

Workshop Playbook

8 Exercises to Spark Innovation



Kelton

Why Workshops?

Workshops are collaborative sessions that have a crystal clear goal — and they're an essential tool in the insights and strategy world. Typically led by an outside facilitator, they're used to strengthen and support a wide range of priorities: uncovering product ideas, better understanding customers, developing brand strategies, and more.

This guide offers a sampling of workshop exercises that Kelton's expert facilitators use to help our clients build empathy, create connections, spark innovative ideas — and ultimately move confidently into the future. Read the explanations here, try a few exercises informally, and get a sense for how much your organization can benefit from pushing thought boundaries.

Key Principles

Keep the following tips in mind when trying out exercises with your team:



1. □

Stay Objective. Assign roles before starting any exercise and designate one or two people as the facilitators. Facilitators should remain completely impartial and shouldn't interject; their focus should be encouraging ideas and maintaining structure.

2. □

Open Your Ears. Stay open minded about what you may find. Tune in for comments that may influence next steps.

3. □

Be Empathetic. Define what success looks like to your team members. Consider who is going to be in the room and what the best communication methods are for your unique group.

4. □

Start Wide, Finish Focused. For each exercise, start out with more open-ended questions and direction, and end on focused priorities.

5. □

Maintain the Flow. Manage the energy in the room. Take breaks when you need them and take care to differentiate work-time vs. break-time.

The Workshops:

Discovery + Alignment:

Uncover your next big product idea.

Sensemaking:

Flex your empathy muscles to better understand consumers.

Brainstorm + Ideation:

Create, iterate, and collaborate with your team.

Prioritization:

Align on the best path to move your brand forward.



Discovery + Alignment

Challenging Assumptions



WHAT IT IS:

The Challenging Assumptions technique encourages participants to question any preconceived notions about the task at hand. Have your team write down all of the conditions they assume to be true in relation to your challenge. Review the assumptions and use these newfound viewpoints to brainstorm different ideas and approaches.

WHEN TO USE IT:

This exercise is particularly relevant for exploratory projects and is also helpful when your team needs to uncover the business factors behind the success of a given output. It's useful for initiatives related to strategic planning, new product ideation, and business development.

RATIONALE:

It's natural (and necessary) that we make assumptions in order to function. If we didn't, nothing would ever get done. But when it comes to problem solving, questioning the most basic assumptions related to a project or challenge can help to unlock a wealth of creative ideas.

TIPS:

It's important to keep the brainstorming assumptions phase separate from the idea generation phase. Generating the initial list of assumptions is a very different mental activity compared to sparking new ideas after taking the assumptions into consideration. Combining the two could muddle the process, leading to subpar outcomes.

Reararticulate



WHAT IT IS:

Reararticulate helps with discovering new approaches to a given situation. First, write down your opportunity/problem statement. Pick three words within the sentence and generate alternative statements for each. Combine words from the alternatives until you have a cohesive new statement.

WHEN TO USE IT:

This exercise can be used to kick off big initiatives, and can also be a helpful next step when consumer insights have exposed a problem that could hinder you from achieving your business objective. Turn to this exercise any time you have to tackle a seemingly impossible problem.

RATIONALE:

Words carry with them their own creative limitations. The way we phrase a problem often influences the type and quality of ideas that we generate to solve it. The re-definition technique allows you to create thousands of different ways to define a problem, which inspires you to conceive un-obvious solutions.

TIPS:

Whether using this technique as a kick off or as an exercise after insight work, make sure that all stakeholders understand the rationale behind this approach. It's helpful to write out your brainstorm on an area with ample white space, like a flipchart or whiteboard.



Sensemaking

Consumer's Shoes



WHAT IT IS:

This activity lifts participants out of usual mindsets and assumptions. Assign a consumer persona to team members, and have them shop as if they were that consumer. Ask real shoppers to embark on the same experience. After, explore the difference between your team's experiences vs. those of your actual consumers.

WHEN TO USE IT:

This exercise reacquaints internal stakeholders with the consumer, and calls attention to different beliefs and decision patterns. Use it to quickly uncover unseen consumer interests, identify gaps that you can focus on in the future, and challenge assumptions.

RATIONALE:

Consumer's Shoes encourages empathetic thinking, which opens the door for your team to challenge any preconceived notions about the way your customers think, believe, and feel. Tapping into the mindset of the consumer will also help to reveal any potential gaps that should be addressed by future research and exploration.

TIPS:

Consumer's Shoes can be a bit tricky to execute internally because it involves recruiting shoppers that fit specific personas. We recommend using a third party to facilitate the process. While you can lead your team through this exercise without the consumer portion, the results will be less powerful without the comparison.

Sensemaking

Feedback Forcer



WHAT IT IS:

Consumer insights spark many valuable ideas. Feedback Forcer helps team members and stakeholders prioritize which ideas are most relevant and viable. Have participants respond to prompts such as “What surprised me,” or “Something I’m confused by.” List out responses, then categorize by theme to see which emerge as most important.

WHEN TO USE IT:

It’s best to use the Feedback Forcer approach during the later stages of a project: either around a project’s midpoint, or after the final presentation. The exercise will spark a discussion on the most important key takeaways and next steps. Use it to move from idea generation to execution.

RATIONALE:

By providing a formal mechanism to “catch” the key themes that resonate with your company’s key stakeholders, you can help to internalize important consumer findings. The Feedback Forcer process helps to expedite the process of turning insights into action by helping to determine the most critical next steps.

TIPS:

Choose 2-3 categories at the most, so that the exercise doesn’t become overwhelming for participants. Use different colored sticky notes to color code the different categories, making it easier to sort through them visually. Turn to a seasoned workshop facilitator to run this exercise for the best results.

A man with a beard and afro hairstyle, wearing a light blue patterned shirt, is sitting at a desk. A woman with short blonde hair, wearing a white blouse, is standing next to him, holding a white tablet. They are both looking at the tablet with interest. The background shows a large window with a view of a building and some greenery. A pink banner is overlaid on the bottom left of the image.

Brainstorm + Ideation

Rapid Idea Building



WHAT IT IS:

Rapid Idea Building quickly sparks creative solutions. Participants write down an idea about a given topic. They then pass their idea to another participant, who builds off of the original or uses it to spark an entirely new idea. Sheets are passed until they arrive back to their original owner.

WHEN TO USE IT:

This exercise can be used at any stage of a project cycle. It's most useful at a stage when generating a high quantity of ideas around a particular topic will help to illuminate the best options. This approach is also helpful for increasing energy levels, and involving shy team members.

RATIONALE:

Research shows that when it comes to brainstorming, quality insights are borne from large quantities of ideas. This is one of the most powerful techniques for getting a large bank of ideas out quickly, because each person generates at least one new angle with each pass of the paper.

TIPS:

To ensure a diverse range of ideas, have participants pass their idea sheets two or three spaces to the right, instead of to their direct neighbor. You can also do this exercise with large sheets of paper posted throughout the room, to get participants up and moving.

Sandboxing



WHAT IT IS:

Sandboxing is all about generating ideas from the intersection of two pieces of information. Decide on two categories (such as “Identified Consumer Need” and “Cultural Themes,” or “Respondent Scenarios” and “Business Objectives”) then make cards with related information for each. Participants pull cards from each category, and brainstorm ideas to be shared in small groups.

WHEN TO USE IT:

This exercise is an excellent tool for any project stage. Use it when you need to spark creative ideas and solutions. It can be especially effective in situations in which you plan to use consumer insights to inspire solutions, and when your goal is to make improvements to a given experience.

RATIONALE:

Great ideas often come from reviewing seemingly disparate pieces of information. The core principle behind Sandboxing is to prime and facilitate the creative process for success. Forcing participants to work within restraints (e.g. what they choose out of the envelope), often enables them to come up with even MORE creative ideas.

TIPS:

Preparation is key for this ideation exercise. Be intentional about the categories you choose, and the related information you include. Think about what tensions might arise with your given combination of categories, and make sure the two ingredients that you hand out can actually be used to draw a conclusion.



Prioritization

Concept Prioritization



WHAT IT IS:

Concept prioritization helps your team decide on which ideas are worth pursuing. Pick the two most relevant factors based on resources and desired outcome, such as ease of implementation and expected impact. Draw an X and Y axis, assign one factor to each, and plot ideas on the graph

WHEN TO USE IT:

Whenever you generate a large (or even medium amount) of ideas, it's important to have a sense of how concepts may perform in implementation so that you can have the best chance at success. This exercise is best when you're wrapping up the ideation phase and need to decide on the best path forward.

RATIONALE:

Prioritizing ideas helps teams to shift their focus from ideation and creative expression to the business problem or initiative/goal at hand. Done correctly, this exercise helps to achieve alignment, define clear ownership over next steps, and generate momentum to move forward with the best, most viable ideas.

TIPS:

Keep it simple and straightforward, and focus on why people plotted an idea in a given position versus the actual rank itself. Remember that disagreements are fine – the point is to capture the dialogue. At the end of the exercise, do a “gut check” to make sure that everything looks right.

Devil's Advocate



WHAT IT IS:

This exercise ensures that your team is considering all sides of a given solution. Assign 1-2 people to be the Devil – the challengers to the plan. As other team members talk through the solution, the Devil(s) interrupt to say why it might not work. After, discuss any valid points and make necessary changes.

WHEN TO USE IT:

Devil's Advocate is most effective to use when your team is ready to finalize a given solution or move forward with a game plan. It is often used in the later stages of a project, after teams receive research findings and have brainstormed multiple options and decided on a course of action.

RATIONALE:

This exercise offers a safe space to build solutions out further, and helps your team to prepare for negative response to the work. It will quickly identify any potential holes in your plan and serves as a useful gut check to make sure that you're using the right strategy.

TIPS:

For groups of six or less, it is best to only assign one Devil. For groups of more than six people, you can assign two team members to be the critics. Make sure that all participants know that it is the Devils' job to interrupt, so that no one gets offended!

WE LOVE TALKING ABOUT THIS STUFF.

Hungry for more workshop strategies? **Give us a call or drop us a note.**



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