

Create a 12-month plan in 2+ hours just like *magic*

There's something about the end of the year or the very beginning of a new one that makes it a great time for your team to carve out plans and set priorities for the next 12 months. But try getting them to hunker down for the better part of a day (or longer!) when their schedules are so jam-packed. There never seems to be one big block of time that's convenient for everyone.

The good news: If you use the " Magic Wall," a group process introduced to me by my friend John Monroe, you only need about 2-3 hours of time together, whether in one room or virtually, to accomplish the equivalent of 1-2 days' worth of planning. This "Magic Wall" can be used in a variety of situations where people need to brainstorm ideas, make decisions, map out activities or agree on priorities, all in a compressed period of time.

Here we describe how to use the Magic Wall approach in both face-to-face (FTF) and virtual settings. Be sure to check out the links at the end of this article for more detailed instructions and ideas.

- **Begin with a blank canvas.** The "canvas" consists of two components: a blank space on the wall, which can be covered with material or very large pieces of paper joined together, as well as a supply of blank paper and a marker for every participant. The wall acts as a bulletin board, where participants can record and post ideas simultaneously.
 - *Face-to-face (FTF):* You can either make your own wall or order a "sticky wall" (see links below). You can also use a large roll of plain butcher paper, or a few flipchart pages taped together. Give every participant a short stack of blank half-sheets of 8x11" paper or similar-sized sticky notes, as well as a black felt-tip marker. Make sure your room has adequate wall space, and determine how best to attach your "canvas" to the wall in advance. If you're short on wall space, you can improvise by using a large table or the floor
 - *Virtual:* Explore which of your favorite virtual meeting tools can best mimic a blank canvas. Some apps are designed specifically to give you the look and feel of using sticky notes. You might also try an electronic whiteboard. The key is to use a platform that's easy to learn and use and allows people to post and place items wherever they choose. Extra credit if your chosen tool allows people to post ideas in advance.
- **Ask a thoughtful series of questions.** When running group planning sessions, be prepared to pose questions that progress from expansive brainstorming to quick annotation, ranking or voting, followed by action planning and scheduling. This progression allows participants to move from objective to reflective thinking, and then to decision-making, target dates and assignments. You'll need to create your own unique set of questions for your session. Check to make sure each question is clear as you go along.
 - *FTF:* Ask people to write just one idea per half-sheet, making sure it's readable a few feet away. Markers should be dark (black, blue, brown) with a medium-thick tip (e.g. medium Sharpie). Try distributing different colors of paper for different questions or categories.

- *Virtual:* Post your questions in your virtual meeting area in advance. Some apps enable you to post questions and responses a variety of ways. Consider whether you want to give people a chance to respond anonymously or whether responses should be attributed, if you have a choice. Ideally, you want to give people a chance to view and build on others' ideas, similar to posting a sticky note next to a related idea on a wall. Consider which, if any, responses you might expect people to post ahead of time.
- **Give the gift of silence.** Once you pose a question, stand back! Allow people time for silent reflection, free of distractions and the influence of others. This way, people can focus more intensely and as a result, can churn out many ideas in a surprisingly short period of time. Building in time for silence also gives introverts an opportunity to be on equal footing with extroverts. Those who speak a different native language will also benefit by having silent time.
 - *FTF:* If some people seem confused or stuck, try approaching them and quietly ask a few probing questions that may spur new ideas. When you see that most people have stopped writing, ask the stragglers to finish up as others start to post their ideas on the wall.
 - *Virtual:* When you can't see others, working silently can feel awkward. You might try playing soft instrumental music while people are typing. Ask people to raise their hands when they're through. Give them a warning before you call time.
- **Give everyone a voice and time in the spotlight.** Let people have a chance to represent themselves by talking through some of their responses, rather than having someone else read them. Set the right tone to encourage brevity, which may mean asking people to choose a handful of their favorite ideas.
 - *FTF:* The facilitator can ask for clarification about a particular response, inviting the person who wrote it to explain. Or, you can ask each participant to summarize selected responses, answering any clarifying questions along the way.
 - *Virtual:* Once people have typed in their ideas, invite conversation by making a comment or asking a question. E.g., "Julie, this is an intriguing concept. Can you say more to make sure we all understand it?" Another way to stimulate dialogue is to invite comparisons. For example: "It seems that John and Sarah have similar ideas, but they may be making different points. John, why don't you go first?" The idea is to give people a chance to discuss their ideas in a way that feels natural.
- **Sort ideas into logical groupings.** Beware of categories that are overly broad or excessively narrow. For example, if you plan to create a detailed action plan, "Community engagement" may be a less useful category than "Educational programs for families in nearby neighborhoods."
 - *FTF:* People can place their ideas next to similar ones as they post them. Or you can ask everyone to view all ideas once they're posted, and start moving papers around to create clusters of similar themes. Ask people to suggest categories that make sense and create headers that encompass all related ideas.
 - *Virtual:* Some apps make it easier to create categories on the fly than others. It's helpful to have category names written out in advance in case you need them, which you can nancy@guidedinsights.com / www.guidedinsights.com / 978-263-2545

paste into the appropriate areas, alongside all related ideas. (Having a tech support buddy helping out behind the scenes can be crucial here!)

- **Reflect as a group.** Shift to an introspective conversation by asking participants questions such as: Which ideas are the most surprising? Which ones intrigue you? What recurring themes do you notice? (Have a bank of questions handy if people are reticent to speak up.) Encourage cross-table conversation by asking for a volunteer to pick an idea they'd like to find out more about by the person who wrote it. *This process is much the same whether FTF or virtual.*
- **Re-order and re-arrange as you go.** As the meeting progresses, be prepared to move or copy ideas into different configurations or categories. For example, when you're ready for action planning, you can grab certain ideas and place them into a matrix of some kind to assign people and dates.
 - *FTF:* The bulletin board feature of the Magic Wall makes it easy for the group to re-arrange topic clusters or headings to reflect decisions and conclusions. This way, when it's time to put the steps into a certain sequence, you can simply move the papers. If the group eliminates items from consideration, move those to the side. Take photos of the wall at the end of each step to document the progression and to transcribe notes as needed.
 - *Virtual:* Explore your app's features to see whether it's feasible to rearrange ideas easily and quickly during your meeting. You may have to settle for rearranging ideas after the meeting, within the meeting notes. If you are able to shuffle ideas, you may want to take screen shots along the way to capture where you are at certain points.

In both the face-to-face and virtual worlds, simple tools are often the most powerful. With the Magic Wall approach, participants can generate, sort and analyze their ideas to serve the conversation they need to have. The flexibility of the tool makes it easy to progress from objective and reflective thinking, to insights and decisions to act. Best of all, participants feel energized and satisfied by the interaction and efficiency of the process.

To accomplish a lot in a short time, think about what kind of preparation and prework participants must do in advance, such as coming with a list of personal priorities or posting ideas in shared online space that you can build on during your time together.

Note on supplies and instructions:

You can order your own "Magic Wall" (a.k.a. Sticky Wall) from [Partners in Participation](#), originators of the Magic Wall process. It comes in several colors, and is easy to fold and carry anywhere. You will need to also purchase spray adhesive, which we recommend that you apply it at least several hours ahead of time.

Need help?

If you're looking for a skilled facilitator to design and run your planning session, whether it's virtual, in person or hybrid, drop me an email or give me a call so we can explore the possibilities.

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