

# FACILITATION GUIDE FOR

## Achieving Strategic Goals

For designers who want to contribute more strategically, facilitation is a valuable superpower. Planning to facilitate a workshop, strategy discussion or alignment session? Follow this guide from Pragmatic Design, with sample activities and tools from instructor Lisa Pertoso.

### 01 Define your focus

If you're unsure of the session's purpose, ask yourself: What challenge is my team facing? What do I need to accomplish? What questions do I need answered? For example, your focus might be:

- ▶ Making the implicit strategy at your company explicit
- ▶ Connecting design work to product strategy
- ▶ Uncovering opportunities for design to impact business goals
- ▶ Aligning design metrics to business metrics

### 02 Get your guestlist

If you're unsure who to invite, ask yourself: How can I ensure diverse perspectives are represented? Who do I frequently hear from about goals or other metrics? Make the focus clear in the invite, along with required vs. optional attendees.

### 03 Select your activities and tools

What artifacts or tools can you pull in from your organization (e.g., positioning documents, personas)? If applicable, review tools from Pragmatic's **Business Strategy & Design** course (e.g., Strategy Translator, Stakeholder Conversation Guide). Determine which is most relevant to the focus area(s).

You might leverage ice breakers or energizers, such as:

(In person) Ask participants to pair up and find two things they have in common within two minutes. Then, switch up the pairs.

(Virtual) Ask participants to turn off their cameras except for one person, who shares something true about themselves. Whomever else the statement is true for turns their video on.

**TIP:** Choose a warm up based on what you want participants to feel or do in the session. You might want them to break out of their routine, think big picture, or get to know each other (if they'll be collaborating).

You might leverage software, such as:

- ▶ [World Cafe Method](#)
- ▶ [6 Thinking Hats](#)
- ▶ [How Might We? Statements](#)

**TIP:** Check out the free, open source tools from [Hyper Island](#).

### 04 Set the stage

Prepare any digital or physical supplies (e.g. sticky notes, whiteboards) needed to facilitate your session.

### 05 Hold the session

Flex those design chops by maintaining neutrality, creating space for contribution and focusing on the future. And ask participants to be present, suspend judgment and challenge themselves before beginning.

### 06 Recap

Send out a recap to the whole group with key findings and next steps for how to leverage what you learned. You can also hold a debrief with your fellow designers.

Want to learn how to connect design to product strategy, uncover opportunities to create value and align design metrics to business metrics? Enroll in our **Business Strategy & Design** course.