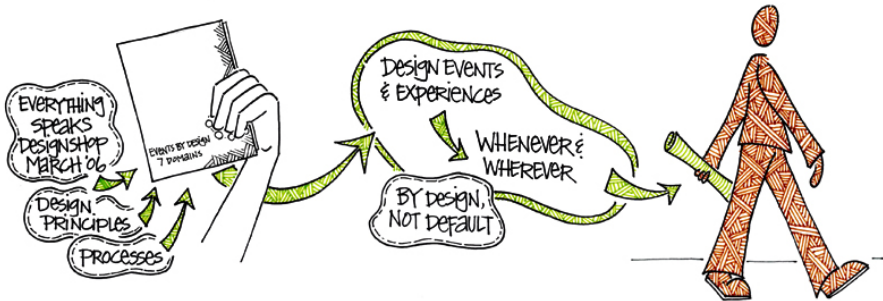


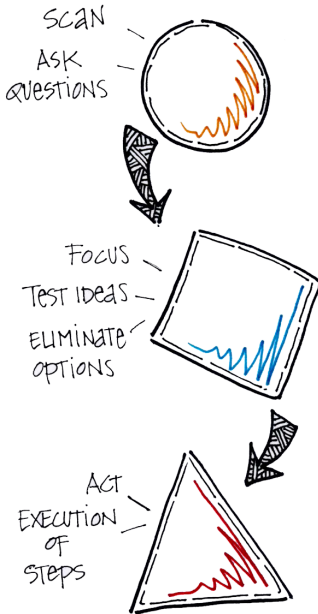
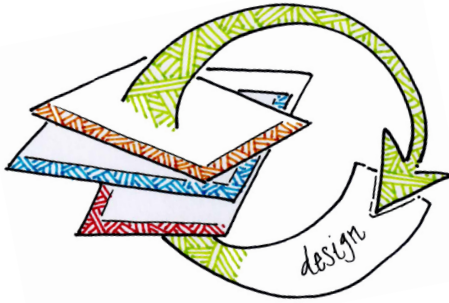
# events by design

facilitating through the 7 Domains™

The book you hold in your hands, "Events by Design," came to being as a result of the Everything Speaks DesignShop® event in Triesen, Lichtenstein March 2006. It is meant to be an ongoing companion, providing principles and processes useful not only with events and experiences within the WorkSpace, but when- and wherever we aspire to a future by design, and not default.



These cards are designed to work a team through three recursions of design. Before you begin designing as a team, review the cards as an individual. Find questions or ideas that you might not have thought about previously. Then, as you engage with other team members, bring up these ideas. Engage in a conversation about each idea. Let these ideas help guide your first steps into a design.



## introduction

### domain overview

explores the essence, calling to mind the relevance of each Domain.

### worksheets

address fundamental questions of the design process meant to help with the final format of your design.

### punch lists

provide precise instructions for succeeding with your workshop.

Recursion is part of a good design process. Design begins with open ended questions and a world of possibilities. As it travels through iterations, options are eliminated, and what matters comes into focus, and finally into execution.

## bibliography

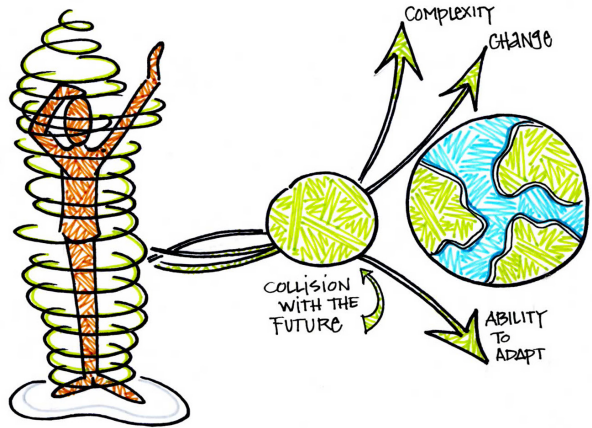
## table of contents

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# assembling complexity

## the design imperative

We live in an increasingly complex and inter-dependant world where it is difficult to keep up with the rate at which our environment, our organizations, and our individual lives are changing. Under this very tangible pressure, we as individuals and organizations often plan our responses by default, rather than taking the necessary time to design. At a planetary level, this is widening the gap between the increase in change and complexity against our relative ability to respond. As this gap widens, it compromises the sustainability of our planet.



## design requires 'Group Genius'

At the turn of the 20th century, a first rate mathematician knew "everything" in his or her field. Today, a first rate mathematician knows less than 1% in his or her field. One effect of this explosion in knowledge has been that each field has become super-specialized--a focus that can take us away from integrated solutions.

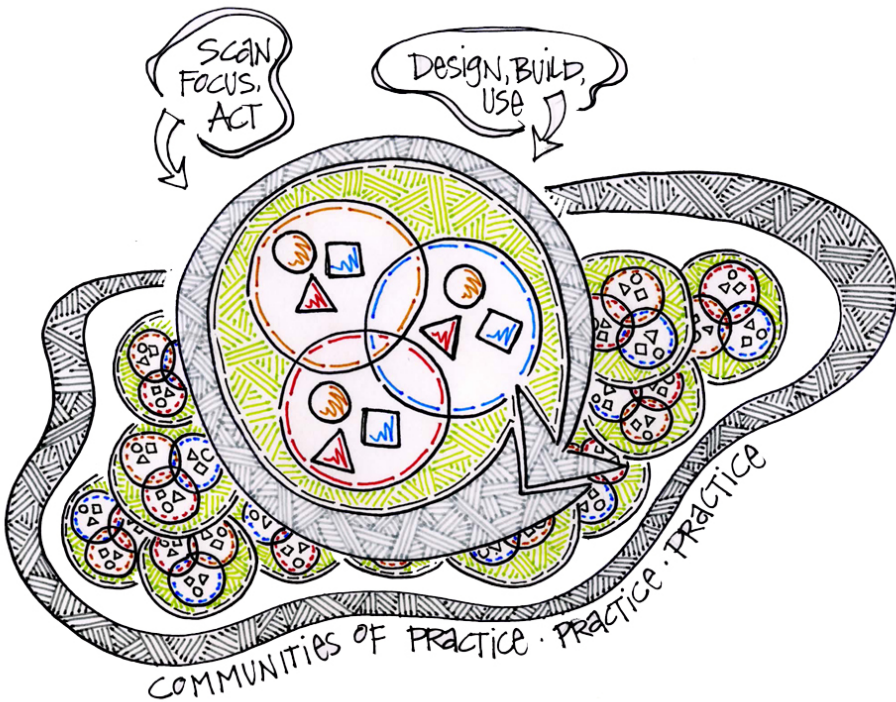


While we will always honour individual genius, it is only Group Genius that will create dynamic interplay among these fields and enable us to solve the complex problems facing our businesses, communities and the world at large.

# grounding patterns

## living systems thinking

Traditional analysis focuses on separating the individual pieces of what is being studied. The root of analysis, leu-, in fact means "to loosen, divide, cut apart." Systems thinking, on the other hand, focuses on how the piece or pieces being studied interact with other members or parts of the system. Rather than isolating smaller and smaller parts of a system, systems thinking expands the vantage point to take into account the interactions of and within larger and larger systems.



## communities of practice

Learning happens through conversations, dialog and doing. It involves all the senses and ways of thinking and knowing. Communities of Practice in the MG Taylor methodology means ongoing practice – design, build, use; Scan, Focus, Act – succeeding, failing, trying again. It is through doing the work that a community creates a common language, builds trust and is able to accomplish remarkable things. Healthy communities of practice are living systems.

## emergence

Emergence is one of the qualities of a living system and it is also both a quality that we want to bring into the design process as well as the very thing that we are designing. Emergence of Group Genius through collaborative experiences is the essence of our work.

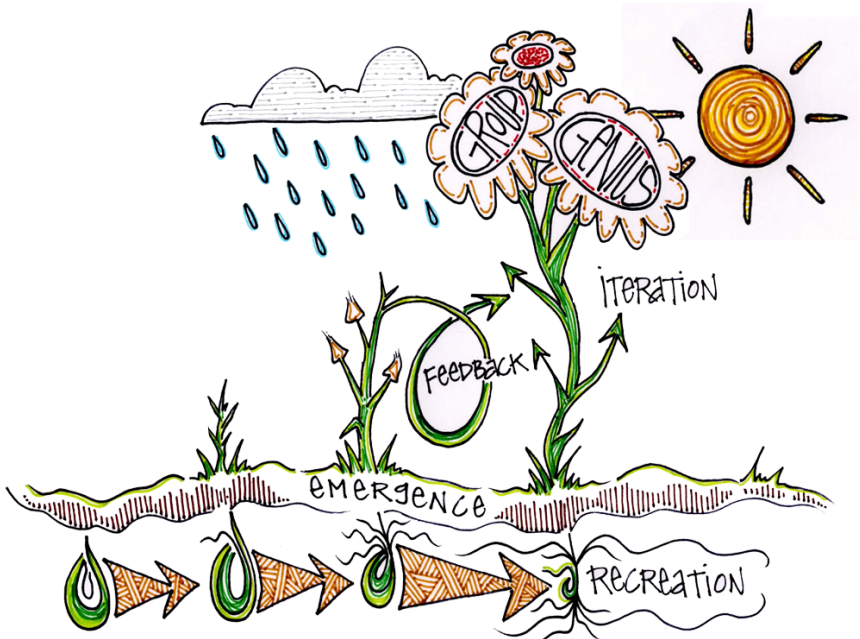
## iteration

Design is a creative process. As such, it has the characteristics of a living system: it requires multiple iterations over time to move to a new state. When designing an experience, iteration provides feedback on ideas and allows us to refine them. The habit of our society is against that discipline – everything has to be fast. We as designers have to adopt that discipline and build it into our ways of working and timetables. In doing so, we will be rewarded by better products in less time.



## beginner's mind

In the act of re-creating an experience every time, we bring a life into it that it otherwise would not have had. Within the process of designing each event, making sure that we start with a beginner's mind is one of the disciplines that allow the creation a high-quality experience for participants.





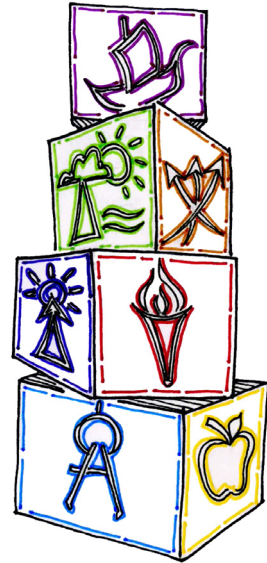
## Using Models



On this journey towards becoming designers, we will play with models that help explore complexity and design. These models are meant to spark the conversations that are essential to the act of design. They are not recipes, nor are they linear in nature. They are tools to guide

us in designing the 'requisite variety of responses' in any given situation. If we meet a complex, high variety challenge/issue/situation with a response that is not varied enough, we are heading for failure.

Models should be seen as systems or interrelated concepts/notions with many different linkages rather than static and linear.



## 7 Domains as a scaffolding



Out of the more than 20 MG Taylor models, the 7 Domains model is the one that offers a most natural way to approach design and become designers. There are several other models that could have been used, such as the 'design formation' model or 'scan focus act'.

The 7 Domains model offers a good way to build a 'scaffolding' for the design of an event. It guides us in managing the conditions required for the emergence of the desired outcomes. People are purposely not shown in this model, because they do not need nor want to be managed. Our job is to manage the domains in a way that creates the conditions required for a group genius answers to emerge and be acted on.



# the essence of body of knowledge

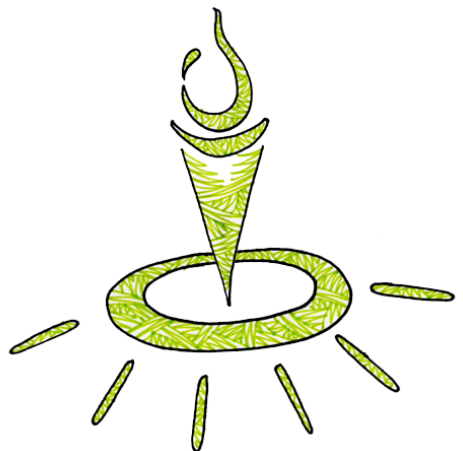
"Knowledge is power." How many times have you heard this? What does this mean in today's complex global economy, where information is doubling every 18 months? Where, through a handful of powerful tools, information is accessible to almost anyone, no longer confined to those at the top of our organizational structures? With cell phones and an internet connection, even some of the most remote villages have found ways to access and share in this dramatic increase in the world's body of knowledge. How do we think about information when there is so much and it is so easily accessible? As designers and knowledge workers, what matters?

Knowing how and when to select, combine and eliminate information has become as important as the information itself. Patterns, principles, and relationships become far more essential in being able to call forth and cull out useful data and information so that it is useful knowledge. Content and context are two very different things. Content without context is useless.

Skilled designers and knowledge workers also scan from a wide variety of resources with many different tools, focusing both inwardly, to understand the existing body of knowledge of a group or community, and outwardly, pushing and expanding the boundaries of what is known, introducing new thinking to the participants. By studying the existing body of knowledge of an organisation, designers begin to know the personality, culture, learning-style, history, and overall context in which the organisation operates.

Through the richness of new information, designers can help organisations reveal and challenge their assumptions and beliefs about the world in a way that opens to new possibilities and opportunities.

Throughout the design process, information is collected, mixed through different lenses, and fed back into the process itself. It becomes richer and



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(body of knowledge continued...)

richer, each time revealing new patterns and relationships. Knowledge becomes powerful not by who controls it, but rather by how it is accessed and made useful.

Over the course of an event, as the design progresses through Synthesis and into Engineering and Building, the demands on the body of knowledge become more precise, more detailed and tailored to the particular need.

# the essence of process facilitation

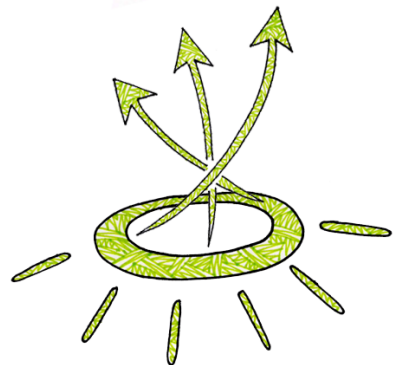
Process facilitation is the systematic removing of blocks to an individual's or team's design process. It establishes parameters and seeks to engage the interaction among all of the other Domains and to ensure a fitness of the Domains as a system to facilitate effectively.

Generally, we tend to think about processes mostly in the realm of project management or coming from the front of the room; yet these are only two of the many modes of Process Facilitation. Most phases of design are not well served by strict time management, content delivery, and keeping people on course and focused.

Design begins open and progresses in an iterative, non-linear manner. It cannot be subjected to standard project management nor, in most phases, limited in its exploration of knowledge. Process Facilitation recognizes the needs of the designers in relationship to the phase of design that they are moving through.

Each of us has different learning preferences and ways of expressing ourselves. Expert Process Facilitation is inclusive of these learning modes and considers them an essential part of bringing forth good designs. Knowing the value of diversity, variety, difference – and the timing and phases in which to either increase them or eliminate them – are all part of Process Facilitation.

Process Facilitation is rigorous, demanding, detail-minded and when well done, invisible in that it creates the foundation for an open-ended process that moves forward seeking authentic solutions and actions, worthy of the talent, time and resource allocations of a group of people. Good Process Facilitation brings forth rich, well-considered solutions and ownership of them.



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# the essence of education & training

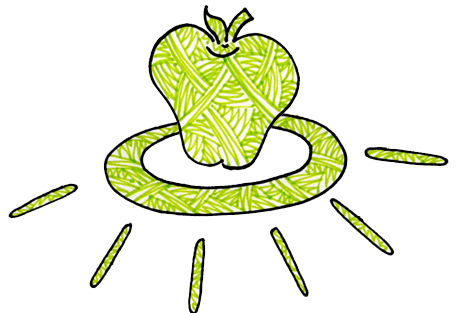
Often confused as one, education and training are completely opposite in intent and method. Education means 'to lead out' and is primarily an open-ended process. Training means 'drawn or dragged behind'; it is a closed process of making things automatic. Education pertains to self-consciousness and discretionary activity; training to the development of habits. Both are needed.

An industrial economy considers ideas, and parts, in isolation to each other. The work of education is to provide and nurture people becoming productive in a particular field or industry. Experts are those who learn everything in their field and bring something new to it.

In a creative economy, educational needs are very different. With information estimated to double every 18 months the nature of learning and "expertise" becomes qualitatively different. Today's challenge is about exploration, relationships, and new pattern-making. It is far less on breaking apart to understand, much more about whole systems and seeing the parts and whole in an inseparable, co-evolving relationship. While certainly learning is an individual discipline, it is equally important to know how and when to learn as a community of practice, in collaboration with each other.

Learning to design is perhaps one of today's most important skills. Design skills are radically different from what most of us learned in school; and yet, they are not so different from the natural behavior of a child at play. Perhaps then, one of the more important learning skills is learning how to unlearn.

Training is still essential to everyday life, but its character is changing. It helps in learning useful new patterns and relationships. The interplay between learning and training is dynamic, always evolving. Training becomes more focused on practicing how to continually learn, communicate, and work as team to go from vision to products and services in the market place.



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(education & training continued...)

Recently, in the CEO WorkSpace session, What Can Creativity Do For You?, one team claimed that finding community building talent is “the single most precious resource in the modern world.” This realization is distinctly different than the competitively, individualistic world of an industrial economy. What is true today is that we cannot merely make a few changes in our educational and learning programs and assume that they will serve us well. Today’s challenge is to redesign and practice new ways of working and learning together. And, to know that this is not for others to design for us, but for us, to design and work together, event by event, project by project.

# the essence of environment & tooling

Often so assumed, Environment garners little attention and is largely taken for granted. An element either out of our concern or beyond our influence. As a result, we find ourselves living and working in environments that have long since outlived their design, in fact becoming choices by default. Once we see and understand Environment as a powerful opener to creativity and design, we can begin to truly participate with it, shaping it and being shaped by it in how we think and act.

Many of today's work environments were designed and built under design principles that assumed control and hierarchy. Architecturally and organizationally, knowledge work was not a consideration. Group interaction, let alone creativity, was at best an afterthought and more often structurally blocked. Content and expertise come from podiums and corner offices. Boardrooms determine what information is relevant, collecting and distributing it in hopes of getting everyone on the same page, steering the ship in the same direction.

It does not have to be this way. More and more people, organizations and communities are realizing this. Our environments are experiencing the shift to a creative economy, where the powers of design and collaboration are being unequivocally recognized as essential to healthy, wealthy and wise ventures. The more complex the world grows around us, the more we need the help of the environment to inform, and teach us new ways of working. This is a time to carefully consider the environment and make it one of our central points of attention and care and learning.

Like an ecosystem, Environment supports us and nourishes us, or hinders and poisons us. It configures to the work, making rich design process possible, or it remains static, handicapping our creative capacities. Work environments – even simple ones – can be as harmonic as those found in nature: utility and beauty feeding each other. No detail in isolation, everything connected by context and pattern.





Environments can learn and evolve from how we use them. Within the projects, we can choose to allow emergent solutions to enter the environment design process. The solution we end with is always new, as a very specific response to specific needs, and it still deploys fluently. Rich environments facilitate productivity. Used wisely they can give back hours out of every day.

A good environment is self-explanatory, yet full of surprise and play. It is simple and robust. Absorbing stress, encouraging respectful behavior without compromise to feisty, spirited debates and interactions. As designers, we can configure and shape how our environments speak and what they say. Environment exemplifies, even in its smallest details.

The ability to rapidly reconfigure collaborative design environments creates a neutral space yet not a plain space. There is a pattern language. Through it, we make intentions as legible as possible. We want participants to explore complexity, to play with problems, and engage in action. Hence, the environment must stimulate and enable collaborative work. We think of it as "working big". It is a media, containing information, making knowledge available, helping participants share. It helps build a common language.

Technology is a willing partner to Environment. Environment helps technology work for participants. It facilitates technology to be useful without being disruptive to the patterns of thought and work. The environment embeds technical solutions to ease, reflect and capture work. The whole system, and each of its components, has to be adequate, flexible, repairable.

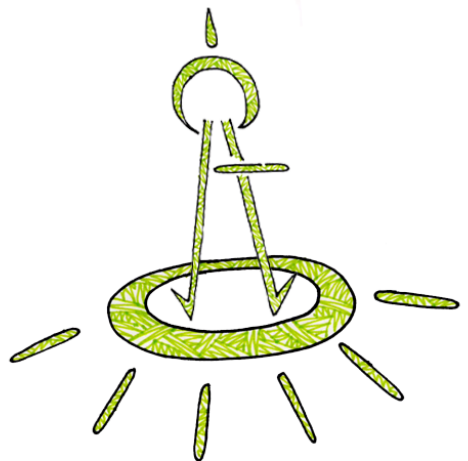
# the essence of technical systems

An enterprise's technical systems is akin to a human's nervous system: it continually organizes a vast amount of information about the activities and health of all its component parts, as well as an array of information about the external environment.

The Technical Systems Domain is the collection of techniques by which the corporate mind/body functions as a unity. It is the means by which knowledge that is fragmented and local can become organized and available where needed for effective design, planning and implementation. Computers and other automation technologies - and how they are used - are only one aspect of this Domain. Its focus encompasses an organization's structural components as well, including procedures and protocols; work rules and processes; communications procedures and equipment; and logistic and physical material handling, to name just a few.

Technical systems are a healthy partner in facilitating productivity and effectiveness whether a group is working face to face, or remotely.

The Davos WorkSpace is an example of a technical system of systems. The walls, HyperTiles, scribing tools, computers, lighting, movable work stations, rolling chairs, plasma screens, and sound systems are all part of a support system helping to facilitate Group Genius. It augments performance of the KreW as well as for participants.



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# the essence of project management

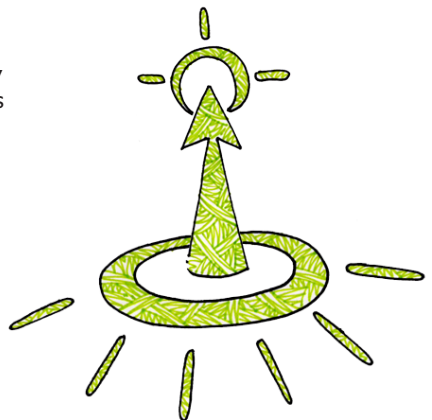
Project management is embedded throughout the design process and is a great assistant to Process Facilitation. When Project Management and Process Facilitation are working hand in hand, they offer a wonderful creative tension between open and closed; choice and constraint; new and reusable; chaotic and flowing; designed and emergent. The result can be something far more surprising and successful than thought possible.

Project Management is the domain of execution. It considers, connects and aligns all of the Vantage Points—philosophy, culture, policy, strategy, tactics, logistics and tasks— into a seamless working system. It provides tools and ways of seeing the parts and the whole in relationship to each other. As a dynamic and feedback driven system, and as a primary accountability and control function across all levels and areas, Project Management acts through a process of measurement, course correction, and adjustment.

Project Management is probably the most fragile of the domains. It can easily kill a design process by inserting itself too early or aggressively, or without a whole-systems view. On the other hand, without Project Management throughout a design process, it is doubtful that a good idea will ever come to fruition.

Project Management insures that there are ongoing cycles of 'design, build, use', each facilitating the end-result to be stronger, richer, more fit to specification and circumstance.

Project Management requires transparency, ownership, and accountability. It honors failure and celebrates success.



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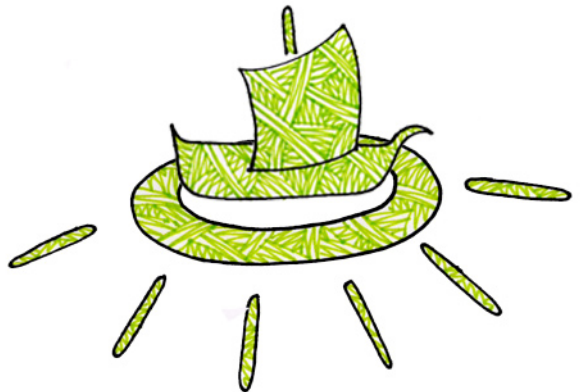
# the essence of venture management

Venture Management emphasizes the braiding together of the Seven Domains. It is a reminder that the domains are seven aspects of a single system that must be understood and managed as a system.

The Seven Domains Model is recursive, so that each Domain requires users to apply the principles and skills of each other Domain if the full strength of the model is to be realized. The new capabilities which result from these interactions are often surprising, due to the phenomenon referred to as synergy—bringing various components together creates a new system, whose performance is not predictable based on the sum of the independent parts.

Venture Management embraces the concept of managing the organization as a living system, rather than managing its resources and results. It is managing the health of the entire enterprise to bring it to a sustained capacity for innovation and high performance. Venture Management means both bringing new options to awareness and gaining maximum use of existing resources. It has many facets, including such activities as finding new uses for existing capacities and solutions; exploring new relationships with outside organizations, such as partnerships and co-ventures; networking; and supporting innovation and risk-taking by internal 'entrepreneurs' throughout an organization.

Venture Management is the successful and continued conduct of exposure to risk. There are no formulas or prescribed means of Venture Management, but there are practices and principles that foster it.



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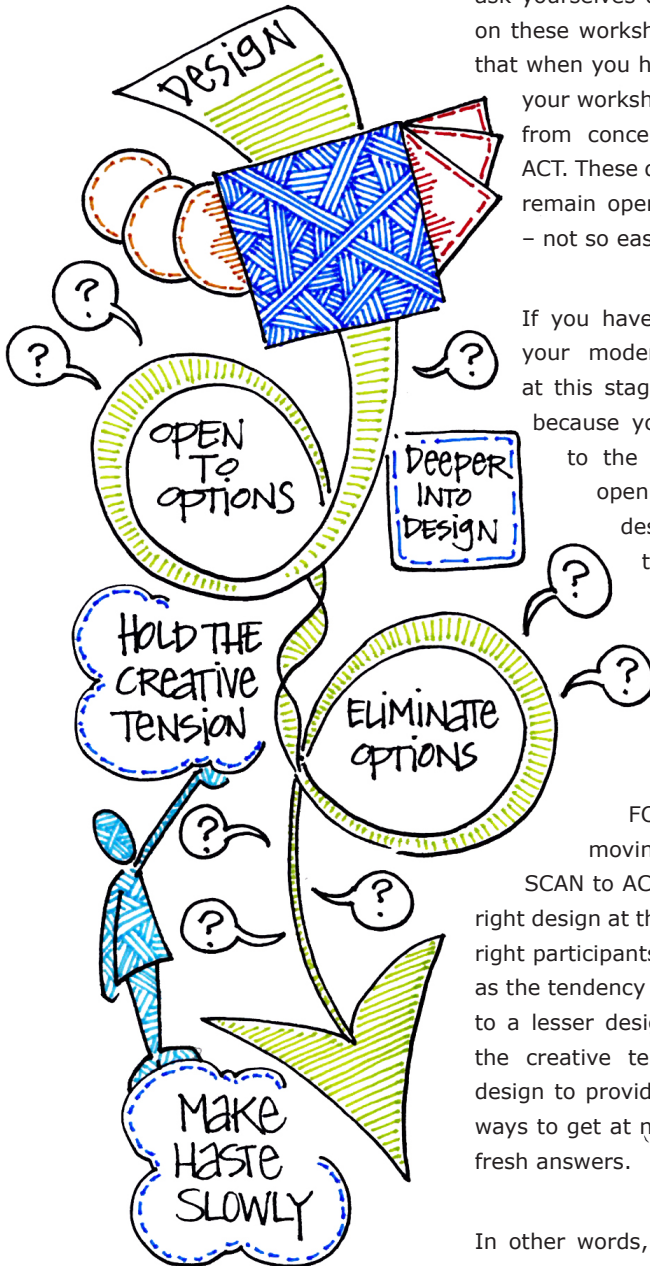


As you get deeper into your design, ask yourselves questions like the ones on these worksheets. It is easy to feel that when you have a good concept for your workshop, you can go straight from concept into the details of ACT. These questions remind you to remain open while closing options – not so easy to do!

If you have not done so, engage your moderators and facilitators at this stage. This is a good time because you have given thought to the structure but are still open to input and further design choices. It is here that you want to take the time to make your ideas stronger and bolder than they might be without this level of thought.

FOCUS is a swing stage, moving back and forth from SCAN to ACT. It is calling forth the right design at the right moment for the right participants. This is a fragile time, as the tendency is to give in too quickly to a lesser design rather than holding the creative tension that allows the design to provide the participants with ways to get at new ways of seeing and fresh answers.

In other words, use these worksheets to “make haste slowly” as you move forward with the design.



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# body of knowledge

How have we incorporated heuristic searches into our information gathering process?

In what ways does the information we have gathered and displayed take into consideration all the different ways of learning - visually, verbally, kinesthetically, etc.?

How do we display our body of knowledge so that it can be viewed by many?

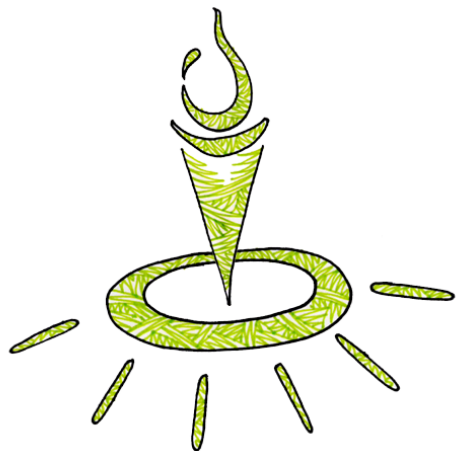
What are the best forms to capture the new knowledge and ideas that come out of a design session?

How will our body of knowledge be added to and retrieved from a collective, shared database, so that it can be retrieved and reused ongoingly?

Does our design process facilitate participants to make significant contributions to the body of knowledge, regardless of whether or not they are "experts"?

What do we know of the knowledge, heritage and style of the organization for whom we are designing this event? How can we make the best use of this in the design?

How informed is our design about the community's culture? How can we best honor it and design processes that augment the culture and not abrade it?



***“Our imagination is stretched to the utmost, not as in fiction, to imagine things that are not really there, but just to comprehend those things that are there.”***

*Richard Feynman, The Character of Physical Law*

# process facilitation

What is our goal? What are we trying to accomplish - not just with the content, but also with the entire experience for the participants?

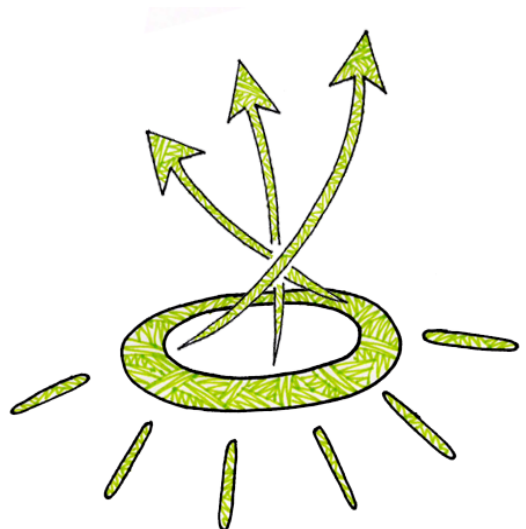
What are the performance specifications for this event? What are the few things that we must do to make our event a success?

What is the dance of our design? How does it move designers and participants through the stages of design mentally, psychologically and physically?

Can we play with the creative tension between the unknown and the known long enough to allow for emergence and insights born out of both the familiar and unfamiliar?

Do we have good feedback systems in place, so that the process facilitation can improve and keep requisite with the participants as they move through different phases of design?

What is it that we want to do that we have never done before? What learning is required?



***“At present, people create barriers between each other by their fragmentary thought. Each one operates separately. When these barriers have dissolved, then there arises one mind, where they are all one unit, but each person also retains his or her own individual awareness. That one mind will still exist even when they separate, and when they come together, it will be as if they had not separated. It is actually a single intelligence that works with people who are moving in relationship with one another. If you had a number of people who really pulled together and worked together in this way, it would be remarkable. They would stand out so much that everyone would know they were different.”***

*David Bohm*

# education & training

Do we have access to a rich body of knowledge that helps us draw forth new and interesting information as well as facts, figures, and measurements?

How does our design provide for both rigorous and open-ended exploration for ourselves?

In what ways does the design support "learning by doing," taking the designer and participants through multiple iterations of exploration?

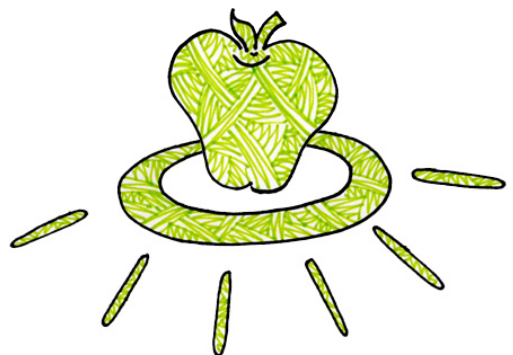
How are we encouraging 'experts' to engage with others from many different vantage points and providing them with the opportunity to be learners as well as share their expertise?

How does our design encourage play and imagination as means of expanding our ways of thinking, challenging assumptions, and creating new possibilities?

Are we putting in place patterns, principles and relationships to create standards that evolve and shift with new context?

Are we constantly engaging and immersing ourselves in the design process, demanding of ourselves the same practices we seek in the participants?

Are we training ourselves to learn new tools and processes?





***“In those places where we’re most alive, we are questions, not answers. These questions change as we age. We have to listen carefully, again and again, to detect new questions, which may announce themselves in a whisper. At any age, the questions we ask define our growing edge. So long as we’ve got even a single question, we’re not dead. If all we have are answers, we might as well be.”***

*Robert Fuller, Somebody's and Nobody's*

# environment & tooling

What are all the components of the environment? Are we paying sufficient attention to air, light, temperature, acoustics?

Are we able to change and modify each of the components of the environment easily and quickly, accommodating the needs of different phases of design?

How does our environment allow for both prospect and refuge?

Is our environment able to support and nurture the individual and collective creativity of the participants in each phase of the design process?

How have we considered the display of information as a means of helping participants to see with new eyes, reframe assumptions and rethink what is possible?

In what ways is the environment attuned to the participants' culture, style and aesthetic sense?

Are the themes and aspirations of the event evident in the physical appearance of the environment?



***“An article in the Architectural Review says: ‘A house is not a machine for living in, but an organ for living through...’ As he goes about his home, a man is reborn and transformed in every room.”***

*The Secret Life of Inanimate Objects, Lyall Watson, 1990*

# technical systems

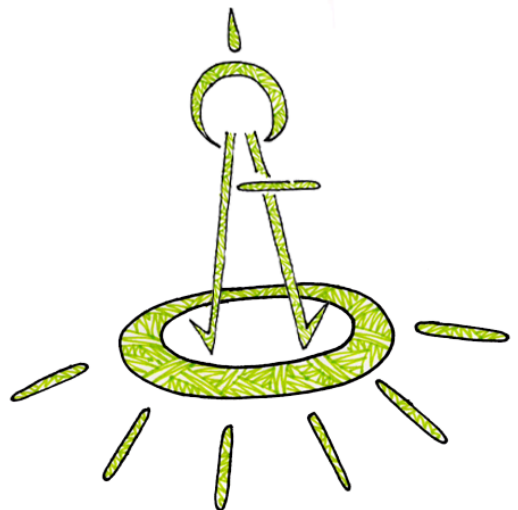
Are we using technology to honor our work and the work of the participants?

Are we integrating technology into the environment so that it is useful but not obtrusive or burdensome to the participants' design process?

Are we using technology to support and show emotions and different ways of learning as well as content?

Are we able to make real time adjustments in terms of music, video displays, and other tools to meet emergent ideas and changes needed to facilitate moment by moment?

Have we chosen some common processes and tools to store, retrieve, and display our body of knowledge? Are all members of the design team able to use these processes and tools?



***“Any sufficiently advanced technology is  
indistinguishable from magic.”***

*Arthur C Clarke*

# project management

How aware and convergent is our team concerning the objectives and anticipated outcomes of the event? How does this translate into design principles for the event?

What resources do we need – people, time, history, environment, tools – to realize our highest expectations for the event?

What is our monetary budget? How is it allocated? How are purchasing decisions made?

Do we have the technology to keep us in touch working iteratively, not only with our team, but also with outside experts and others who will be involved in making our goals reachable?

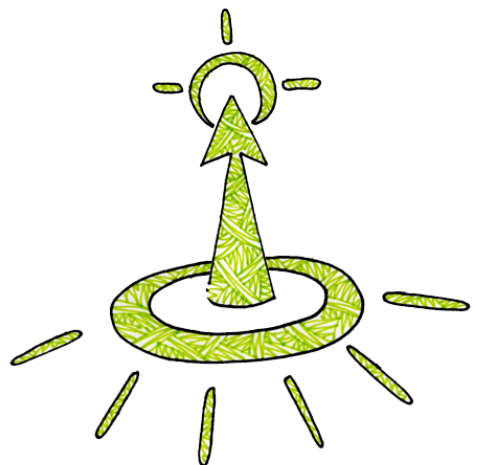
Are we allowing for sapient leadership, such that leadership and responsibility can emerge from within the team as appropriate to the task at hand?

Are we working through fast iterations of design to get to the essence of our work?

Are we using group work and individual work to the best of both advantages?

How do we budget our time according to where we are in the creative cycle?

Design has two parts: “creating the problem,” which is open-ended, and “solving the problem,” which is close-ended, driving the understanding to a precise conclusion. Do we know which part we are working? How do we know?



**“Exemplary performers use the constant flow of information to shape products and services. In contrast, other performers use only initial information. They tend to present their initial product or service as final and often have an aversion to producing or reproducing the product or service.**

**“Exemplars, on the other hand, use the flow of information as inputs to engage in productive iterations of product development. The exemplar, given the time constraints, will repeat the process as many times as necessary in order to produce a perfect product.**

**“For most products or services, the exemplar engages in six iterations of production. Each of these iterations emphasizes further shaping of the product because of new information feedback. Each iteration becomes a more and more efficient resource investment -- perhaps half of the previous phase. In turn, each iteration doubles the quality of the product or services. The exemplar becomes increasingly more efficient in resource investments and effective in results outputs.”**

*Robert Carkhuff, The Exemplar, 1984*

# venture management

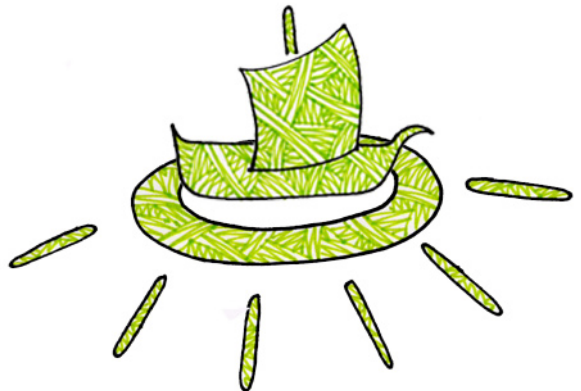
How do specific, individual events fit together as a seamless whole – an ecosystem – supporting the mission and work of the enterprise as a whole?

How is learning being documented and fed back into the larger system so that everyone benefits? How are we learning from other events and teams?

In what ways are we honoring the memory of each event – capturing outcomes not only of content, but also in context, mood, and energy?

What are the Rules of Engagement between the various components and players? What are the protocols for changing the design? What is the balance between an open flow of information sharing with clear communication channels to and among the various key players (Sponsors, Moderators, Design Leads, etc.)?

Are we all accountable and responsible for success or failure?





***“The more we study the major problems of our time, the more we come to realize that they cannot be understood in isolation. They are systemic problems, which means that they are interconnected and interdependent... Ultimately these problems must be seen as just different facets of one single crisis, which is largely a crisis of perception. It derives from the fact that most of us, and especially our large social institutions, subscribe to the concepts of an outdated worldview.”***

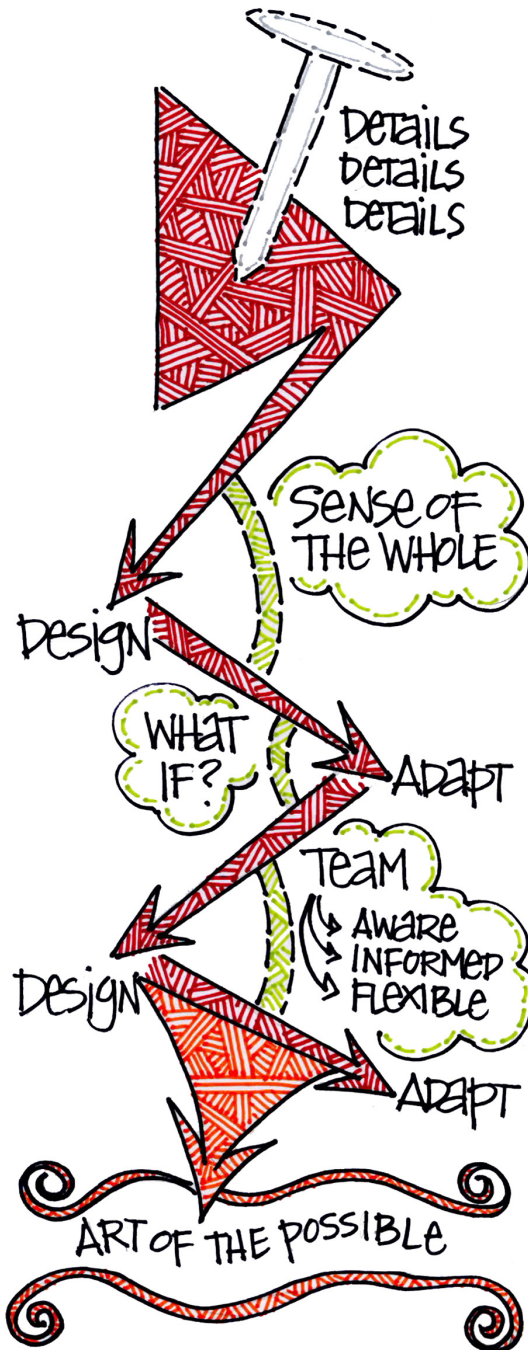
*Fritjof Capra, The Web of Life: A New Scientific Understanding of Living Systems, 1996*

'For want of a nail' is a phrase often heard when the details are not in place. ACT requires a detailed sense of the whole. Here you want to know who is doing what, when.

Details take on an added dimension with the design process because workshops must be designed to adapt. Are you expecting 60 participants or 25 show up? Do your plans call for adapting without degradation? Imagine one of your moderators just goes on and on and his time eats into the rest of your design - how do you adapt without degradation? Whatever you have planned for, chances are something else will happen!

Are you a team? Are you able to work in a flow, allowing for real time learning and correction? These are the kinds of considerations that you want to take into account.

And of course, there are all the normal things like, who is doing video? Have the tapes been labeled? How are we displaying information? etc. This is where the fine art of the possible becomes real.



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# body of knowledge

## **1 - 2 weeks prior to event:**

Is the knowledge base (articles, books, props, music) robust and rich enough to support and enhance the existing design for the event?

Are Krew members and sponsors accessing and contributing to the knowledge base?

Have assignments and instructions been drafted?

Do the knowledge objects exist in both hardcopy and electronic form?

Is the Body of Knowledge in-step with the Environment and Technical Systems?

## **Prep day(s), during event and post-event production:**

Has an individual or team of Krew been identified to manage the knowledge base throughout the event?

Do the production, graphics and environment leads have context and understanding of how knowledge objects will be used throughout the event?

Is a system and process in place for the knowledge base to be organized, labeled and documented?

How will the content participants create (work walls, hypertiles, cubes, etc.) be organized, labeled, documented and displayed? Who is responsible for this?

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# process facilitation

## **1 - 2 weeks prior to event:**

Has a Sponsor Meeting been scheduled during the final prep day, allowing several hours so that they can review design, give input on teams and assignments, and prepare their opening comments?

Has the information about the event - context, current Strawdog, links to relevant websites, wikis, etc. been received and reviewed by all Krew members?

Have event dates and arrival times been communicated to Krew and Participants?

Does the Process Faciliator (Design Lead) have a model of how the event is going to be supported - which knowledge workers are going to assume which roles?

Is the Process Faciliator or Logistics lead in touch with all relevant providers - catering, facilities, etc.?

Has the catering schedule and food selection been reviewed? Have any special dietary restrictions of participants and Krew been accounted for?

Have all necessary supplies been ordered and accounted for?

Has the Process Facilitator / Design Lead(s) visualized the design process from end to end, auditing what will be needed to transition and support each module?

## **Prep day(s) and during event:**

### **For prep day, prepare initial Krew circle-up, including:**

Ice-breaker activity (optional - based on experience of team working together)

Review context and objectives of event

Strawdog copies and on white board

Review roles anticipated, while allowing for Krew members to step-up to roles

### **Prepare Sponsor Walk-through:**

Includes (at minimum) sponsor(s), key facilitator/moderator, Process Facilitator, Writing team

Have current copies of strawdog, assignments and team lists available for review

Print and distribute strawpups (name tag sized copies of the strawdog) on each event morning.

Process Faciliator should identify and document Krew roles, keeping several modules ahead of the actual event. At any given time, the PF should know:

Who is doing what?

How upcoming environment and assignment transitions are going to flow, and who is responsible?

The readiness of assignments and related materials needed for upcoming modules

Make regular check-ins with the Key Facilitator / Moderator to be sure they have everything they need and can focus on the energy and conversations of the participants.

Make regular check-ins with Team Leads - writing, production, environment, etc.- to be sure they have everything they need and their processes are going smoothly.

Allow for periodic circle-up check-ins with the full Krew (esp first thing in morning and last thing in evening)

Spend time to prop up sagging energy and motivate them- You heavily influence the Krew mood!

Search for blocks that you can eliminate to facilitate Krew effectiveness

Consider weak points in processes and address immediately

Food is critical—healthy snacks and lots of coffee

Allow time for them to sleep/recharge

## **Considerations after the event:**

Develop an evaluation component at the end of the event.

Write learnings, stories, outcomes from event and incorporate into Body of Knowledge such that it can be used in designing upcoming events.

Follow work product development and complete audit. Unless otherwise specified, PF has final go/no go for event deliverables.

Ensure that Krew understands invoicing process.

# education & training

## **1 - 2 weeks prior to the event:**

Has the Krew spent time learning about the topic and client, such that you are reasonably proficient in the culture, language, situation and issues that the event will address?

Does the Krew have access to the documents and resources with which to learn about the topic and client?

Does the event design incorporate the 5 E's of Education from both the Krew and participant perspective?

Does the event design engage and support multiple learning styles?

Have training and knowledge transfer exercises - with new technology, for example - been accounted for and designed into the pre-event preparation?

Are there "knowledge experts" participating that have any special needs or requirements for transferring knowledge to Krew or other participants, either before or during the event?

Have read-aheads and other relevant educational material been sent to participants and sponsors and Krew?

## **Prep day(s) and during event:**

Identify and schedule training opportunities for Krew and client.

Be sure that new/first time knowledge workers have a mentor/buddy that they can go to with questions, mentoring and guidance.

Is the Environment set up to facilitate discovery, insight and learning across various learning styles and intelligences?

Develop process to capture event learnings among Krew members.



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# environment & tooling

## 1 - 2 weeks prior to event:

Ensure that all WorkWalls, furniture, technology and production systems have been shipped and are scheduled to arrive to schedule.

Determine whether you need additional set-up help from movers and how much lead time they'll need in order to have the environment in working condition by the time the Krew arrives.

Ensure that all paper, printer cartridges, tiles, and general supplies are stocked.

If not already done, produce a space map / floor plan for the WorkSpace environment. Including both participant work areas and Krew work areas.

## prep day(s) and during event:

Environment lead, PF, and Graphics team determine optimal placement and format of Knowledge Wall, Knowledge Agents and Welcome Wall.

Environment lead and team create optimal set-up of WorkWalls and furniture to support the integrity of the event design. This includes:

- Transitions between different modules and activities that require different set-ups;

- Setting break-out spaces;

- When and how to "dress the space";

- Whether tables will be required.

With PF and Technology team, determine needs and set-up of any multi-media displays such as plasma screens for video and slide presentations.

Environment lead create a space map which can be used by both Krew and participants to find their way to specific areas.

Inform Krew of process, swarm needs, and timing of tricky transitions.

Together with photo lead and production lead, determine process for wall/hypertile capture.

## **ensure that “everything speaks”:**

Pens work perfectly/ pen trays are set

Nametags are displayed to be easily found

HyperTile kits and art supply kits are full

## **determine best location and set-up for event check-ins:**

Circle-ups

Sponsor meetings

Group Photo

Continuously refresh the space, removing clutter and inviting intrigue.

## **after the event:**

Return space to pristine condition, cleaning Walls, stowing tables and chairs, archiving knowledge agents, packing toys, etc.

Note supply needs so that the environment can be restocked prior to its next deployment.

Environment and production team leads coordinate to bundle client knowledge agents, props and other re-usable content.

If appropriate, add knowledge agents to body of knowledge.

# technical systems

## 1 - 2 weeks prior to start of event:

Are the tech systems "simple" enough that any Krew, moderator, sponsor or participant that needs to use it can do so?

Is there technology that requires training of the Krew, moderator, sponsor or participants in order to be truly beneficial to the event?

Are the tech systems "sophisticated" enough to support and facilitate the needs of the Krew and participants?

Review the design, start to finish to identify the key processes that technology will enable or support (documentation, video capture, Internet research, music facilitation, document repository, etc.).

Is the Technology lead in-design with the Environment lead to be sure these two domains are aligned and have a shared vision of how technology will support the Process Facilitation of the event?

Do you have a back-up plan in case you have a technical system failure?

## Prep day(s) and during event:

All technology and tech related supplies are on hand and in top working order. This includes but is not limited to:

- Microphones
- Cameras (video/photo)
- Beamers
- Plasma screens
- Lighting
- Mixer
- Music
- Server
- Laptops
- Internet Kiosks (for participants use)

## Ensure that all Krew and moderators know how to operate the tech systems relevant to their abilities for high-performance.

Included but not limited to:

- Accessing the server, printers, Internet
- Music system
- Video cameras, video mixer, digital cameras
- Microphones
- Lighting (including how to close drapes and shades to reduce glare)

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Tech lead together with production lead ensures appropriate placement and labelling of all electronic folders and files on server.

Tech lead ensures that applicable client inputs are appropriately placed and accessible on the server.

Coordinate with DWI (documentation, writing, inputs) lead and photo lead on best placement and naming conventions.

Tech team look for and suggests innovative ways to use tech in design.

Tech lead considers tech weaknesses and back-up plan in case of breakdown.

# project management

Note: These Project Management tasks are closely tied to those of Process Facilitation. These two Domains should work hand-in-hand.

## **1 - 2 weeks prior to event:**

Establish and communicate rules of engagement and expectations of the Krew - individually and collectively.

### **Schedule of all pre-event meetings and activities:**

Sponsor / Moderator Meeting

Training sessions

Krew dinner (often the night before the final "prep day")

Start time for Krew prep day(s)

### **If you've not already done so, create audits of:**

skills of the Krew

tools and technology that will be available

client inputs and knowledge agents

supplies, materials and props that will augment the environment

### **Get contact information for any contacts who may need to be contacted with urgency such as:**

Publicis

Facilities personnel

Tech support

Session Moderators

Krew Accommodations

Taxi service

Establish a budget for the event and determine protocols for how purchasing / spending decisions will be made.

## **Prep day(s) and during event**

Coordinate with Process Facilitation and Tech Lead to be sure all systems are online and that Krew has access to and ability to use technology such as printers, servers, a/v, lighting, etc.

Time box prep-day activities to keep Krew on task and moving through quick cycles of design.

Map Krew members to specific roles/responsibilities for each module of the event (at least Day One):

- Documentation
- Scribe
- Video
- Environment
- Music
- Production
- etc.

Keep a running "supply list" of items needed. Be sure time is allotted to procure these supplies during business hours.

Communicate and coordinate with caterer to finalize meal schedules, menus and set-up. Be sure to include Krew in counting meals and set-up.

Locate auxiliary printers and production capabilities in the case that WorkSpace systems go down for any reason.

During event, schedule work cycles for Krew during meal times and after-event hours to be sure everyone has an opportunity to eat and take a break from their work.

In coordination with Process Facilitator, produce a detailed, annotated strawdog.

# venture management

## 1 - 2 weeks prior to event:

Craft a narrative (story) of what is going to be happening in the WorkSpace, why it is important, and how it relates and furthers the themes of the Annual or Regional Meeting and the Mission of the Forum.

- Share and iterate the narrative with all Krew, so that each of you can be evangelists for the WorkSpace.

Think through and identify ways in which all of the WorkSpace sessions relate to one another.

- Identify means by which information and outputs will travel from one workshop to another.

Establish and communicate what the Rules of Engagement will be between and among the various roles and players.

- The protocols for changing the design
- The communication channels to and among krew, sponsors, moderators, participants, and observers during the event

## Prep day(s) and during the event:

Listen carefully to sponsor concerns and reassure that the process can and will work to meet the stated objectives. If there seems to be a sudden change in objectives, it is the Venture Management function that re-addresses the design and sponsor rules and needs.

Create a Red Thread function or team that can identify and weave underlying and common themes within and between workshops.

Determine a method/system for the reusability of artifacts, outputs, and content produced during sessions so that it can be fed into future events.

Communicate what is going on in the WorkSpace to the larger system, i.e., the other Forum events and activities.

Determine and communicate how follow up and client contacts will be managed:

- with participants asking for further information.
- with potential opportunities recognized by Krew.



## **After the event:**

Create and share the story of the WorkSpace as it unfolded over the event.

Include elements such as:

- Session summaries;
- Red Threads;
- Highlights, key outcomes and new ideas;
- Photos of participants and graphics they created.

## **The Workspace Wiki**

<http://blueoxen.net/ws/wef2006/wiki.pl>  
... is our ongoing collaborative design space. You must have permission to enter and edit these pages. If you are not already a regular user, ask Patrick Frick or Todd Johnston to be added.

## **MG Taylor Descriptions of the 7-Domains Model**

[http://www.mgtaylor.com/public/2001/7domains\\_audit.html](http://www.mgtaylor.com/public/2001/7domains_audit.html)  
<http://www.mgtaylor.com/mgtaylor/glasbead/sevndoms.htm>

## **MG Taylor Online Manual**

<http://www.kwcafe.net/manual/>  
hosts a great body of knowledge. Ask your Project Lead to provide you with the name and password. Once you have access to it, add it to your bookmarks. This is a useful site!

## **Search the MGTaylor Website**

[http://www.mgtaylor.com/public/2001/search\\_site.html](http://www.mgtaylor.com/public/2001/search_site.html)  
or models, modules, background, etc.

## **Explore the MGT Modeling Language**

<http://www.mgtaylor.com/mgtaylor/glasbead/expmodel.htm>  
You'll find descriptions of many key models.

## **Peter Drucker's article,**

"My Life as a Knowledge Worker"  
<http://pf.inc.com/magazine/19970201/1169.html>

## **Trends and informed places to Scan**

World Changing  
<http://www.worldchanging.com>  
Trend-Watching  
<http://www.trendwatching.com>  
Doors of Perception  
<http://www.doorsofperception.com>

## **Books**

Cradle to Cradle, McDonough and Braungart  
Radical Transformation, Joel Garreau  
The Tipping Point, Malcolm Gladwell  
Blink, Malcolm Gladwell  
The Wisdom of Crowds, James Surwiecki  
The Power of Impossible Thinking, Gunther  
The Rise of the Creative Class, Richard Florida  
Out of Control, Kevin Kelly

## **The Global Business Network**

(GBN) maintains a wonderful reading list - <http://www.gbn.com/BookClubNewsletterDisplayServlet.srv>

## **Matt Taylor's personal website**

maintains a reading list - [http://www.matttaylor.com/public/valueweb\\_mechanics.htm#system\\_method\\_biography](http://www.matttaylor.com/public/valueweb_mechanics.htm#system_method_biography) referenced against key concepts and terms of art used by MG Taylor and its Value Web members.

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