

# Aperius Consulting

## A STRATEGY BRAINSTORMING CHECKLIST

### Summary:

- Brainstorming sessions are difficult to plan and manage, An approach that works is:
  - Get the right people in the 'room'.
  - Optimise the environment.
  - Invite people early – and follow-up.
  - Provide pre-work only if absolutely necessary.
  - Create a session plan.
  - Clearly document what was discussed and decided.

# A STRATEGY BRAINSTORMING CHECKLIST

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I've been part of a lot of strategy brainstorming sessions. I've been a minor player, observing the session or documenting decisions reached. I've been an active participant, working with others to develop solutions to problems or identify/exploit new opportunities. And, I've been a facilitator, striving to keep the discussion running smoothly and participants focused on achieving the best possible outcome from the session.

Anybody who has acted as a facilitator can confirm, it isn't easy. I've developed an approach that isn't guaranteed fool-proof (*because fools are incredibly creative at disrupting brainstorming sessions*), but it does work ... most of the time.

*The chances of a successful brainstorming session are significantly increased if you've got the right people in the room*

## ***Strive to have the right participants in the session***

Unfortunately, this may be obvious, but isn't as easy as it sounds. It helps to think of participants in terms of key roles that they will play in the session:

- **Administrators** – are individuals who provide support for the session. Typically, they're documenting the results, managing equipment, or facilitating discussion. Although they're important to a smooth session, they're not core contributors.
- **Experts** – are individuals who have valuable or unique insight relevant to the topic of the session. You need at least one of these people so that they can share their expertise with everybody else. They're especially important when dealing with complex and/or esoteric issues where knowledge and understanding is limited and difficult to attain.
- **Catalysts** – are individuals who keep the discussion flowing. They clarify and enhance group understanding. These people are very useful but be careful; those that do *nothing* but ask questions (and don't contribute to the broader discussion) can stifle fresh thinking and derail brainstorming sessions.
- **Visioneers** – are individuals who are capable of assimilating data and discussion to come up with new ideas. They are highly creative and their ideas typically form the basis of solutions to problems or achievement of opportunities.
- **Constructors** – are individuals who translate ideas into action. These people tend to be particularly good at framing discussions within reality and remind everybody of key constraints. They're the people who can move ideas from concept to reality.

It's worth noting that the roles aren't exclusive, and don't have to be played by different people. Quite often, key individuals can play multiple roles. It's especially common to find blurred lines between (especially talented) catalysts, visioneers and constructors. In many high-growth SMB

organisations, it's common to find just two people coming together in successful brainstorming sessions - with all roles admirably represented.

*Brainstorming works best when all participants are comfortable and have necessary materials easily to hand*

### *Create the right environment*

Creating the right environment is increasingly challenging, especially when brainstorming sessions frequently include remote participants via telephone, video or online chat. The key is to find a way to bring people together in the most optimal way possible. There are four basic considerations:

- Keep the environment free of *unnecessary* distractions. Mental multi-tasking is (at best) exceptionally difficult, so keep participants engaged in the session and not thinking about other things. Use facilitation approaches that keep participants mentally connected to the session.
- Allow for *necessary* distractions. It isn't credible to *completely* eliminate distractions. In fact, it can be counter-productive to do so because participants worry about things that they need to be doing. Worse still, they may leave (or never turn up at all) if they feel that they are 'locked in'. It's better to have 80% attention than nothing at all.
- Make sure that the 'room' is conducive to open and honest discussion. There are two dimensions to this – mechanical and emotional. From a mechanical perspective, participants must feel that the environment is secure and they can communicate freely without being overheard. From an emotional perspective, participants need to feel that their contribution will be respected, and treated in confidence.
- Make sure that the materials necessary to conduct the session are available and working. In a physical meeting, this means securing whiteboards, flip charts, notepads, sticky notes, projectors, collaboration software, laptops, tablets etc. In a virtual meeting this means confirming the functionality of telephone lines, video connections, collaboration software, data networks, etc.

Although it's a mistake to underestimate the importance of the environment, don't abandon a brainstorming session because it isn't perfect. Although you want to optimise the environment, if all you have is a Google Hangouts connection capable of conducting a conference call with key participants, or a few seats in a coffee shop, that's better than nothing.

*Early contact maximizes participant attendance*

### *Manage the invitation process*

Asking an entrepreneur or a key business professional for 15 minutes of their time "*sometime next week*" is probably not going to work. Most high-value people are very busy and social/business calendars are packed. People often have predefined commitments stretching out weeks, months and (sometimes) years into the future. But, there are three steps that will maximize the chance that you'll get the right people to show up at a strategy brainstorming session:

- Send invitations early. The earlier, the better. There is a perception that if you send invitations *too* early they're ignored or forgotten. I disagree. You should establish awareness of the session as soon as possible, even if the invitees look at the invitation, realise that it's x hours/days/weeks/months from now, and forget about it. At least they have seen it.
- Follow-up invitations with 1-on-1 conversations that ensure participants understand the purpose of the session and the role that you hope they will play. It also makes it top-of-mind, even if only for that period when you're talking with them. If possible, do follow-ups face-to-face or via telephone. If that isn't possible, use online chat. As a very last resort and if nothing else is possible, use email.
- Send session reminders (at appropriate intervals) before the event. You run the risk of adding to the noise of everyday communication, but regular reminders (preferably face-to-face or telephone) keep the session top-of-mind. With reminders, participants are less likely to drop out at the last minute and more likely to spend time thinking about the session before it happens.

It may seem that the amount of 1-on-1 interaction necessary to ensure that participants turn up at a group session is self-defeating. After all, if you have to spend time talking about the session with each participant, why have the session at all? But, the value of bringing people together as a group is the collective, rather than individual participation. The best ideas frequently emerge from group debate rather than individual or 1-on-1 discussions.

*Establish knowledge and understanding of the topic before the session.*

### *Provide a reasonable amount of pre-work*

It's tempting to send out vast quantities of pre-work before a brainstorming session. The logic is to get everybody up-to-speed on the topic prior to the event so that they can be much more productive together. But, how often have you been in any kind of meeting where everybody has reviewed the pre-read materials beforehand? The fact is, people rarely spend the time to go through pre-session materials and the first time they start even thinking about the topic is when they walk through the door (either physical or virtual) of the room.

With this in mind, think carefully about what material you want people to review prior to the session. Send only the most essential and ideally, send none at all. Instead, spend the first part of the session bringing everybody up-to-speed as rapidly as possible. This is often what happens anyway. The difference is if you sent out pre-session materials and still do an up-front review, you'll irritate the few participants that DID review the materials before walking in the room.

*Create a framework for discussion and debate.*

## *Develop a session plan*

Strategy brainstorming sessions rarely go exactly to plan. By their very nature, they are fluid meetings, with discussions flowing in unforeseen directions. But this is all the more reason for a session plan. The longer and more involved the topic, the greater the need for a plan, but even 10-minute strategy sessions need a framework. The key elements of a session plan are:

- **Timeline**—how much time can be allocated to the session? Make the schedule transparent, including the time for each section of the session. Allow time for breaks, sidebar conversations and (if necessary) third-party discussions.
- **Discussion topics**—what is the focus of the session and any individual sections? Clearly define the overall topic, the individual sections, and the intended outcomes or deliverables.
- **Constants and constraints**—what are the parameters within which the discussion must be framed? Ensure that relevant boundaries are clarified and understood by all participants.
- **Discussion thought starters**—what are the statements that will maintain or stimulate discussion? Develop discussion points that will keep conversation flowing throughout the session.
- **Processes and approaches**—what approaches will be used in the session (or different sections of the session)? Think about how best to arrive at the desired outcome and what materials will be needed.
- **Measurement system**—what systems will be used to 'rank' ideas or break discussion deadlock? Think about what methods you'll use to arrive at decisions (such as group voting), including core criteria that participants should consider when making their choices (such as ease of implementation, overall impact, cost, resource intensity, and time-to-value).

As a template for a brainstorming session, I generally start with the following outline, and then adjust and refine dependent on the topic, the participants, and the purpose of the session.

1. Problem/opportunity discussion (10% of time).
2. Solutions brainstorming (40% of time).
3. Issues and concerns identification (20% of time).
4. Recommendations definition (10% of time).
5. Metrics review (in instances where achievement of the solution/opportunity should be measured). (10% of time)
6. Wrap up—a summary of the session and identification of: additional work needed, to whom it is assigned, and when it will be completed (10% of time).

It's worth placing extra emphasis on '3', especially in situations where the session is focused on finding a solution to a problem—and the best solution is the 'least worst'. In those instances, it's especially important to think about pitfalls and mitigate them as much as possible.

*Ensure that what was discussed and decided isn't forgotten*

## *Document the session*

Typically, as soon as a strategy brainstorming session ends, participants disperse and move on to the next item on their task list. Discussion points, ideas, action-items, and core decisions are forgotten as other priorities take over. This is why it's essential to document the session.

Some strategy brainstorming sessions are confidential or conducted under (for example) Chatham House rules. If this is the case, documentation should be carefully controlled in line with agreed principles for the session. However, in most instances, documentation of the session should be completed as soon as possible.

In an ideal world, the entire session will be recorded—video or audio. That means that you can go back and review the session with 100% clarity. If this isn't possible, minutes should be taken by somebody assigned the administrative task of 'scribe', preferably augmented with relevant pictures and charts. It's worth noting that 'graphical recording' (notes in the form of pictures) is a popular way of capturing the essence of a meeting, but is unlikely to capture all of the nuances of detailed discussions and should be augmented with text notes.

Although, as the facilitator you want the most detailed possible record of the session, '*less is more*' is the mantra for the materials to be distributed to participants. A complete set of minutes is unlikely to be read and the same goes for an audio/video recording. Instead, a relevant précis should be distributed, covering:

- A high-level (bullet-point) review of discussions.
- An outline of ideas surfaced and decisions reached.
- A clear listing of action items, with target dates for completion and assigned responsibilities.

Just as invitations should be followed up with 1-on-1 interactions, the same is true for session review documents. Face-to-face, telephone, chat or (as a last resort) email conversations should be used to connect with session participants. Ask if they have had any additional thoughts since the session, if they have had any post-session ideas, and if they are clear on any outstanding tasks to which they have been assigned.

## Summary

This approach isn't a one-size-fits-all and as mentioned up-front, it isn't *guaranteed* to work. A quick 'idea generation' session requires less preparation than a multi-day strategic planning exercise. But, after many hundreds of hours facilitating different types of strategy brainstorming sessions, I can confidently say that working through these six steps will improve the chances of a successful brainstorming session.

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