

## UNDERSTANDING, CLUSTERING, AND RANKING OPTIONS

# OCTOPUS CLUSTERING

A very quick group method to sort and cluster ideas in preparation for a decision. Everyone takes part, so everyone gets to know the range of ideas.

<b>Duration</b>	<b>Preparation:</b> a few minutes to prepare the wall <b>Activity:</b> 5–15 minutes, depending on the number of notes
<b>Physical requirements</b>	You need a wall covered in a “cloud” of sticky notes, 2–3 meters (6–9 feet) wide. This will probably be the output of a highly divergent method like brainwriting. Make sure that all the sticky notes are hanging between belly and head height for an average participant. Clearly mark the limits of the cloud using tape or a few sticky notes in another color. You also need enough space in front of the wall for everyone to stand in rows.
<b>Energy level</b>	High
<b>Facilitators</b>	1
<b>Participants</b>	6–30 people
<b>Expected output</b>	Sorted clusters of sticky notes, familiarity with the content of the notes, and growing sense of shared ownership

A crowd of people stand in front of a wall of sticky notes. The people are arranged in rows. The front row actively sorts the notes; the rows behind them have various support or preparation functions. Every few seconds, the rows cycle so a new group of people come to the front and every row gets a new role. After a few cycles, the sticky notes are sorted and the group know the content.

Octopus clustering will quickly transform a random cloud of sticky notes into a series of clusters. Use it to sort large numbers of ideas, insights, “How might we ...?” questions, data – anything which can be expressed as a few words or a picture on a sticky note. The method gives everyone an excellent overview of what the material is, and encourages shared ownership of ideas between group members. The new clusters might help the group understand the overarching structure of the material, or suggest different directions for the next step.

Though the description here seems complex, in practice the exercise is very simple and great fun. The following guide takes you through how to set it up, step by step. After you have done it once or twice, most of this will seem obvious.



- A Octopus clustering. In this very large group, five rows of participants sort dozens of sticky notes in minutes. Note the engagement, and how the second row is actively supporting while the third, fourth, and fifth rows discuss the overarching structure, preparing to step forward into more active roles.

## Step-by-step guide

- 1** Set up rows of people in front of the wall. You will need 3–5 rows. First, ask for volunteers to form the first row in front of the wall. Point out that their row is the same width as the wall. Point out that, like an octopus, they have many arms.
- 2** Ask for volunteers for the second row. Point out that the two rows will not mix.
- 3** Add more rows until everyone is in a row. Ask everyone to be aware which row they are in, and to never mix rows. If the last row is shorter, that is no problem.
- 4** Explain what to expect:
  - In a minute, I will ask you to start sorting the sticky notes. Your role in this task depends on where you are standing. Your roles will change.
  - If you are in the front row, you will be actively moving and grouping notes in whatever way makes sense to you. Never cover a note with another note.
  - If you are in the second row, you will be actively coaching the first row. Be loud and helpful!
  - If you are in the third row, you should aim for an overview of what is happening and look for lost stickies. Shout some suggestions to the rows in front. If you are in the fourth (or fifth) row, discuss with your neighbors, look for that overview and be ready to start giving advice in a few seconds' time.
  - Every 30 seconds or so during the exercise, I will say, “Empty hands! Come out! Step forward!” When I say “Empty hands,” the people in the first row should quickly get rid of whatever note they are holding by passing it to the person behind them. When I say “Come out,” the first row will turn left and come out of the group on the left side. They will then go to the back of the group, fill up the last row and start a new row. On “Step forward,” everyone will step forward into new roles and start sorting. OK?
- 5** Start the exercise. After about 20 or 30 seconds (not much longer), call out “Empty hands! Come out! Step forward!” Give people just enough time to complete each of these simple steps.
- 6** You might need to remind the people who have stepped forward of their new roles. As the first row come out, direct them to the back of the group.
- 7** Repeat the cycle every 30 seconds or so. When you notice clusters starting to concretize, draw the sorters' attention to the “orphan” notes that are left over. You might pause the exercise for this, or just keep rolling.
- 8** After 5–8 cycles, the sorting is usually complete. Warn the next row that they are the last row, and finish with applause.
- 9** Step back to get an overview. Ask the group if they want to merge any groups. Ask for headings for the clusters and label them in another note color.

## Method notes

- Keep this fast-moving and light. Music is helpful. Encourage all the rows to be actively engaged.
- Do not make more than five or six rows. If you have a lot of people in the group, make the cloud of sticky notes and the rows wider. If you have five or six rows, keep the cycles very short or the rear rows will get bored and lose concentration.
- When the first clusters are forming, try giving the people in the third or fourth row some differently colored sticky notes and pens. They will usually start making cluster headings. Invite subsequent rows to challenge and subdivide these headings. Keep those pens and sticky note pads in the middle rows; they can pass individual notes forward.
- At the end of the exercise, people have been working fast and physically close to each other (that might not be appropriate in some cultures). In itself, the exercise is a great warm-up. Also, now everyone has touched many notes, and the notes are crumpled and tired. The group are losing ownership of the ideas, and will be ready to leave them behind to move forward.
- Like any clustering exercise, this can produce “orphans” – notes with no clear affinity to a cluster. Because they are “left over,” they are easy to ignore – but they can be very useful and unusual ideas or data. Make sure when you make your cluster headings that you do not ignore these – even if that means making a heading for a single sticky note.
- Sometimes, you will have “black holes” – one or two very large clusters. If necessary, point this out (it’s best to tell the rear rows) and run more rounds explicitly to break up these large clusters. ◀