

# Carolyn Browne Tamler

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## The Power of the Collaborative Mind: Planning Workshops and Focus Groups

By Carolyn Browne Tamler

Several years ago, an office with two naturopathic doctors and a receptionist asked me to do a planning workshop with them to assess how things were working in their office. I thought, with only three people, why didn't they just talk with each other to find out what was happening in their office? During our workshop, the receptionist timidly mentioned that she didn't know what to do when one of the doctors was running late for the next appointment. The doctors were surprised that she had never brought this up to them. The result was that a specific policy was developed to deal with the situation. There were several other small policy and operational items that were also discussed and most problems were resolved.

What I have learned in my years of facilitating workshops, discussions and public meetings is that, when asked, everyone wants to contribute and share and know others are hearing them. Often, the smaller the group, the more difficult it is to express a concern because there is a fear of saying something that will be hurtful or expressing an opinion that might be seen as "dumb." We humans seem to come packaged with an extreme need to be right and an extreme fear of being humiliated.

The main criterion for any group process is to create an environment that is safe and fun. Safety comes from establishing simple rules that require participants to honor the opinions and ideas of others that are expressed and to encourage sharing in a way that is light and maybe even a bit silly. Have you ever had someone "order" you to come up with a creative idea or a solution....and then found your mind had gone completely blank? I believe we are most creative and energized when our thoughts are encouraged to come freely, with no time limits or imperatives. And, creativity is supported when we know that we can present an idea or opinion without fear that someone may criticize us for what we say.

There are two small group formats that I love to do because it gives me great satisfaction to acknowledge the feelings and opinions people want to share: the **Planning Workshop**,

which is an informal, but structured meeting for planning future actions of a group or organization; and the **Focus Group Discussion**, which is a subjective marketing research tool used to assess the attitudes and opinions of a particular group of individuals.

### **The Planning Workshop**

As a result of my own experiences, I have become a strong proponent of incorporating a planning workshop into nearly every process I do. I usually call this a “strategic planning workshop,” because it brings people together to create a common vision and to share ideas and concerns, which are then incorporated into future plans and decisions.

A planning workshop can involve a handful of people or 10 or more team leaders, managers or others who are charged with plotting the direction of an organization or a group.

It is important to have a simple, but well-planned agenda for the meeting. I usually begin with a future question: “If everything goes the way you believe is best for this (group, agency, organization, etc.), how will it be working (or looking) six months from now?” A list is made of all of the visions people have for the future. Then, I ask, “What exists today that is contributing toward the visions (or the goals) you have expressed?” After these suggestions are listed, I ask a third question: “What needs to happen (what improvements need to be made; what changes can you suggest; etc.) to achieve the vision (goals) you have listed?”

Once all of the ideas are listed, I ask people to prioritize by selecting a few (usually three or five) items that are most important. I often provide small dots or stars to allow people to indicate their priorities. The prioritized list can provide an excellent tool for identifying and prioritizing tasks that need to be done and assigning responsibilities.

Choose a setting that will be relaxed and comfortable, and allow about two hours for the workshop. Hold the intention that the major purposes for this workshop will be to involve everyone in planning and sharing ideas and to develop a specific task list that can be accomplished.

### **The Focus Group Discussion**

A focus group discussion is a subjective research tool that provides data that cannot be quantified but is an excellent way of gaining information about the perceptions, attitudes and ideas of the population of which the group is representative. The group includes eight to 12 people (10 is an ideal number) who are representative of a specific population or subgroup in the population. A facilitator uses a prepared discussion guide and is responsible for keeping the participants on topic and assuring that all voices are heard and honored.

Although I realize many people would find it difficult to accept that the information gained from a discussion of ten people can be projected to the larger population, in my experience where I have done a focus group (or groups) followed up by a statistically valid random sample survey, it is surprising how closely the conclusions from the two research methodologies match.

Most often, I hire a professional marketing research firm to recruit the focus group participants. I provide the recruiters with specific screening criteria (usually a mix of ages, neighborhoods, occupations, etc.). As much as possible, those selected should be a reasonably good cross-section of the population.

Participants are traditionally given an incentive - usually a cash fee or donation to their club or favorite charity - to ensure attendance and to provide tangible proof that their participation is important to those who are conducting the discussion.

If your office or organization is looking for guidance in planning the future or simply improving current operations, there is great power in collective wisdom. A planning workshop provides useful information and allows people to have a stronger sense of ownership and participation in their organization.

If you want more information about a customer base, a focus group discussion with a representative group of your customers will provide a safe environment for people to share their ideas, and will provide you with a highly effective business and marketing tool.

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