

Technology Team Road Map

(Documented in a Mindmeister Mind map)

Discussion created by **Sheila LeGeros** on **3/25/2009 11:13 AM**
[Sheila LeGeros](#)

Posted by [Sheila LeGeros](#) on 3/25/2009 11:13 AM

MESSAGE FROM DOUG DRUCKENMILLER, March 24, 2009

Wayne thanks for this discourse. The road map represents a brainstorm and conversation that Sheila, Cheryl Kartes and I had in the Minneapolis airport on Friday. Our primary insight to the way forward was to get Top articulated as thinklets that would enable the matching of those to specific virtual tools. The thinklets can then be combined to match our methods or other approaches. Thinklets can also identify the specific requirements for a process that can be matched to tool affordances (features) that meet the need of the thinklet. Based on what you've articulated, I think the thinklet level is more atomic than what we call a method and not the same level of abstraction. The thinklet concept applies at the level of context, brainstorm, group, name and resolve.

This is the level to match to thinklets or to capture as new thinklets. They are the basis of many of our methods. In fact you might find that the thinklet book (Briggs et al) would provide a great number of alternative approaches to implement our basic methodology (100 different brainstorming approaches for example.) The naming step is a unique insight and is the same that is used in graphic facilitation in that it is all about the relationships between data items. We have a lot to contribute here to the organizing pattern of interaction that is a relatively small group of thinklets in Collaboration Engineering.

In CE approaches, a couple of kinds of sorting are about the only approaches used. Naming is something that there is not much support for or understanding in CE. This is a real contribution to the field to get thinklets articulated here. I'm sure there are a number of different ways of doing this task. This is part of the key to building consensus and some of those thinklets might be useful to explore. I'm not really sure how to treat ORID. It is a primary pattern of interaction that we use in any number of ways. It appears to apply at all levels, as a specific thinklet, as the framework for a method, or the rationale for an application or an intervention. I suppose because

it contains in a nutshell our strategic insight into how to think based on a Kierkegaardian model of consciousness.

MESSAGE FROM WAYNE NELSON, March 24, 2009

A few of things – this is longer than I thought it would be. This great mind map appeared in my email with no warning, very little context and no clues as to what I should do with or about it. One of the things I have learned is that virtual facilitation requires more communication and requires that communication is more explicit. I've gotten a couple of updates about it, but I can't discern any substantial changes. I don't know what I should be doing with it.

A couple long thoughts

Methods Talking about a “method” is a bit of a funny business for us. In one sense, there is only one ToP method - - O-R-I-D. It can be said that the Focused Conversation ‘Method’ is an application of that basic method. The Consensus Workshop ‘Method’ is another. There are a few that we have created and documented. In a “pure” sense, they are all applications of a single methodological approach. These processes, in addition to the “ToP Historical Scan” “Action Planning” and a couple of others are commonly referred to as “methods.” In my mind, they are each built on the foundation of a single methodology for a distinct purpose and usage. In contrast, “Appreciative Inquiry” is a distinctly different method. It is based on a different set of assumptions and moves in a distinctly different way through a thinking process. O-R-I-D employs what we might call “mega-thinklets.” From the perspective of the philosopher – sociologist, it's a phenomenological method. These major types of thinking are distinct. They can be used by themselves. Strung together, they form a unique thinking method. This is all built upon work by Kierkegaard, Husserl, Heidegger and Sartre primarily and flavoured by others. They each contributed a bit of the whole idea. Mathews and his early cronies really put together a completely unique and distinct form of phenomenological inquiry.

For our purposes, however, I think we need to think and use the term “Method” to point to specific ToP applications. When we do ToP Facilitator Certification, we assess peoples' ability to understand and use:

The Focused Conversation Method

The Consensus Workshop Method

The Action Planning Method

The Historical Scan/Wall of Wonder Method

The ToP Strategic Planning Method

Go to <http://ica-associates.ca/Template/NewCourses/ToPCertification/index.cfm>.

The overview of the competencies lists them. The Certification Guide goes into more detail.

Thinklets – an idea to try on for size. This is a new term for me; so here's my take on it. I've only done a wee bit of reading and none of it in great depth. Use the ToP workshop Method as an example. For the sake of exploration, let's say there are 5 real Thinklets here. The steps of the method are: Context Brainstorm Group Name Resolve

Context – the unique thinking that goes on here is getting a grasp of the whole picture, the relationships involved and focusing the group. It is a distinct kind of thinking. When this is well considered and well done, we engage the participants' brains in a unique way. This gets done in many different ways, depending on the situation, but it can be broken down even further into smaller steps that prepare people to think together about a specific topic. The key part of the context – around which the whole thing pivots – is the focus question. Hussrel talked about the need to focus an inquiry on something specific rather than an abstract concept. Sartre called it the "en soi" the thing for itself. A conversation about chairs, for example, might begin by looking at 10 different specific, real chairs. In the case of the workshop method, it is a question that provides that focus. The contexting step is grounding the upcoming inquiry around a specific question that is of common interest to the group involved. We've come up with a little process for constructing a focus question that works pretty well.

Brainstorm – This is a very specific thinking step. A very distinct type of thinking. At it's best, the brain is doing something like scanning when this is going on. It is noting – grasping ideas in relation – response to a carefully expressed and well contexted focus question. It is an objective level kind of thinking. It provides the foundation for the remainder of the inquiry.

Group – A very different kind of thinking. This is associative in nature. It is the kind of thinking in which the mind seeks meaningful connections among ideas. The meaning, in this case, comes from the initial focus question. The focus question is the reference point. Without it, the connections are based on many different reference points and confusion reigns. This is reflective level thinking. It is a serious mistake to think that the reflective levels are only about personal feelings. In this case, that is somewhat

tangential to the forming of associations that make sense to a whole group. We've done this in a lot of different ways, but the thinking process is similar. Name – Another type of thinking. This kind is trying to truly differentiate. It seeks to understand a set of ideas - - - in relationship to the focus question. Not too hard to see this as interpretive level thinking. It is important to keep in mind that the name is to be a distinct answer to the focus question. We use a simple O-R-I-D conversation to get the group to come up with a name together. With variation for specific content, it goes like this. O – Read the cards in the cluster R – What are the key words you see written on the cards? I – What is the central idea? – That is an appropriate response to the focus question D – What would you name this cluster of ideas that provides an answer to the focus question.

We find that going through that whole thinking process take people deeper, helps them focus, gets much higher quality names with less abstraction and builds more consensus. For years, we more or less flailed around without direction in the naming step and depending on someone good at synthesizing ideas. Getting clear that it is a distinct type of thinking that requires substantial dialogue among group members really helped us. People construct a shared understanding rather than just say yes to a bright light in order to reduce the pain of thinking. Some like to make this step quick, because it's not easy. It's a mistake that leads to hollow, abstract cluster names that do not grip the group's imagination. This is the place where real creative breakthrough often happens. A good naming conversation is a crucible for innovation. There are many ways to do this that can include poetry, drawing etc in order to engage multiple thinking modalities. The best one ever for me was asking a group to come up with a name and a drawing. They constructed a truly meaningful story for themselves. It made a massive difference for them.

Resolve – This is obviously the decisional level and why it is so critical to think it through carefully. What kind of resolution is required for this group – in this situation – in relation to this topic? There is no real standard way of doing this step. We often use an O-R-I-D conversation, but we sometimes need to do other things – like ensure that assignments are made etc. All decisional level activities. Thinklets are all distinct types of thinking. They require different processes in face-to-face situations and in terms of virtual facilitation especially, they will each require different tools. At least I cannot see a single virtual tool that can assist a group in all of these types of thinking. If I want to do a whole ToP Consensus Workshop in a virtual environment, I'm going to need several tools to get from start to finish. I can see a suite of tools gathered in one place - a

virtual conference room or whatever.

[Sheila LeGeros](#)

Posted by [Sheila LeGeros](#) on 3/25/2009 11:21 AM

Thank you Wayne for your well-considered comments. You raise a good point about the importance of setting context before sending things out to a virtual team.

Separately, I am working on a mind map with Doug and Jon Jenkins about the nomenclature and hierarchy of collaborative processes. Doug and Jon have been working on this already, in terms of creating a nomenclature usable in the IAF Database that can encompass all collaborative processes. I'd like to propose that as we devise our nomenclature that we think broader than ToP, so that our work fits together with other methodologies, and into the IAF Database. After I hear back from Doug and Jon, I'd like to share it with the team.

Regarding ORID, I had the same observation as Doug that ORID is something that is hard to pin down, because it pervades our thinking in the ToP world. I thought of calling it both a Framework and Thinklets, where O, R, I, D are each thinklets. As we get into our work on thinklets it will become more apparent how to classify and treat ORID.

Sheila

[Sheila LeGeros](#)

Posted by [Sheila LeGeros](#) on 3/25/2009 11:26 AM

MESSAGE FROM JERRY MINGS, March 24, 2009

Here are some observations for consideration.

a) Scope - the vision utilizes a global scope while the ToP Core Methods use a USA ToP Scope. I think we need to reconcile that as a starting point. (I would personally replace Action Planning with Event Design as the core)

b) Guiding Principles- the principles shift between technology requirements and the people operating the technology. I think we should use the ToP Certification Criteria as the basis for any discussion on the principles associated with a facilitator. As for the software, I would advocate it remain a function of the facilitation design. I think it would be helpful to build a standing equation to best express the principles. Example: Event Outcome is a function of Facilitator, Technology, and Group

c) Project Outcome should be a new branch. At the end of 9 months we should have completed: I would suggest the ToP Certification Body of Knowledge should be aligned to ensure people who are ToP Certified can utilize known software. I would provide the first set of software recommended for use in a ToP Certified event. [I am concerned we are trying to find the "golden set of tools" for ToP in a world where software design is changing and funding for software is driving change.]

d) Certifying Tools - I would caution against certifying tools. I'm open to a dialogue to help me see the other side of the coin. Yet, I'm raising a flag early in the process that I firmly believe this not where the time should be spent. Competency in the use of any tool is important. The important key is to know which tool works in which environment.

e) We are going to need to deal with the issue of privacy legislation. I don't see it on the map and this is a very important issue. Laptop security is an issue in Canada to the point of passwords on laptops and smart phones cannot be the same. So far, I've added passwords for Mindmeister, scheduling software for meetings, the software you use for brainstorming. This is three data based entries, three unique passwords and three unique user names. No complaints, however, I want to point out the mounting complexity of the problem. Plus, I have to change these on a regular basis. We really, really, really need to talk about privacy and secure entry of data.

Wrapping Up - I think this mind map is a great starting point and look forward to the feedback from others in the group. My comments are designed to help provide some early thoughts. Thanks for all your hard work. Very much appreciated. Jerry

[Sheila LeGeros](#)

Posted by [Sheila LeGeros](#) on 3/25/2009 11:52 AM

Hi Jerry,

Thank you for your thoughtful and meaty reply. I need time to absorb everything you said. In the meantime, I have a question about your comment:

Scope - the vision utilizes a global scope while the ToP Core Methods use a USA ToP Scope. I think we need to reconcile that as a starting point. (I would personally replace Action Planning with Event Design as the core)

Yes, at the ToP Trainers Network meeting in Denver we decided to limit our work in 2009 to the methods which are taught in our basic course, called ToP Facilitation

Methods (or TFM), which encompasses: Focused Conversation, Consensus Workshop, and Action Planning. The reason for this selection was to make it feasible (don't bite off more than we can chew), to make it practical (enable a complete set of processes to go virtual), and to be representative (if we can implement these 3 methods virtually, it's pretty safe to say we can do just about all of our processes).

Please tell us what you offer as the basic ToP course in Canada?

Do you teach Event Design in your basic course?

Do you teach Action Planning in Canada (if so, when does it come in the sequence)?

In my mind Event Design is one of the things that needs the most redesign before it goes virtual. After looking at the Design Eye posted by Wayne (which I really like), I can see that the Event Design method is very different between the USA and Canada, and I'm not even sure that there is one consistently used approach in the USA (I was taught several methods and don't have strong affinity for any of them).

I recommend we start with our basic tried and true processes that don't require a lot of rethinking before going virtual. What are your thoughts?

Thanks again for all your ideas and suggestions,

Sheila

[Wayne Nelson](#)

Posted by [Wayne Nelson](#) on 3/26/2009 9:54 AM

More on Thinklets

Having read part of both Briggs and Kolfschoten on this, I think the primary steps of the Consensus Workshop Method I talked about are probably more like categories of thinklets. There are several ways to do each of those things.

The "context" step, for example, includes several parts. In some cases, it is a long process that is as interactive as it is presenting things. I can see a whole set of thinklets that help people get prepared for a ToP facilitation event. This is especially true when we work with groups that are quite diverse in experience and knowledge of the topic and do not share a common history related to it. It takes quite a bit to get people ready to engage. Some of these steps involve conversations and exercises. I bet a poll of ToP

facilitators would reveal a lot of "thinklets" that are in use.

Imagine that for the other major methods listed. There are heaps of alternative ways to do action and implementation planning. There are lots and lots of ways of using the historical scan - wall of wonder.

There are some very common patterns that have carried through, but let's be very clear that ToP is a living body of knowledge that is constantly being developed. We are continually working on ToP development - in our facilitation practices. When clients ask us for something, we sometimes have something in our bag and sometimes we have to invent. Those inventions do get integrated into our practices and eventually into our published material and into our training programs.

In addition to that, there are a lot of us who are using ToP in concert with other methodologies. Jo, for example, used what was truly a ToP process in concert with the Royal Dutch Shell Scenario Planning method. A whole new set of thinklets.

Potentially, this can be huge and extremely significant. I really think we need to begin with the basics - classic procedures we use that are pretty much common to and in current use by ToP users around the world. I would include in that set, recent innovations that have been integrated into the ToP body of knowledge and are in use by a significant number of ToP users.

[Wayne Nelson](#)

Posted by [Wayne Nelson](#) on 3/26/2009 10:20 AM

To respond to a couple of Sheila's questions - -

Please tell us what you offer as the basic ToP course in Canada?

Do you teach Event Design in your basic course?

Do you teach Action Planning in Canada (if so, when does it come in the sequence)?

Let's say we have a few of basic ToP courses. You can see the basic course design by going to the links.

[Meetings That Work](#) is the most basic. It is focused on meeting facilitation and the "basics" of facilitation.

[Group Facilitation Methods](#) teaches the Focused Conversation Method and the

Consensus Workshop Method. Each method is a day and includes demonstration, theory and practice.

[Facilitated Planning](#) teaches the ToP Strategic Planning Method. This is where we teach Action Planning. We placed it in this course to give time for real practice of both methods in the Group Facilitation course and to set in context.

We teach Event Design in our "[Art and Science of Participation](#)" course. It is a 6 day advanced course.

[Sheila LeGeros](#)

Posted by [Sheila LeGeros](#) on 3/26/2009 12:19 PM

Thanks Wayne. That's helpful. It looks like we are both in agreement to start with basic methods.

[Ethan Mings](#)

Posted by [Ethan Mings](#) on 5/23/2009 7:49 AM

Copy of e-mail

Thanks for the notification on the Mindmeister Map notification.

I reviewed the map, which contains Project Scope, Mindmeister Navigation Tips, Road Map and Key (Project Personnel).

A few highlights for your consideration.

a) Under ToP Core Methods, I would add a new branch called, Top Design. Rational: design is a critical element in the creation of a virtual or real life facilitation experience. While the three methods mentioned provide design methods for using the tools, they do not provide design tools for a facilitation event. People interested in the facilitation methods will require a "method - design" in order to identify when to use a tool and why to use a tool. Hence, I would ask that ToP Design be identified as part of the Core Methods Branch

b) In keeping with my notes from a) the inclusion of a design methodology will provide a framework in which Thinklets + Methods + Processes fit.

c) At a gut level, I still sense there is a search for something in virtual world that will match the "card" workshop as well as action planning. I noticed little feedback on the recent trip to Second Life. I suspect it did not meet the needs of the group. I would like to learn more about how people did experience SL. I raise this point given it is important to do the technical tools last, not first. At this point, I think a stronger focus on design will provide significant returns in leveraging the project.

d) Missing from the map is the topic of privacy, security and international law.

Privacy is a very important issue and must be a key part of this project. It is hard to have agencies engage in using technology if privacy issues are not addressed up front. It is criteria that we need to include in our work.

Security is a factor given the location of security, back up and hacking of information. A good example of this the practice intercepting e-mail for content change, scanning or intelligence work within organizations. Security is important when it comes to personal safety (e.g., people arriving at your home through internet search and intelligence work) and must be addressed. So, we all need to think through that.

International Law is a key factor when dealing with organizations in various countries. Online collaboration must take into account how various countries view information and database work. For example, how the US collects demographic data and utilizes social insurance numbers is radically different than Canada.

The rules for all three domains - privacy, security and international law - are not the same.

d) A suggestion - Change the Virtual ToP Technology Team to Scope of Team. Then the existing branch will make better sense. (You may want to include a few words on the Knowledge Team or create a branch link to the Knowledge Team mind map.

Overall, it looks good.

Have a great day.