

# 10

# FACILITATION METHODS

Methods that help keep workshops  
engaging, relevant and productive

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# FACILITATION METHODS

Methods that help keep workshops engaging, relevant and productive

Facilitation is a higher level task which sits above other activities such as research, ideation, and prototyping. A workshop or project consists of a mix of methods from other chapters, bound together by facilitation activities. As such, it's impossible to express facilitation as a method worksheet, except in the case of some specific activities like activation exercises and feedback techniques.

This short chapter includes one useful feedback technique, plus a few

great warm-up activities which can be useful in many workshop or meeting situations. They can energize and focus teams, and help reinforce safe space by letting people have fun failing together. But remember that many service design activities are great activators themselves. It's often better to have a design activity that energizes, instead of an energizer that distracts. When content meets engagement, you are on the road to success.

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For more on how to select and connect these methods, see **Chapter 10, Facilitation**, in **This is Service Design Doing**. You might also want to look at the section on dramatic arcs in **Chapter 3, Basic Service Design Tools**.

### Consider the following key questions when selecting the right facilitation approach and method:

- **Role:** What kind of role do you want to adopt as a facilitator?
- **Co-facilitation:** Do you choose to work with a co-facilitator? How do you split the roles and responsibilities?
- **Team:** Who is going to be in the room? Who needs to be there? Who can be there? How formal or informal is the relationship between the participants?
- **Purpose and expectations:** What is the workshop for? Why are we doing this? What are the expected outcomes and outputs? What is possible within the given timeframe?
- **Safe space:** How do you create safe space for participants to create the physical and mental environment which accepts and embraces failure? How do you create safe space for the organization?
- **Work modes:** What mix of work modes do you need to prepare for?
- **Context:** Where and when are you running your workshop sessions?

# THREE-BRAIN WARM-UP

A very effective and very popular warm-up where participants have fun failing.



<b>Duration</b>	The first time, about 6 to 8 minutes; after that, about 3 minutes
<b>Physical requirements</b>	Space for everyone to stand
<b>Energy level</b>	Extremely high
<b>Researchers/Facilitators</b>	1
<b>Participants</b>	Groups of 4 (or 3; see “Method notes”)
<b>Expected output</b>	Very awake participants, laughter, and a sense of fun through failure

This warm-up exists in many forms and under different names.<sup>01</sup> It is especially intense, and can be used to make a powerful start to the day, to clearly punctuate the process, or to shake people out of a rut.

## Step-by-step guide

- 1 The basic form is a group of four people. The subject starts in the middle, and the warm-up proceeds as follows:
  - The person standing behind the subject’s left shoulder (Color Canvas) asks simple visual questions, immediately repeating each question until the subject answers correctly. (“What color is the sun? The sun? The sun? The sky? The sky?”)
  - The person standing behind the subject’s right shoulder (Math Professor) asks very simple math questions, immediately repeating each question until the subject

<sup>01</sup> The Global Service Jam’s warm-up playlist on YouTube includes videos explaining this warm-up and showing it in action. See <http://bit.do/JamWarmups>.

answers correctly. (“Two plus two? Two plus two? Half of six? Half of six? Half of six?”)

- The person standing in front of the subject (Puppet Master) makes very slow, precise movements mostly with their hands, waiting for the subject to copy each pose precisely before moving on.
- 2** The three people all demand the subject’s attention at the same time. The subject answers all the questions and mirrors the movements simultaneously.
  - 3** When the subject is warm (eyes bright, face full of life, usually after about 30 seconds), change positions so everyone gets a new job. Always change all teams at the same time, so everyone can start and finish each round at the same time, sharing the experience and building the dramatic arc.
  - 4** At the end, debrief the warm-up (see “Method notes.”) ►



- A** The three-brain warm-up, a very powerful warm-up with physical, cognitive, and spatial elements.



## Method notes

- If the group is not divisible by 4, make some groups of 3 (subject, Math Professor, Color Canvas) and have the subject look at another group's Puppet Master for the movements. Or, have one person who gives all the movements, and many groups of 3 (subject, Math Professor, Color Canvas) who do the other tasks.
- The basic rule for the two questioners is “never stop talking.” Remind them that it's OK to re-use questions and that “you need your answer NOW!”
- The basic rule for the Puppet Master is “be very slow, and very precise.”
- Some thoughts on debriefing: at first, we initially struggle to talk and use our hands at the same time (most participants will often “forget” the hands). But we soon get into the flow, and the result is very invigorating. In design too, we will do best if we enrich our accustomed verbal channel by using our hands and bodies. Also, this activity is basically impossible – everyone fails, from the CEO to the newest intern – but they still get a benefit from the exercise. And because everybody fails, nobody gets embarrassed. As designers, we will all fail together, and by failing we will move forward. ◀



# COLOR-CHAIN WARM-UP

A fun team warm-up which includes a lesson on communication.

<b>Duration</b>	The first time, about 12 minutes; after that, about 5 to 8 minutes
<b>Physical requirements</b>	Space for everyone to stand in circles of 6–12 people
<b>Energy level</b>	High
<b>Researchers/Facilitators</b>	1 for every 2–3 circles
<b>Participants</b>	Groups of 6–12 people
<b>Expected output</b>	Awake participants, fun, and a useful lesson in communication and group process

This warm-up takes a little longer, but gives teams a shared sense of accomplishment as well as something to think about. This is quite a simple warm-up which looks complex when written down. Try it!

## Step-by-step guide

- 1** Have participants stand in circles of 6–12 people, and ask each team to choose a captain. The captain stays in the circle as a participant.
- 2** Build the color chain like this:
  - Ask the captain to give a color to a second person in the circle. It should be clear what the color is, and whom it goes to.
  - The second person will give a different color to a different person, and so on until everyone has a color. The last person gives a color to the captain. (It helps to have a visible sign that you have given your color; for example, folding your arms. You only need this sign in the first round.)
- 3** Now you have built a color chain. Ask the captain to give the same

► color to the same person again, restarting the chain. Group members don't need to fold their arms any more. When the chain comes back to the captain, he should start it again, and again ... Ask the group to keep running the chain, and get faster and faster.

- 4** Stop the chain. Tell people to remember their color. Debrief: "How many people should you be you listening to?" (Answer: "One." You don't need to listen to the whole chain.)
- 5** Ask the captain to build a new chain as in step 2, but with participants assigning one another animals this time. The chain should be different, so everyone should try to give their animal to a new person, not the person they gave their color to.
- 6** Run the animal chain a few times until it is familiar.
- 7** Stop the chain. Point out that the two chains are separate and could easily run at the same time ...
- 8** Ask the captains to run the color chain and the animal chain at the same time. Suggest they start with one, then throw in the other after a few seconds so both are running. The chains should both run simultaneously but never mix – a color always leads to a color, an animal to an animal.
- 9** The two chains usually fail. Stop the chains.
- 10** Ask how many people they should be listening to now. (Answer: "Two.") Ask if this is possible. Point out that if Tom is trying to give "purple" to Sue, but Sue is busy with "antelope," she might not hear him. Whose problem is that? Can Sue listen louder? No, we have to take responsibility for our message until we know it has been received.
- 11** Ask the groups to run the chains again, with each participant taking responsibility for each message until they know it has been received. They will usually get more physical (leaning in and using hand movements – i.e., using more channels), will repeat the messages as necessary, and will wait for confirmation that they have been received.

- 12** The two chains usually run well now. Stop the participants, and ask them to remember their colors and animals.
- 13** Ask the captains to start a third new chain, perhaps of countries.
- 14** When the third chain has been learned, ask the captain to try all three chains at once. Tell the participants, "Remember, you can't listen to three people. But you can relax, if you trust the people around you to do their jobs; to take responsibility for reaching you. If you are busy, they will wait. Trust them." If any chain gets lost, the captain should just start it again.
- 15** Finish by physicalizing the chain – for example, by high-fiving on every handover. This gives a fun finish. Debrief the warm-up (see "Method notes").

### Method notes

- Three chains is usually enough for a first time. With practice, move to four, five, six ...

- For slower groups, offer them objects to pass around for each chain. Later, take away the objects.
- This is a great model of communication and project processes. The fundamental process (the chain) is totally sound in theory, but it fails in practice on the handover. Only by taking responsibility for the handover can we make it work. This means we have to make sure to transmit on multiple channels, perhaps repeat ourselves, and especially wait for some sign that the message has been received. And if we trust our colleagues to fulfill their responsibilities, even a very complex process is manageable (even relaxed). ◀

- Ⓐ A player in the color chain gets more physical in his communication, and delivers his message more effectively. Behind him, a second group are playing.



# “YES, AND ...” WARM-UP

A warm-up which introduces a new mindset of additive creativity and cooperation, as well as demonstrating the design principles of divergent and convergent phases.

<b>Duration</b>	The first time, about 4 minutes; after that, about 2 minutes
<b>Physical requirements</b>	Space for everyone to stand in pairs
<b>Energy level</b>	Medium to high
<b>Researchers/Facilitators</b>	1
<b>Participants</b>	From 2 to 2,000 people
<b>Expected output</b>	Awake participants, fun, and a useful lesson in convergent and divergent behavior

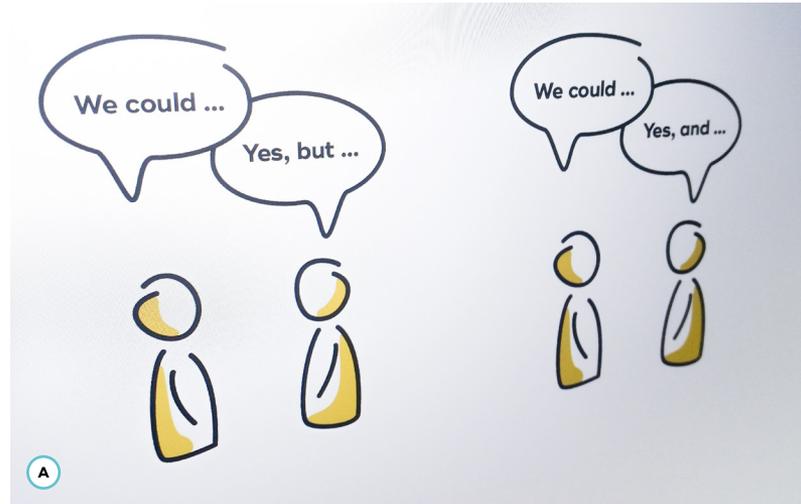
This game makes clear that divergent and convergent phases are both useful, but that some people feel more comfortable in one or the other and that they should best be separated.

Participants will keep referring to this warm-up during (and even after) the project. Do it before important group work sessions, especially sequential ideation methods like 10 plus 10. For more impact, let the participants do some group work before the warm-up, then some afterwards – and compare the difference.

## Step-by-step guide

- 1** Organize the group into pairs who stand face to face. If someone is left without a partner, make one “triangle” group of 3.
- 2** Ask the pairs to plan something together (you might suggest a holiday, a party, a meal ...). Explain they will do this as a “ping-pong” task of speaking in turn.

- 3 Tell them that:
  - One person in the pair will start by making a suggestion, like “We should go to Mexico.”
  - Then the second person will respond to the suggestion, reacting to it with a sentence beginning “Yes, but ...” (and continuing logically from that).
  - Then the first person will respond, reacting to the response with a sentence beginning “Yes, but ...” (and continuing logically from that).
  - Then the second person will respond ... And so on.
- 4 Give them a clear “GO!” signal.
- 5 Let the teams run for about 45 seconds. Then ask them, “How far did you get?”
- 6 Ask them to repeat the task, but this time replacing “Yes, but ...” with “Yes, and ...” ▶



A The “Yes, but ...”/“Yes, and ...” game.

- 7 Give them a clear “GO!” signal.
- 8 Again, let the teams run for about 45 seconds. Then ask them, “How far did you get?”
- 9 Compare the results of the two rounds. Compare the energy of the two rounds. See “Method notes” for more on debriefing.

### Method notes

- Many teams will say that the “Yes, but ...” round felt familiar; some will say it is typical meeting culture. Most teams will notice much more energy in the “Yes, and ...” round. They will certainly have come further with their planning, and many will have enjoyed themselves more. This does not mean that “Yes, and ...” is better than “Yes, but ...”
- “Yes, and ...” can produce ideas which are impractical, unaffordable,

even illegal. The proposals built using “Yes, and ...” might collapse soon, but at least they provide a starting point to work from.

- “Yes, but ...” on its own is painful. We don’t get far, but it’s still useful to be connected to reality. And some people feel more comfortable in this realistic mode.
- The trick in design projects is to have clear phases of “Yes, and ...” followed by “Yes, but ...” You might like to point out that “Yes, and ...” represents divergent thinking and “Yes, but ...” represents convergent thinking. Both are useful, but we must be aware which mode we are in. Mixing them is painful for the group.
- An excellent intermediate strategy is “Yes, what I like about your idea is ... so we could ...” ◀

# RED AND GREEN FEEDBACK

A simple but effective closed feedback system to maximize input and keep moving forward.<sup>01</sup>

<b>Duration</b>	The first time, 5 minutes or more per team; after that, about 2 minutes or more per team
<b>Physical requirements</b>	Pen and paper for the teams to record feedback
<b>Energy level</b>	Low to medium
<b>Researchers/Facilitators</b>	1
<b>Participants</b>	At least two teams, or a team and some visitors
<b>Expected output</b>	Praise and constructive criticism for the teams; new ways forward

Well timed, these feedback rounds help you keep your participants working at a good, fast speed within a workshop setting. This method also contributes to the group dynamic and exchange as participants quickly learn what is going on in other teams.

## Step-by-step guide

After a presentation or proposal, there are three steps:

### 1 “Understanding” questions (optional)

The audience can ask for any unclear points to be very briefly explained. Keep this step very short, and make sure participants do not disguise red or green feedback as a question.

### 2 Green feedback

The audience tell the team what they liked or loved about the proposal, and what should be kept or expanded ►

<sup>01</sup> Thanks to our friends at Swisscom for teaching us this method.

on in future iterations. The feedback recipients may only say “thank you.”

### 3 Red feedback

The audience share their worries or doubts about the proposal. There is one important rule – you cannot give red feedback unless it is constructive. Every criticism must be combined with a clear proposal or suggestion for the team. If you have no constructive suggestion, you keep quiet. The feedback recipients may only say “thank you.”

#### Method notes

- Give participants an impossibly short presentation time frame. When the (say) two minutes are over, everyone claps, whether they are finished or not. This will make the presenters concentrate on the really important aspects.
- It is hard work to reply with “thank you” only. Sometimes it is clear that

the person giving feedback has not understood your point. If this happens, that is your feedback – don’t be tempted to explain. It is much more important to keep getting more feedback (by letting the others talk) than to explain what you meant.

- Red and green feedback is a closed feedback method: it does not allow discussion of the feedback. That helps to keep your timeboxes in a concise workshop, but might feel limiting to the receiving group at times. Consider planning in some time after the feedback session for more open discussions in the group or on a bilateral basis.
- Constructive feedback can include direct suggestions for changes (“Make it bigger so that trucks fit.”) or other courses of action which are helpful for the team (“I think that’s illegal. Ask Xiang on the third floor,” or “Meet me in the break, I can tell you a technical hack.”) ◀



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This book is a companion to the main book “This is Service Design Doing”. Check our website for more information and additional resources.



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