a large group and does not want everyone to hear their idea, sometimes if you break into groups of two, three, or four, they may be more forthcoming with their idea.

Slide 40

Working With the Dominant Person



Image: This is a picture of a man in the military with his mouth wide open and yelling.

Question: How can you get someone to give others a chance?

Brainstorm: Take 5 minutes to develop ideas on how to solve this problem.

Slide 40 video transcript.

We have all been in meetings where someone dominates the group. It is always a challenge to get a word in edgewise. So what do we do? With this I would like to spend the next three or four minutes and write down a few ideas of how to quiet down the dominant person and how to get productive ideas out of that group when it does tend to be dominated by one person.

Slide 41

Working with the Dominant Person Continued

Suggested Solutions:

- Utilize structured brainstorming with role play.
 - Ask them to take an alternate point of view.
- Request other peoples view points.
- “Thanks for the suggestion, now I would like to hear from some of the others.”
- Before the meeting, or during a break, acknowledge they are saying good points, but that we would also like to get other ideas on the table.
- Ask the group as a whole to play “devil’s advocate” & bring up all that is wrong or risky.
- Only speak when you have the ball.

Slide 41 video transcript.

Probably the most important thing in dealing with the dominant person is making sure that everyone else has an opportunity to give their viewpoint. Structured brainstorming works very, very well in making sure that everyone gets a turn to give their viewpoint, and also, it limits the amount of time the dominant person has to give theirs, thereby, not allowing them to dominate the conversation. It is also good to allow that person to get what they have on their chest off, and then go to someone else immediately as to allow them to comment on that person's viewpoint. This allows them to pass the ball and allow someone else a turn so that the dominant person cannot continue to take over the conversation. It is important that you, as the facilitator, inform that person that they are being rather dominant and they are not giving someone else a chance. This would be best done in private or during a break, but never, ever in front of the whole group, if you can avoid it. And last but not least, if that dominant person is taking over the conversation, you can turn to the rest of the group as a whole and actually solicit risk mitigation strategies, i.e., ask them "This is the view that is on the table. Why is this risky? What things will we have to do to make sure that this idea that has been thrown on the table will work? What risks are we taking in going with this person's point of view?"

Slide 42

Not Addressing the P 2 O Objective

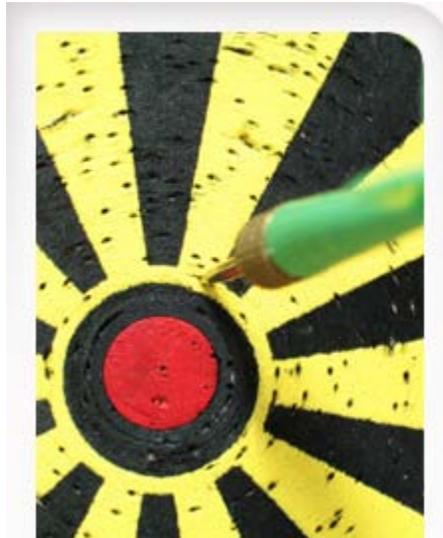


Image: This is a picture of a dart sticking in a dartboard just outside of the bulls-eye representing the meeting going off target.

Question: How can you make the discussion more focused?

Brainstorm: Take 5 minutes to develop ideas on how to solve the problem.

Slide 42 video transcript.

Not addressing the meeting objective is a common problem that you see in meetings. Oftentimes when you are trying to solve problems, groups will get into detailed discussion; the problem will take on a life of its own and lead to somewhere that is not necessarily productive in solving the issue at hand. What do you do in that situation? I would like for you to take the next few minutes to write down some ideas of how you think, as a facilitator, you can keep this group on track?

Slide 43

Not Addressing the P 2 0 Objective Continued

Suggested Solutions:

- Strong facilitator leadership: recognize that discussion is not leading toward objective.
- Review P 2 0 objective chart.
- Suggest that what is being addressed may be a good topic for a different P 2.0 event.
- Park tangential discussion topic.
- Structured brainstorm on next agenda item.
- Take a break.

Slide 43 video transcript.

The key to dealing with this situation is making sure that, as a facilitator, you show strong leadership. You swing the conversation back into the direction of the objective. It is very, very important for you to first recognize that this is not on the plate, this is not on the agenda - what is being discussed. Second, bring everyone in the group back to what is on the agenda. The problem you have with this is that sometimes, although the topic that they are speaking about is not on the agenda, it is still important. If you recognize that, and if the group feels that way, but it is still not an objective on the agenda, you can always put it in a parking lot and tell them we know and acknowledge that this is an important point, however, our objective is to get to point A. Therefore, we will put this in the parking lot and we will deal with it later in our discussion. And last but not least, you can sit there and review the objectives again and make it clear to the entire group that this is not on the agenda. You are not only going to take it into the parking lot or eliminate it from discussion, but you may go into structured brainstorming to make sure that everyone is reviewing the topics that we want to review.

Slide 44

Managing Argumentative Situations



Image: This is a picture of two men in an office arguing. It is a clip from the “Monty Python” argumentation scene.

Question: How to enable a constructive dialogue on controversial issues?

Brainstorm: Take 5 minutes to develop ideas on how to solve this problem.

Slide 44 video transcript.

As you facilitate meetings, they sometimes become argumentative. Sometimes with a valid reason, oftentimes just because people like to argue. Now, I would like you to take a few minutes to just think through, as a facilitator, how you can diffuse argumentative situations.

Slide 45

Managing Argumentative Situations Continued

Suggested Solutions:

- Encourage it, if it's productive argument.
- Park the issue – come back to it later.
- Document opposing views on white board.
- Summarize and reiterate to ensure both sides are “hearing” the others arguments.
- Ask for others opinions on the opposing sides of the argument.

Slide 45 video transcript.

Some of the techniques that we use for managing argumentative situations are just to put the issue in the parking lot and leave it alone until people settle down on the issue. Another way to do it is to just get the opposing view on the whiteboard. Sometimes, if you write them down, it is easier to see each point of view; lists associated pros and cons, and sometimes, reach an agreement. The other thing that you can do is oftentimes these arguments are going off in a vector that is not necessarily where you want to head. It is often useful to go back to the meeting objectives and sometimes that will help to get the group back on track and avoid the argumentative situation. In any case, you yourself, as the facilitator, do not want to become involved in the argument. Your job is to work to diffuse it.

Title Slide 46

Using Technology to Support P 2 0 Sessions

Think Tank Software

Slide 47

Using Technology – ThinkTank

ThinkTank is a software tool that has the following capabilities:

- Ability to contribute simultaneously from various locations.
 - a. Ideas from everybody.
 - b. All voices heard.
- Brainstorm and evaluate ideas anonymously.
 - a. Unconventional / unpopular ideas get attention.
- Keep digital archives.
 - a. Complete set of records of the group activities.
- Conduct web conference solutions.
 - a. Content is “created” during collaboration.
 - b. Organize ideas, voting, group writing.
 - c. Work together towards a decision or deliverable.

Slide 47 video transcript.

It seems that more and more these days, we are working from geographically dispersed locations. That should not be a reason where we cannot go in and conduct meaningful sessions to review our processes. We have purchased some software in ESMD called ThinkTank that you have available to you. You can use this software to conduct these kinds of sessions with your group members who may be located in other locations. In the next several charts, we will look at what ThinkTank does, how you get information into ThinkTank, and how it can be useful to you throughout this process.

Slide 48

Using ThinkTank – Brainstorming

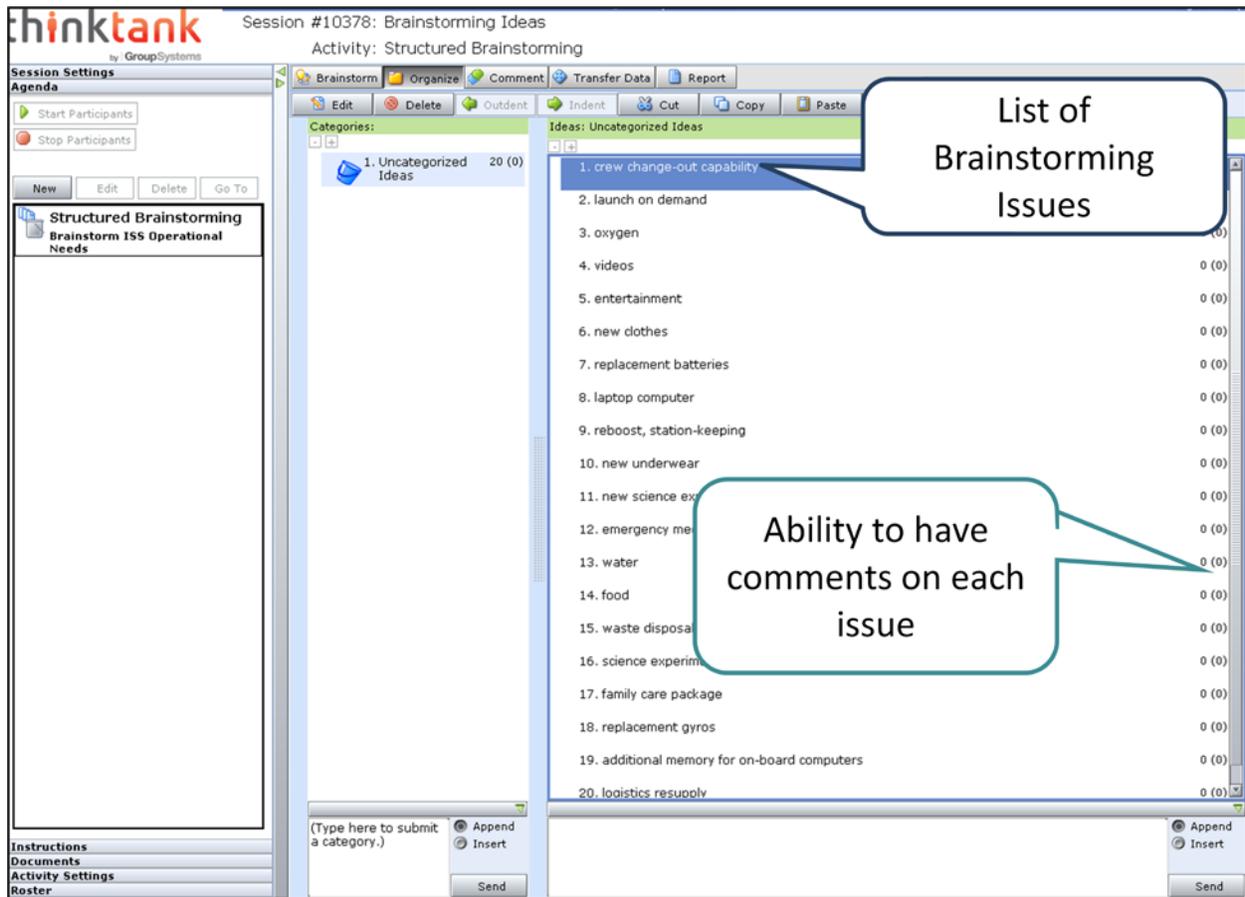


Image: This is a screenshot of the ThinkTank tool. The left column is the agenda and the activity selected is structured brainstorming. The middle column is the categories area which represents the major issue categories, or bins, associated with the fishbone. The right column is the brainstorming ideas area where ideas are listed as participants enter them. Two conversation bubbles are visible to highlight important aspects of the ideas area. The first bubble shows the list of brainstorming issues and the second bubble shows the ability to have comments on each issue.

Slide 48 video transcript.

This is a quick screen snapshot of ThinkTank software. As you can see, in the ThinkTank software, we can have a list of brainstorming ideas, the people can contribute to those and add to those as they will, and they can also add comments on the right side, as you see here on your screen, to each brainstorming idea.

Slide 49

Using ThinkTank – Binning

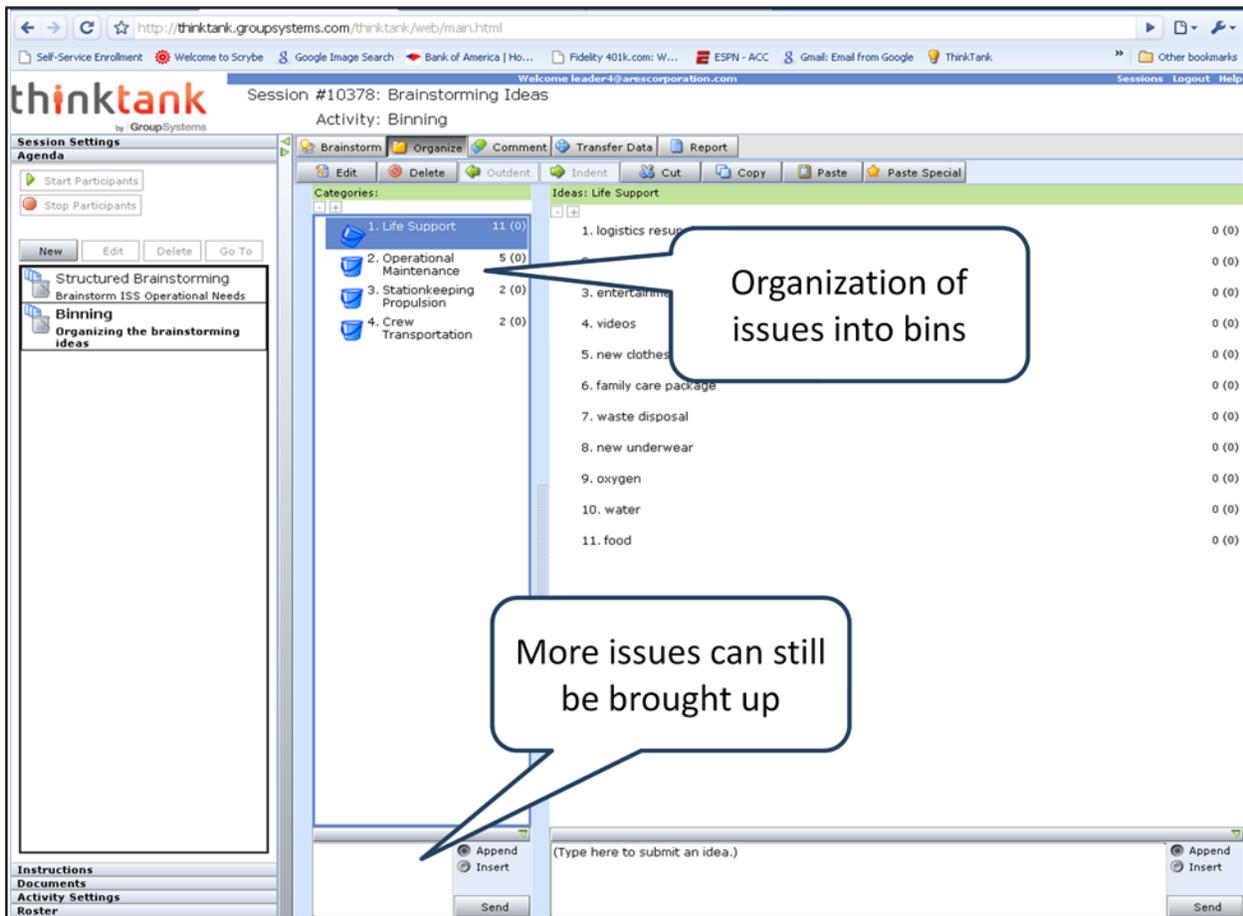


Image: This is a screenshot of the ThinkTank tool. The left column is the agenda and the activity selected is binning. The middle column is the categories area which stores the bins. Four bins are listed in this column. The right column is the ideas area where ideas are listed as participants enter them. Two conversation bubbles are visible to highlight important aspects of the categories area. The first bubble shows the organization of issues into bins and the second bubble shows where more issues can still be brought up or entered.

Slide 49 video transcript.

Once you have the ideas on the table, you can create logical bins in which to organize these ideas, or folders into which you can put these ideas to start creating some kind of logical order as you go through this process improvement activity.

Slide 50

Using ThinkTank – Ranking

The screenshot displays the ThinkTank interface for a session titled "Session #10378: Brainstorming Ideas" with the activity "Ranking the Issues". The left sidebar shows the "Agenda" with options like "Start Participants" and "Stop Participants", and a list of topics including "Structured Brainstorming", "Brainstorm ISS Operational Needs", "Binning", "Organizing", "Ranking", and "Ranking to tackle". The main workspace shows a list of items being ranked, such as "1. food", "2. water", "3. entertainment", "9. logistics resupply", "10. new underwear", and "11. new clothes". The right sidebar contains a "Report" button and a "SEND" button. Three callout bubbles highlight key features: "Ability to vote & revoke" (pointing to the "Vote" button), "Ability to create a report" (pointing to the "Report" button), and "Ability to display ranking results in numerous ways" (pointing to a bar chart titled "Average Vote Score for Criteria: RankOrderVote").

Criteria	Average Vote Score
family care package	11
food	10
new clothes	7
logistics resupply	6
water	5
entertainment	5
oxygen	4
emergency medical supplies	4
new underwear	3
waste disposal	3
videos	1

Image: This is a screenshot of the ThinkTank tool. The left column is the agenda and the activity selected is ranking. The right column which covers the rest of the screen shows the preference voting method, where participants can rank ideas into the order of their choice by clicking and dragging of the mouse. Three conversation bubbles are visible to highlight important aspects of the voting area. The first bubble shows the ability to vote and revoke. The second bubble shows the ability to create a report. The third bubble points to a chart that can be created by tallying the votes and it shows the ability to display ranking results in numerous ways.

Slide 50 video transcript.

After we have binned and categorized the ideas, we can rank them, we can vote or re-vote and tell people how we feel the prioritization should go, and we also can create a report that will actually tell the leader of the group, or the facilitator in this case, or something that you can give to the Program Manager immediately afterwards, as to how people feel about the subject or objective that you are trying to achieve.

Slide 51

Using ThinkTank – Action Reports

Activity: Action Plan

Task Name	Responsibility	Start Date	Finish Date	Percent Completed
1. Utilize Soyuz	NASA HQ	09/18/08	12/18/08	50
2. Utilize Ariane V	NASA HQ	09/23/08	11/13/08	50
3. Extend lifetime of Space Shuttle	NASA HQ	09/30/08	10/23/08	50
4. Use Refurbished Gyros	Chief Engineer	09/22/08	10/27/08	25
5. Free up onboard CPU memory by transferring info to laptops	Chief Engineer	09/09/08	11/15/08	50
6. Streaming Videos for Entertainment	Life Support Team	09/16/08	11/25/08	70
7. Reuse old clothes	Life Support Team	09/26/08	11/02/08	75

4. Action Plan
Action plan for solutions

1. Action Plan Task Grid

#	Tasks	Responsibility	Start Date	Finish Date	Percent Completed
1.	Utilize Soyuz	NASA HQ	9/18/08	12/18/08	50
2.	Utilize Ariane V	NASA HQ	9/23/08	11/13/08	50
3.	Extend lifetime of Space Shuttle	NASA HQ	9/30/08	10/23/08	50
4.	Use Refurbished Gyros	Chief Engineer	9/22/08	10/27/08	25
5.	Free up onboard CPU memory by transferring info to laptops	Chief Engineer	9/9/08	11/15/08	50
6.	Streaming Videos for Entertainment	Life Support Team	9/16/08	11/25/08	70
7.	Reuse old clothes	Life Support Team	9/26/08	11/2/08	75

2. Action Plan Tasks with Comments

- Utilize Soyuz
- Utilize Ariane V
- Extend lifetime of Space Shuttle
- Use Refurbished Gyros
- Free up onboard CPU memory by transferring info to laptops
- Streaming Videos for Entertainment
- Reuse old clothes

Images: These are two small screenshots of the ThinkTank tool. The first screenshot shows one of the activities called the “action plan” in which lists can be created with responsibilities and due dates for a project. The second screenshot shows the action plan layout and details as it looks in the generated ThinkTank report. Tasks, responsibilities, and due dates are in table format and can be easily sent out as part of a report to members.

Slide 51 video transcript.

The ThinkTank software also has reporting capabilities where you can print out several different types of reports to maintain a permanent record of your Process 2.0 session. In this case, you can see that we have printed out an action report so that there can be action follow-ups after the meeting.

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Additional Information

- E S M D I R K M Portal Hyperlink:

<https://ice.exploration.nasa.gov/ice/site/km/P20/> .

- E S M D I R K M Wiki Hyperlink:

<https://ice.exploration.nasa.gov/confluence/display/ESMDRiskAndKM/Home> .

- E S M D Risk and K M C o P Hyperlink:

<https://secureworkgroups.grc.nasa.gov/esmd-risk-know-mgmt> .

Slide 53

Process 2.0

Just do it!

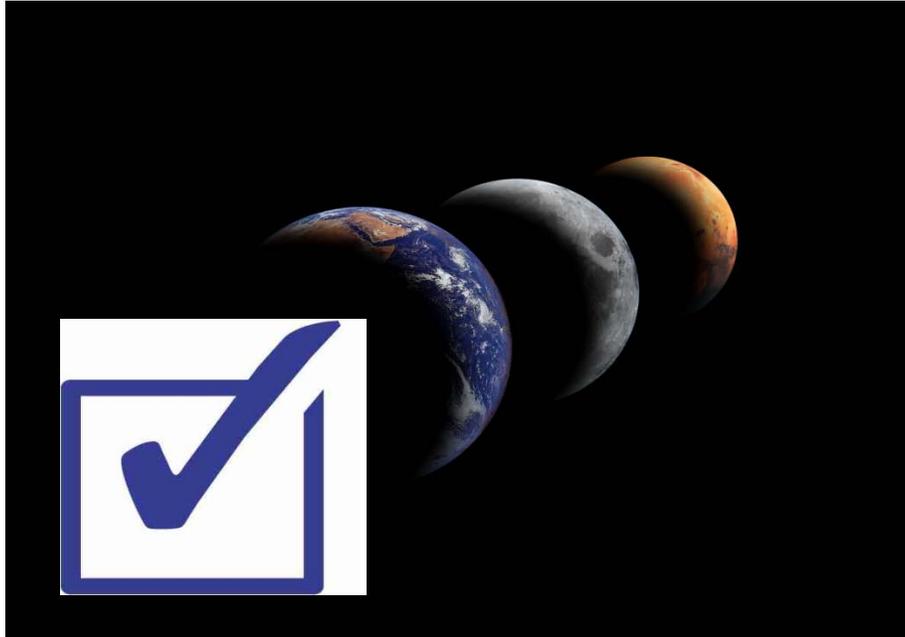


Image: This is a decorative image showing the Earth, Moon and Mars and simple checkbox signifying the completion of the Process 2.0 Facilitator Training Course.

Slide 53 video transcript.

Thanks for taking this course today. I hope you received some benefit out of this in understanding how to apply Process 2.0 to your projects. And now it is up to you, to JUST DO IT, JUST DO IT, JUST DO IT!!

End Slide 54

Credits

Process 2.0 training is a product of Exploration System Mission Directorate's Risk and Knowledge Management Office and ARES Corporation.

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- d. Robert Curbeam (ARES) 281-461-9797



Images: These are the logos for NASA and ARES Corporation.