



DATA GOVERNANCE AND MASTER DATA MANAGEMENT CONFERENCE EUROPE

11 - 14 March 2024 | London, UK

****Please score and comment on this session and speaker
in the event mobile app****



**DATA GOVERNANCE AND
MASTER DATA MANAGEMENT
CONFERENCE EUROPE**

data vantage
consulting

Running and Designing Your Own Perfect **Data **Governance** Workshops**

DG & MDM Conference

London, UK

March 13, 2024

Agenda

01. Introduction

**02. The Anatomy of
a DG Workshop**

**03. The 6 Laws of
Master-level Facilitation**



**04. The Art of Designing
DG Workshops**

**05. DG Workshops
Master Recipes**

**06. The Confident
Facilitator**

**07. Facilitating
Remote Workshops**

08. Wrapping Up

Introduction



A top-down view of a white desk. In the top left corner, there is a small green succulent in a white pot. In the center, the text "Most Data Governance programs fail!" is written in a bold, blue font, with a blue underline under the word "fail!". In the bottom right, a silver laptop is open, and a person's hands are clasped together on the desk. The person is wearing a silver watch with a metal mesh band on their left wrist.

**Most Data Governance
programs fail!**

Why do **most DG programs fail?**

- **People side** versus Technology side!
- Growing complexity of **modern data organizations**.
- Where's **the value**?
- And what about **the communication**?
- **Disconnect** between **speed** of business and speed of DG program!



“

...better managing and using data is **THE management challenge** of the 21st century.

(~ Tom Redman)

How effective are your meetings?



Endless debate cycles



Biased meetings & wrong priorities



Frustrated teams & loss of momentum



Communication barriers

Why workshops are better than meetings?

- ❑ Grab pen and paper
- ❑ I flash some words on the screen
- ❑ Take 20 seconds to write down every word you remember
- ❑ I'll show the words again, how many did you remember?

Cat

Fish

Tree

Flower

Tape

Key

Door

Head

King

Square

Hammer

Ball

Shoe

Box

House

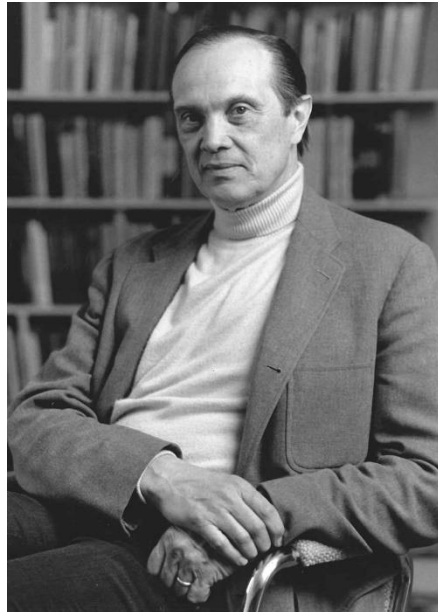
Apple

Milk

Ball

The Magical Number 7 (plus or minus 2)

Some limits on our capacity for processing information.



George Miller

Data Point B

Data Point A

Data Point A2

Data Point C

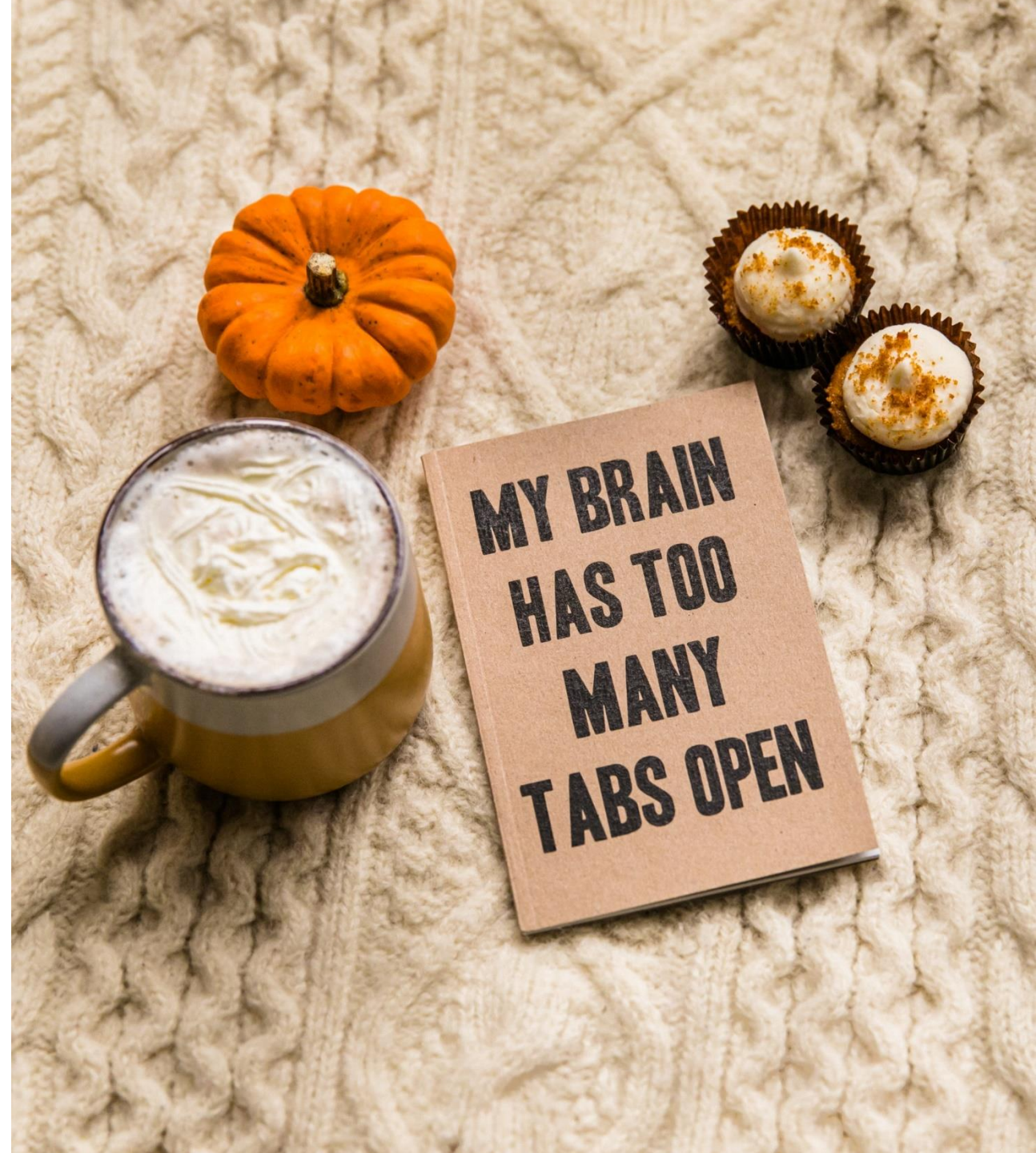
Story	To Do	In Progress	Done	Goals
Update Product Backlog	Develop new feature	Implement new feature	Test new feature	Create Proof Data Most & Corresponding API
MVP Data	API	API	API	MVP - Connect API to Existing Data to ensure



The Brain Stuff

In meetings, you have a ton of information being produced, but people don't actually remember. Our brains struggle to process this data avalanche, especially when cognitive biases like **recency bias** and **primacy bias** come into play.

Our brains are just not made to process the amount of data that happens in a meeting.





Workshops allow you to **visualize** meetings and make **decisions** based on the data that is visualized around you.

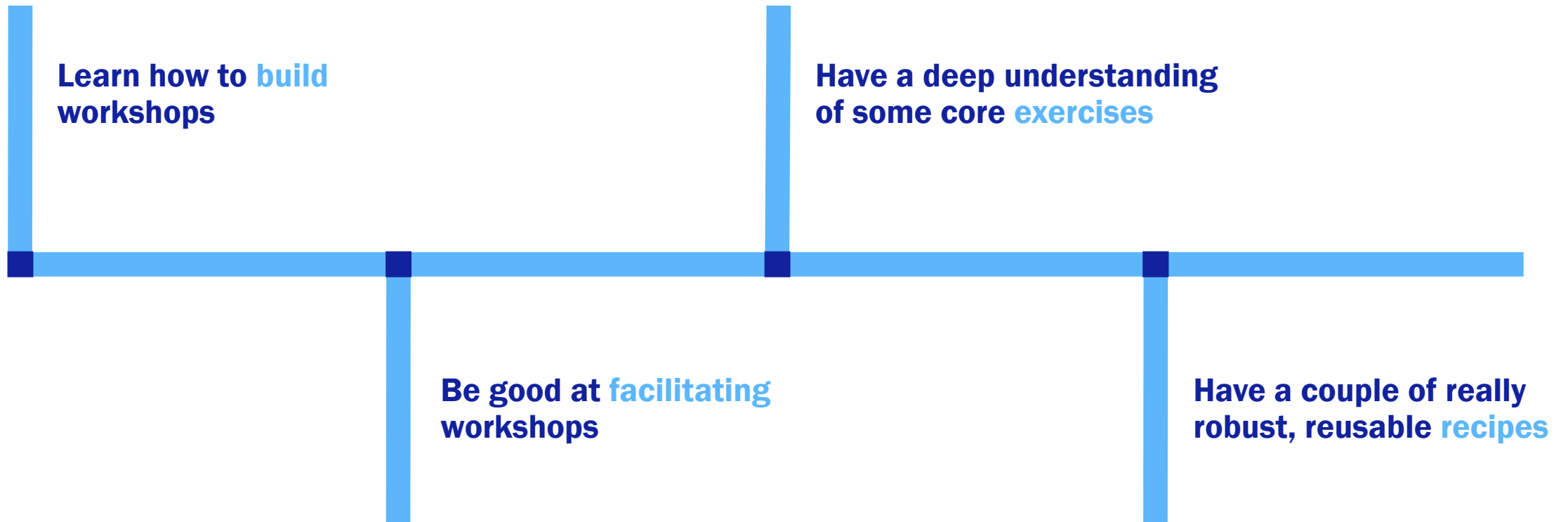
The Workshop Facilitator


As a workshop facilitator (aka *The Workshopper*), you help groups of people or teams **make decisions** and **solve problems**.

From crafting a vision for data governance to overcoming implementation challenges, workshops can play a crucial role in the development and deployment of effective data governance within a company.



How to become good at Workshop Facilitation?



An aerial photograph of a winding river with a bridge crossing it. A small white car is visible on the bridge. The river's banks are rocky and the water is a deep blue-green color. The overall scene is captured from a high angle, showing the intricate patterns of the river's flow.

The **Anatomy** of a Data Governance Workshop

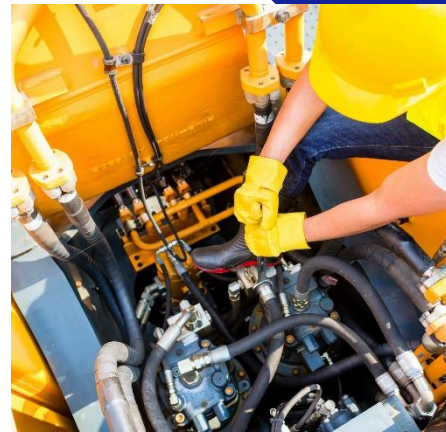
The Anatomy of a Data Governance Workshop



Principles



Mechanics



Framework

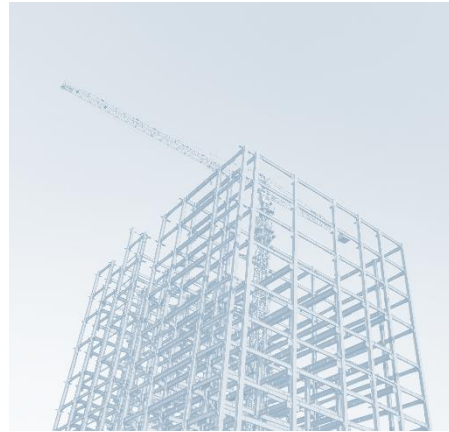


Exercises

The Anatomy of a Data Governance Workshop



Principles



Mechanics



Framework



Exercises

Principles

Every great workshop is built on a solid set of guiding principles. Think of these principles as the **fundamental rules** that shape the success of any workshop you run.

These rules are not something you need to actively think about. They are so basic and straightforward that they naturally guide the flow of the workshop.

Leaving out any of these crucial elements usually leads to a less effective workshop. So, make sure you keep them in mind!



4 Principles

- 1. Discussions are Sequenced**
- 2. Discussions are Visualized**
- 3. We Work Alone, Together**
- 4. There's Always a Decision**

4 Principles

1. Discussions are Sequenced

2. Discussions are Visualized

3. We Work Alone, Together

4. There's Always a Decision

The Workshopper decides who should speak, when they should speak and for how long.

The Workshopper also makes sure the speaker stays on-topic and is giving information relevant to the point in the workshop.

This, for example, helps us avoid someone giving ideas and solutions while we're still trying to define the challenge.

4 Principles



1. Discussions are Sequenced

2. Discussions are Visualized

3. We Work Alone, Together

4. There's Always a Decision

The Workshopper ensures that all relevant data and topics are easily readable and scannable at all points during the workshop.

It's extremely difficult for a group to keep more than a few pieces of data in their heads at once.

The Workshopper removes this burden by visualizing the conversations in a standardized way.

4 Principles



1. Discussions are Sequenced

2. Discussions are Visualized

3. We Work Alone, Together

4. There's Always a Decision

Participants in our workshops are working towards the same goal, always collaborating together in real-time, but they rarely communicate or share ideas freely.

Ideas and conversation points are created individually and then anonymized to reduce idea contamination, group think, and group biases.

This allows even the most introverted group members to present ideas and topics they might usually not get a chance to articulate.

4 Principles



1. Discussions are Sequenced

2. Discussions are Visualized

3. We Work Alone, Together

4. There's Always a Decision

We don't end any workshop without a decision. Workshops must end with clear next steps and clear responsibilities assigned.

It's because of this that we don't start any workshop without ensuring that one of the participants takes the role of **the “decider”**.

The Anatomy of a Data Governance Workshop



Principles



Mechanics



Framework



Exercises

Framework

The backbone of any workshop is its structural framework, which provides the necessary **logic and organization**.

One highly recommended framework is the **"4C's"**. It offers a sturdy structure for any workshop.

This framework enables a seamless integration of specific exercises into the workshop's agenda, ensuring a coherent flow.



4 C's Framework

1. Collect

2. Choose

3. Create

4. Commit

4 C's Framework

1. Collect

2. Choose

3. Create

4. Commit

Every workshop needs to start with a phase of information collection. This can be where a team comes together to collect challenges, ideas, data, inspiration, or anything that could come up in an open conversation.

The data collected then needs to be visualized for all participants to see.

4 C's Framework



1. Collect

2. Choose

3. Create

4. Commit

Once enough content and data has been collected, it's time to Choose what to focus on and what to ignore. It's important that the entire team really knows exactly what they're working on so they don't create solutions for the wrong or irrelevant challenges.

The Choose phase of the workshop gives clear direction and acts as a foundation for everything else.

4 C's Framework



1. Collect

2. Choose

3. Create

4. Commit

Once the team has collected and shared the relevant information and everybody's on the same page with the "scope of work", it's time for team members to Create solutions.

Solutions don't need to be final, or even well thought-out – at this point it's more about creating multiple potential solutions.

4 C's Framework



1. Collect

2. Choose

3. Create

4. Commit

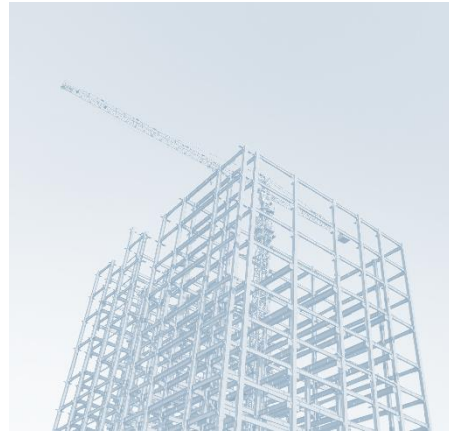
A workshop is useless without actionable takeaways, unless the goal was purely about inspiring the team.

In the commit phase, the Workshopper helps participants to commit to a small number of solutions that will be executed on and discard/de-prioritize others, while also helping the team define the next steps.

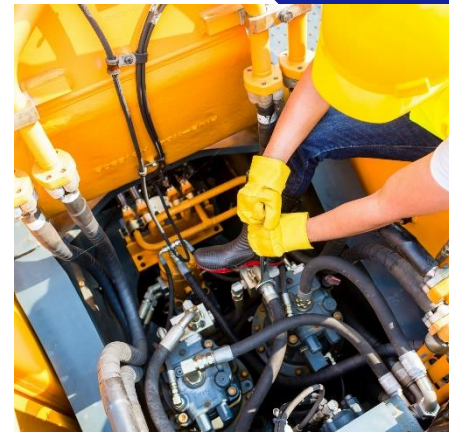
The Anatomy of a Data Governance Workshop



Principles



Mechanics



Framework



Exercises

Mechanics

The guiding principles are like the unconscious, instinctive parts of workshop planning and execution, while the operational mechanics zoom in on the **actual execution** of the workshop itself.

You can see these mechanics at play in almost every workshop activity, shaping what happens behind the scenes.



3 Mechanics

- 1. Standardized, Anonymized Note Taking**
- 2. Multi-Layered Voting**
- 3. Timeboxing**

3 Mechanics

1. Standardized, Anonymized Note Taking

2. Multi-Layered Voting

3. Timeboxing



Rather than everyone in the workshop taking their own notes with their own systems on their own mediums (a.k.a notebooks, laptops etc), everyone in the workshop uses the same note-taking **medium** (Sticky-Notes or digital alternatives) and the same note-taking **structure** (one 'idea' or point per Sticky-Note).

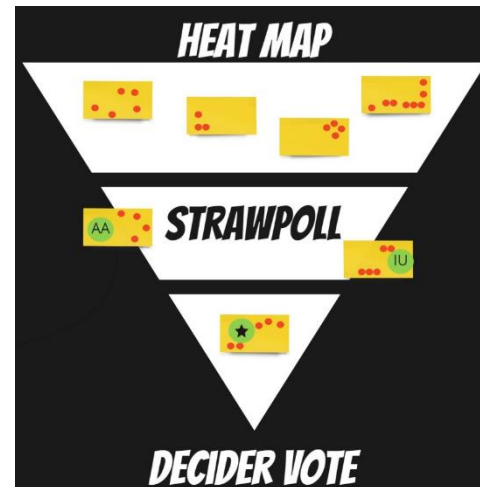
This allows the conversations to be visualized in a standardized way that everyone can understand and refer back to.

3 Mechanics

1. Standardized, Anonymized Note Taking

2. Multi-Layered Voting

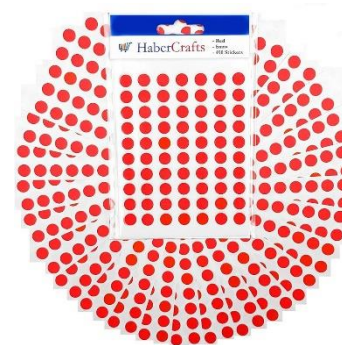
3. Timeboxing



When decisions need to be made, we use a voting system that can be customized based on the level of commitment needed.

There are 3 layers in total:

- A. Anonymous Heatmap Voting
- B. Semi-Anonymous Strawpoll Voting
- C. Decider Vote



3 Mechanics

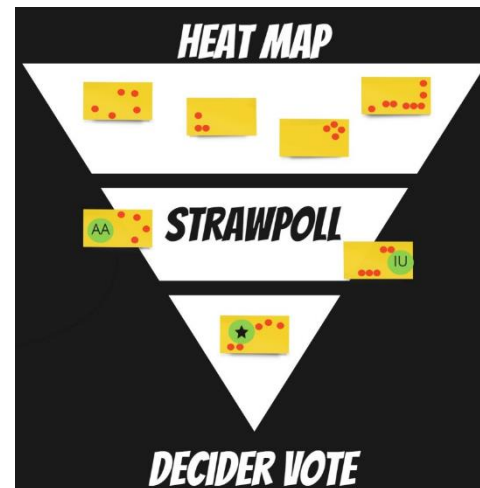
A. Anonymous Heatmap Voting

B. Semi-Anonymous Strawpoll Voting

C. Decider Vote

Participants get a large amount of voting dots and register their interest on ideas, challenges or topics.

This is usually a non-committal voting type which is only used to guide the conversation and show where the interest in the group lies.

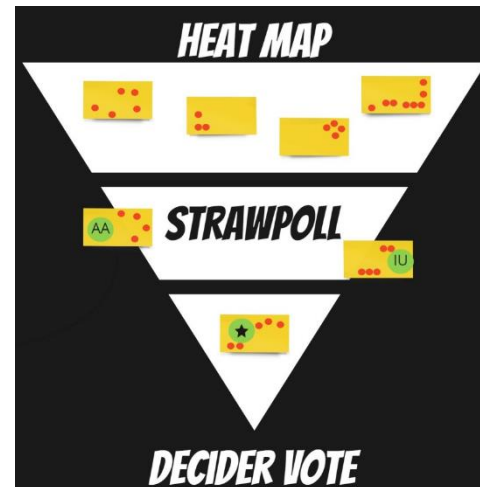


3 Mechanics

A. Anonymous Heatmap Voting

B. Semi-Anonymous Strawpoll Voting

C. Decider Vote



Participants generally get one voting dot and with this dot they need to decide on one solution or challenge that they want the group to focus on.

This voting exercise begins anonymously as the participant gets time to think about their selection. They then write their name on the vote and everyone in the group votes at the same time.

This allows the group to see who voted for what, but not to influence the votes.

3 Mechanics

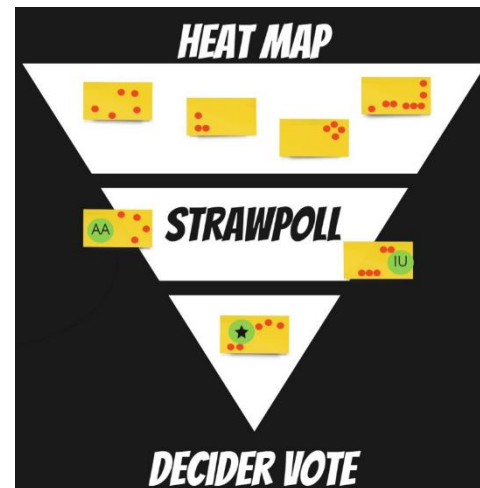
A. Anonymous Heatmap Voting

B. Semi-Anonymous Strawpoll Voting

C. Decider Vote

This is the final commitment of the workshop where the assigned decider of the group must make a final decision (or multiple final decisions depending on the workshop).

This decider vote might happen multiple times during a workshop, especially if there are issues that need a tie-breaker to resolve.



3 Mechanics

1. Standardized, Anonymized Note Taking

2. Multi-Layered Voting

3. Timeboxing



Every exercise in a workshop should be timeboxed to ensure that the workshop actually gets completed and to avoid certain exercises dragging on too long.

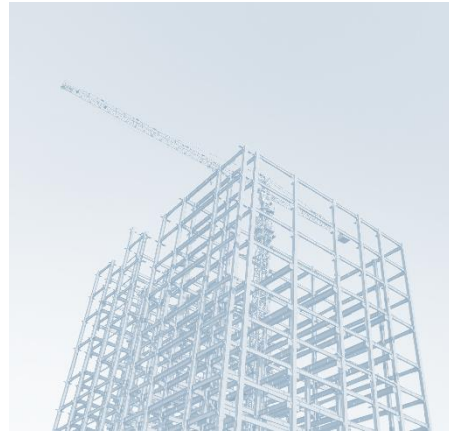
The time boxing should always feel a little too short, while still being fair. You may also add or remove time as you see fit depending on the situation.

An example of this might be during Lightning Demos, if you feel the workshop needs more inspiration, you could extend this section.

The Anatomy of a Data Governance Workshop



Principles



Mechanics



Framework

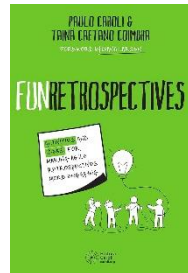
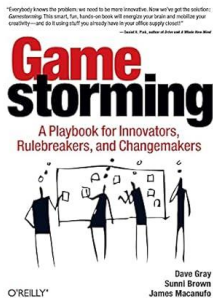
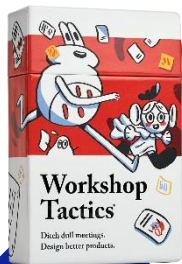


Exercises

Exercises

When it comes to workshops, there are so many exercises to choose from, it can be overwhelming! I prefer using a core set of **10 exercises** that are absolute game-changers when you really get the hang of them.

The secret is to become a pro at these essential exercises, so you can make the most impact in your workshops.



10 Core Exercises

1. Expert Interview

2. 10 for 10 Brainstorm

3. Sailboat

4. Lightning Demos

5. Applied User Story Mapping

6. Map

7. Long Term Goal & Key Q's

8. Concept Creation

9. Action Board

10. Storyboard

10 Core Exercises

1. Expert Interview

2. 10 for 10 Brainstorm

3. Sailboat

4. Lightning Demos

5. Applied User Story Mapping

Perfect for capturing the challenges and topics a group has brought to a workshop before deciding on where to focus.

Expert Interview

1. Timing

Between 30 to 60 minutes

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Expert Interview

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow



Expert
Interview

Expert Interview

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Main goal

- *Collect* and *visualize* all the challenges in the room around a specific topic.

When to use?

- If you don't have a single specific focus, only a broad idea.
- It's a way to control the conversation and collect information.

Expert Interview

1. Timing

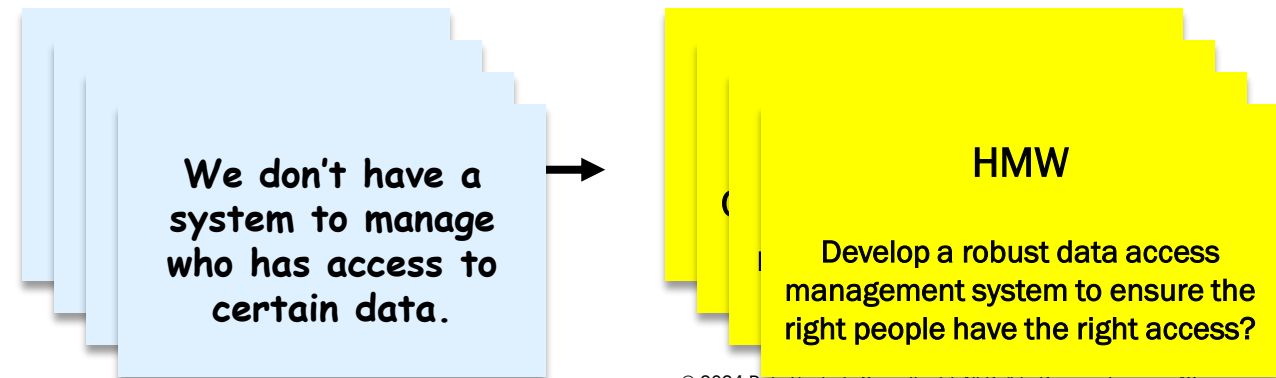
2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- The participants are **the experts**, the facilitator is going to interview them one by one.
- Only **one person speaks** at a time during the interview process. Everyone else takes notes using HMW's.
- We utilize the "**How Might We's**" (HMW's) standardized note-taking system, transforming problems and challenges in an actionable way.



Expert Interview

1. Timing

2. What you'll need

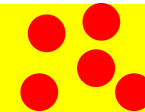
3. Main goal & usage

4. Introducing the exercise

5. Flow

- After all interviews, we're going to stick all of our HMW's on the wall and we'll have a **quick overview** of the challenges we need to consider.
- We then use a **heat map voting** system to decide which challenges to tackle immediately and which ones to address later.

HMW



Enhance our data security measures to protect sensitive information?

HMW



Increase the data quality of our monthly report?

HMW

Develop a robust data access management system to ensure the right people have the right access?

HMW



Centralize our data sources to provide a unified view?

Expert Interview

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 1: The Interview

- **Timing:** 5 minutes per person
- Only interview **one person** at a time
- As soon as you've created an HMW, pause the interview and show it as an **example**.
- It's okay to skip people who don't want to speak.
- Use **simple, open-ended phrases** like:
 - *"talk about the challenges you're having"*
 - *"go into more detail on that"*
 - *"tell me more"*

Expert Interview

1. Timing

2. What you'll need

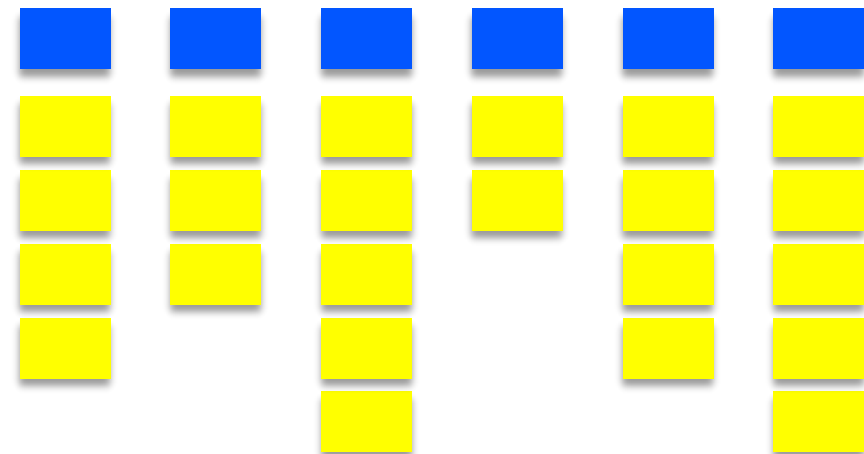
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 2: Visualize

- **Timing:** 5 minutes
- Ask participants to stick all their HMW's on the wall.
- Search for **duplicates** and remove/stack them.
- If you like you can ask the team to “**cluster**” the HMW's into categories.



Expert Interview

1. Timing


2. What you'll need

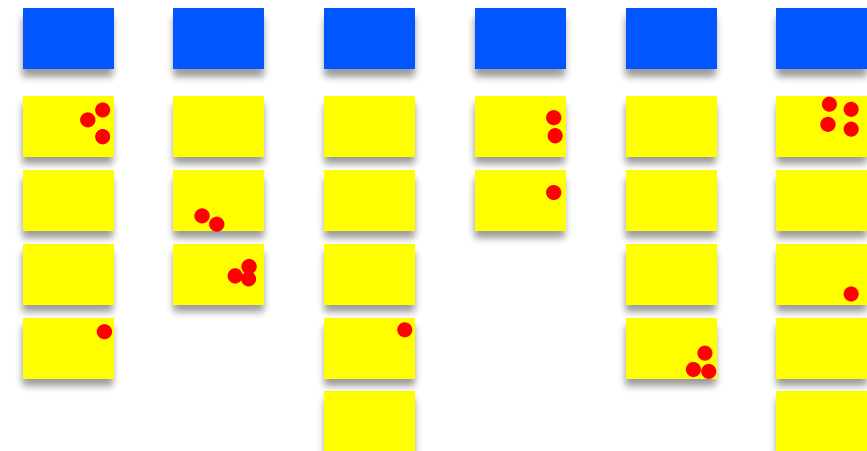
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 3: Vote

- **Timing:** 10 minutes
- Give every participant **4 voting dots**. 
- Let them silently vote on which challenges they would like to focus on. (no discussion!)
- Tell them that there are **no voting rules**. They can vote on their own HMW's or put multiple dots on one HMW.



Expert Interview

1. Timing

2. What you'll need

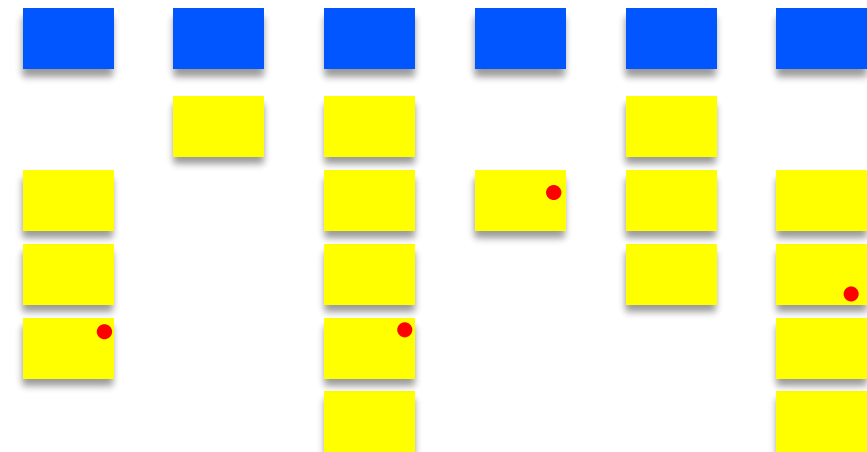
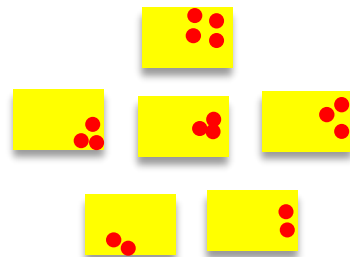
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 4: Revisualize

- **Timing:** 2 minutes
- Take HMW's with votes off the board (ignoring anything with less than 2 votes).
- Place these HMW's in order of most votes next to the board.



Expert Interview

10 Core Exercises

1. Expert Interview

2. 10 for 10 Brainstorm

3. Sailboat

4. Lightning Demos

5. Applied User Story Mapping

A simple, fast but powerful Note and Vote exercise that's all about producing and curating ideas.

10 for 10

1. Timing

Between 15 to 30 minutes

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

10 for 10

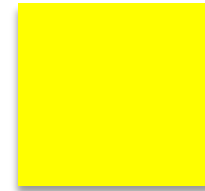
1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow



10 for 10

10 for 10

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Main goal

- Come up with ideas for a specific topic, super fast.

When to use?

- Mainly to generate a lot of ideas.

10 for 10

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

-
- The exercise is a rapid brainstorming session aiming to **generate 10 interesting ideas** related to a specific topic.
 - Participants get a **short amount of time** to write down lots of ideas.
 - Don't worry about the quality of the ideas, just the **quantity!**
 - In the second part of the workshop, participants will **curate and select** the stronger ideas.
 - **Only one idea per sticky note!**

10 for 10

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 1: Generate ideas

- **Timing:** 5 minutes
- Ask everybody to produce at least **15 rapid-fire ideas** in the 5-minute timeframe.
- Keep reminding people that they don't need to produce good ideas, just **lots of ideas**.
- Encourage people who are not producing ideas fast enough to go faster.

Data
reliability

Data as an
asset

Private &
secure

Accountability

10 for 10

1. Timing

2. What you'll need

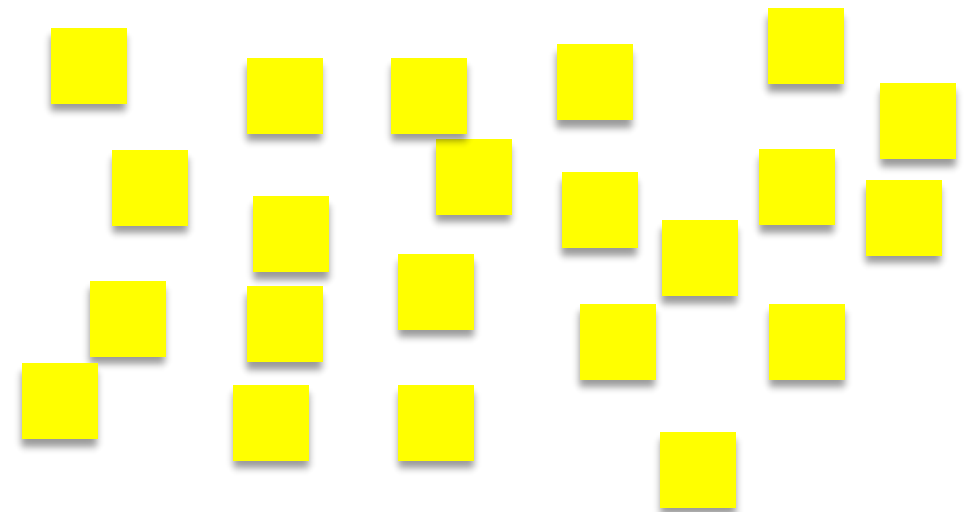
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 2: Visualize ideas

- **Timing:** 1 minute
- Ask participants to stick all their ideas on the wall.
- Don't categorize the ideas, just **remove duplicates** without discussion.



10 for 10

1. Timing


2. What you'll need

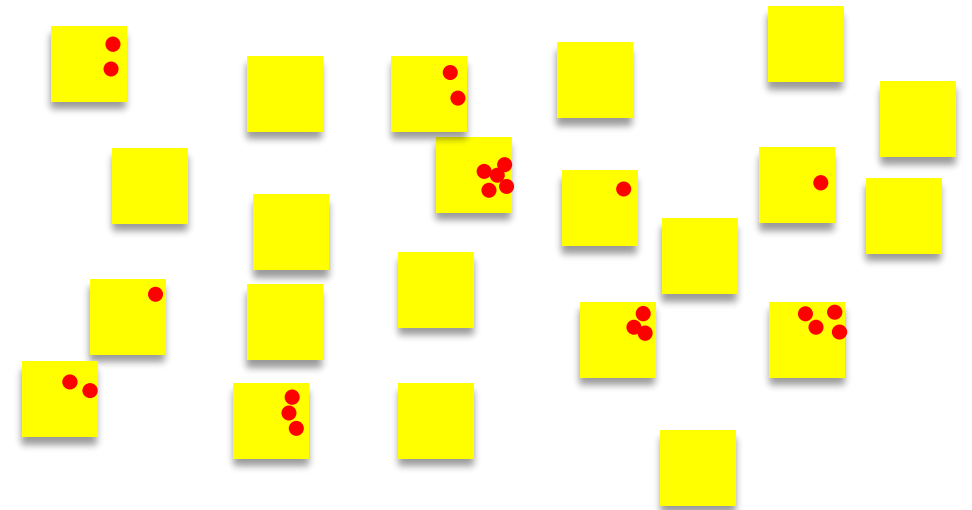
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 3: Vote

- **Timing:** 3 minutes
- Give every participant 10 voting dots. 
- Let them **silently vote** on the ideas they like the most – avoid discussions.
- Tell them that there are **no voting rules**.



10 for 10

1. Timing

2. What you'll need

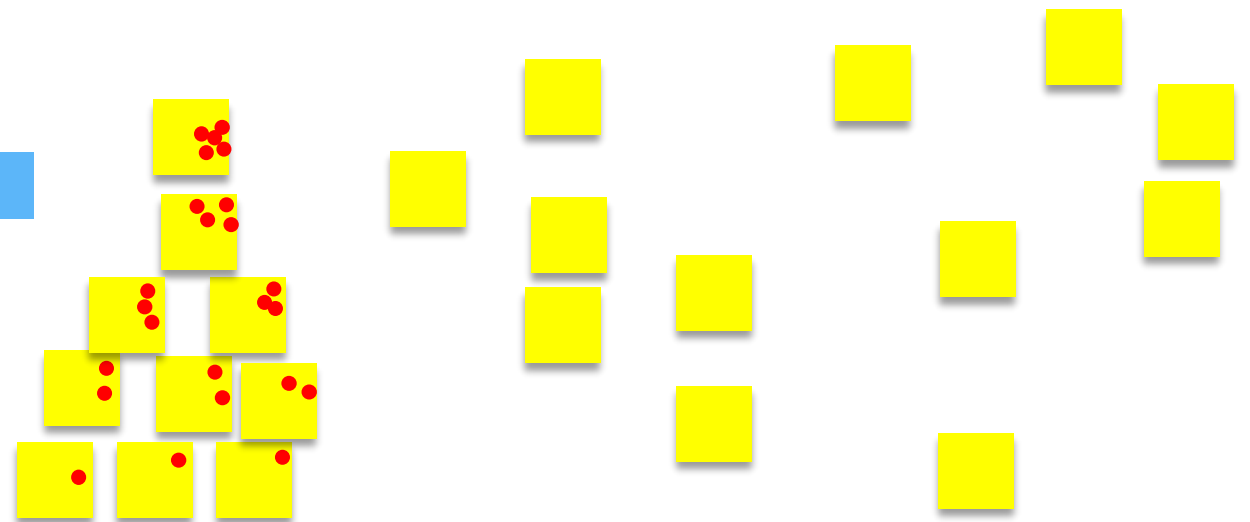
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 4: Revisualize

- **Timing:** 1 minute
- Take the **top 10 ideas** with votes on them off the wall.
- Place the ideas in order of most votes next to the wall.



10 for 10

10 Core Exercises

1. Expert Interview

2. 10 for 10 Brainstorm

3. Sailboat

4. Lightning Demos

5. Applied User Story Mapping

One of the best exercises that exists for finding problems and challenges when there's no clear starting point.

Also a great standalone exercise for retrospectives.

Sailboat

1. Timing

Between 30 to 45 minutes

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Sailboat

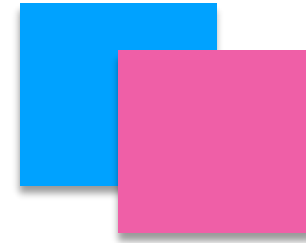
1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow



Sailboat

Sailboat

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Main goal

- **Collect** and **prioritize** challenges to work on from a broad starting point.

When to use?

- This is a great standalone exercise for retrospectives.
- Possible to connect this exercise to the HMW-exercise and translate all these problems into HMW's.

Sailboat

1. Timing

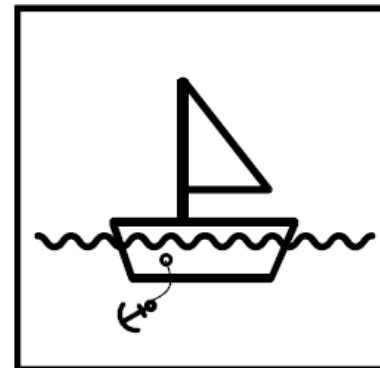
2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- The "Sailboat" exercise is designed mainly to identify **challenges**.
- Draw a **simple sailboat** on a whiteboard or flip chart.
- The sailboat metaphorically represents “**what’s moving us forward**” (the sail) and “**what’s holding us back**” (the anchor).



Sailboat

Sailboat

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 1: Moving us forward

- **Timing:** 5 minutes
- Ask everyone to silently write 3-6 **positive things** that moved the company forward during their recent data project(s) or initiatives.
- One thing per sticky note.

Marketing data insights opened the door for new sales.

MDM really improved our business processes!

The SAP cloud migration went smooth

Finally we understand our data with our data dictionary

Sailboat

1. Timing

2. What you'll need

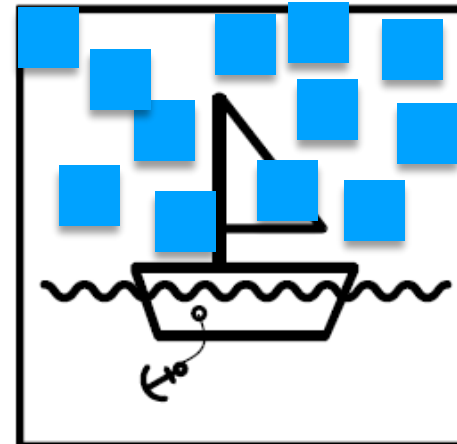
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 2: Present

- **Timing:** 5 minutes
- Each team member walks to the Sailboat one by one and **presents** their “positives” to the rest of the group.
- Once a member has presented their positive, they **stick** it to the top half of the sailboat.
- There should be **no discussion** here, only reading directly from the sticky note.



Sailboat

Sailboat

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 3: Holding us back

- **Timing:** 8 minutes
- Ask everyone to silently write as many **negative things** that held them back during the project on individual sticky notes as they can think of in 8 minutes.
- Tell the team that this exercise will be **anonymous**, unlike the first part of the sailboat. So they should feel free to write whatever is on their minds.

Low-quality data sources are weighing down our progress.

No clear data strategy

The self-service BI reporting isn't used much

Our data security really sucks!!!

Sailboat

1. Timing

2. What you'll need

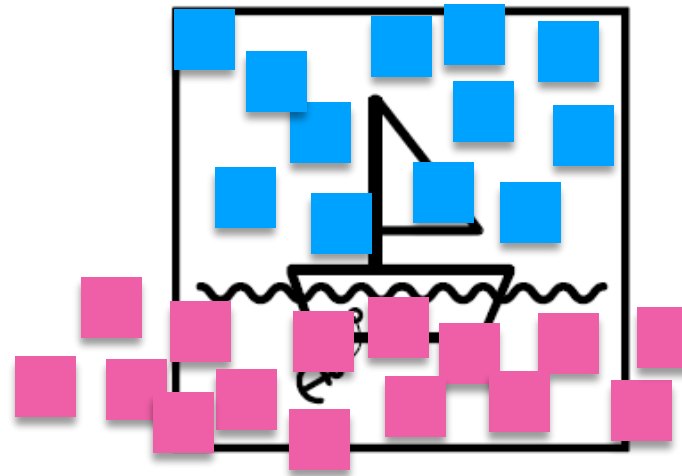
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 4: Visualize

- **Timing:** 8 minutes
- Ask participants to **stick** all their negative stickies on the space underneath the boat.
- Don't worry if you've drawn the boat too small, let the stickies spill out onto the whiteboard or wall.
- Don't categorize the ideas, just **remove duplicates** without discussion.



Sailboat

1. Timing


2. What you'll need

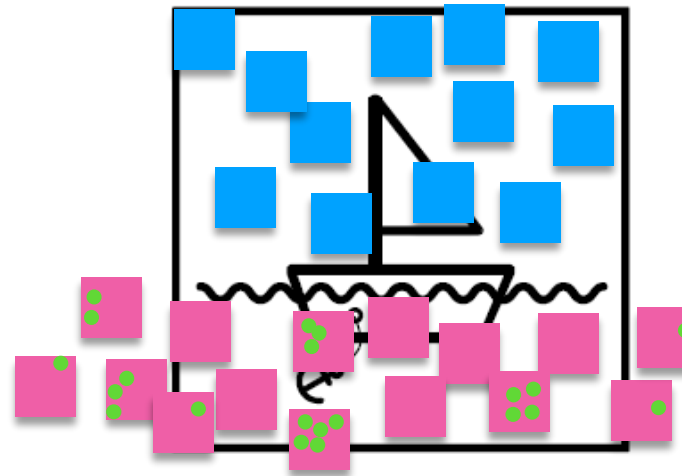
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 5: Vote

- **Timing:** 8 minutes
- Give every participant 8 voting dots. 
- Let them **silently vote** on the negatives/challenges they felt held the team back the most.
- Tell them that there are **no voting rules**. They can vote on their own ideas, they can put multiple dots on one idea, etc.



Sailboat

1. Timing

2. What you'll need

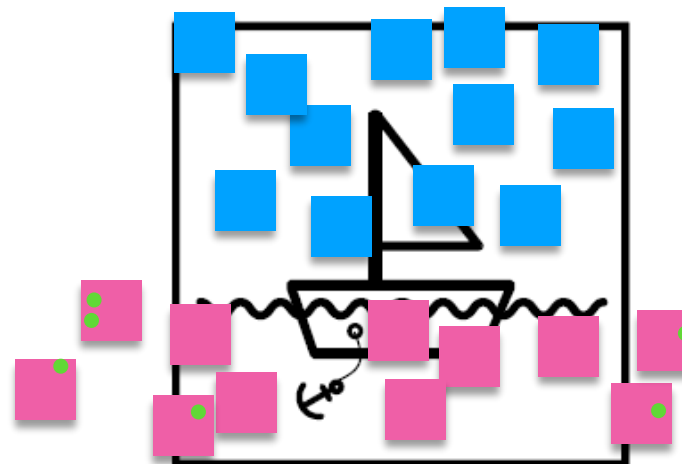
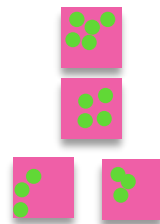
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 6: Revisualize

- **Timing:** 1 minute
- Take **negative stickies** with votes off the board (ignoring anything with less than 2 votes).
- Place these stickies **in order** of most votes next to the board.



10 Core Exercises



1. Expert Interview

2. 10 for 10 Brainstorm

3. Sailboat

4. Lightning Demos

5. Applied User Story Mapping

A perfect exercise for sharing inspiration and ideas in a structured way, this exercise is one of the best ways to get the creative juices flowing before jumping into solution generation.

Lightning Demos

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Between 30 to 45 minutes

Lightning Demos

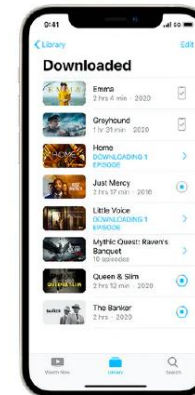
1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow



Lightning
Demos

Lightning Demos

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Main goal

- *Collect* and *share* inspirational ideas from sources outside the company/team.

When to use?

- To get a team inspired.

Lightning Demos

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- This exercise is an **inspiration-gathering exercise** to stimulate creativity before concept creation.
- Ensure all participants have **device access** and internet connectivity.
- Ask all participants to **find examples** of how other companies have solved the challenge we're trying to solve.
- Emphasize **learning** from others' solutions, not just copying them, to avoid reinventing the wheel.
- Remind participants to **stay focused** on the task and resist distractions like checking emails or Teams messages.
- Show some **real examples** before the exercise starts.

Lightning Demos

1. Timing

2. What you'll need

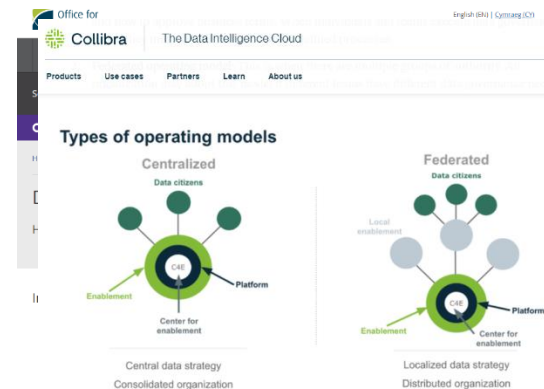
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 1: Search for Demos

- **Timing:** 15 – 30 minutes
- Ask everyone to search the web for examples of how other companies have **solved** or **approached** the challenge the team is working on.
- The example does not need to be from a similar industry/vertical (e.g fashion).
- They should end the exercise with **2-3 examples** to show, each written on a separate sticky note.



COLLIBRA

Big Idea:
Centralized operating model with
Data citizens

Lightning
Demos

Lightning Demos

1. Timing

2. What you'll need

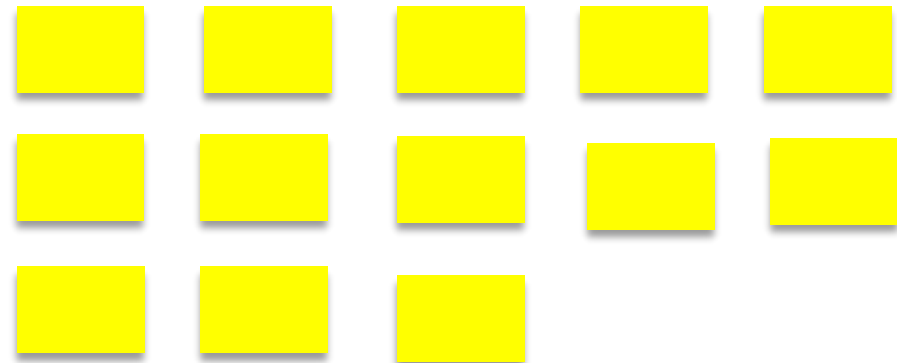
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 2: Present

- **Timing:** 5 minutes per person
- Allow each participant to **present** their Lightning Demos. Be sure that they **stick to the big idea** and don't get lost.
- Once everyone has presented, stick the sticky notes on the wall so everyone has a view of what's been presented.



10 Core Exercises

1. Expert Interview

2. 10 for 10 Brainstorm

3. Sailboat

4. Lightning Demos

5. Applied User Story Mapping

A more in-depth brainstorming tool involving the creation of a User Story Map (or timeline), this is a great exercise if you want to come up with feature ideas or improvements in a process, service or product that already exists.

Applied User Story Mapping

1. Timing

Between 35 to 55 minutes

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Applied User Story Mapping

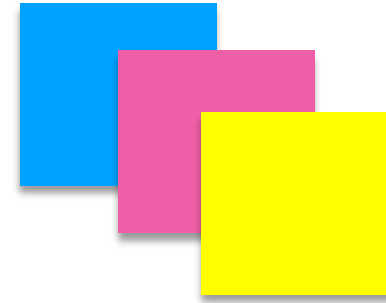
1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow



Applied
User Story
Mapping

Applied User Story Mapping

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Main goal

- Produce *ideas* and *solutions* based on a timeline of activities.

When to use?

- Inspire people to come up with ideas with the user in mind.

Applied User Story Mapping

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- This exercise is an **in-depth brainstorming exercise** using an imaginary timeline of (data) activities for a **specific user**.
- We're then going to use this **timeline** to brainstorm how to improve their day with our process/product/service.
- Show some **real examples** before the exercise starts.
- **Users** can be Subject Matter Experts, Data Stewards, the CEO, or even specific customer personas.

Applied User Story Mapping

Step 1: Create the story

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- **Timing:** 7 minutes
- Ask every participant to write the **individual steps** of the daily life of the chosen user (*for example, data steward*).
- Each step should be on a single yellow sticky note and be easy to read.
- Each participant should aim to create **15-25 steps**.

Collaborate with IT to resolve technical data issues

Attend morning meeting to discuss data quality

Assist in data migration project

Check email for any urgent data-related issues

Applied User Story Mapping

Step 2: Create the timeline

1. Timing

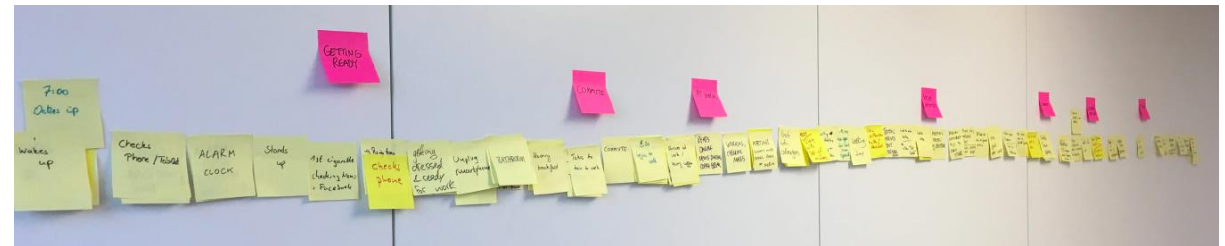
2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- **Timing:** 3 minutes
- **Time for chaos:** Ask all participants to create one common timeline using all of their steps combined.
- **Duplicates** should be turned into stacks of similar steps. Discussion should be minimal.
- While this is happening, the Facilitator should start creating **top-level categories** representing the time of day and specific actions.



Applied
User Story
Mapping

Applied User Story Mapping

Step 3: Brainstorm

1. Timing

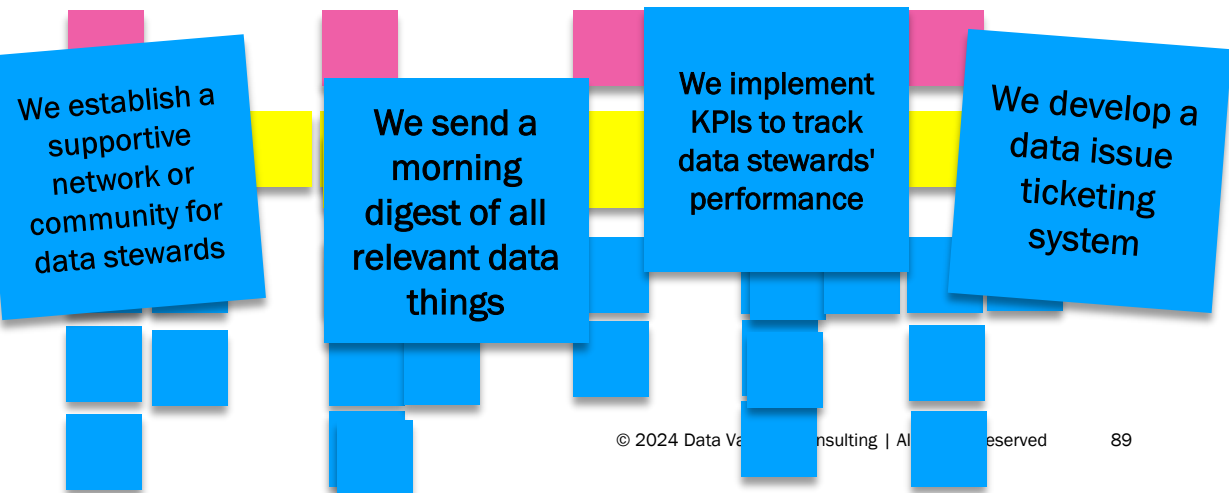
2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- **Timing:** 15 minutes
- Give each participant a stack of **blue sticky notes** and ask them to start coming up with ways to improve the user's life at points along the timeline.
- Participants should **stick their ideas up** as they write them until the 15 minutes is up.
- One idea per sticky and remove or stack **duplicates**.



Applied User Story Mapping

Step 4: Vote


1. Timing

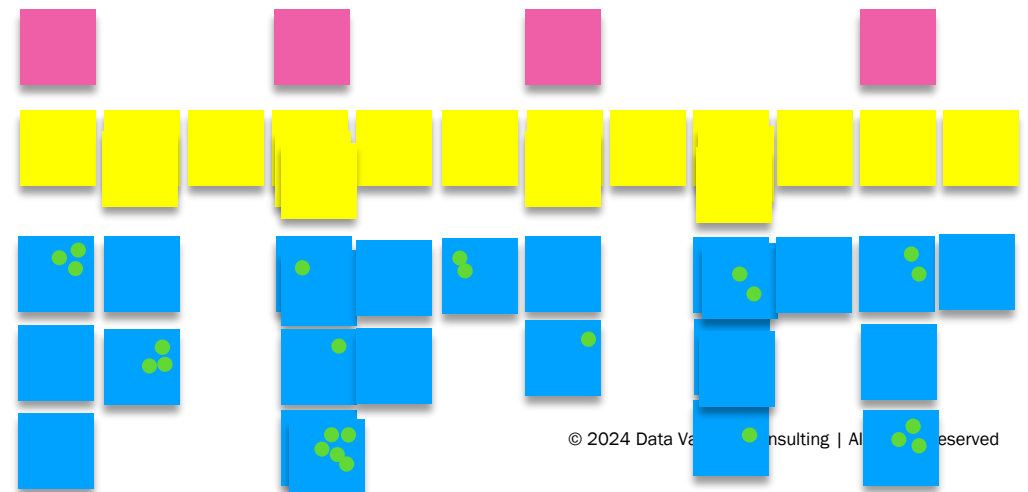
2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- **Timing:** 15 minutes 
- Every participant gets **6 voting dots** which they can use in any way they like.
- They're simply voting on which ideas or solutions they think are **the strongest**.



Applied User Story Mapping

Step 5: Revisualize

1. Timing

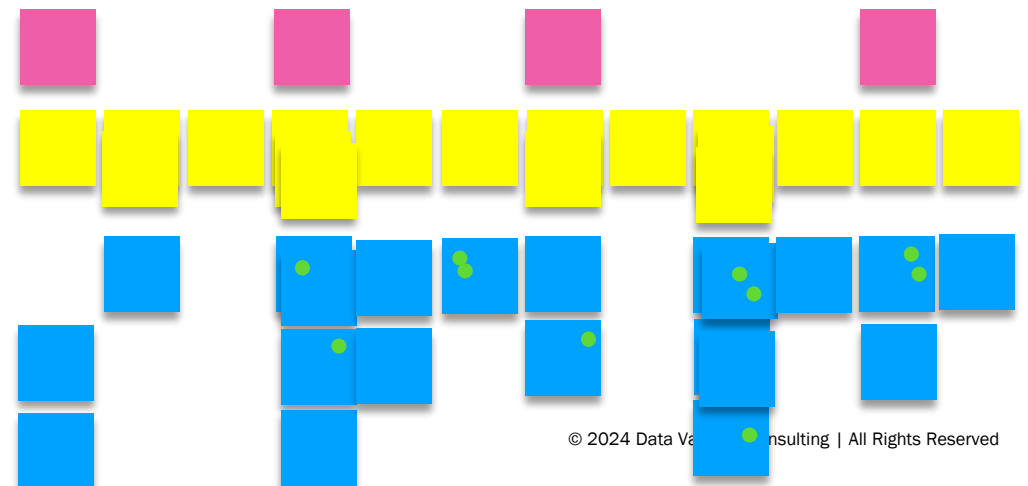
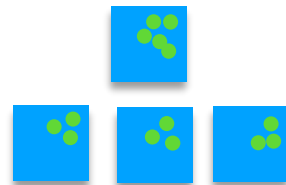
2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- **Timing:** 1 minute
- Take ideas with votes off the board (ignoring anything with less than 2 votes).
- Place these stickies in order of most votes next to the board.



Applied
User Story
Mapping

10 Core Exercises

6. Map

7. Long Term Goal and Key Q's

8. Concept Creation

9. Action Board

10. Storyboard

This exercise, taken straight from the Design Sprint, is the perfect way to give a team a visual reference of the product, service, process or experience that they're working on.

This allows both the team and the Workshop Facilitator to point to and highlight areas of focus.

Map

1. Timing

Between 30 to 60 minutes

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Map

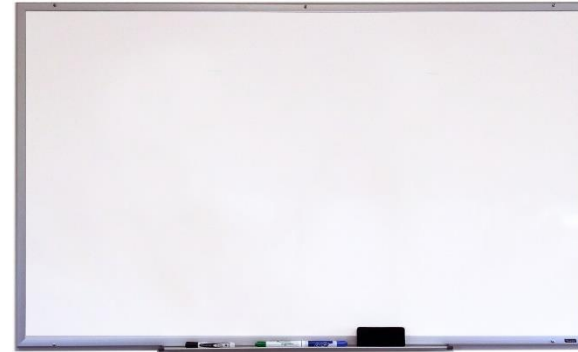
1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow



Map

Map

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Main goal

- Visualize the product, service, or process the team is working on.

When to use?

- Good way to get a team aligned on what to focus on.
- Basically, people can point and say: “*Now let's focus on this bit.*”

Map

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

-
- This exercise is just a simple way for us to have a **visual representation** of the user journey to and through our process, service or product.
 - We can also use the map to decide on which areas to **focus** on and which to ignore, for now.
 - It can also be used to visualize **multiple user types** and experiences if needed.

Map

1. Timing

2. What you'll need

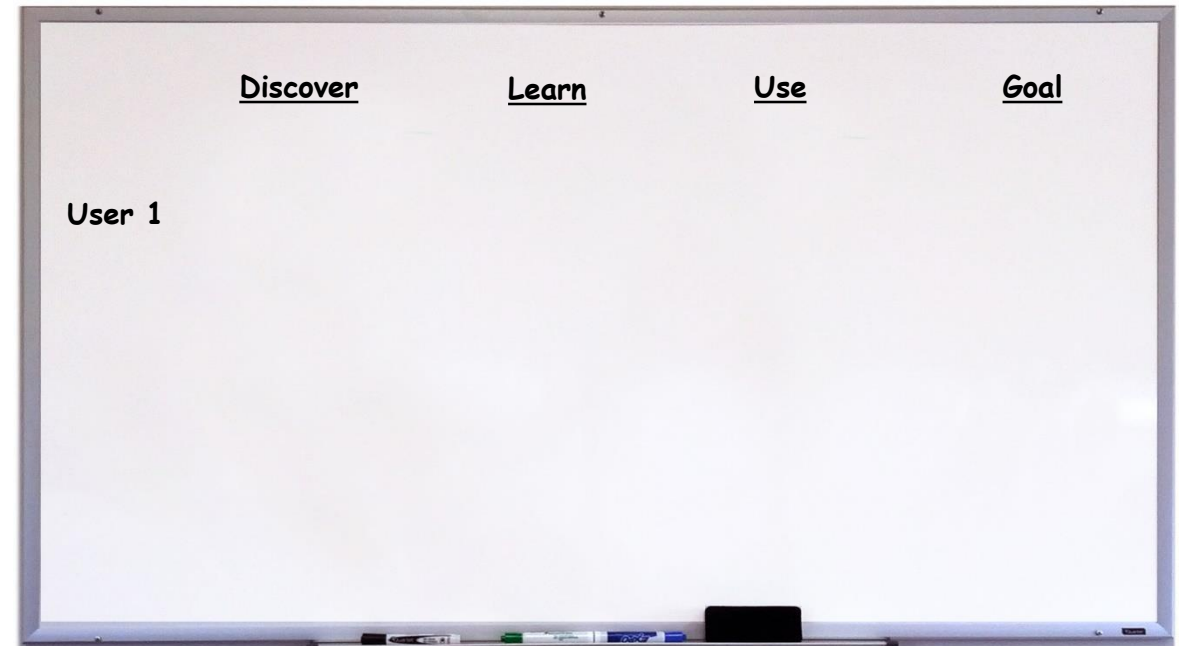
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 1: Create the outline

- **Timing:** 4 minutes
- The Facilitator creates the **map outline** to make it easier to fill in as a team.
- The common headings we use in the Map exercise are “**Discover**”, “**Learn**”, “**Use**”, and “**Goal**”.



Map

1. Timing

2. What you'll need

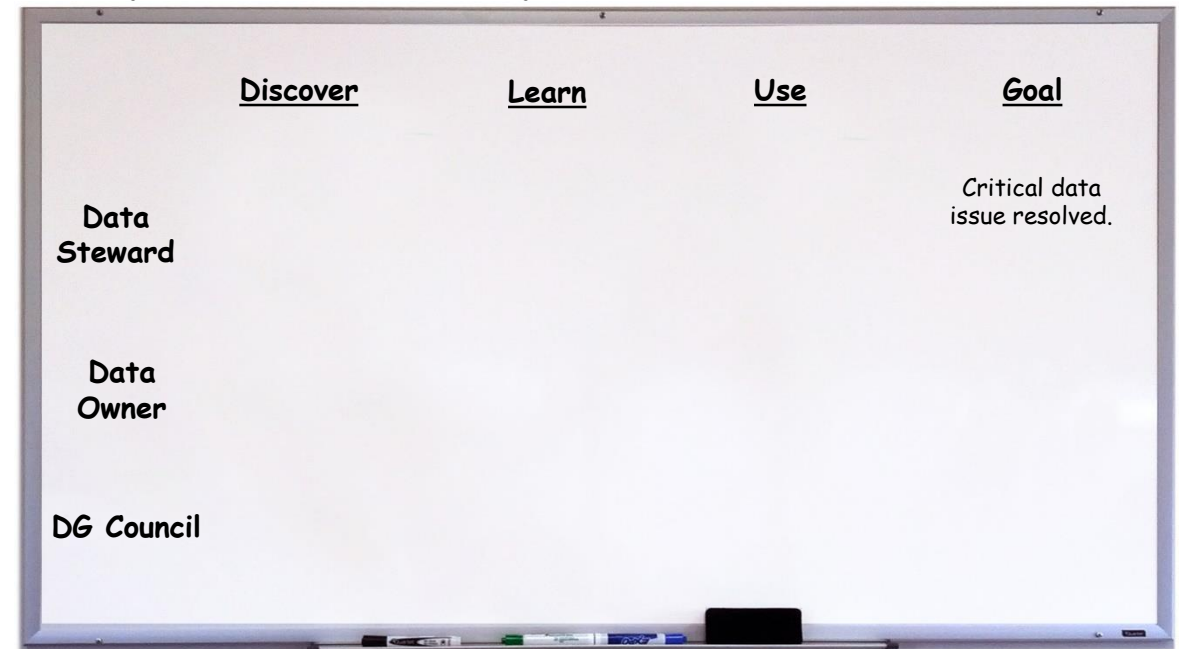
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 2: Add the goal

- **Timing:** 7 minutes
- The first step in filling out the map is to add the **goal**. If there isn't a clear answer from the participants here, just use a note and vote.
- Write the different wordings of the goal on the whiteboard until you and the team are happy with one.



Map

1. Timing

2. What you'll need

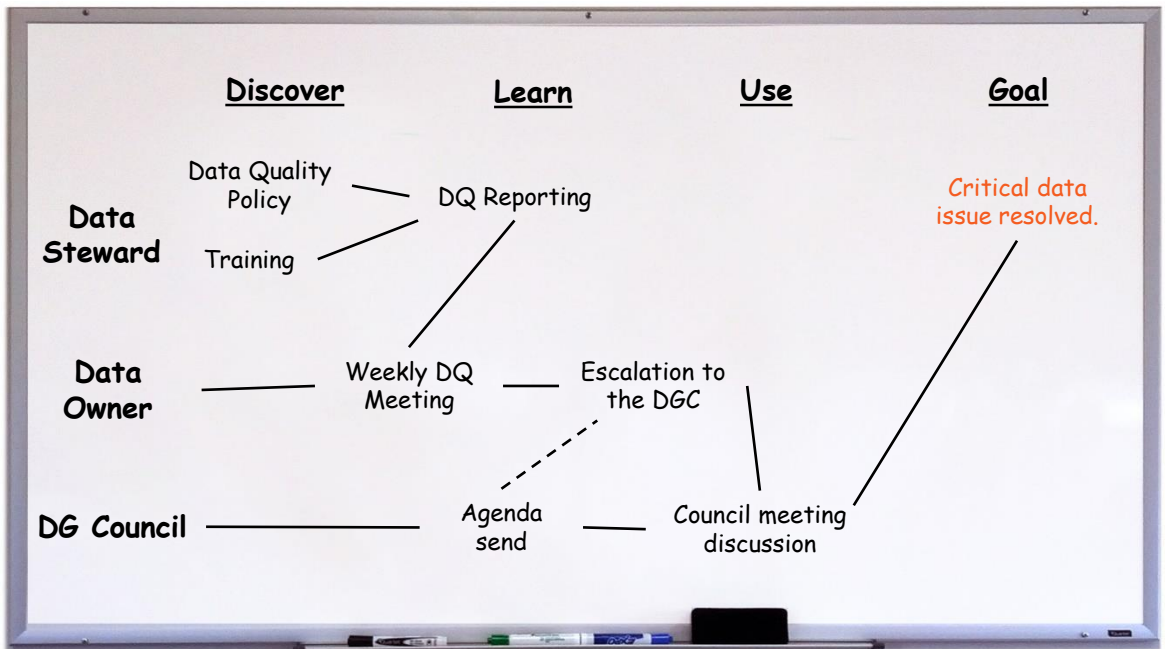
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 3: Fill out the rest

- **Timing:** 15 – 30 minutes
- The next steps in filling out the map is to go from Goal to Discover, then Learn and then Use.
 - **Discover:** “How will they find out about...”
 - **Learn:** “How do they learn more about it?”
 - **Use:** “What do they do when they use the product broadly?”



Map

1. Timing

2. What you'll need

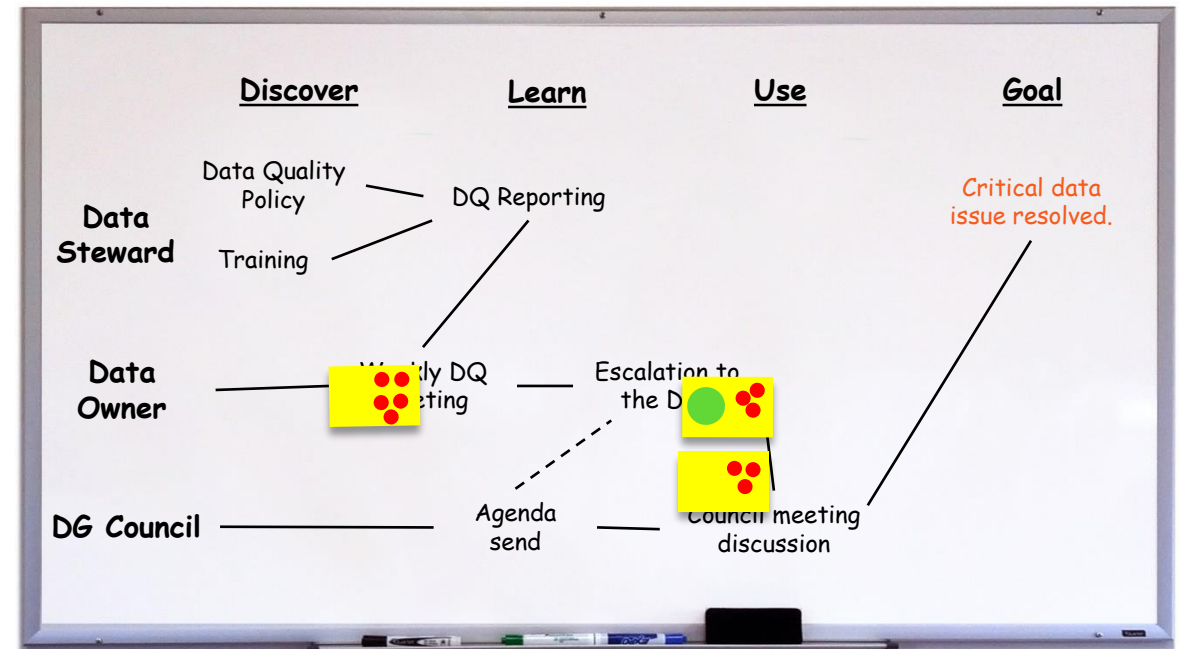
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 4: Place the HMWs

- **Timing:** 5 minutes
- Next, the Facilitator takes the top HMWs and decides together with the team where it fits on the map.
- Don't discuss too long. If in doubt, go further left!
- The entire purpose of the Map is to pick a **target area**. One area to focus on for the rest of the Sprint.



Map

Map

1. Timing

2. What you'll need

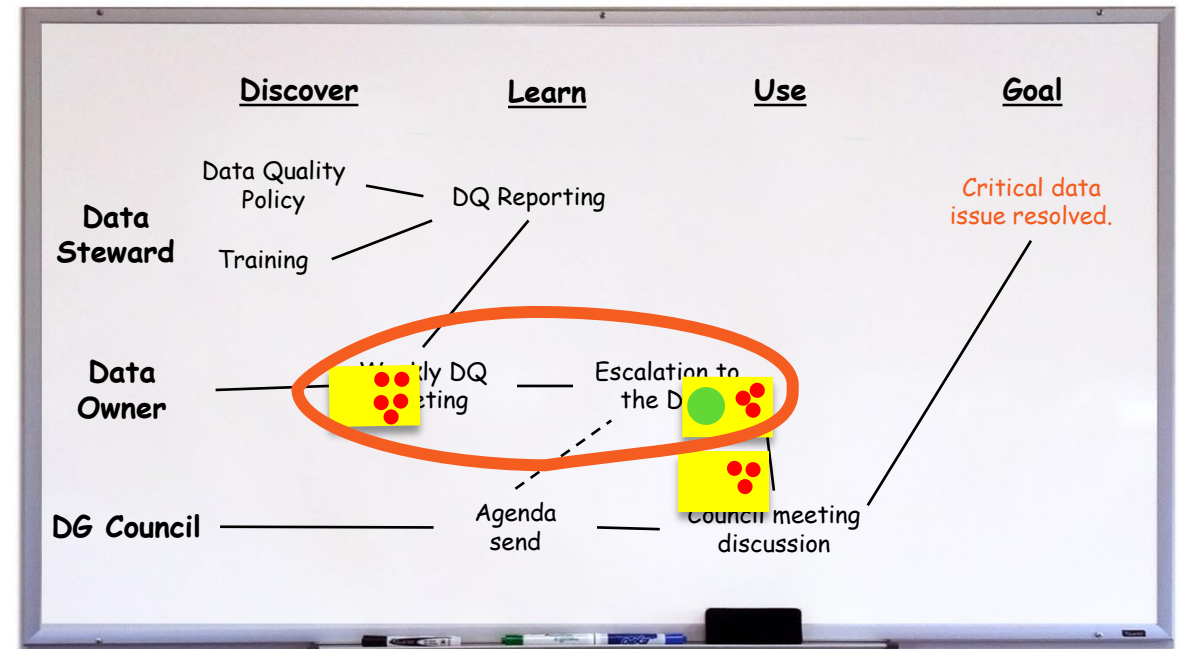
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 5: Select a Target

- **Timing:** 5 minutes
- Determine which area of the map the team should focus on, either through (controlled) discussion, through a note and vote or through adding HMW's to the board if you've already run that exercise.



Map

10 Core Exercises

6. Map

7. Long Term Goal and Key Q's

8. Concept Creation

9. Action Board

10. Storyboard

Getting everyone to work toward a shared goal is invaluable, especially when you're working on something a bit bigger and a bit more vague like Data Governance.

This exercise gives a team a clear and agreed-upon North Star to work toward and is a fantastic reference point for the Workshop Facilitator to use if the conversations go off track.

Long Term Goal and Key Q's

1. Timing

Between 45 to 60 minutes

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Long Term Goal and Key Q's

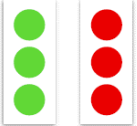
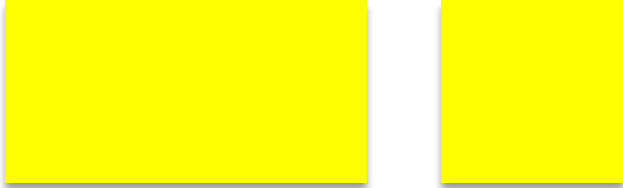
1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow



Long Term
Goal and
Key Q's

Long Term Goal and Key Q's

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Main goal

- Have a one-pager that summarizes the project/program **goal** and **key questions**.

When to use?

- Working as a team towards a shared goal or towards the same direction.

Long Term Goal and Key Q's

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- The exercise aims to align all team members on the project's **North Star**, or long-term goal. This should represent our **ideal state** two years from now.
- Next, we will devise **Key Questions** to test whether our North Star goal is really possible or if it's just too optimistic.
- The outcome of this exercise will be a **one-pager** summarizing our North Star and Key Questions, providing a clear, concise guide for the project's direction.

Long Term Goal and Key Q's

Step 1: Create a 2-year goal

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- **Timing:** 8 minutes
- Give every participant a block of rectangular sticky notes.
- Each participant should create **2 to 3 2-year Goals**.
- A **2-year goal** is simply a statement about the most optimistic outcome for this project/program would be in 2 years.

IN 2 YEARS TIME

We will have embedded a culture of data stewardship.

IN 2 YEARS TIME

IN 2 YEARS TIME

We will have implemented advanced data analytics capabilities

Long Term Goal and Key Q's

Step 2: Visualize

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- **Timing:** 1 minute
- Each participant should choose which 1 of their 2 year goals they think is the **strongest** and stick it on the wall/whiteboard.



Long Term Goal and Key Q's

Step 3: Vote (Strawpoll)

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- **Timing:** 5 minutes
- Give each participant a **large voting dot** and have them write their **initials** on it.
- Set a timer for 5 minutes and have participants **silently decide** which 2 Year Goal they think is most appealing (without voting).
- Once they've decided which one they'll choose, they should write their **reasoning** on a sticky note.
- Once the time is up, everyone should **vote at the same time** to avoid influencing each other's votes.

MV

DG

CM

FT

Long Term Goal and Key Q's

Step 4: Present

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- **Timing:** 1 minute per person
- The Facilitator now calls each participant **one by one** to the whiteboard and has them **explain** to the group why they voted on what they voted on.
- The Facilitator needs to take care that the participants don't ramble and **don't take more than one minute** to explain their reasoning.

MV

DG

CM

FT

Long Term
Goal and
Key Q's

Long Term Goal and Key Q's

Step 5: Decider Vote

1. Timing

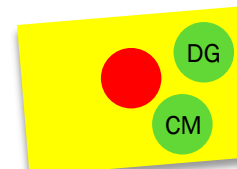
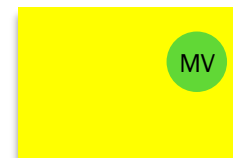
2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- **Timing:** 3 minutes
- As every workshop and every exercise ALWAYS has a **Decider**, no discussion will be required to decide who that is in this exercise.
- The Decider is given **one voting dot** and must decide on which 2-Year Goal sentence will be used on the One-Pager.
- The Decider may also choose to combine 2 stickies to make a more appealing sentence if they can do so **without discussion**.



Long Term Goal and Key Q's

Step 6: Key “Can We” Questions

1. Timing

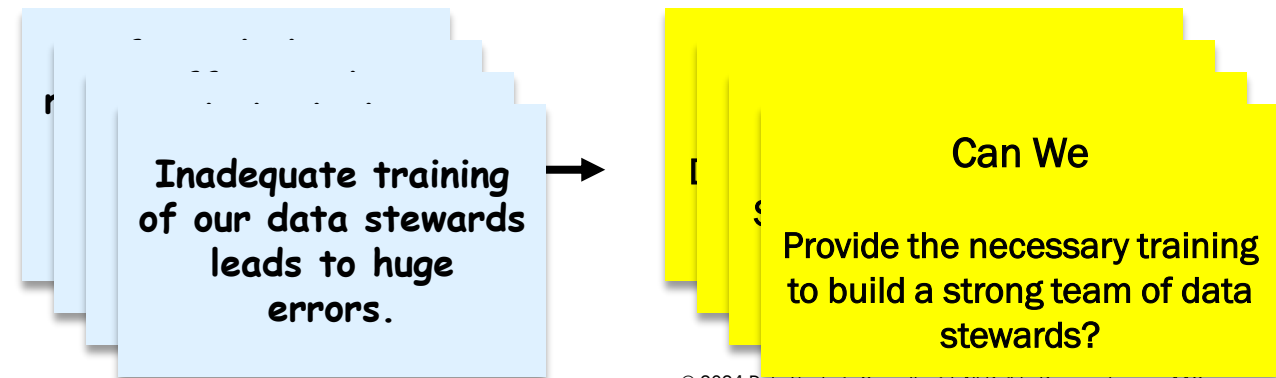
2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- **Timing:** 8 minutes
- Ask every participant to now write things that could stop the team from reaching the 2-year term goal and to rephrase those challenges as **“Can We”** questions.
- Participants should **write as many** as they can in the time allotted but can only choose 3 from their stack to add to the whiteboard.



Long Term Goal and Key Q's

Step 7: Vote

1. Timing

2. What you'll need

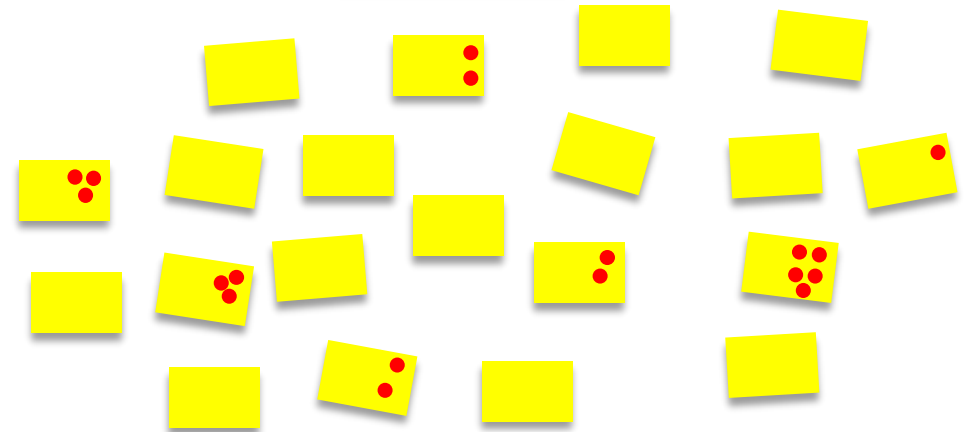
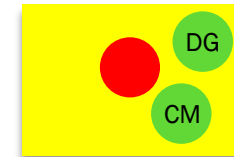
3. Main goal & usage

4. Introducing the exercise

5. Flow

- **Timing:** 5 minutes
- Give every participant (but not the Decider) **3 voting dots** and ask them to choose the Can We questions they feel **MUST be addressed** if we are to reach the 2-year goal.

2-Year Goal



Long Term
Goal and
Key Q's

Long Term Goal and Key Q's

Step 8: Decider Vote

1. Timing

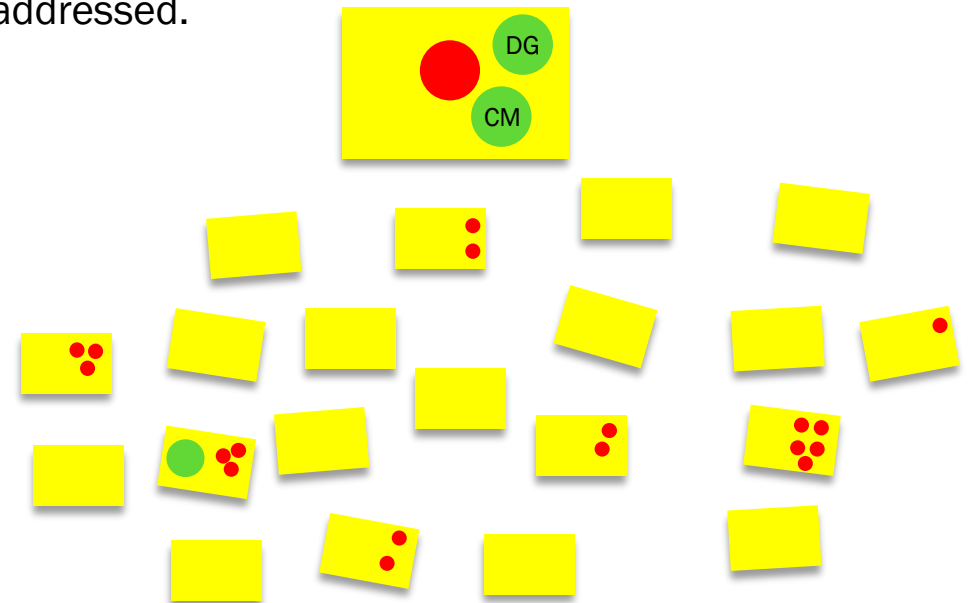
2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- **Timing:** 3 minutes
- Rather than revisualizing the sticky notes, give the Decider **one vote** and allow them to choose one Can We question that they think absolutely must be addressed.



Long Term Goal and Key Q's

Step 9: Revisualize

1. Timing

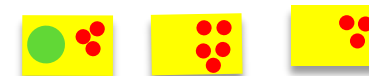
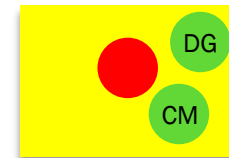
2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- **Timing:** 1 minute
- Remove all but the **top 3 Can We** questions from the board, remembering that the Decider vote is automatically at the top.



Long Term Goal and Key Q's

Step 10: Write as One-Pager

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- **Timing:** 5 minutes
- Get one large piece of Magic Paper or Flip Chart Paper and rewrite the LTG and Key Questions.
- This sheet will act as the North Star for the project and the Can We questions can be connected to other exercises and activities.

In 2-Years

Our data quality will be unparalleled, with accuracy rates exceeding 98% across all key datasets.

Can We

- Streamline our data management processes to increase data accuracy?
- Adopt robust data quality management tools and techniques?
- Demonstrate the tangible benefits of data quality to our stakeholders?

10 Core Exercises

6. Map

7. Long Term Goal and Key Q's

8. Concept Creation

9. Action Board

10. Storyboard

Nothing beats making ideas tangible and visual enough so that everyone can understand them with no explanation needed.

There are multiple ways to approach this exercise, but the end result is always the same: a clear, self-explanatory concept solution that could be executed upon if chosen in the workshop.

Concept Creation

1. Timing

Between 35 to 60 minutes

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Concept Creation

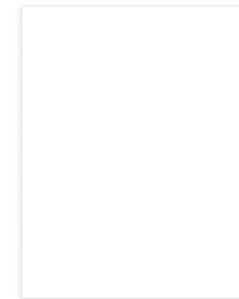
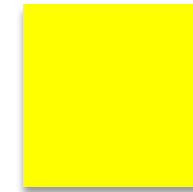
1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow



Concept
Creation

Concept Creation

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Main goal

- **Create** a self-explanatory concept that can be turned into a real test or prototype.

When to use?

- To develop an illustrated idea which requires no further verbal explanation and can demonstrate a solution to the challenge you are focused on.
- The concepts can be later turned into prototypes, storyboards, or whatever you link it to later.

Concept Creation

1. Timing

2. What you'll need

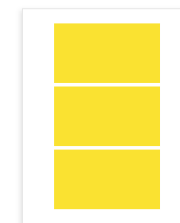
3. Main goal & usage

4. Introducing the exercise

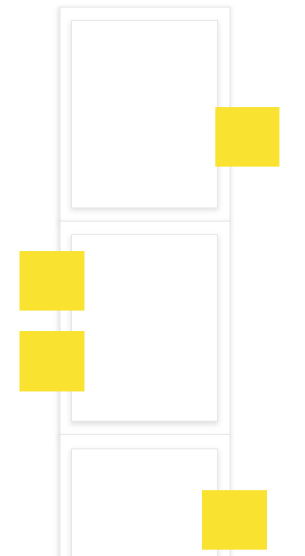
5. Flow

- This exercise is custom to the type of workshop you're facilitating.
- Each Concept is delivered in **3 steps**, forcing participants to really focus on the bit of the product you are trying to create.
- Two types of concepts:

Simple image concept



Detailed image concept



Concept Creation

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 1: Creating concepts

- **Timing:** 35 - 60 minutes
- Decide if the participants need to do a simple or a detailed image concept.
- Ask the participants to go over all of the ideas from previous exercise(s)/workshop(s), and to condense that down into a **simple and easy-to-understand concept**.

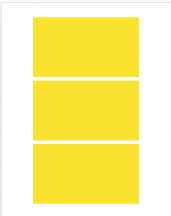
Concept Creation

- 1. Timing
- 2. What you'll need
- 3. Main goal & usage
- 4. Introducing the exercise

5. Flow

Simple image concept

Simple image concept



Concept Creation

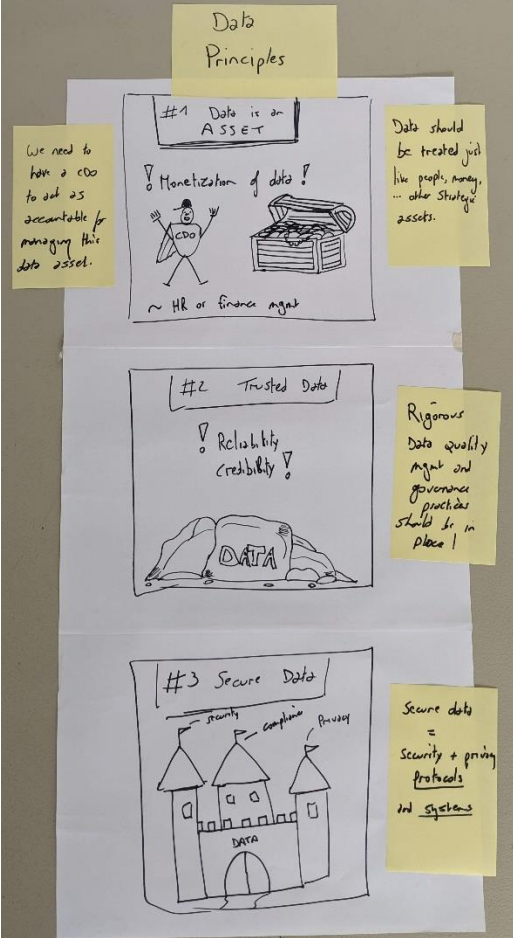
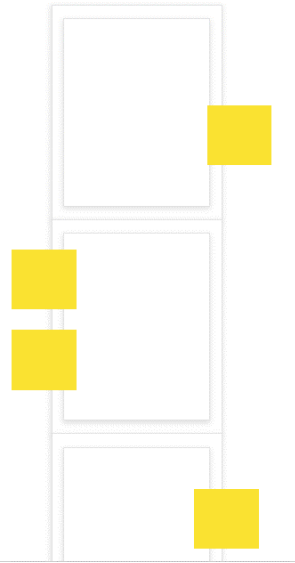
Concept Creation

- 1. Timing
- 2. What you'll need
- 3. Main goal & usage
- 4. Introducing the exercise
- 5. Flow

Concept Creation

Detailed image concept

Detailed image concept



10 Core Exercises

6. Map

7. Long Term Goal and Key Q's

8. Concept Creation

9. Action Board

10. Storyboard

Action board is derived from the extremely popular 4X4 Effort/Impact scales that management consultancies love to use, and for good reason!

Action Board is one of the easiest and fastest ways to visualize which ideas will have the highest impact for the challenge the team is working on.

Action Board

1. Timing

30 minutes

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Action Board

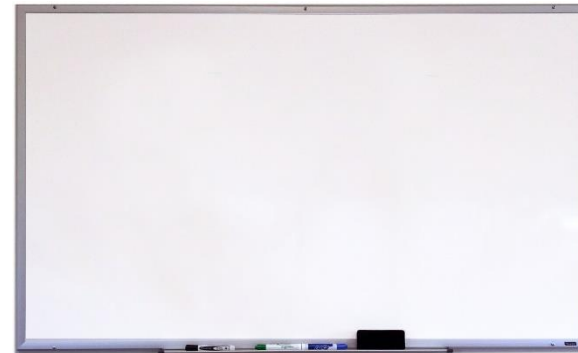
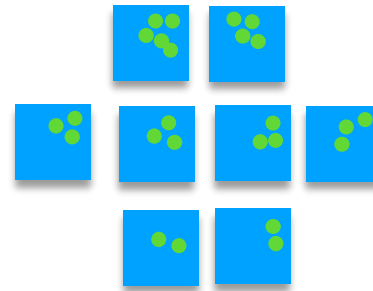
1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow



Action Board

Action Board

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Main goal

- **Prioritize** ideas and tasks in a way that takes feasibility into consideration.

When to use?

- Get to know exactly which ideas to focus on and who will actually be responsible for that execution.

Action Board

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- The Effort/Impact exercise, also known as the "Action Board", is the best **prioritize exercise!**
- But you need to have produced ideas, challenges or solutions from a previous exercise.
- "Effort" refers to how much work it would take the team to realize the idea.
- "Impact" measures how significantly the idea would contribute to the project goal.

Action Board

1. Timing

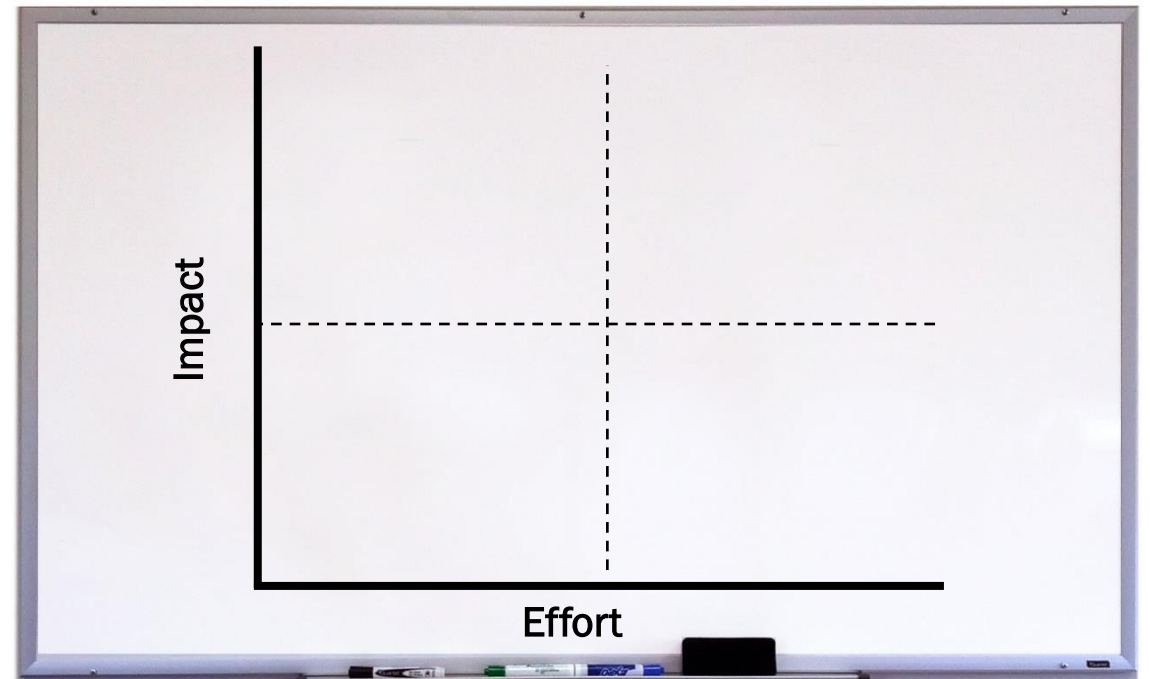
2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- Draw the **Impact/Effort scale** and the quadrants.



Action Board

1. Timing

2. What you'll need

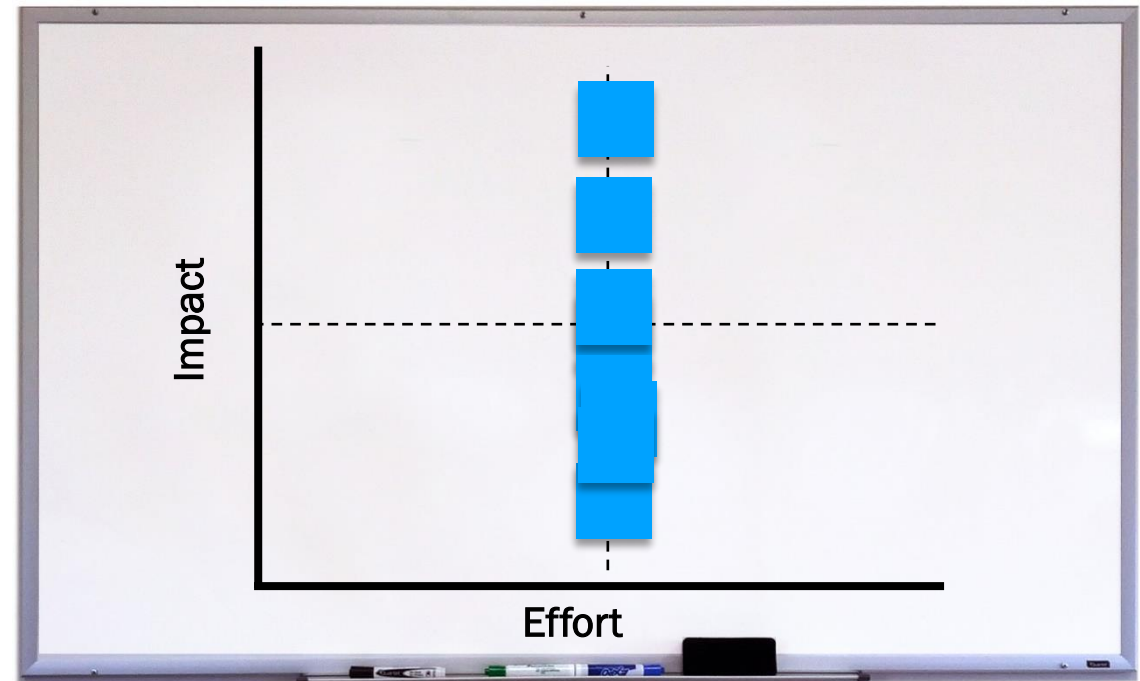
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 1: Impact first

- Timing: 8 minutes



Action Board

1. Timing

2. What you'll need

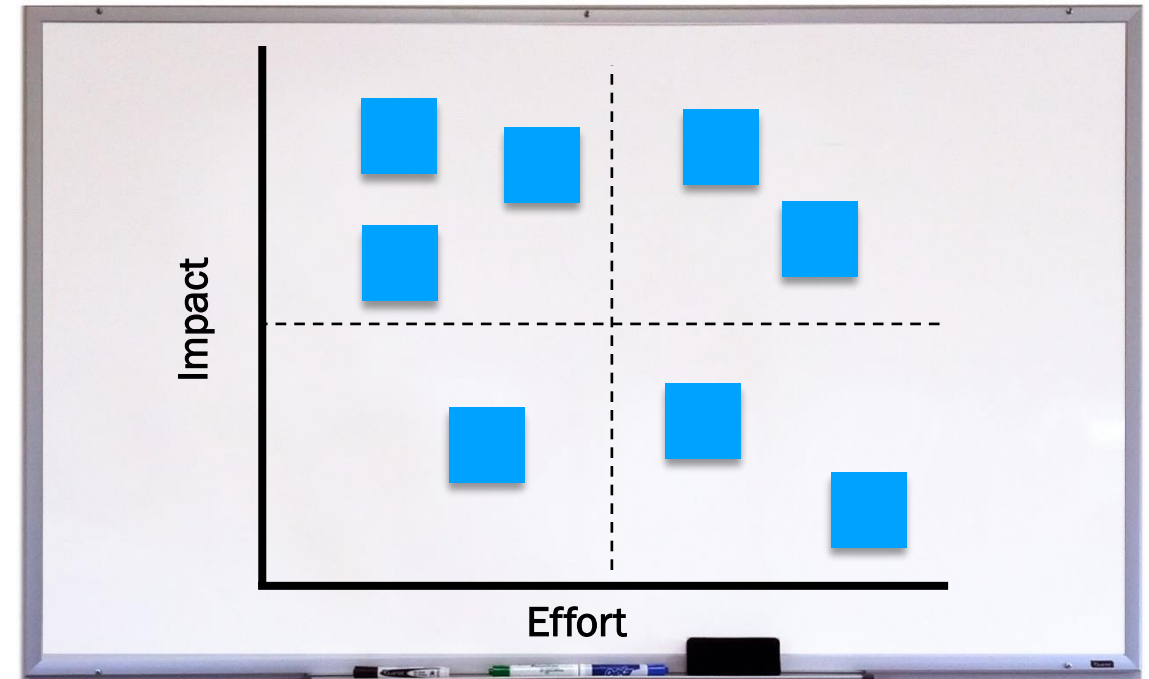
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 2: Effort

- Timing: 8 minutes



Action Board

1. Timing

2. What you'll need

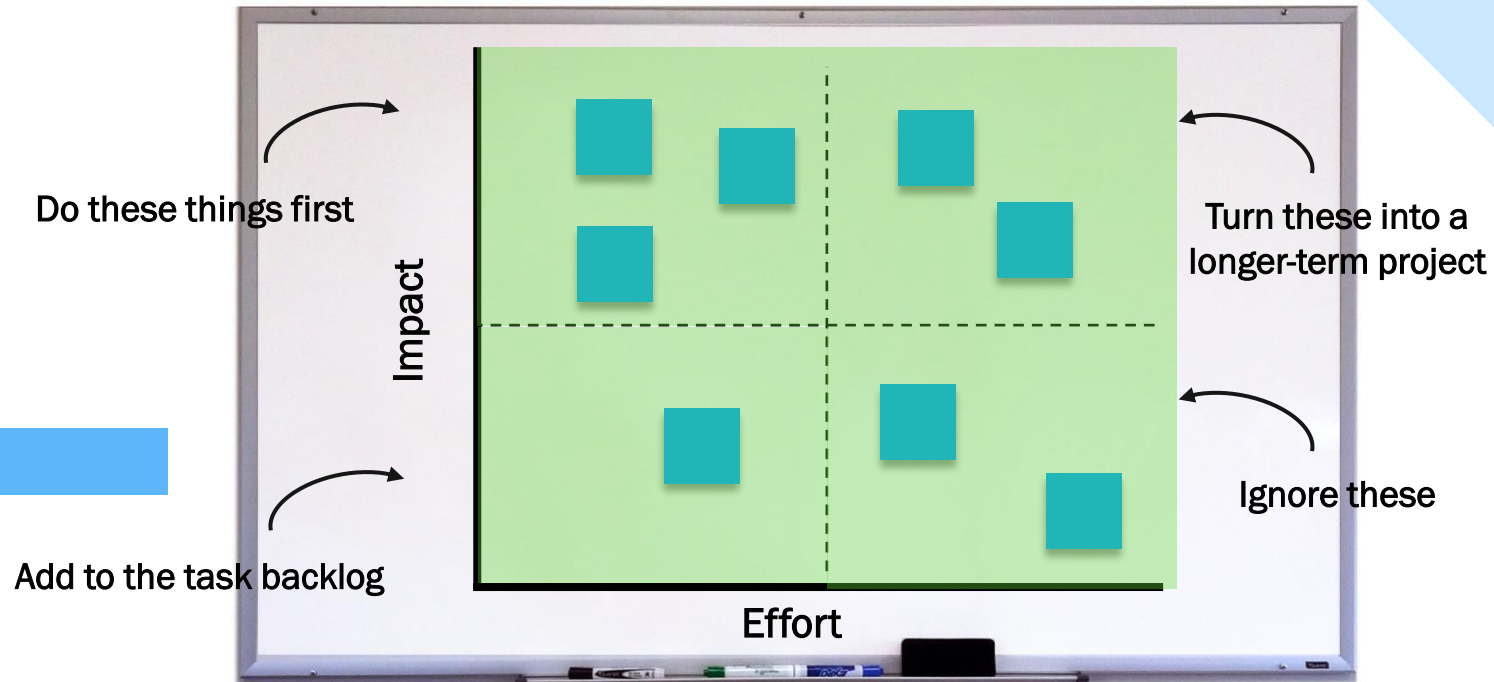
3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 3: Present the quadrants

- Timing: 4 minutes



Action Board

Action Board

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 4: Assign experiments

- **Timing:** 8 minutes
- One by one the Facilitator rewrites the stickies in the top left quadrant as **2-6 week experiments**.
- **Assign** these experiments to specific people on the team.
- Give one team member the task of adding the other relevant stickies to a project or task backlog.

**Use SharePoint
instead of Excel
for Business
Glossary**

Experiment: Use SharePoint instead of Excel for Business Glossary

Timeline: 4 weeks

Experiment: Replace the Excel Business Glossary with SharePoint for 4 weeks and see if usage improves among Data users.

Responsible: Peter

10 Core Exercises

6. Map

7. Long Term Goal and Key Q's

8. Concept Creation

9. Action Board

10. Storyboard

Not every workshop will need a tool as powerful as the Storyboard, but if you want to get extremely specific on how to execute a chosen concept, then almost nothing can beat it.

This is a slow and painful exercise to bring a team through - but in the end you'll have a level of detail that will allow for any team to execute the results of the workshop immediately.

Only use this if you've got at least 2 hours to spare.

Storyboard

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Between 60 to 200 minutes

Storyboard

1. Timing

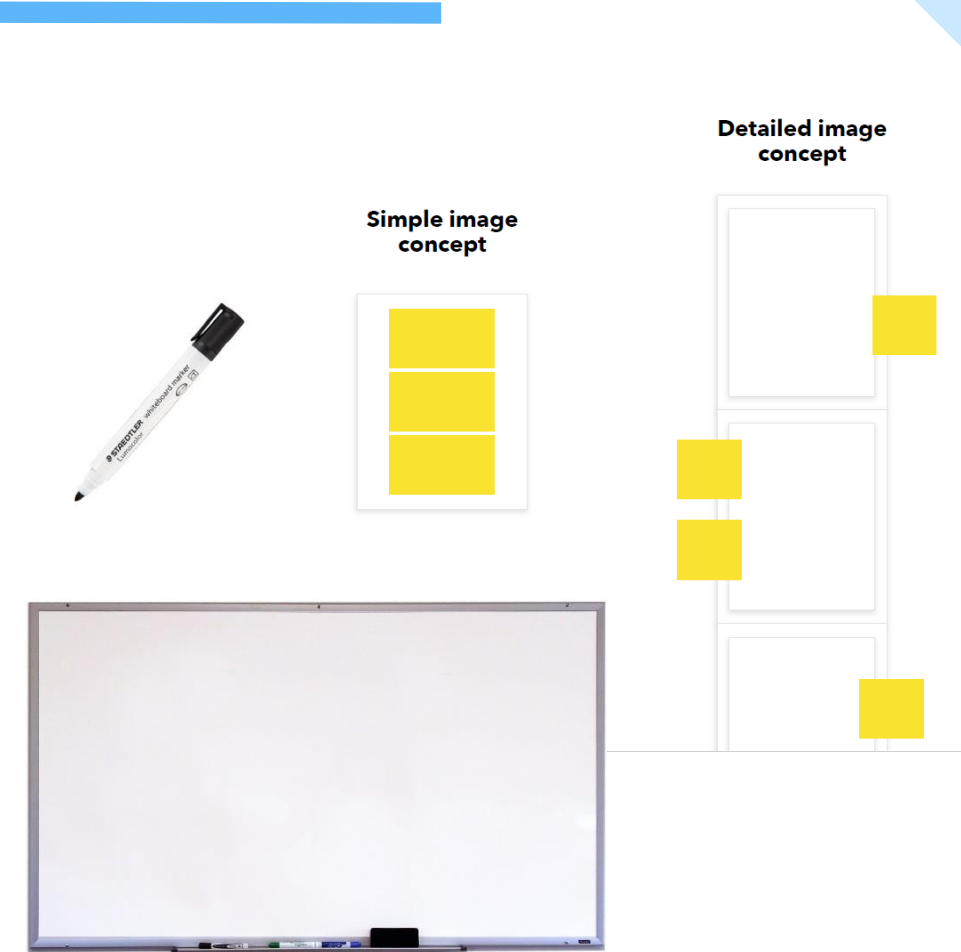
2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Storyboard



Storyboard

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Main goal

- **Create** an extremely clear step-by-step guide that can be turned into something concrete.

When to use?

- Powerful tool if you're going to design a specific process, digital prototype or something concrete.

Storyboard

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

- Storyboarding is one of the most valuable stages of the **design thinking** process.
- Storyboarding is an exercise where you take the broad ideas and concepts created earlier in a workshop and draft a **detailed user flow** in preparation for the development of a high-fidelity process (or prototype).
- It offers an **engaging, visual way** for teams to collaborate when solving problems.

Storyboard

1. Timing

2. What you'll need

3. Main goal & usage

4. Introducing the exercise

5. Flow

Step 1: Creating concepts

- **Timing:** 200 minutes
- A Storyboard generally contains between **8 and 10 boxes** where we draw a user story step-by-step.

Storyboard

The 6 Laws of Master-level Facilitation



Law #1: Be the Guide, not the Hero

Your role as a Workshopper is to help others get to where they need to go in the most efficient and enjoyable way possible.

As Gandalf was the guide to Frodo in The Lord of the Rings, you are the guide to your participants in the workshop.

In your mind, you should always be thinking of ways to make your workshop participants the “heroes” of whatever project you’re facilitating.



Law #1: Be the **Guide**, not the Hero

Tip 1. Don't give advice to your participants

Tip 2. Asking questions and summarizing what participants say

Tip 3. Highlighting individual participants and their wins and contributions

Law #2: Manage Energy Like it's a Delicate, Finite Resource

One of the worst and most common habits of an amateur Workshopper is building and running workshops that leave participants feeling drained rather than energized at the end of the day.

Multiple studies have shown that the average company employee can only stay productive/switched on for 3 hours per day! (2 hours 53 minutes to be exact)



Law #2: Manage Energy Like it's a Delicate, Finite Resource

Tip 1. Be very generous and careful with your schedule

Tip 2. Only 3 hours of your workshop will be productive.

Tip 3. Actually provide a detailed schedule for the day - include all breaks!

Tip 4. Be flexible!

Law #3: Start Strong, End Stronger

There are two phenomena of the human brain that 90% of Workshoppers don't take advantage of: one is called the **Serial-position effect**, the second is the **Peak-end rule**.

In a nutshell: people are going to remember the start of the workshop, the end of the workshop and mayyyybe one high peak in the middle. But that's about all you can hope for.

Start the workshop strong, end the workshop stronger and you'll run more memorable workshops than 90% of people.



Law #3: Start Strong, End Stronger

Tip 1. End with a highlight session

Tip 2. Showing the progress that happened in the workshop

Tip 3. Find the rituals that work for you

Law #4: Set and Get Expectations

Nothing kills a workshop faster than mismanaged expectations. If your client or team are expecting one thing and they get another, then no combination of amazing workshop design and skillful facilitation will fill that gap.

That gap between expectations and reality has to be closed before the workshop starts, and constantly observed during the duration.



Law #4: Set and Get Expectations

Tip 1. Onboard the participants before the workshop starts

Tip 2. In the workshop itself! Set and get expectations

Tip 3. Show people an Emotion Graph of the day

Law #5: Beware of The Curse of Knowledge

The Curse of Knowledge is a cognitive bias that occurs when an individual, communicating with other individuals, unknowingly assumes that the others have the background to understand.

Don't assume that everybody knows what to do. Don't expect that people in the room understand what you mean.



Law #5: Beware of The Curse of Knowledge

Tip 1. Create your workshop with the beginners mindset

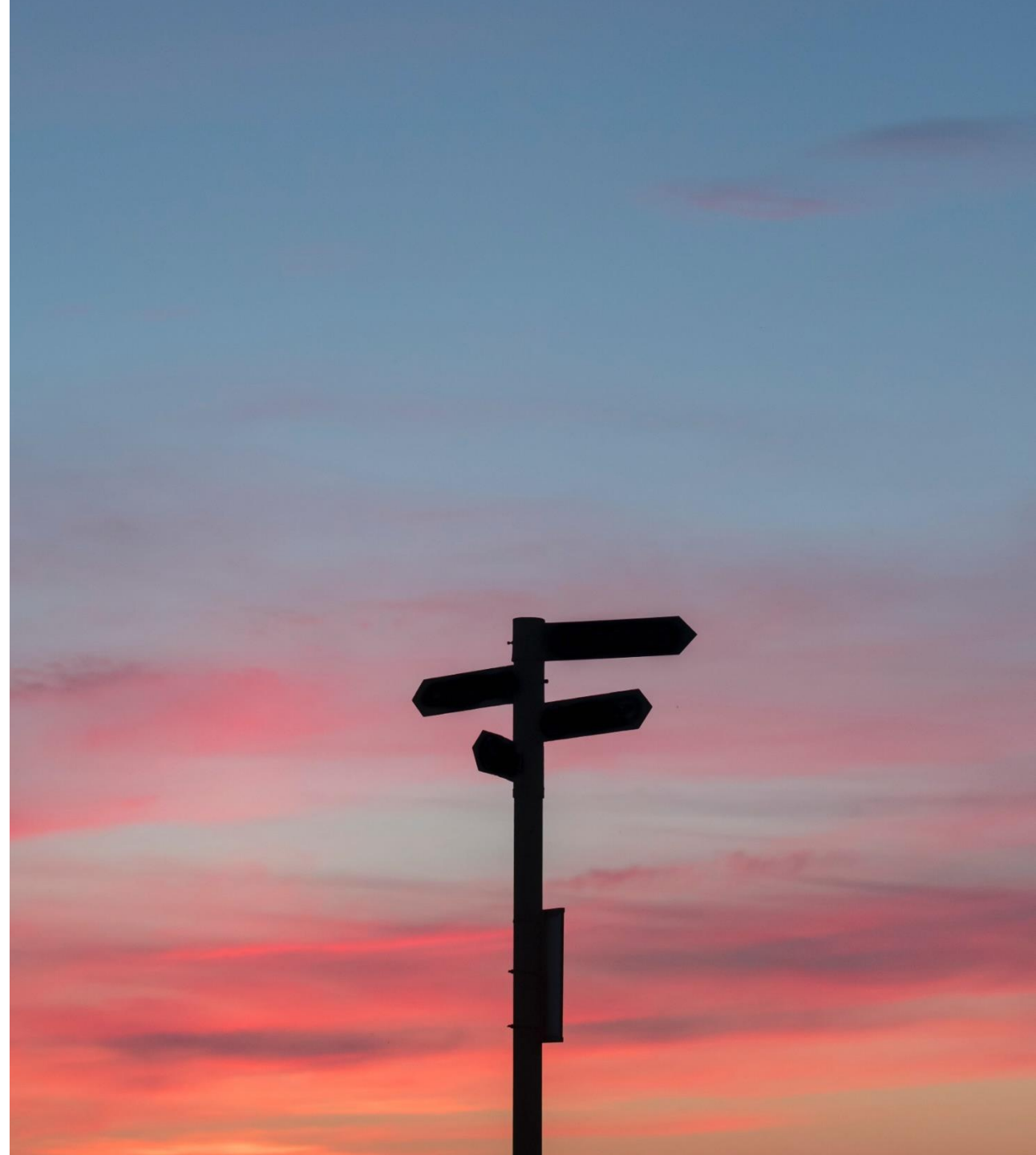
Tip 2. Your participants don't know the big picture of the workshop

Tip 3. Watch your language

Law #6: Improvisation is Key

A great workshopper is a master improviser. They can redesign the workshop on the fly as the goalposts move. They can completely scrap their plans in an instant and mould the experience to whatever the situation needs.

Most importantly: they've mastered the art of Workshopping to the extent that none of this requires a lot of energy. It just happens.



Law #6: Improvisation is Key

Tip 1. Keep your cool

Tip 2. Plan for the worst

Tip 3. Know your exercises

The Art of **Designing** Data Governance Workshops



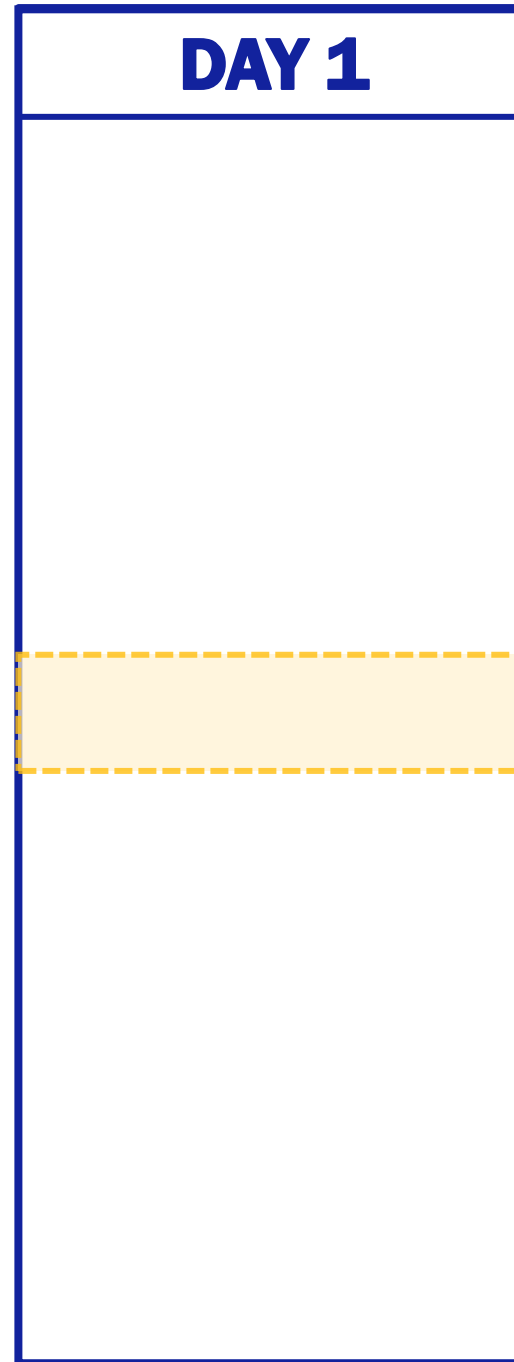
The Workshop Builder Canvas

Top 10 Exercises



End Stronger!

DAY 1



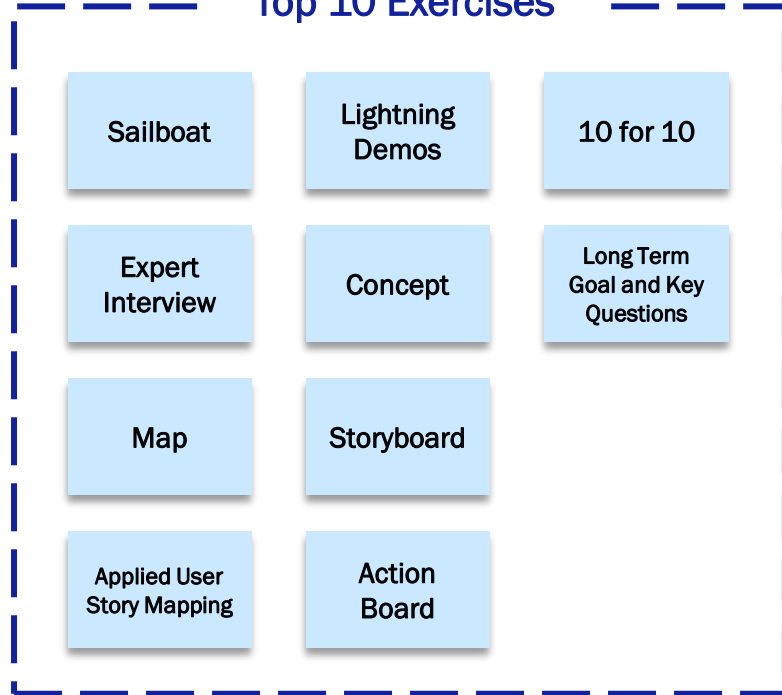
Start Strong!

- COLLECT
- CHOOSE
- CREATE
- COMMIT

FOCUSSED WORK
(3 hours per day, cannot be split)

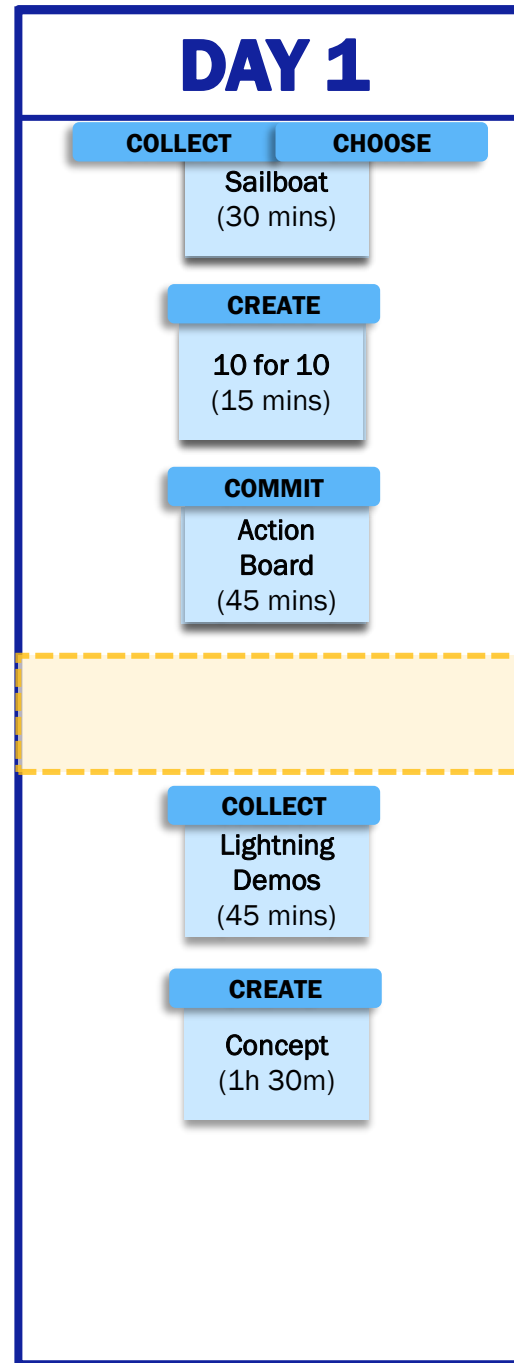
The Workshop Builder Canvas

Top 10 Exercises

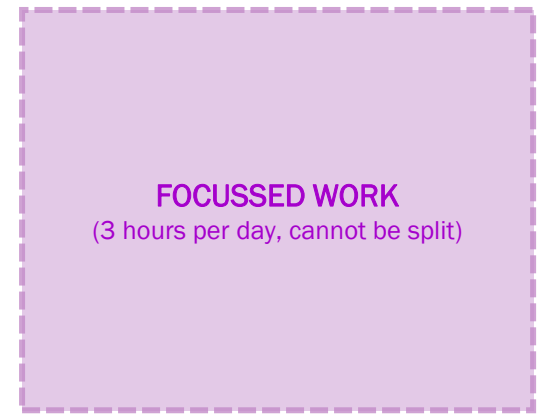


Add Timing

End Stronger!



Start Strong!

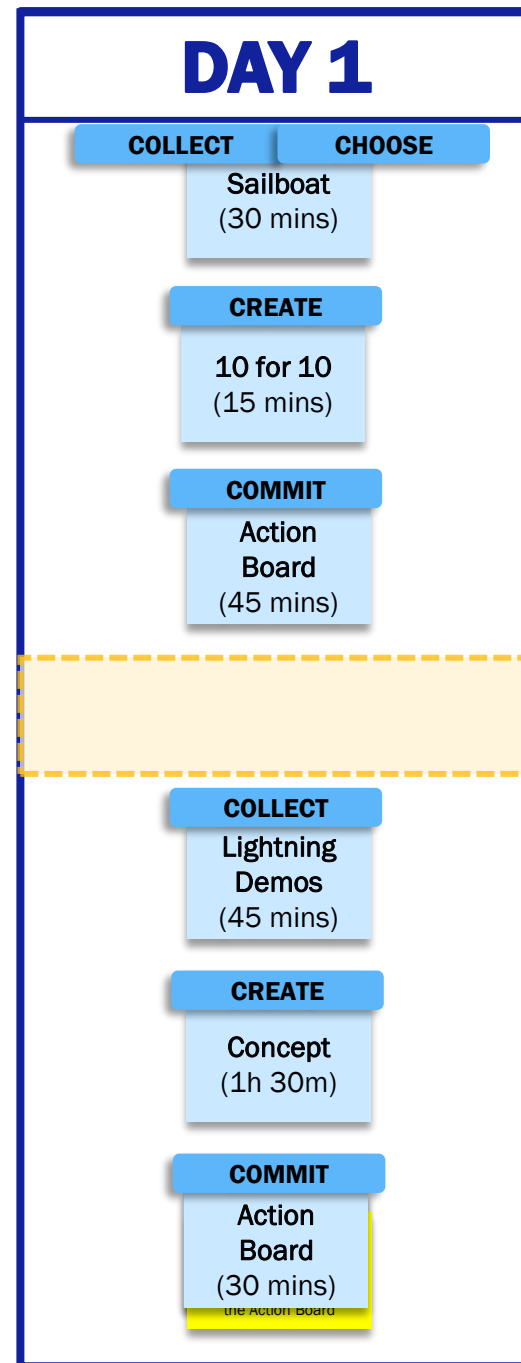


The Workshop Builder Canvas

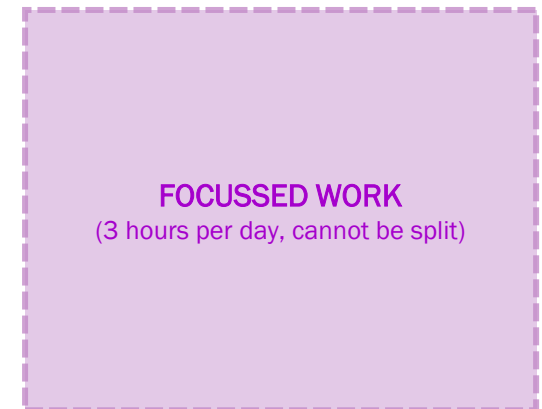


End with Commit

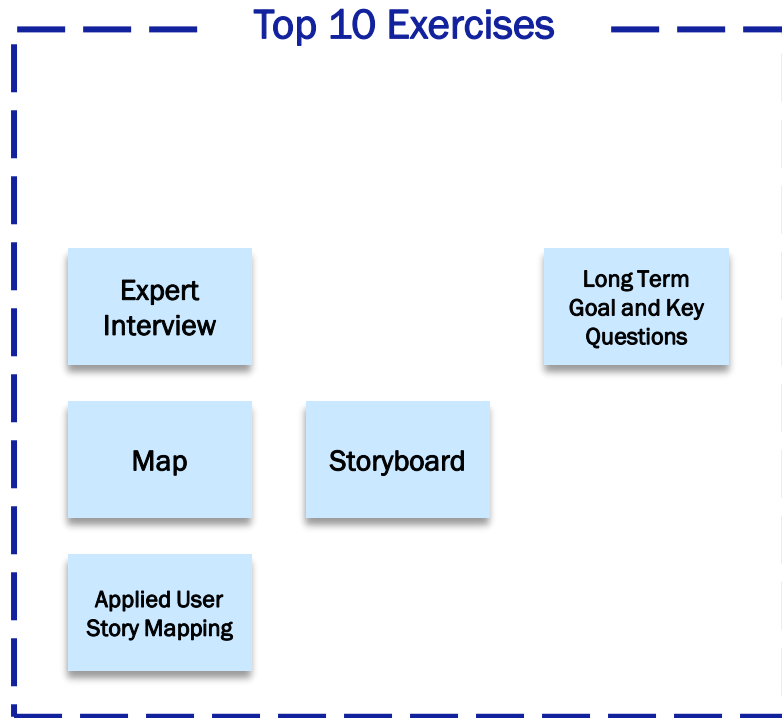
End Stronger!



Start Strong!

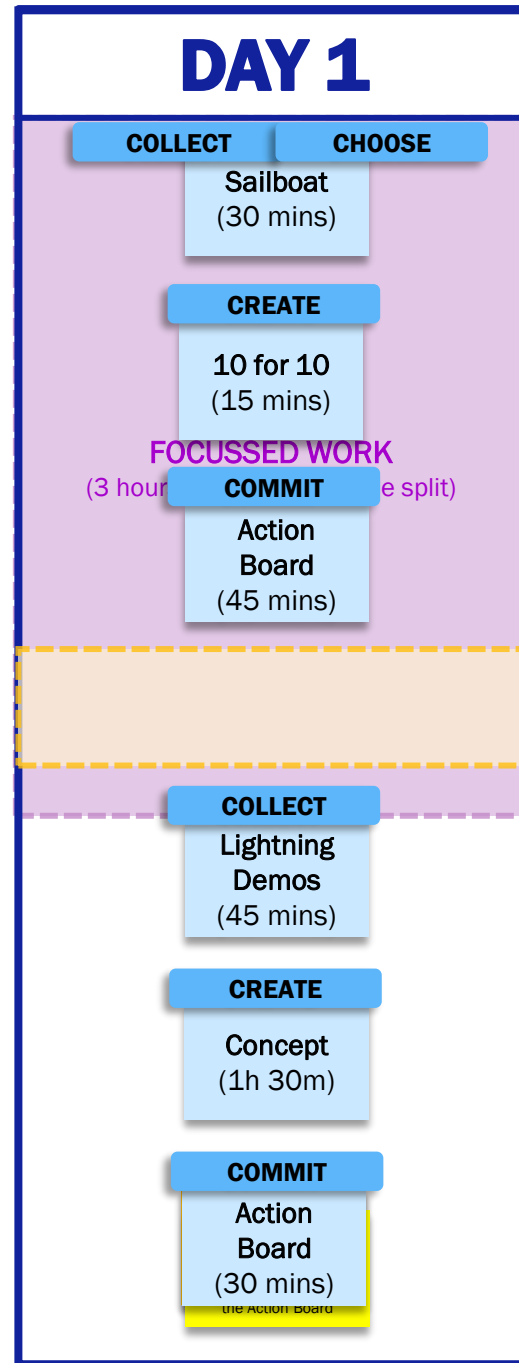


The Workshop Builder Canvas

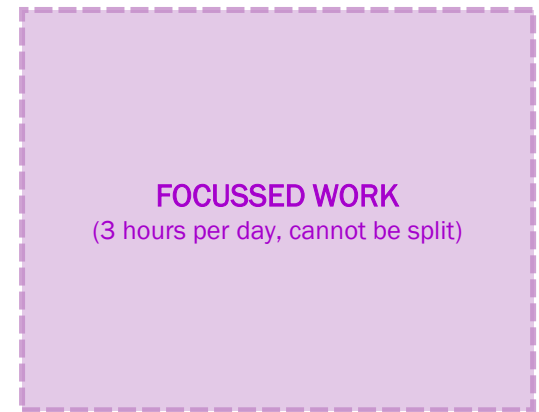


Ensure Focus

End Stronger!



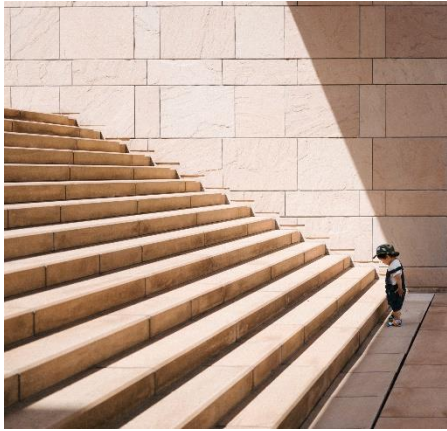
Start Strong!



An aerial photograph of a two-lane asphalt road winding through a dense plantation of palm trees. A single white car is visible on the road, moving from the bottom left towards the top right. The road has white dashed lines in the center and solid lines on the edges. The palm trees are lush green and densely packed.

**Data Governance
Workshops
Master Recipes**

Data Governance Workshops Master Recipes



Challenge 360



Strategy Signal



Plan-O-Rama



LDJ Royale

Master Recipes

1. Challenge 360

2. Strategy Signal

3. Plan-O-Rama

4. LDJ Royal

“Challenge 360” helps to align a team on WHAT exactly to work on/solve and what to ignore for now.

Challenge 360

1. Timing

2. Main goal & usage

3. Flow

Is 4 hour long, so it's a 1-day workshop

Challenge 360

1. Timing

2. Main goal & usage

3. Flow

Main goal

- To help align a team on what exactly to work on, what they should be solving, and what things to ignore for now.

Issues/Questions this workshop can be used for:

- What's the real challenge?
- What should we do?
- We don't know where to start
- Everyone has a different idea of what to do next
- We're confused
- We don't know what the challenge is (can't articulate it)
- Are we all aligned on the challenge?
- Why is this worth solving?
- What issues could come up while trying to solve this problem?

Challenge 360

1. Timing

2. Main goal & usage

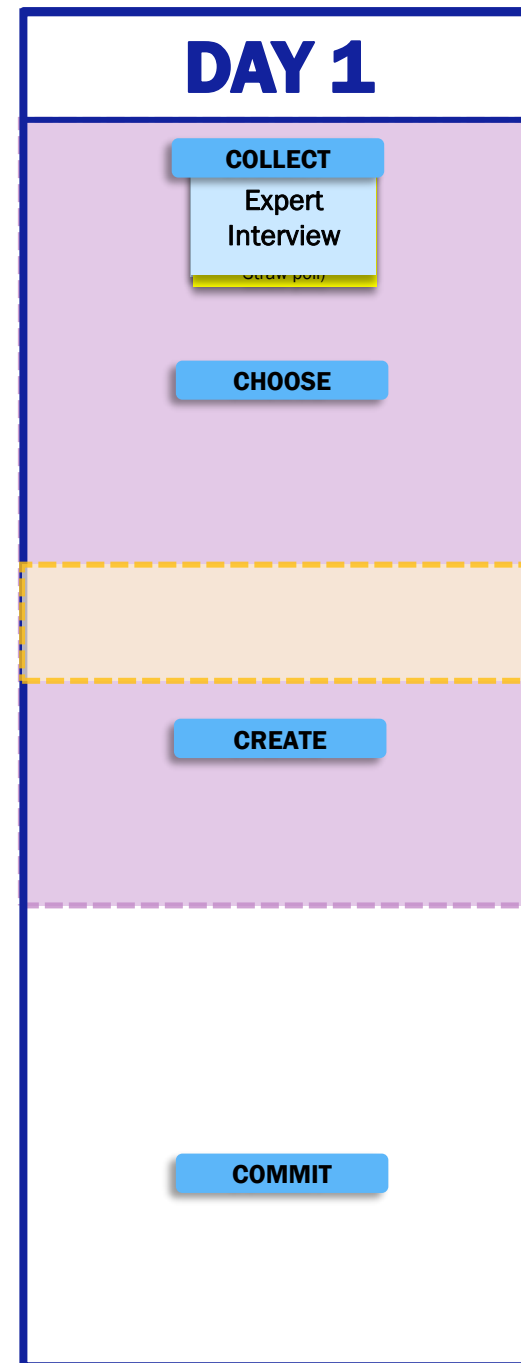
3. Flow

Exercise 1: Expert Interview

- **Timing:** Up to 45 minutes
- Ask everybody: What do you think we should be solving?
- **2 layers of voting:** Heatmap followed by Strawpoll vote

Challenge
360

End Stronger!



Start Strong!

MV HMW
Increase the data quality of our monthly report?

Challenge 360

1. Timing

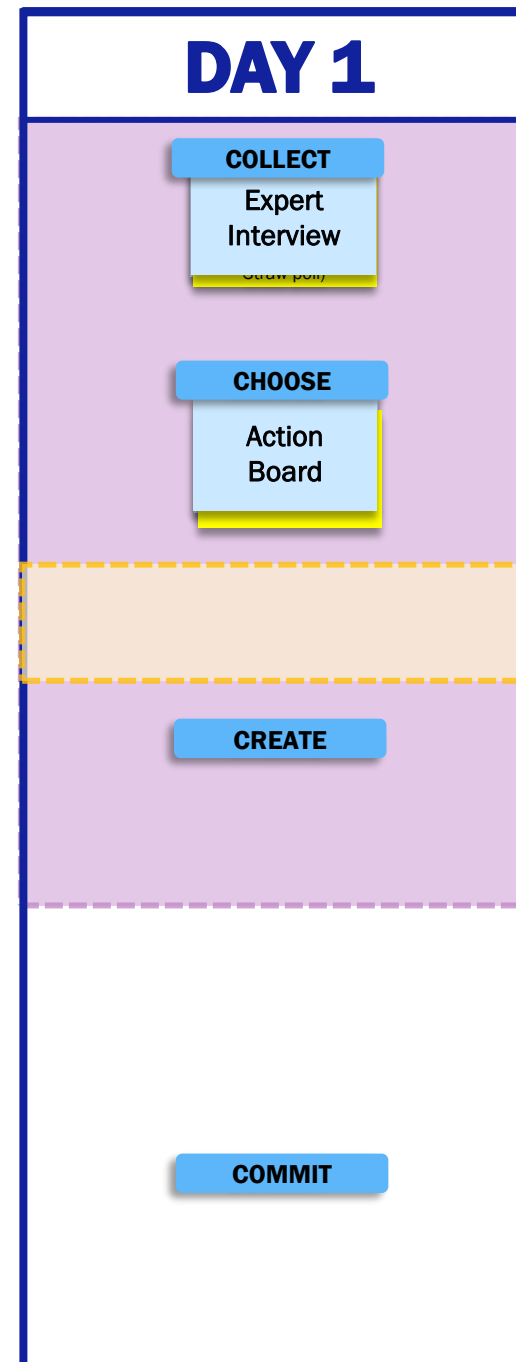
2. Main goal & usage

3. Flow

Exercise 2: Action Board

- **Simple version:** we leave out “Effort”(X-axis). Only include “Impact” (Y-axis).
- Take first the Strawpoll voted HMW.
- Next, add some non-Strawpoll voted HMW as well.

End Stronger!



Start Strong!

IMPACT
Most

HMW

HMW

HMW

HMW

Least

Challenge
360

Challenge 360

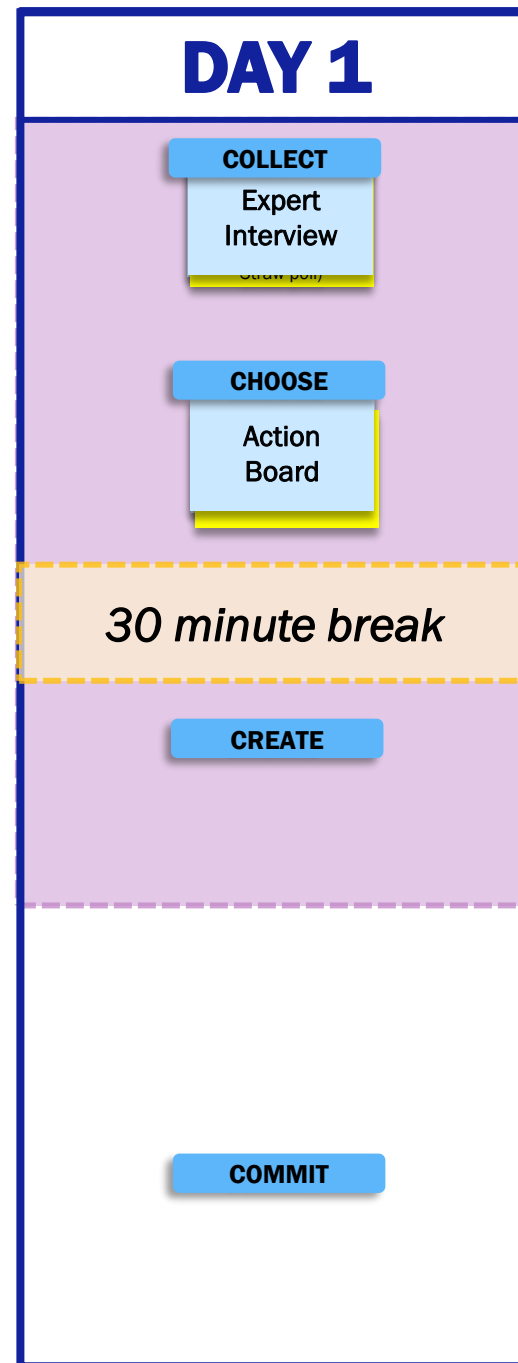
1. Timing

2. Main goal & usage

3. Flow

Challenge
360

End Stronger!



Start Strong!

Challenge 360

1. Timing

2. Main goal & usage

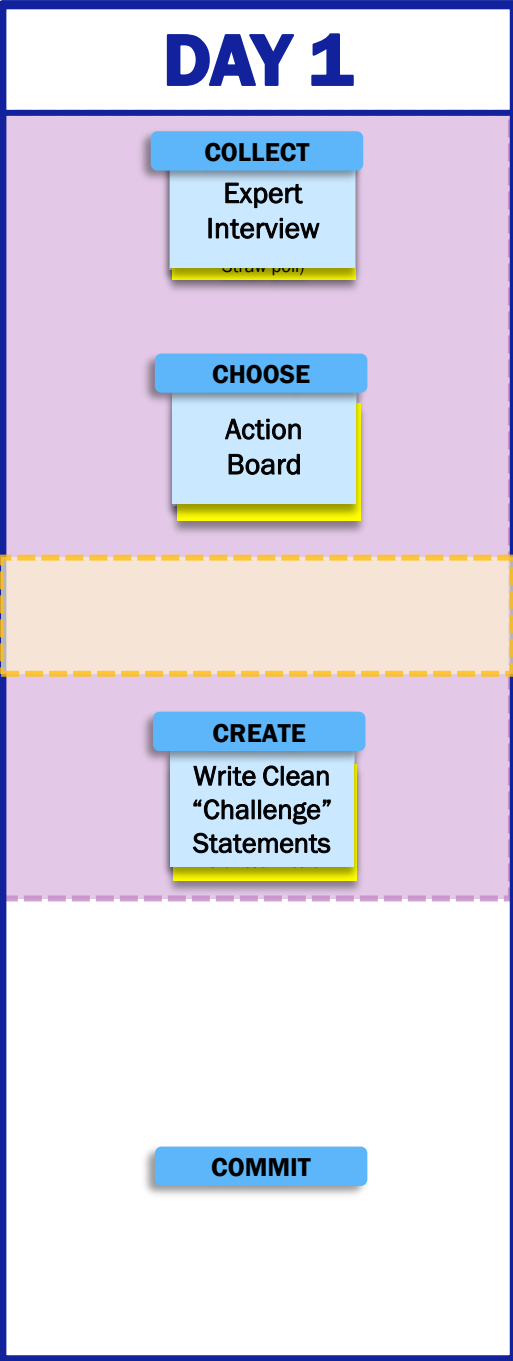
3. Flow

Exercise 3: Create a Clean "Challenge" Statement

- Select which challenge really represents where we want to go.
- If you are not able to come to it yourself, you can do it through voting.

Challenge 360

End Stronger!



Start Strong!

HMW

Increase data quality at ACME?

Challenge 360

1. Timing

2. Main goal & usage

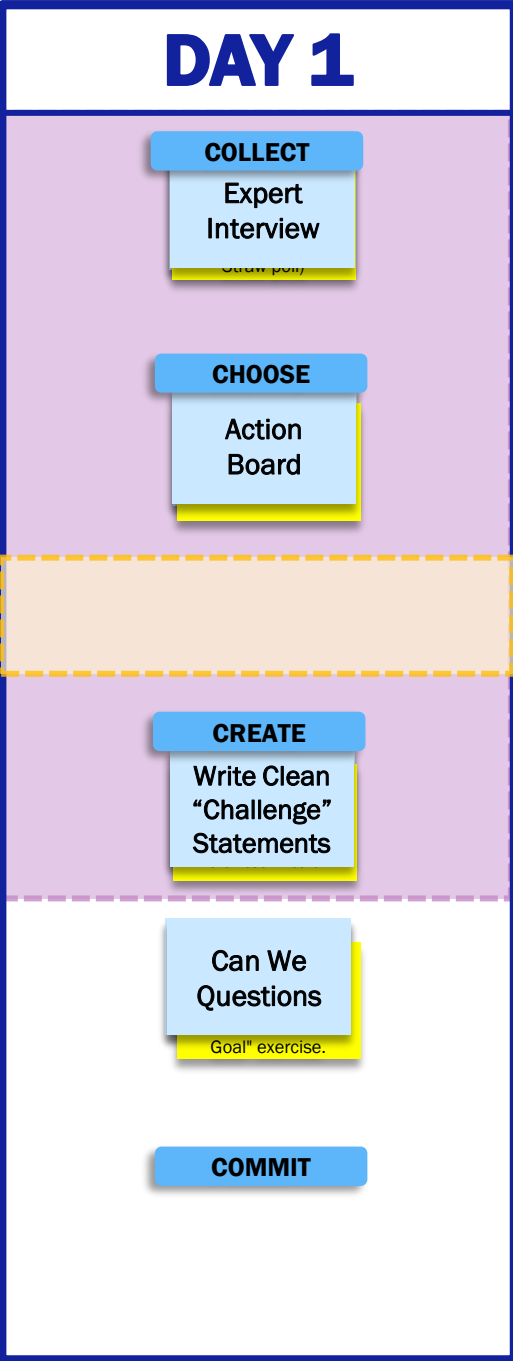
3. Flow

Exercise 4: Can We Questions

- Create "Can We Questions" based on "What things might stop us from solving this challenge."
- Vote as described in the "Long Term Goal" exercise.

Challenge 360

End Stronger!



Start Strong!

HMW
Increase data quality at ACME?

Can We
What types of things could stop us from solving a challenge like this?

Challenge 360

1. Timing

2. Main goal & usage

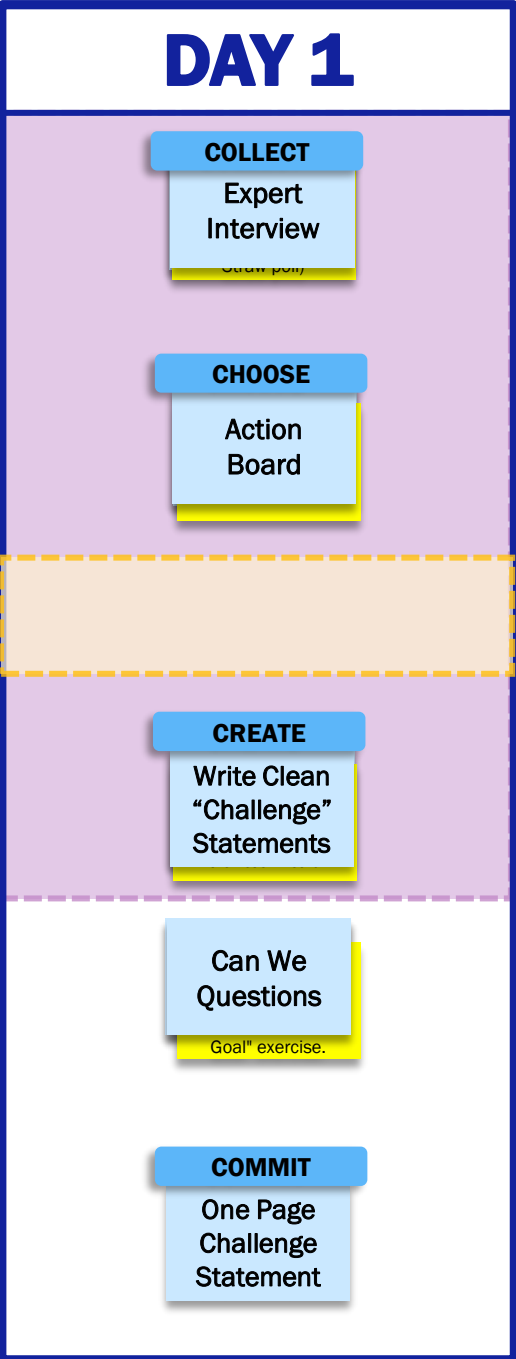
3. Flow

Exercise 5: One Page Challenge Statement

- Goal is getting this all on 1-page.

Challenge 360

End Stronger!



Start Strong!

HMW

Increase Data Quality at ACME?

Can We

- Streamline our data management processes to increase data inaccuracy?
- Adopt robust data quality management tools and techniques?
- Demonstrate the tangible benefits of data quality to our stakeholders?
- ...

Master Recipes

1. Challenge 360

2. Strategy Signal

3. Plan-O-Rama

4. LDJ Royal

“Strategy Signal” helps a team define an ‘End Goal’ and a strategy for solving selected challenges.

Strategy Signal

1. Timing

2. Main goal & usage

3. Flow

A simple 2 half-day workshop.

Strategy Signal

1. Timing

2. Main goal & usage

3. Flow

Main goal

- To help align a team on where they are going, what their vision is, and how they are going to get there.

Issues/Questions this workshop can be used for:

- What's the goal?
- Where are we going as a company?
- What does success look like?
- What's the 'big picture' here?
- What's the actual 'end point' of what we're trying to do here?
- How will we actually get to our goal?
- What's the big overarching focus of this company/team?
- In what order will we actually do things?
- What are the big projects and big initiatives that we need to run this year/quarter?

Strategy Signal

1. Timing

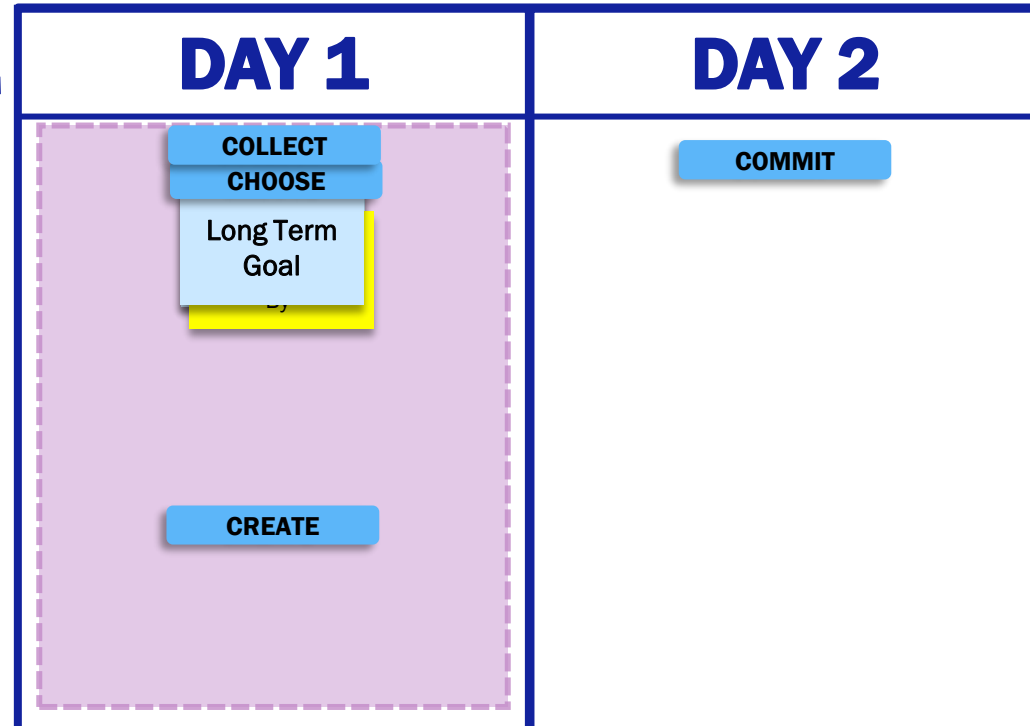
2. Main goal & usage

3. Flow

Exercise 1: Long Term Goal

- Start with the 2-year goal.
- Skip the “Can We” questions, instead add a metric "As Measured By".

Start Strong!



End Stronger!

Strategy Signal

1. Timing

2. Main goal & usage

3. Flow

Exercise 1: Long Term Goal

- Start with the 2-year goal.
- Skip the “Can We” questions, instead add a metric "As Measured By".

IN 2 YEARS TIME

We will have embedded a culture of data stewardship in our company.

As measured by

Having established an active data steward community.

Strategy Signal

1. Timing

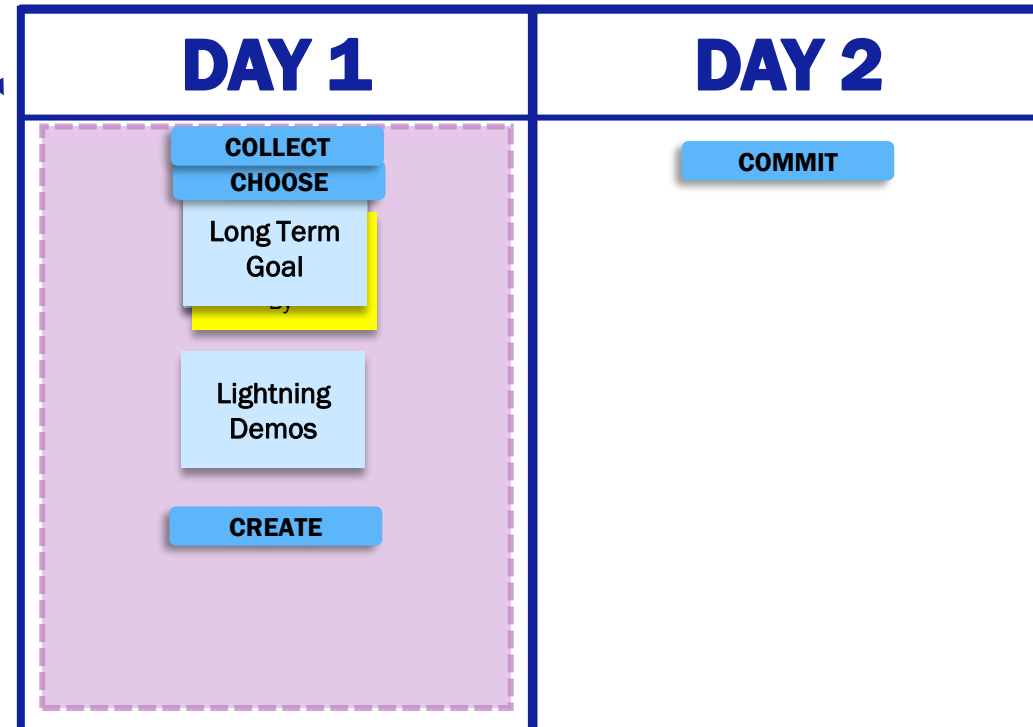
2. Main goal & usage

3. Flow

Exercise 2: Lightning Demos

- Based on the Long Term Goal.
- Let's show some examples and get the inspiration going.
- Take a 15 minute break afterwards.

Start Strong!



End Stronger!

Strategy Signal

1. Timing

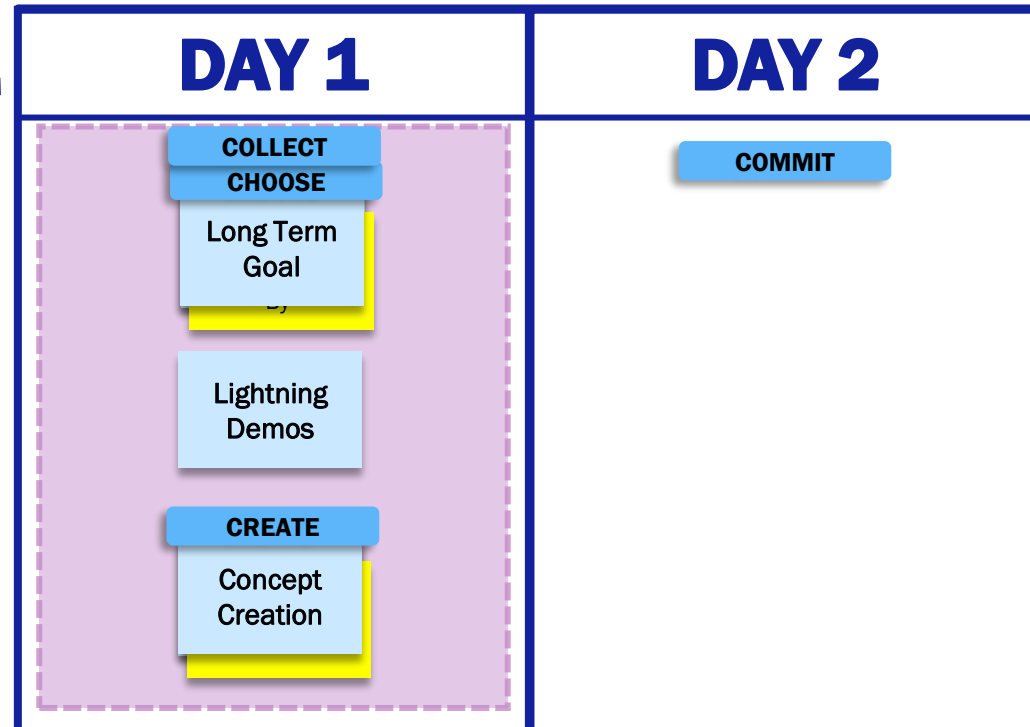
2. Main goal & usage

3. Flow

Exercise 3: Concept Creation

- Use the concept style format to do this exercise.
- The **concept style** here is more about writing down the strategy rather than drawing it.
- If you have time, participants could create more than one concept (2 or 3 would be perfect).

Start Strong!



End Stronger!

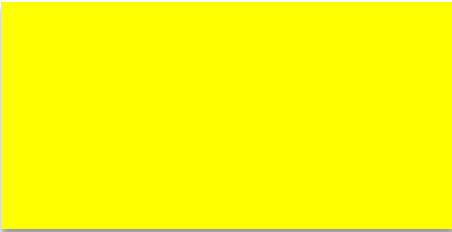
Strategy Signal

Concept Creation

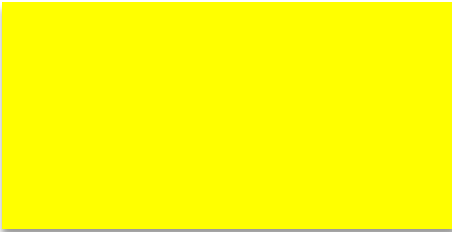


Catchy Title

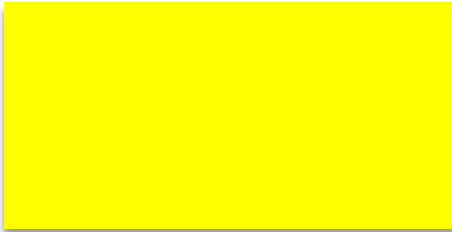
The Big Idea!



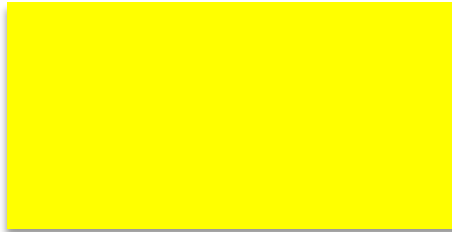
- 1. Customer
- 2. Primary use case
- 3. How does the idea service the use case?



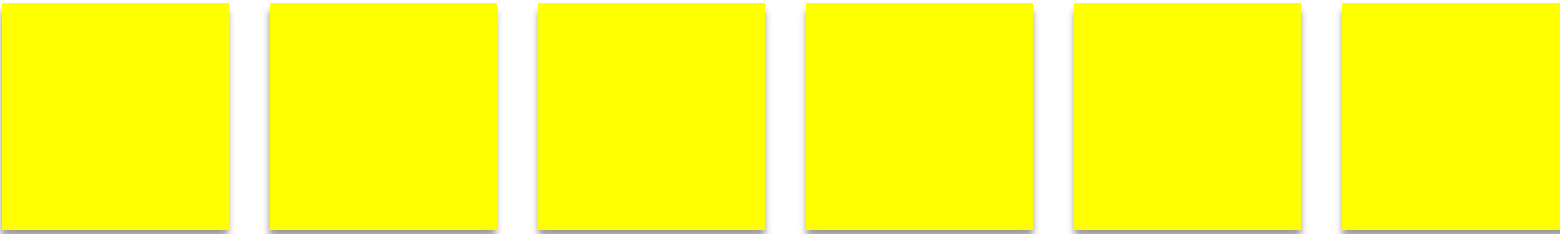
How does this concept specifically address the long-term goal, metric or Can We questions?



What additional information is needed to pursue this idea? Where can it be sourced and how?



Customer Journey Steps
(Start with 1 & 6)



Strategy Signal

Concept Creation

Data Steward Community

Catchy Title

The Big Idea!

Launch a data steward community for all our data stewards. Then create a competition (hackathon) to invest in ideas that align with the 2-year goal.

- 1. Customer
- 2. Primary use case
- 3. How does the idea service the use case?

- 1. Data Stewards
- 2. Foster a culture of data stewardship through the establishment of a community.
- 3. Providing a platform for collaboration, knowledge sharing, and idea generation. The hackathon further stimulates innovation and engagement.

How does this concept specifically address the long-term goal, metric or Can We questions?

It helps us create an engaging environment that promotes data stewardship. The active participation in the community and hackathon serves as a measurable metric.

What additional information is needed to pursue this idea? Where can it be sourced and how?

We need to have an understanding of the current level of DS engagement (surveys?). And we need to identify potential leaders for the community.

Customer Journey Steps
(Start with 1 & 6)

Create an online community that allows idea submissions

Translate the 2-year goal and challenges into community content

Look for inspirational stories to present in the community

Look for partners to share their existing experiences in the community

Look for a partner(s) to support the evaluation process

Invest in developing the chosen solution

Strategy Signal

Strategy Signal

1. Timing

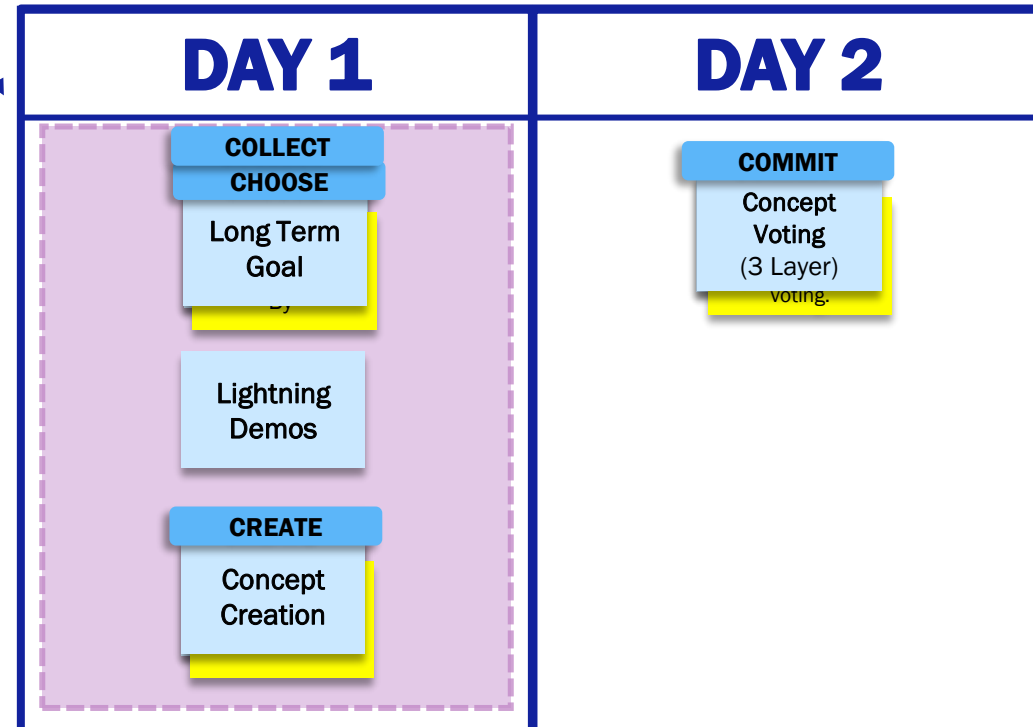
2. Main goal & usage

3. Flow

Exercise 4: Concept Creation

- Vote on 3 to 4 concepts at least.
- Use multi-layered voting: Heatmap, Straw Poll, Decider Vote.
- The Decider is chosen interesting concepts that they think would work to move the company towards that Long Term Goal.

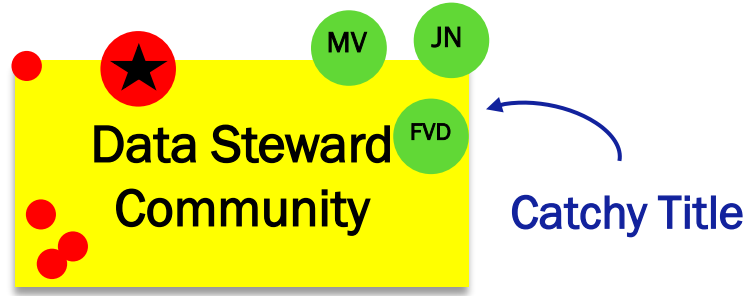
Start Strong!



End Stronger!

Strategy Signal

Concept Creation



The Big Idea!

Launch a data steward community for all our data stewards. Then create a competition (hackathon) to invest in ideas that align with the 2-year goal.

1. Customer
2. Primary use case
3. How does the idea service the use case?

1. Data Stewards
2. Foster a culture of data stewardship through the establishment of a community.
3. Providing a platform for collaboration, knowledge sharing, and idea generation. The hackathon further stimulates innovation and engagement.

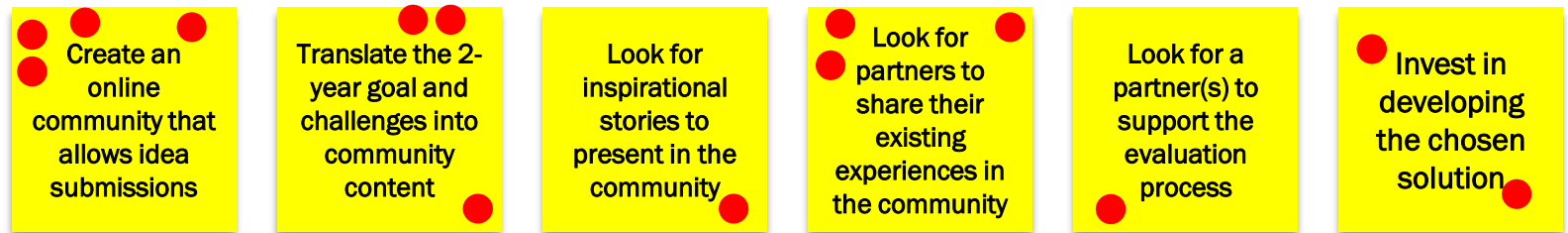
How does this concept specifically address the long-term goal, metric or Can We questions?

It helps us create an engaging environment that promotes data stewardship. The active participation in the community and hackathon serves as a measurable metric.

What additional information is needed to pursue this idea? Where can it be sourced and how?

We need to have an understanding of the current level of DS engagement (surveys?). And we need to identify potential leaders for the community.

Customer Journey Steps (Start with 1 & 6)



Strategy Signal

Strategy Signal

1. Timing

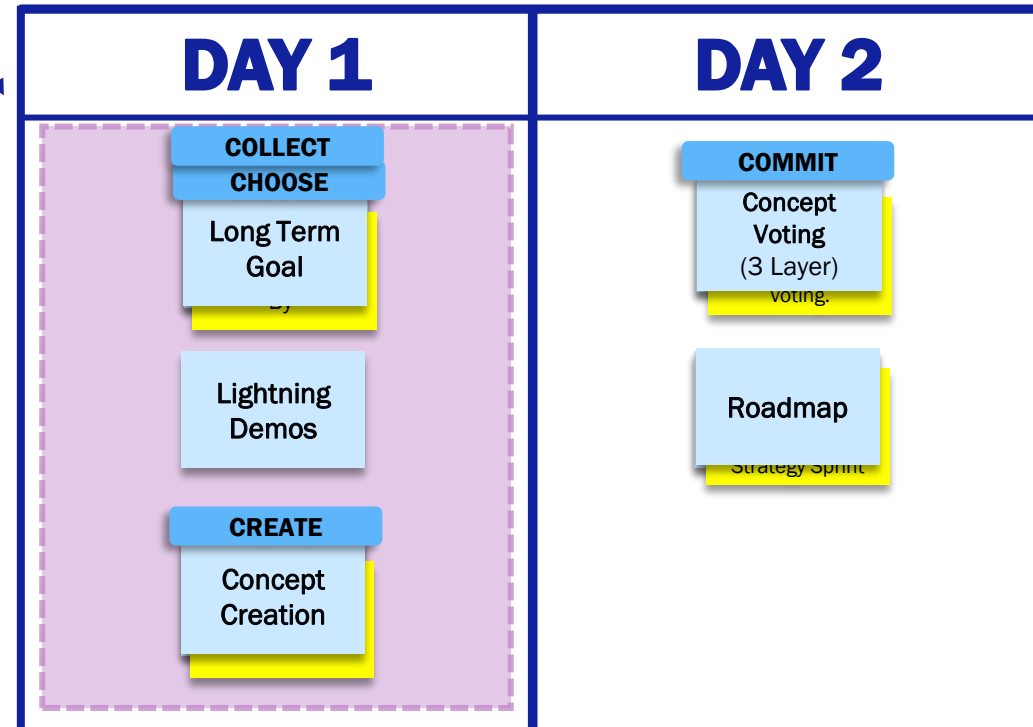
2. Main goal & usage

3. Flow

Exercise 5: Roadmap

- First draw out a roadmap, depending on the timeline.
- Keep the roadmap super simple!
- Stick the concepts on the roadmap considering when the participants are going to try these concepts.

Start Strong!

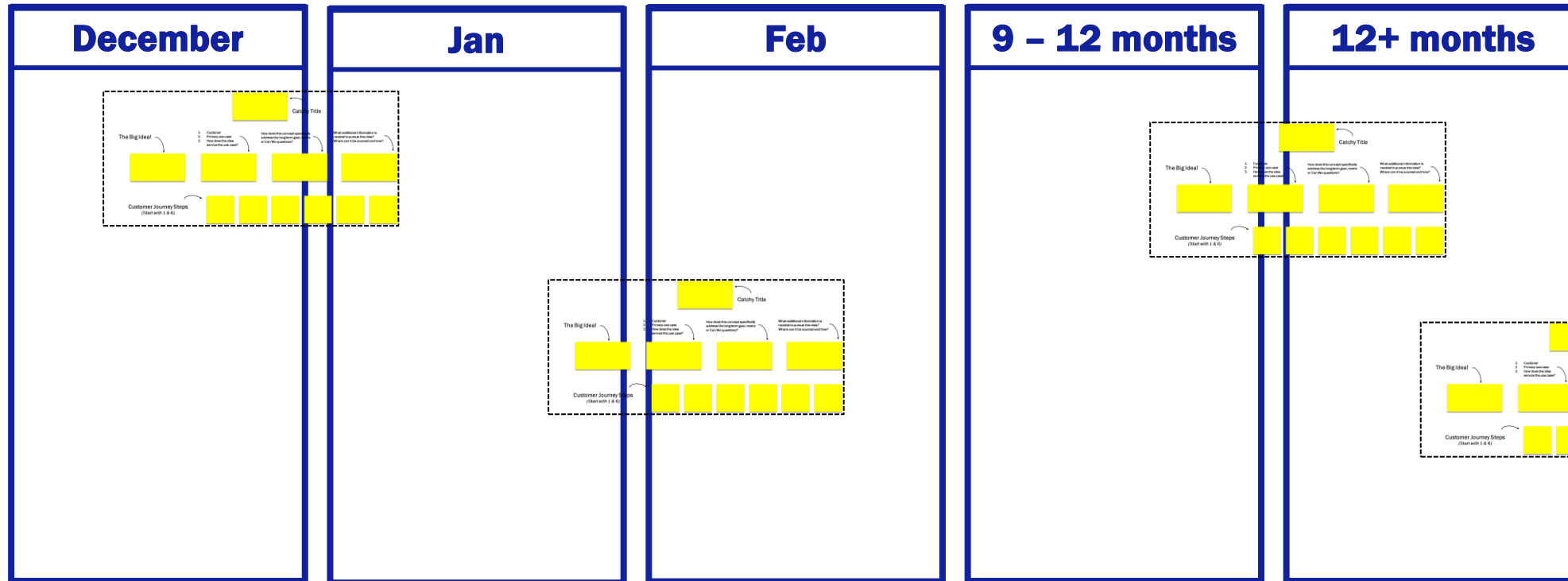


End Stronger!

Strategy Signal

Roadmap

Simple Roadmap



Strategy Signal

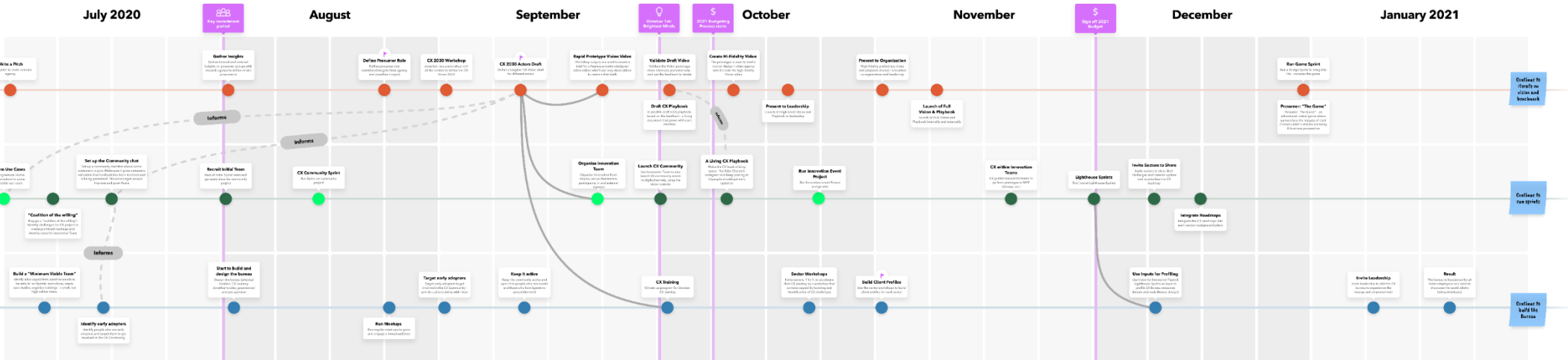
Roadmap

Fancy Roadmap

The vision and the benchmark

We go viral

Delivering the change



Strategy Signal

Master Recipes

1. Challenge 360

2. Strategy Signal

3. Plan-O-Rama

4. LDJ Royal

“Plan-O-Rama” helps a team execute their strategy.

Plan-O-Rama

1. Timing

2. Main goal & usage

3. Flow

Takes 2 to 3 hours.

Plan-O-Rama

1. Timing

2. Main goal & usage

3. Flow

Main goal

- To help a team figure out what are the steps involved to actually execute a strategy or a project, and who should do what.

Issues/Questions this workshop can be used for:

- What are the exact steps we need to do to make a project happen?
- What do we need to do right away?
- How do these things fit on a time line?
- Who needs to actually do this specific task?
- What are the deadlines?
- What are the deliverables?
- How do we get this DONE?
- What are the tasks?
- What are all the things we need to do?
- When do these things need to happen?
- Who is going to do these tasks?

Plan-O-Rama

1. Timing

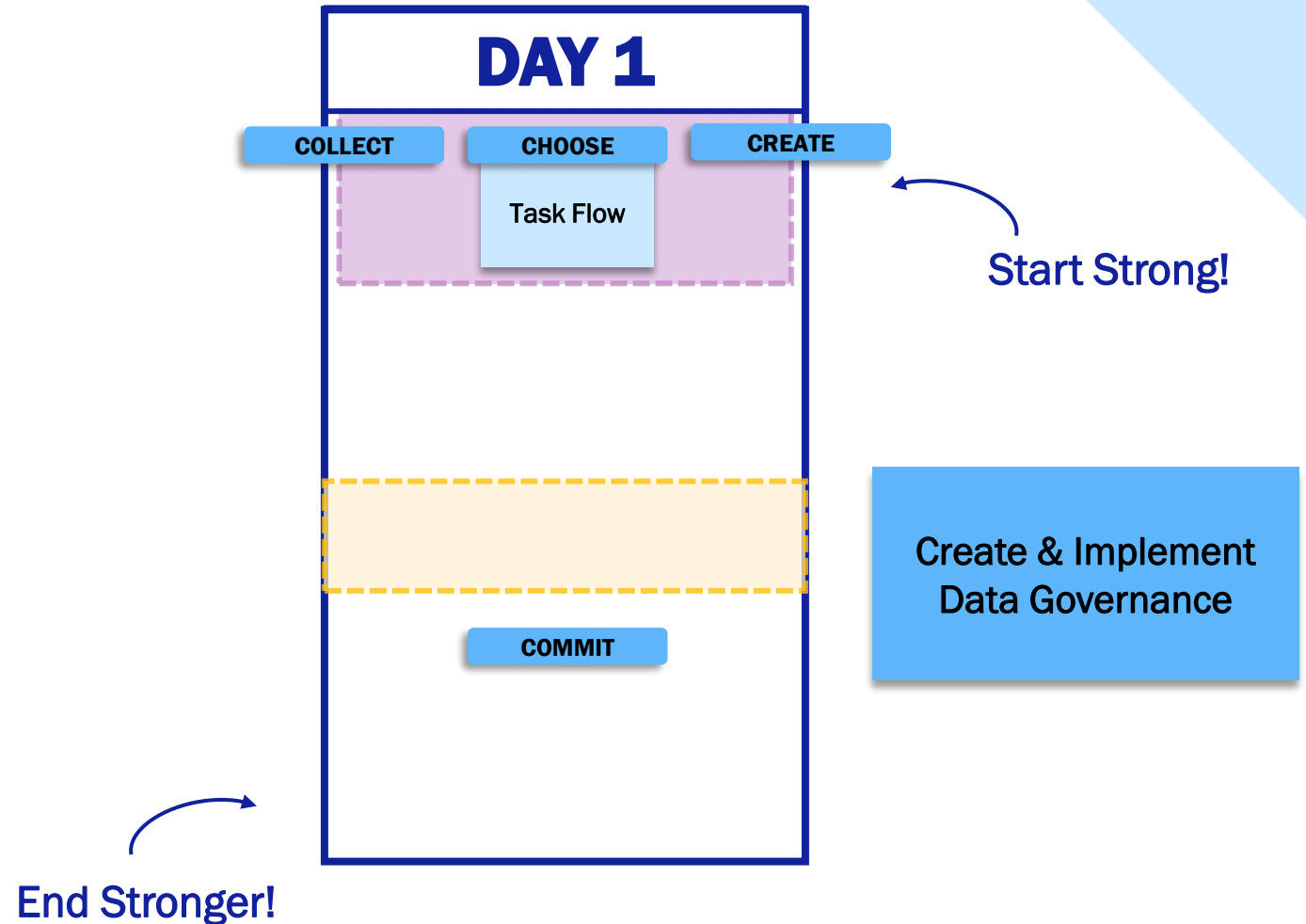
2. Main goal & usage

3. Flow

Exercise 1: Task Flow

- This is a combo of collect-choose-create, it's a custom exercise derived from User Test Flow (Design Sprint).
- Ask the participants what they think is every single step that should be done to make the challenge/project happen.
- Make them write it down on a sticky note, and stick it on a horizontal line.

Plan-O-Rama



Task Flow

Create & Implement Data Governance

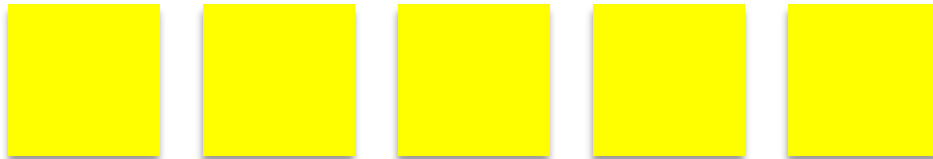
Decide on this 1st

Fill this 2nd

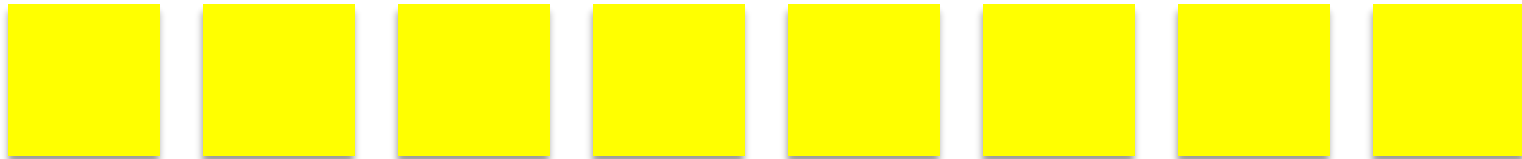
Mathias



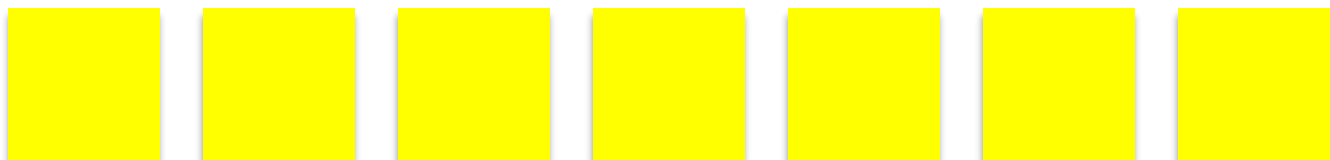
Jess



Brian



Liz



Plan-O-Rama

Plan-O-Rama

1. Timing

2. Main goal & usage

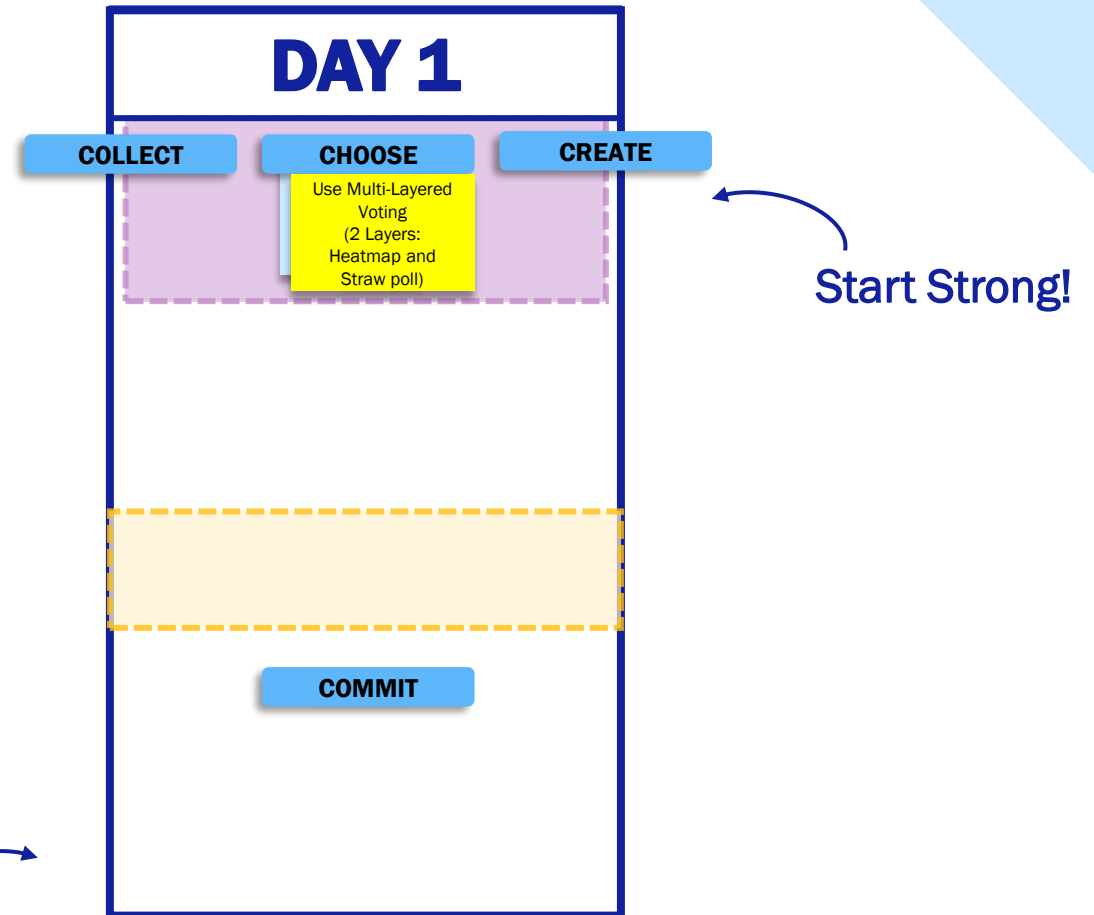
3. Flow

Exercise 1: Task Flow

- Everybody gets 1 voting dot and needs to vote on the one flow that encompasses it all.
- Then, the Decider then decides which Task Flow is most complete, but they can also choose post-it from other flows. You can give the Decider as many as dots if needed.

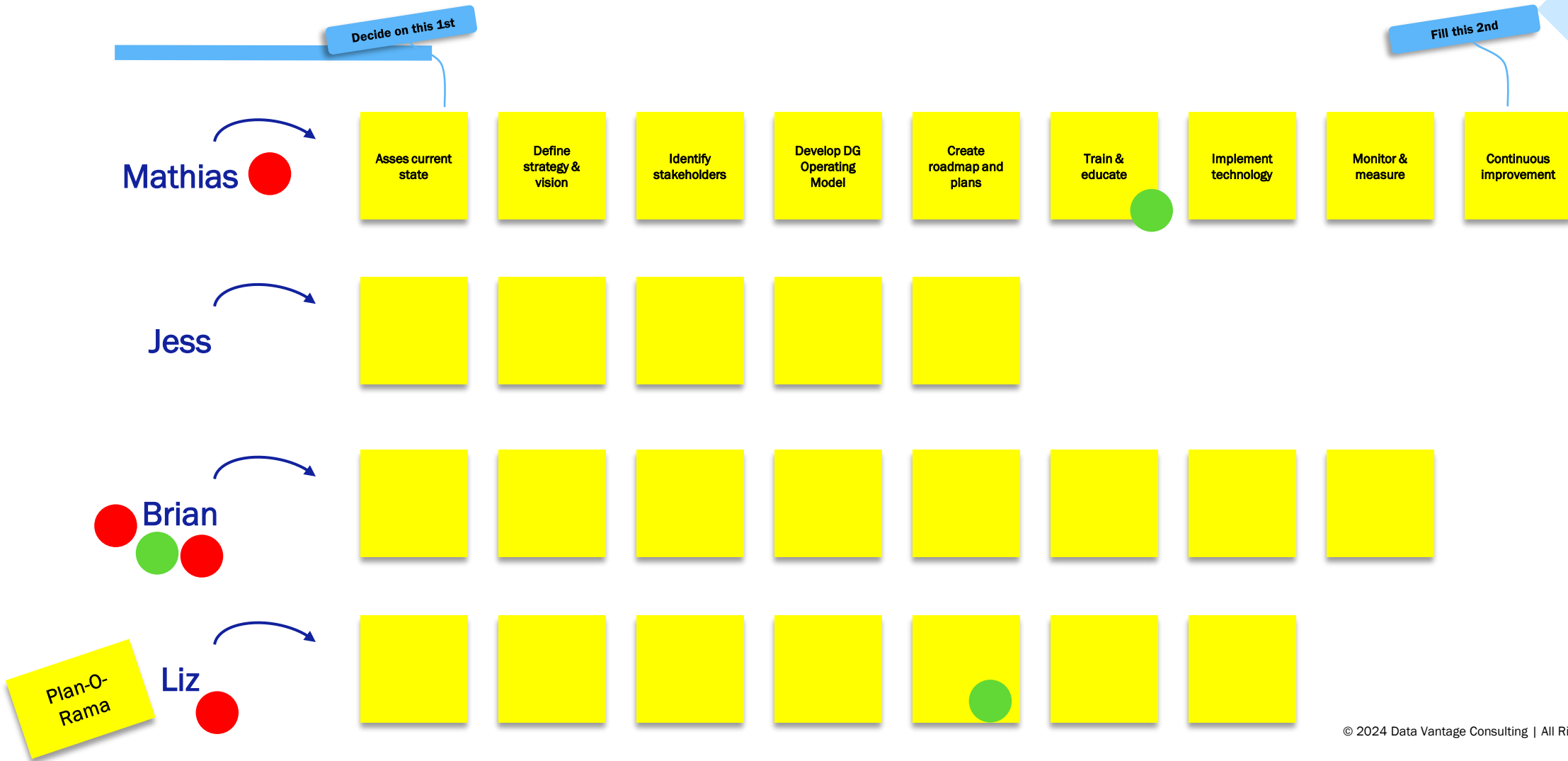
Plan-O-Rama

End Stronger!



Task Flow

Create & Implement Data Governance



Plan-O-Rama

1. Timing

2. Main goal & usage

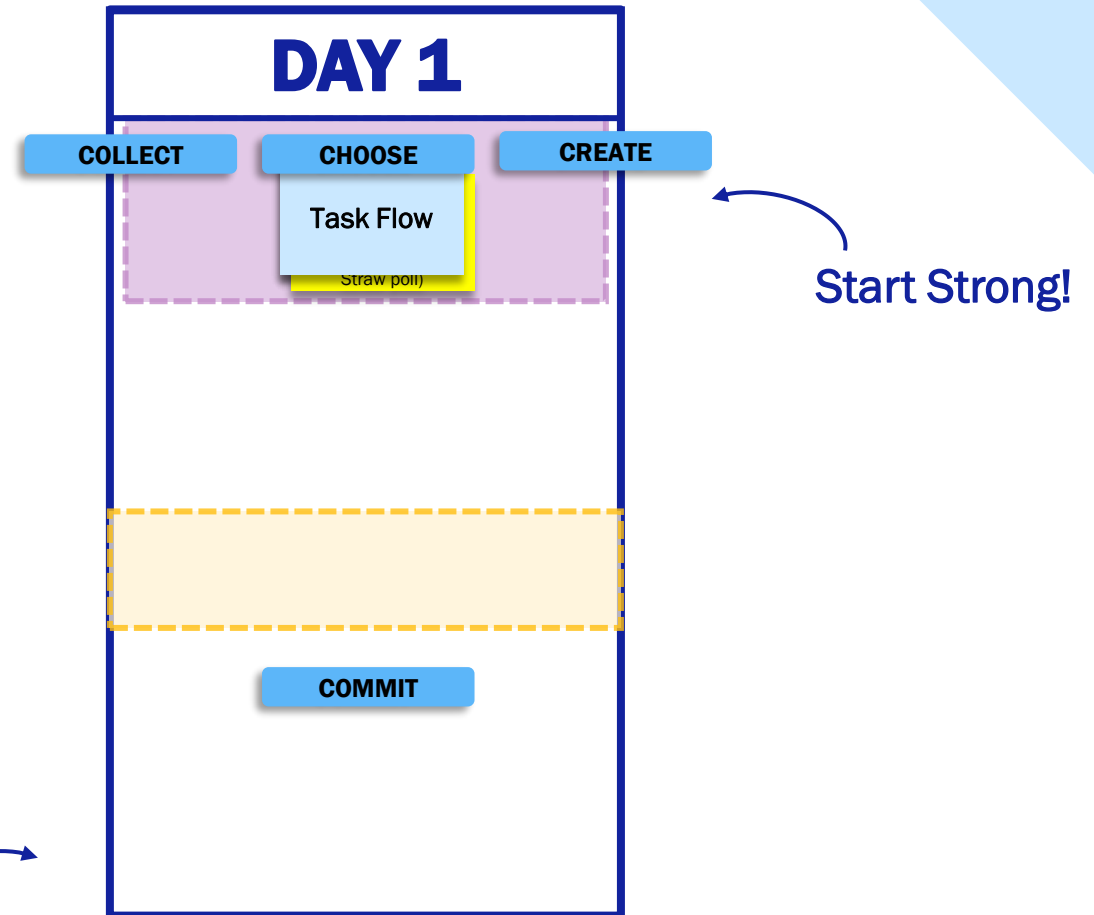
3. Flow

Exercise 1: Task Flow

- Finally, the participants need to decide on the start date and end date and fill in the in between steps and deadlines. Basically creating some kind of a timeline.

Plan-O-Rama

End Stronger!



Task Flow

Create & Implement Data Governance



Plan-O-Rama

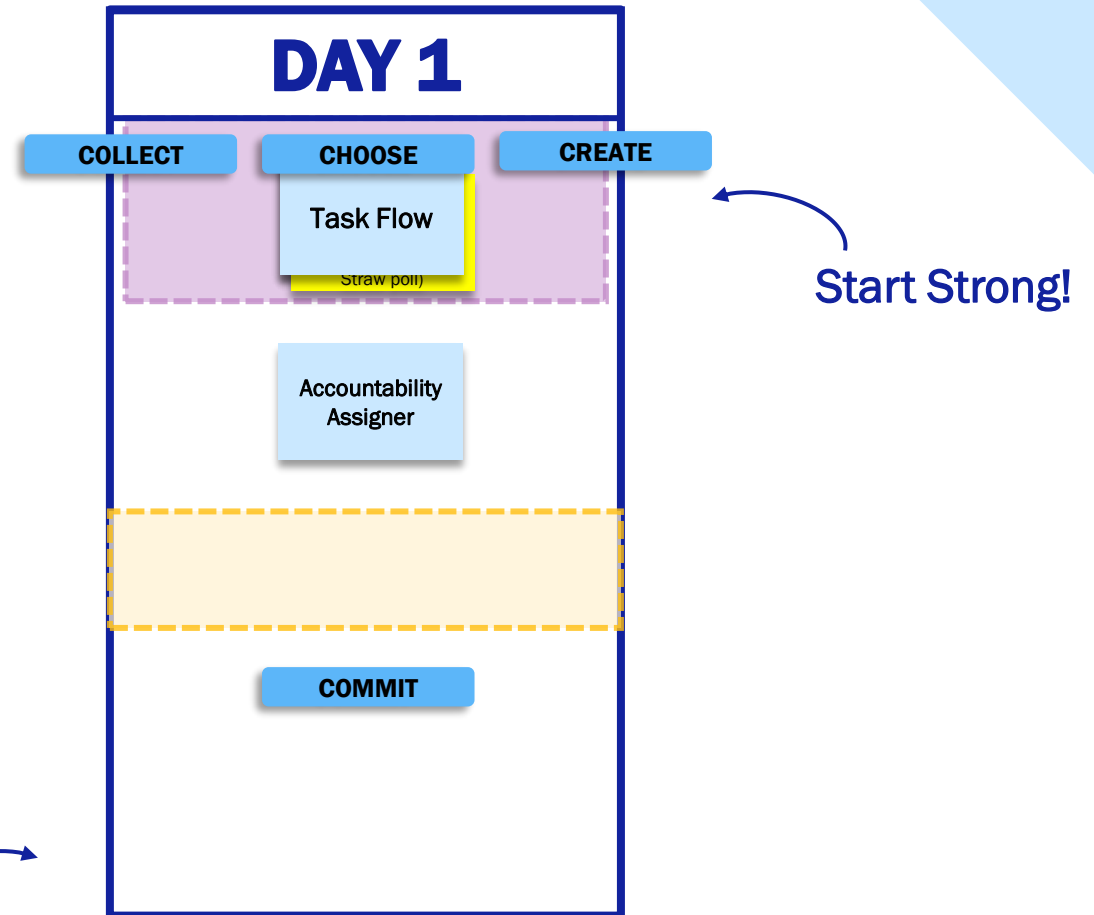
1. Timing

2. Main goal & usage

3. Flow

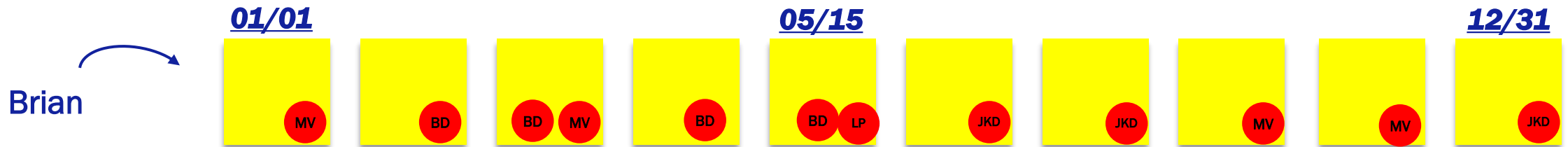
Exercise 2: Accountability Assigner

- Ask people to assign tasks to themselves with a dot with their initials on.
- Some steps can have multiple people assigned.



Task Flow

Create & Implement
Data Governance



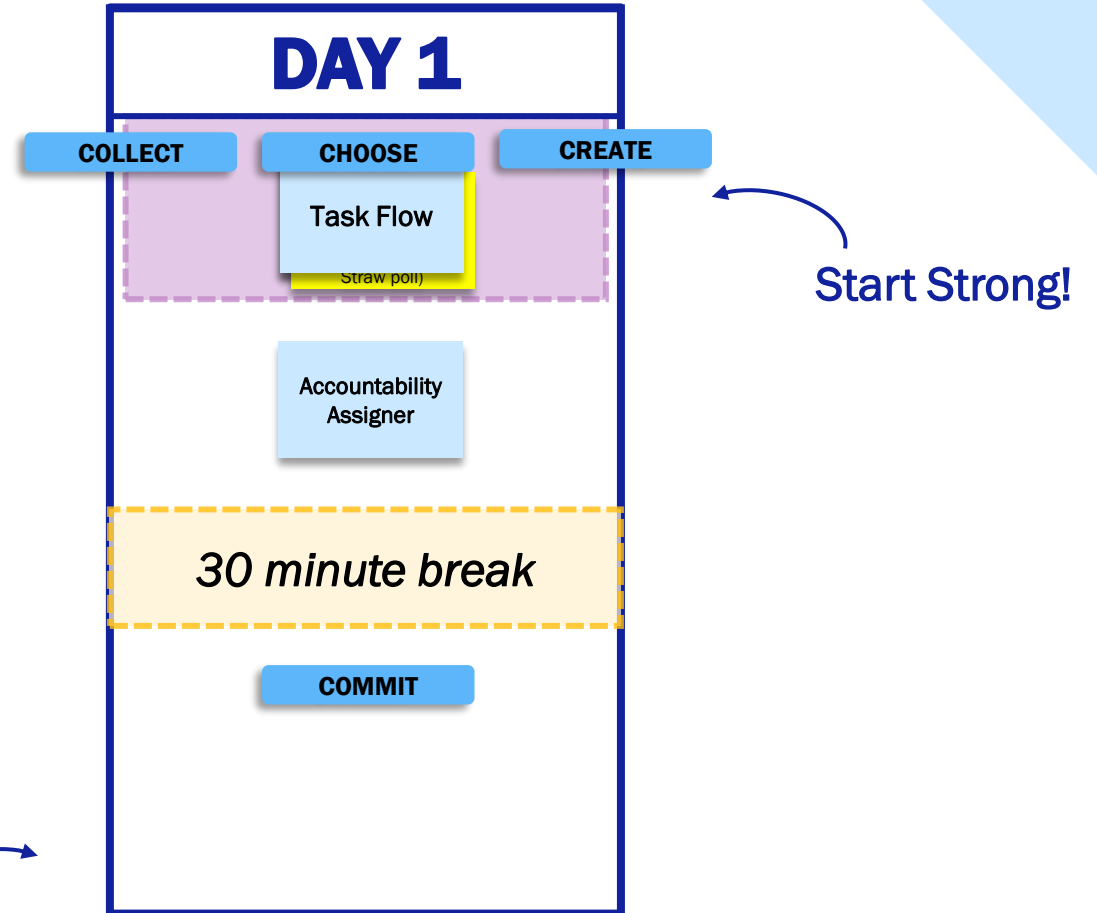
Plan-O-Rama

Plan-O-Rama

1. Timing

2. Main goal & usage

3. Flow



Plan-O-Rama

Plan-O-Rama

1. Timing

2. Main goal & usage

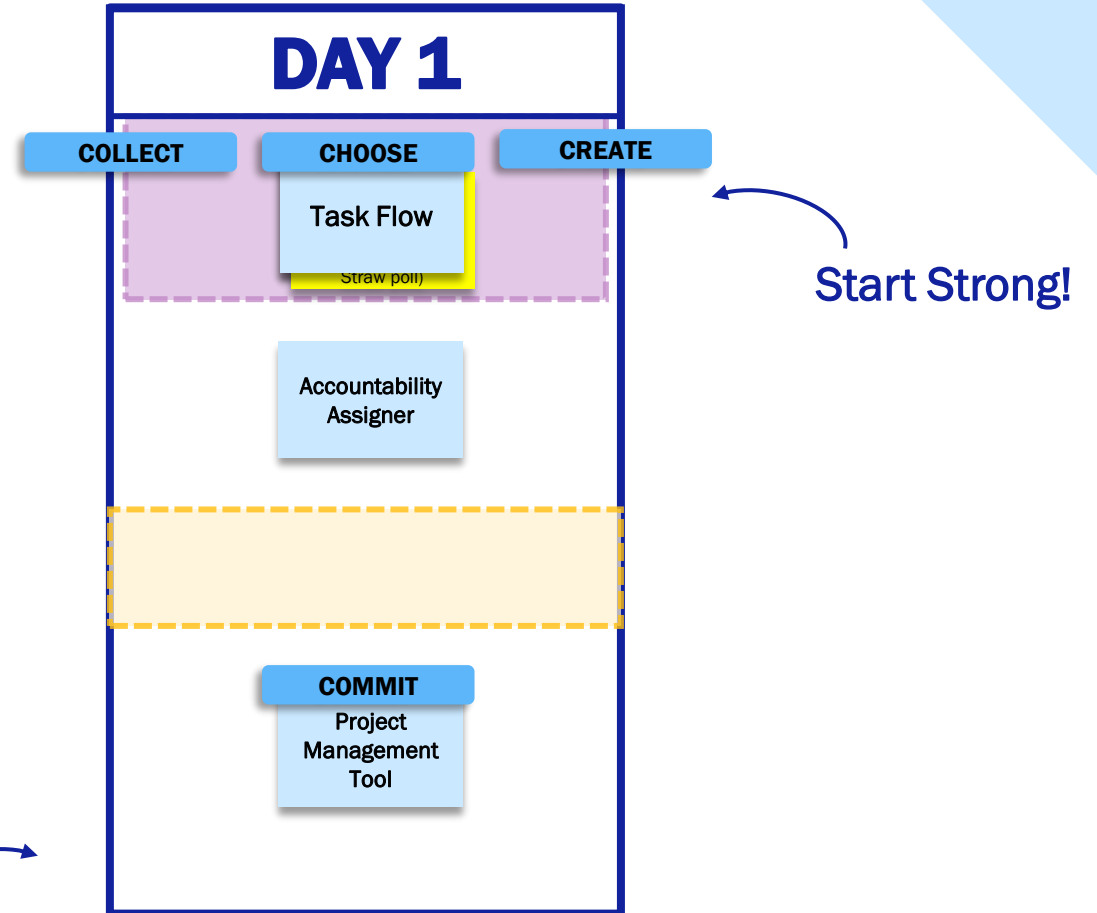
3. Flow

Exercise 3: Project Management Tool

- Put everything in a PM tool like Asana or Trello.

Plan-O-Rama

End Stronger!



Master Recipes

1. Challenge 360

2. Strategy Signal

3. Plan-O-Rama

4. LDJ Royal

“Lightning Decision Jam” Royal is a general-purpose problem solving & and decision-making workshop.

Lightning Decision Jam Royal

1. Timing

Takes about 3 hours.

2. Main goal & usage

3. Flow

Lightning Decision Jam Royal

1. Timing

2. Main goal & usage

3. Flow

Main goal

- It's the perfect general-purpose problem-solving and decision-making workshop.

Issues/Questions this workshop can be used for:

- When you have a problem to solve.
- When you have a tricky decisions to make.
- When you have a lot of issues but don't know where to start.
- When you just want to do a brainstorming session.
- When you have strange vibes in the team and you want to figure out what's actually wrong here.
- Use it for a retro-spective.
- Use if for troubleshooting unclear situations.
- Just to show people what a workshop is.

Lightning Decision Jam Royal

1. Timing

2. Main goal & usage

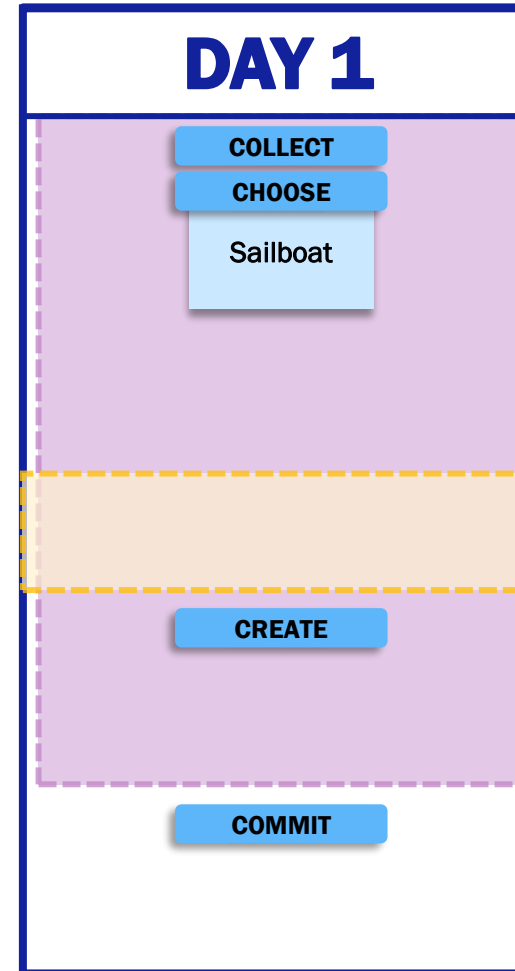
3. Flow

Exercise 1: Sailboat

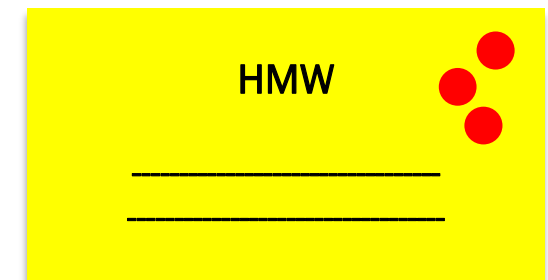
- Great exercise to start figuring out the positive and negative things in a team.
- Clarify the challenges to focus on and reframe challenges into HMW's.
- Focus on 1 top voted HMW.

LDJ Royal

End Stronger!



Start Strong!



Lightning Decision Jam Royal

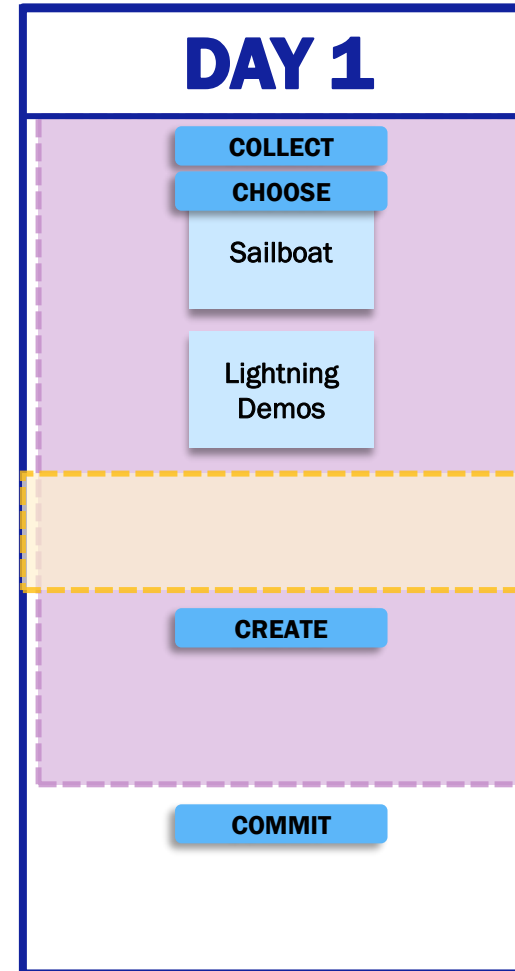
1. Timing

2. Main goal & usage

3. Flow

Exercise 2: Lightning Demos

- Show some examples for the HMW.

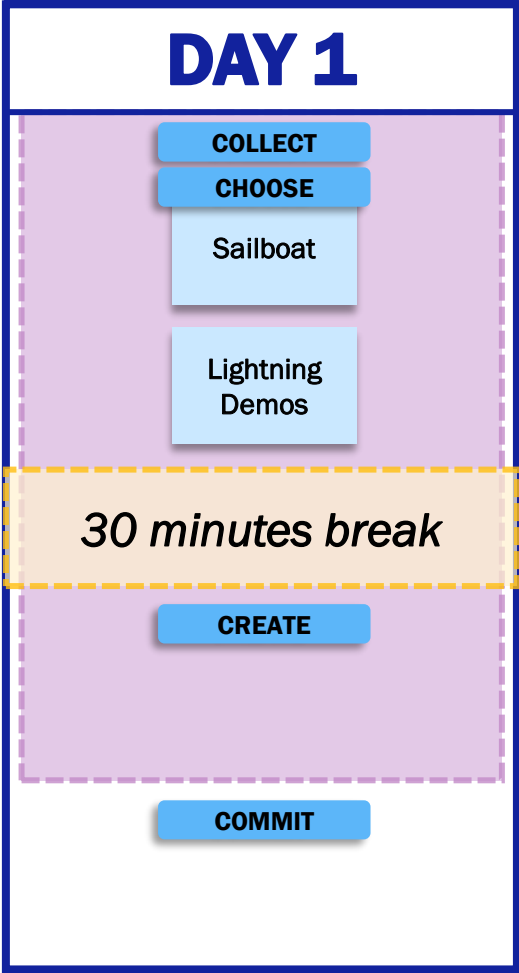


Start Strong!

End Stronger!

Lightning Decision Jam Royal

- 1. Timing
- 2. Main goal & usage
- 3. Flow



Start Strong!

End Stronger!

LDJ Royal

Lightning Decision Jam Royal

1. Timing

2. Main goal & usage

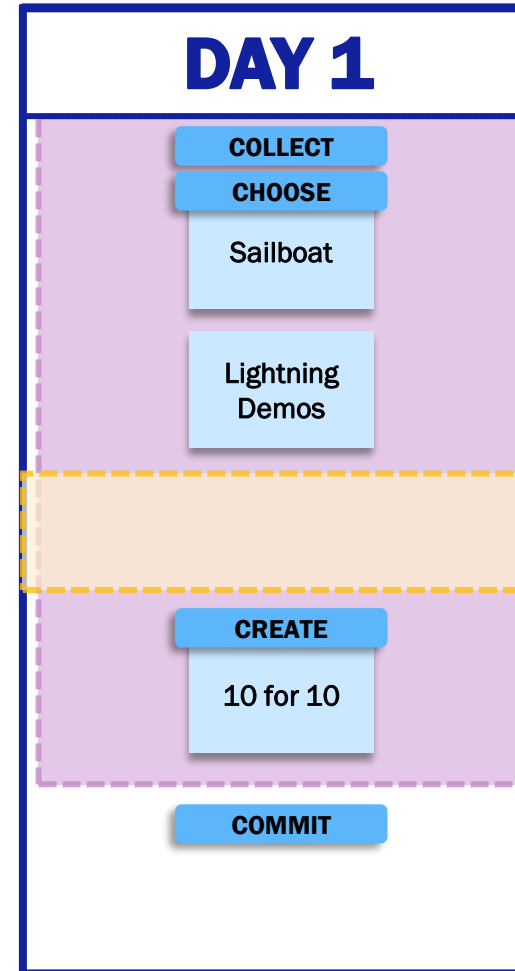
3. Flow

Exercise 3: 10 for 10

- Ask everybody to produce at least 15 rapid-fire ideas in the 10-minute timeframe.
- Sometimes change to 15 minutes, depending on how much time we have. Or 20 minutes.

LDJ Royal

End Stronger!



Start Strong!

Lightning Decision Jam Royal

1. Timing

2. Main goal & usage

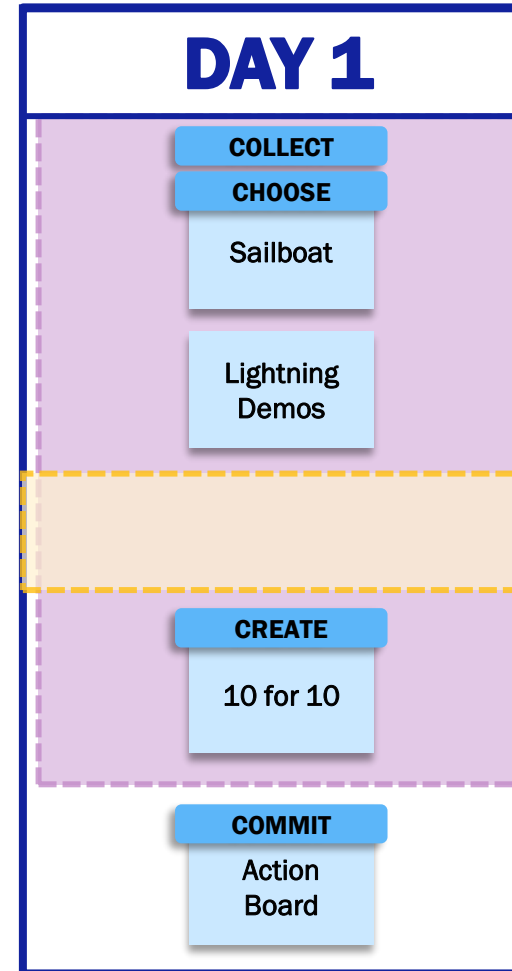
3. Flow

Exercise 4: Action Board

- **Impact:** Which of these challenges are most likely to positively impact or solve this HMW that we're working on?
- **Effort:** How difficult would this be to achieve?

LDJ Royal

End Stronger!



Start Strong!

The Confident Facilitator



How to become a Confident Facilitator?



The Confident Facilitator

As a facilitator, you will naturally **become better** with each workshop you facilitate. To go beyond the plateau that most facilitators hit when they become “good enough,” conscious effort is needed in order to **improve** your facilitation skills.

As you experiment with and tweak your workshops, you’ll develop a set of **universal principles and tactics** that can be applied to improve all your workshops, regardless of their topic.

Remember Law #1: **Be the Guide, not the Hero!**



Manage Workshop Anxiety

Mindset is the foundation of all the facilitation tactics.

Keep in mind that **not every workshop will run 100%**, but this is okay. Don't stress out about being sick, jetlags, delays, and other panic triggers.

Embrace and keep in mind that you'll always be able to facilitate the workshop because you can rely on the tactics and the recipes.

In addition, don't hide your **weaknesses**. Own them!

DON'T PANIC

Setting yourself up for Success!



Intro & Warm Up



Set Ground Rules



**Set & Get
Expectations**



Agenda & Structure

Intro & Warm Up

A vital part to your workshop's success is getting people to **feel engaged and switched on** right from the start.

Always start with an easy, **ice-breaker exercise** to activate the group and set the tone for participants to be engaged.



Who's sitting next to you?

Write # 1. Name

Write # 2. First job

Write # 3. What you learned

- Get the participants a sticky note and ask them to write down 3 things (name, first job, what you learned from that job).
- Then, let them **one by one** tell their story to the group.
- In case the group is too big, you can ask the participants to break into **groups of 3-5**.
- **Do it yourself first** so that they can see how it works!

Set Ground Rules

This is so important yet very easy to miss! All you need to do is make your **ground rules clear** to the participants **up front**. You'll save yourself a lot of questions that would otherwise interrupt the flow of your workshop.

Do it all up front and you'll be able to remind people of the rules later without losing the trust of your participants.

“The ground rules for this workshop are...”



Types of Ground Rules

- No devices
- No judging
- Break every 90 mins

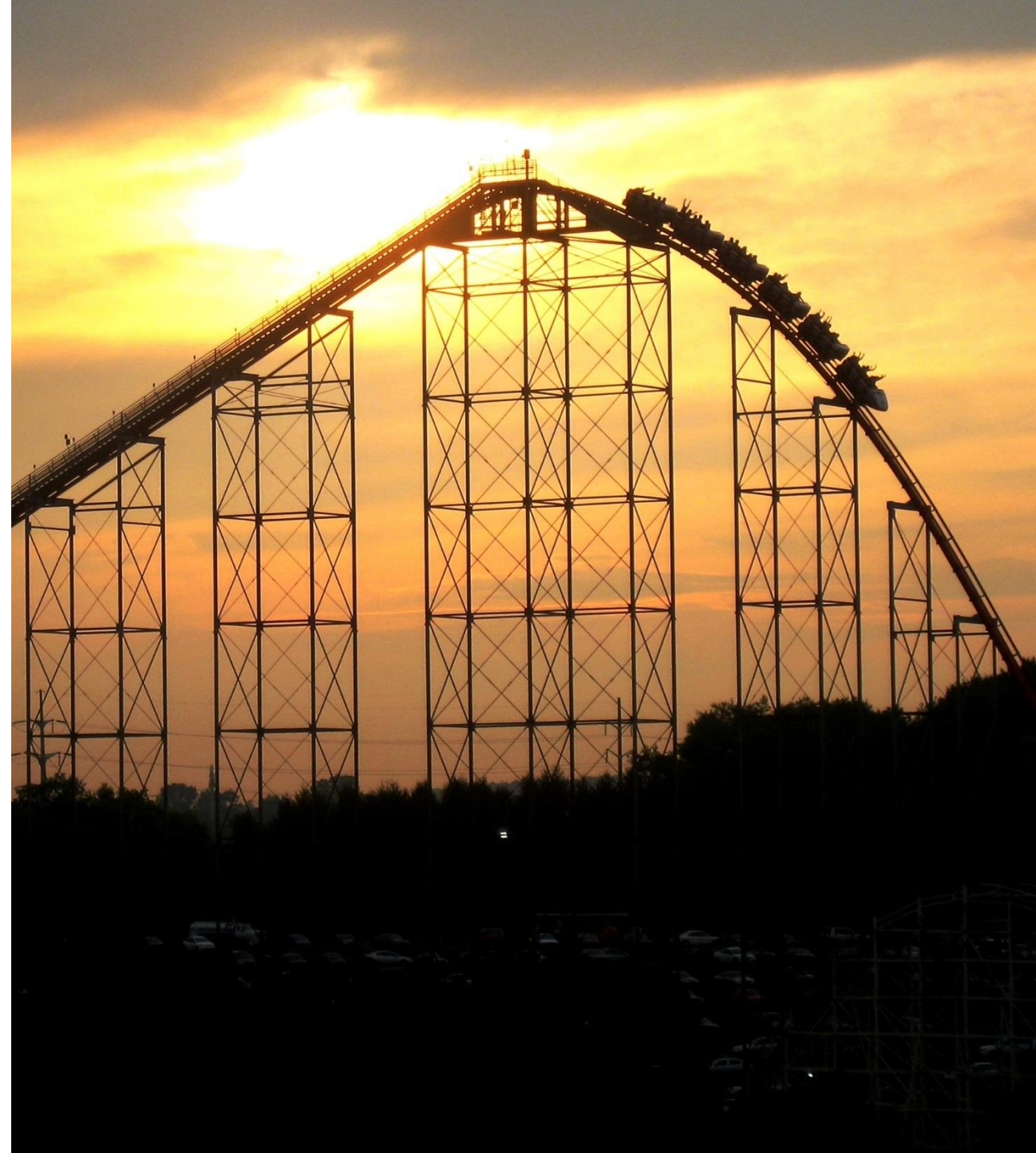
*“Is everybody okay
with this rule?”*

Set & Get Expectations

This step alone will make your workshops a lot smoother to run.

It's natural for people to assume that they are the only one feeling **overwhelmed** or finding something **difficult**. You can reduce this simply by telling people what to **expect**, and how they might **feel** during the process.

Equally important to setting expectations is **getting** them from your participants!



Set Expectations

1. It's common that this might feel **too rushed**
2. Often it will feel like we're **losing ideas**
3. This might feel **uncomfortable**
4. It's normal to not have **any ideas yet**
5. It's normal to feel like **it's not going to work**

- Saying a few sentences about how participants can **expect to feel** throughout the day drastically improves the smoothness and feeling in the room!
- It's very important to say these things **before** participants feel them. If you say it after, it's already too late.
- Confirm the participants to **trust the process**.
- You can always draw an **emotional rollercoaster**



Get Expectations

1. What are you hoping to **get out of this**?
2. What will make this **worthwhile for you**?
3. Why did you **come here today**?

- Asking your participants what they **hope to get out of** this workshop will make them feel heard and help you know which topics to focus more attention on.
- You can always **point** to a participant and **ask** what they're expecting to gain from the workshop. **Write** their answer down on a sticky note and put it on the wall.

Agenda & Structure

It's important to **communicate** the agenda of the workshop, either by displaying it physically in the room or by repeatedly showing it in the slide deck.

This will give people a sense of **orientation** so they never have to wonder about where they are in the workshop or how much more there is to go.

It also helps avoid people asking what's coming next, which can break your flow and confidence as a facilitator.



Agenda

✓ 01. Introduction

✓ 02. The Anatomy of a DG Workshop

✓ 03. The 6 Laws of Master-level Facilitation

✓ 04. The Art of Designing DG Workshops

✓ 05. DG Workshops Master Recipes

➔ 06. The Confident Facilitator

07. Facilitating Remote Workshops

08. Wrapping Up

Giving Clear Instructions

One of the main things you will be doing as a Facilitator is **asking people to do exercises**. This trips up most facilitators! People often do not know how to describe an exercise to somebody.

Giving clear instructions sounds obvious, but is easily forgotten or overlooked.

Luckily there is a super **simple framework** for teaching exercises!



Formula for Clear Instructions

1. What

2. Why

3. How

Formula for Clear Instructions

1. What is the exercise

2. Why

3. How

Hey everyone, we're about to dive into an exercise called "How Might We".

Formula for Clear Instructions

1. What is the exercise

2. Why are we doing the exercise

3. How

The "How Might We" exercise is a super simple way for us to transform our challenges and problems into clear statements. These clear statements will then serve as the foundation for creating awesome solutions.

The reason we're doing this is because we need a standardized system for generating those solutions.

Formula for Clear Instructions

1. What is the exercise

2. Why are we doing the exercise

3. How do you do the exercise

Here's how you do it: you start by writing "HMW" on the top left of your post-it, like this. "HMW" stands for "how might we".

Next, when you hear the expert in the room share the challenges she's facing, pay attention. If you come across a negative challenge or statement, like for example, "We don't have executive sponsorship for our data governance program!", that's your cue to turn it into a "How Might We" statement.

Think of it as an opportunity, something we can create a solution from.

So, in this case, the statement would become "How might we ensure executive sponsorship for our data governance program?". See, all you're doing is transforming a negative problem or statement into an opportunity statement.

It's a simple yet powerful way to approach challenges and find solutions.

The 3x Rule



1st time. 50% of participants hear you

2nd time. 75% of participants hear you

3rd time. 95% of participants hear you

No matter how hard we try to pay attention, the truth is we often can't sustain focused attention for long periods of time, and certainly not for the length of a whole workshop.

Don't expect all people to listen all the time. Therefore, you should build that expectation into the way you communicate information in your workshop.

To minimize the chances of anyone in the room missing a vital piece of information, make sure to **say important things three times.**

Giving Clear Instructions

- 1. One way to do an exercise**
- 2. Show examples**
- 3. Use insight statements**

Giving Clear Instructions

1. One way to do an exercise

2. Show examples

3. Use insight statements

You might think that giving people multiple options to do an exercise would give people more freedom, but in most cases, more options only add confusion.

People in your workshop have a lot of mentally draining activities to do and aren't as familiar with the tasks as you are.

Therefore, you should only **show one way of doing** an exercise.

If, and only if, people ask you for other options, that's when you can provide an alternative.

Giving Clear Instructions

1. One way to do an exercise

2. Show examples

3. Use insight statements

Examples help us **understand concepts better** since they take ideas from an abstract description and make them concrete by giving them context.

Some presenters fear that showing examples will limit and influence people's thinking and decide to leave them out in the name of creative freedom. In practice, the tradeoff is worth it.

Creative freedom can come later. But when you're teaching people an exercise for the first time, it helps to have a **template to follow**, just like training wheels for riding a bicycle.

Giving Clear Instructions

1. One way to do an exercise

2. Show examples

3. Use insight statements

During a workshop, you're going to be talking a lot, which means your participants will have to take in a lot, but there's only so much the mind can absorb before losing focus.

So while it's good to give a detailed explanation of a concept or exercise, make sure to **summarize** with an insight statement.

An **insight statement** tells people the "why". It gives context for the task.

- "The big idea with this exercise is..."
- "The most important thing about this is..."
- "The way to do this exercise well is..."
- "The main problem we'll try to solve is..."

The Danger of Troublemakers

As a facilitator, you need to be prepared to handle all kinds of situations that may arise during your workshops, and that includes **difficult individuals and troublemakers**.

Troublemakers can easily derail your workshop since they tend to:

- Talk a lot
- Distract others
- Don't listen to instructions
- Ask difficult questions
- Try to take over
- Try to catch you out



Mitigating Troublemakers

1. Set expectations

2. Record ideas (and move on)

3. Use a question Parking Lot

4. Use note & vote

5. Give tasks

- In order to mitigate troublemakers, you need to both expect to have some in your workshops and prepare for how to deal with them. By doing so, you can calmly and confidently stay in control without letting them affect the experience of those around them.

Mitigating Troublemakers

1. Set expectations

2. Record ideas (and move on)

3. Use a question Parking Lot

4. Use note & vote

5. Give tasks

- If you set the expectations correctly in the **beginning** of your workshop, it will be easier for you to handle these situations later.
- So make sure to **refer back to the expectations** that you've set at the beginning of the workshop.
- This will help to keep everyone on the same page and ensure that the workshop stays on track.

Mitigating Troublemakers

1. Set expectations

2. Record ideas (and move on)

3. Use a question Parking Lot

4. Use note & vote

5. Give tasks

- Occasionally participants will contribute **input which doesn't seem to fit**. This might be because they aren't used to your workshop methods, they don't know what might be coming next, or perhaps they have a hidden agenda you don't know about.
- If you're doing an exercise that has layers of voting and decision-making, it's usually not going to cause a problem if you simply note down the input, even if you think it doesn't make sense.
- You can even create an **Idea Parking Lot** or **just start writing**.
 - **Helps people feel heard**
 - **... and their input is valuable**
 - **They can let go and move on**

Mitigating Troublemakers

1. Set expectations

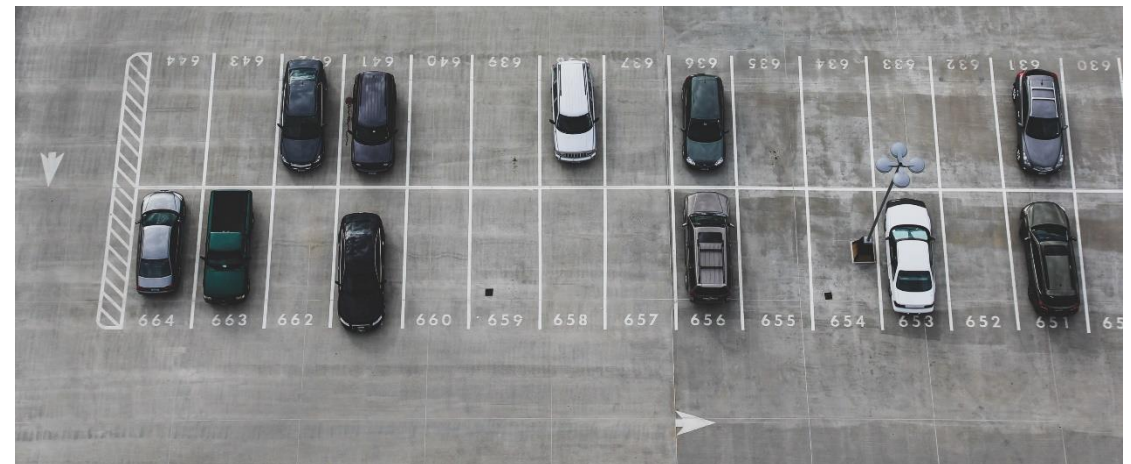
2. Record ideas (and move on)

3. Use a question Parking Lot

4. Use note & vote

5. Give tasks

- Sometimes it's hard for people to stop talking and move on when they feel that the topic is important and shouldn't be forgotten.
- A **Parking Lot** is a space where questions and topics can be "parked" for discussion later.
- Be sure to include a block of time in your agenda to **come back and answer** those questions!



Mitigating Troublemakers

1. Set expectations

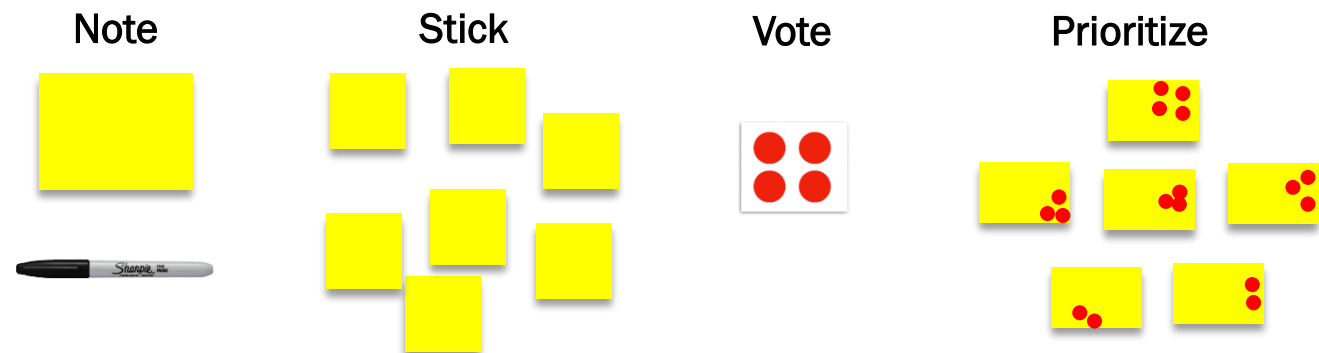
2. Record ideas (and move on)

3. Use a question Parking Lot

4. Use note & vote

5. Give tasks

- Whenever you see a circular discussion and the topic is important to help you move to the next step, gently **stop the discussion** and tell people that now is a perfect time to do a note & vote!
- With a **note & vote**, everyone gets to express their opinions, and have their say by voting on the ideas.
- You will reach a much faster, actionable outcome with Note & Vote than you would with an open ramble.



Mitigating Troublemakers

1. Set expectations

2. Record ideas (and move on)

3. Use a question Parking Lot

4. Use note & vote

5. Give tasks

- If you've tried everything and nothing seems to be working, don't worry, there's still something you can do.
- Give the Troublemakers tasks during the workshop, like drawing the map or taking notes of people's input.
- You can even address them as a volunteer or a **co-facilitator**.

Cutting Out Circular Discussions

Circular discussion is a natural occurrence whether you're in a business meeting, personal conversation, or a workshop. It's how humans are used to communicating, and it can be a hard habit to break.

It's okay to allow some **room for discussion**, but as the facilitator, you need to take charge the moment you feel a **discussion is going nowhere** or is taking up **too much time**—and you shouldn't wait long before you cut in.



Answering Difficult Questions

It's a guarantee that there will be times when you are faced with difficult questions to which you don't know the answer. They can throw you off your game if you don't know how to handle them.

I recommend using a combination of the following 3 techniques for handling difficult questions:

1. Set expectations (and refer back to them)
2. Use a Parking Lot
3. Ask probing questions



Probing Questions

- **“That’s a really interesting question! Can you tell me what’s behind you asking that?”**
- **“Are you thinking of a specific situation?”**
- **“What do you mean exactly? Can you tell me more?”**

Probing Questions are like a magic trick! They allow you to **engage in the question** without revealing that you might not know how to answer it.

Uncertainty in a facilitator can lead to the group losing trust and confidence in you as a leader.

What if that doesn't work?

Although the above techniques work well in most cases, you should still expect and prepare for troublemakers who simply won't cooperate.

This situation is definitely an exception and should be a rare occurrence. Don't use the **Nuclear Option** unless absolutely necessary.

1. Approach the person privately in a break and ask how they're doing.
2. Approach again and tell them directly they are being disruptive and impacting the workshop for others.
3. Ask them to leave (if 1 & 2 don't work)



An aerial photograph of a two-lane asphalt highway curving along a rocky coastline. A bright yellow car is driving on the road. The ocean is on the right, with white waves crashing against the shore. The left side of the road is a rugged, rocky cliffside.

Facilitating Remote Workshops

How are in-person and remote workshops different?



Onboarding & Setup



DG Strategy Sprint



Delivery & Handover

Benefits of Remote Workshops

1. Distributed teams

- Easier to organize, even with distributed teams.
- Take action NOW instead of waiting for the perfect time "when the stars align" and people can make time for the workshop.
- You can build a remote collab habit/culture and show that it's easier to collaborate than on location.

Benefits of Remote Workshops

1. Distributed teams

2. Easier to organize

- No need to organize a workshop room - or having to deal with subpar rooms. You have the perfect set-up.
- No need to buy materials - and you never run out.
- Fully digitized, so you are not having to type everything up.

Benefits of Remote Workshops

1. Distributed teams

2. Easier to organize

3. Much more accessible

-
- You can sprint worldwide! Easier to commit for some people.
 - Easier to get buy-in from busy people who might otherwise not be able to join.
 - Easily scalable to larger groups.

Benefits of Remote Workshops

1. Distributed teams

2. Easier to organize

3. Much more accessible

4. Environmental impact

-
- No travel costs, no jetlag, no environmental impact.

Benefits of Remote Workshops

1. Distributed teams

2. Easier to organize

3. Much more accessible

4. Environmental impact

5. Same outcomes & quality

-
- SAME outcomes / quality as in an in-person sprint... if not better!
 - It's not a lesser or inferior option.

Benefits of Remote Workshops

1. Distributed teams

2. Easier to organize

3. Much more accessible

4. Environmental impact

5. Same outcomes & quality

6. Lower stress

-
- Lower stress with fewer variables, more focus on the participants.

Challenges of Remote Workshops

1. It's going to feel...weird

- The **experience** is impacted, it's harder to make people feel special because you can't host them in a nice space and make coffee for them, etc.
- We don't get to **host** clients before & after the workshop and during breaks.
- The energy that you would have with in-person interactions don't carry over exactly to a remote workshop happening over a video call.
- So you need to **bring a lot more energy** than you would normally do in an in-person workshop.

Challenges of Remote Workshops

1. It's going to feel...weird

2. Building rapport

- It's harder to have **casual chats** in breaks to build rapport and keep the energy up.
- Some of the clues you normally see in **body language** are not there. Set expectations beforehand and try to have the participant's camera on at least.

Challenges of Remote Workshops

1. It's going to feel...weird

2. Building rapport

3. Isolation

- When working on the Miro-board, participants might feel **isolated** since they can't see the rest of the room (could be good or bad). I recommend they see the facilitator the whole time.

Challenges of Remote Workshops

1. It's going to feel...weird

2. Building rapport

3. Isolation

4. The tech set-up

- **Tech will go wrong** and that can disrupt the flow of the workshop.
- You can't control the participant's **environment**: connection, noise, slow laptop, small screen, bad mic, bad cam. So have a tech test call with your participants.
- Participants can get easily **distracted** with other apps on their computers.
- Participants **can't completely disconnect** from their day-to-day work and immerse themselves in the workshop like they can when they're completely away from their office and devices.

7 Principles

1. Energy
2. Communication
3. Helping people feel included
4. Be a good guide
5. Preparing for tech failures
6. Don't overcomplicate things
7. Having a Technical Facilitator

7 Principles

1. Energy

2. Communication

3. Helping people feel included

4. Be a good guide

5. Preparing for tech failures

6. Don't overcomplicate things

7. Having a Technical Facilitator

- A **workshop is not a meeting!** So it should feel different than a normal conference call. It should feel energetic!
- Avoid setting up a fake persona. Get genuinely excited about your client challenge.
- Start your workshop with a starting exercise, an **ice-breaker**. Especially if participants jumped in from another meeting.
- Have some workshop **music**.

7 Principles

1. Energy

2. Communication

3. Helping people feel included

4. Be a good guide

5. Preparing for tech failures

6. Don't overcomplicate things

7. Having a Technical Facilitator

-
- Communicate the appropriate **times** and the necessary **information**.
 - Avoid that it feels like a long call!
 - Break-up the information on what the workshop will feel like, breaks, ...
 - Keep everyone **involved** so that they feel like being part of a total project.
 - Allow a bit more time during **discussions**. But if needed, cut in so that the discussion doesn't keep going.

7 Principles

1. Energy

2. Communication

3. Helping people feel included

4. Be a good guide

5. Preparing for tech failures

6. Don't overcomplicate things

7. Having a Technical Facilitator

-
- Make people feel like they are **part of a team!**
 - Establish some **rules and guidelines** so that everybody is heard and included.
 - Ask everybody to **raise their hand** if they want to speak.
 - Keep your eye on people who are more quiet, gently ask for their input, and add their voice.

7 Principles

1. Energy

2. Communication

3. Helping people feel included

4. Be a good guide

5. Preparing for tech failures

6. Don't overcomplicate things

7. Having a Technical Facilitator

-
- Share the information at the **right time**.
 - Make use of **progressive disclosure**. Only reveal the current exercise and cover up all other exercises so people will snoop around.
 - Ask everybody to follow your **cursor** on the board.
 - Minimize the need to switch between the video **Zoom** and the whiteboard **Miro** board. Ideally, you have a 1/3 Zoom and 2/3 Miro set-up.

7 Principles

1. Energy

2. Communication

3. Helping people feel included

4. Be a good guide

5. Preparing for tech failures

6. Don't overcomplicate things

7. Having a Technical Facilitator

-
- Have **fallback** options and back-up plan.
 - Map out **scenarios** so you know exactly what to do and you don't stress out on the spot.
 - Set-up **alternatives**, have solutions ready and even simulate to really know what to do.
 - Have a **technical facilitator** present to assist.

7 Principles

1. Energy

2. Communication

3. Helping people feel included

4. Be a good guide

5. Preparing for tech failures

6. Don't overcomplicate things

7. Having a Technical Facilitator

-
- Keep it simple!
 - Try to move **horizontally** in Miro instead of having to need to scroll up and down.
 - Tell your participants that they only need just a few **buttons** and set them at ease so that they don't feel stressed to learn the entire tool.

7 Principles

1. Energy

2. Communication

3. Helping people feel included

4. Be a good guide

5. Preparing for tech failures

6. Don't overcomplicate things

7. Having a Technical Facilitator

-
- Somebody who can take care of **backup** tasks.
 - A technical facilitator really increases the quality of your workshops.

Engage and create nice experience

One of the key differences between an in-person workshop and a remote workshop is that you're not in the same room with people.

1. Keeping the **energy** up!
2. Dealing with **group dynamics** and conflicts
3. Only use $\frac{1}{2}$ day workshops
4. **Communicate proactively** and guide people



The ideal hardware set-up

- ✓ Good internet connection
- ✓ Good audio
- ❑ Laptop / desktop
- ❑ Microphone (built-in is a no go!)
- ❑ Headphones / earbuds (using speakers is a no go!)
- ❑ Webcam
- ❑ Lighting and ambient lighting
- ❑ Monitors
- ❑ Desk
- ❑ Chair



The ideal software set-up

- ✓ Email / [Basecamp](#)
- ✓ Calendar booking ([Calendly](#))
- ✓ Survey Tool ([Typeform](#)/[Google Forms](#))

- ✓ Video conference software ([Zoom](#))
- ✓ Digital whiteboard ([Miro](#))
- ✓ Music ([Spotify](#))
- ✓ Chat ([Basecamp](#))
- ✓ Screen recording tool ([Loom](#))

Scoping Workshop

A Scoping Workshop is an optional free 1-hour workshop used during the sales process. The goal is to **define the challenges** of the client. So, the benefits of the Scoping Workshop are:

1. Define the project
2. Client gets to have a taste of Strategy Sprint
3. They get to see remote workshopping in action



Scoping Workshop

2. SETTING THE SCENE

Let's start by taking 10 mins for you to tell us about **your current challenges as a business**.

As you talk, we'll be taking notes and categorizing them on the fly.

Setting the Scene

Core Product Proposition	Product Vision	Customer Problem we are looking to solve	People who will use our product	Ideas we have right now

10 min

5. PLACING BETS

Thanks for sharing your ideas on the canvas! 🙌 We have LOADS of good ideas now! But when it comes to communicating value, less is more, so...

Next step: we narrow them down by picking the best ones. **But HOW..?!** 🤔

SPOILER: We won't be discussing them as a group. 🤫 Instead, we'll use **Dot Voting**. 🗳️

Here's how this works...

1. SELECT A DOT THEN COPY IT
2. FOLLOW THE ARROWS
3. PASTE YOUR DOTS ON THE STICKIES WITH THE BEST SELLING POINTS
4. USE 3 DOTS PER COLUMN
5. GO :*



7 min

3. ZOOMING IN — TOGETHER, ALONE!

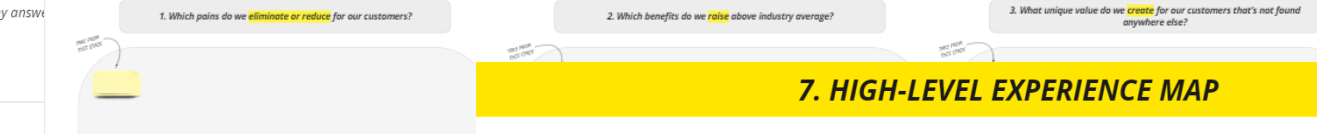
Thanks for sharing your thoughts! 🙌

Now that you're all warmed up, it's time to **get you in on the action** with the next exercise.

The next exercise is all about **the value you offer to your customers** & how you solve their problems. We're going to do this in three steps, each 5 mins long.

Basically, in each step, all you got to do is read a question then **write as many answers** to that question as you can think of — and **keep writing** until the 5 minutes are up.

So while in **quiet time** many answers

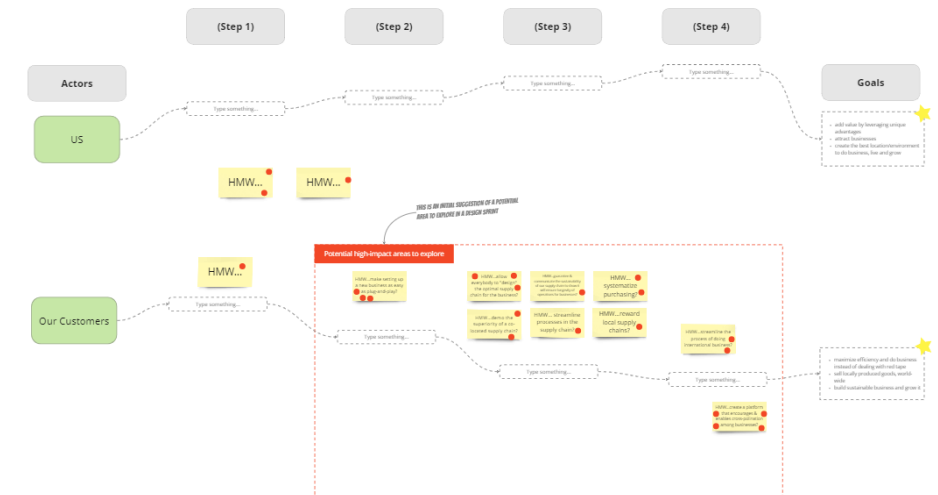


6. KEY VALUE PROPOSITION



4. THINKING OUT LOUD QUIET

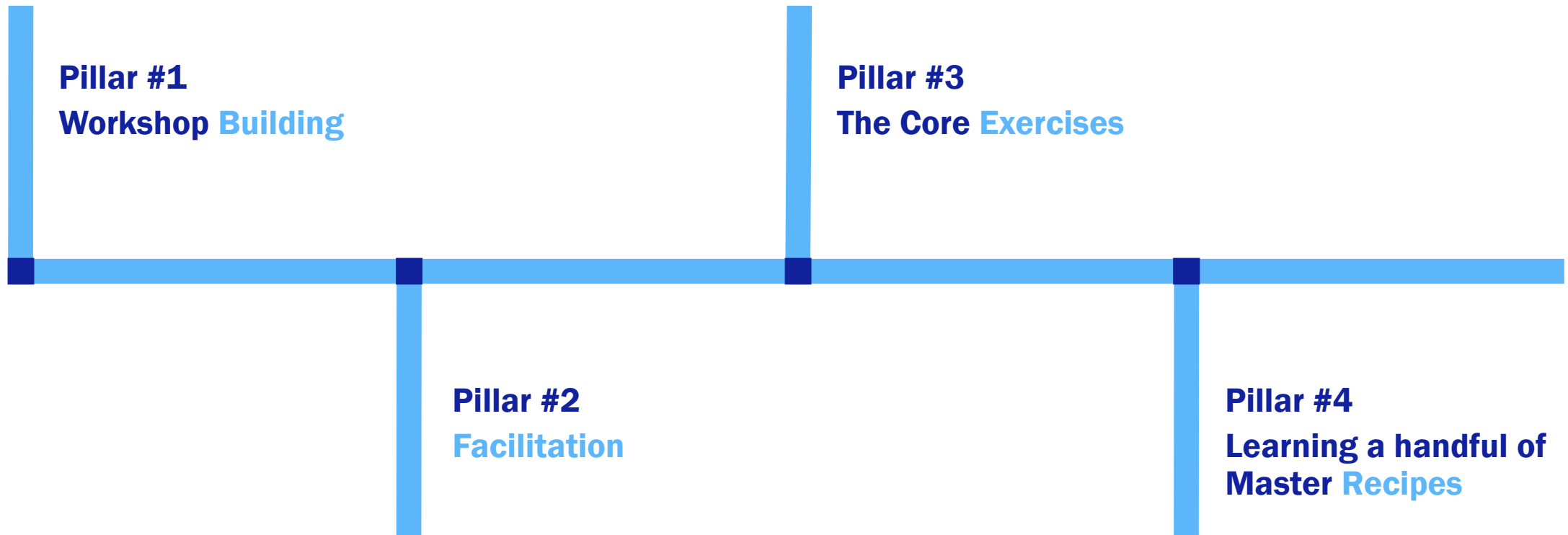
7. HIGH-LEVEL EXPERIENCE MAP





Wrapping Up

The 4 Pillars Of Becoming a Workshop Facilitator?





data vantage

consulting

<https://datavantageconsulting.com/>



Mathias Vercauteren
The Data Governance Advocate

mathias@datavantageconsulting.com

USA Office

223 South West Street, Suite 900,
Raleigh, North Carolina 27603, USA

+1 984-248-6426

Europe Office

Spoorwegstraat 23,
Waasmunster 9250, Belgium

+32 468-258-947



DATA GOVERNANCE AND MASTER DATA MANAGEMENT CONFERENCE EUROPE

11 - 14 March 2024 | London, UK

****Please score and comment on this session and speaker
in the event mobile app****