# Objective Alignment Session Plan

This plan includes two agenda templates (one for you as the facilitator and one for your stakeholders), instructions for the exercises I typically use, and a worksheet you can print and use in your session.

## Agenda

Here’s the agenda you can print for you and anyone else who is playing a facilitation role in your session.

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| --- | --- |
| Activity | Duration |
| Background and Ground Rules: Explain the project, why people were invited, and the rules you expect participants to follow. | 15 minutes |
| Introductions: Share your name, title, and why you were invited. | 30 minutes |
| Individual Exercise and Discussion: Complete the worksheet that covers business/department/team goals, problems and opportunities, and personal viewpoints, and discuss with the group. | 30 minutes |
| Problems Post Up and Grouping: Brainstorm problems this project should help solve, and group them into categories. | 45 minutes |
| Perfect World Post Up and Grouping: Brainstorm what will be different if the project is successful, and group into categories. | 30 minutes |
| Reality Brainstorm: Make two columns on the board, and brainstorm based on the previous two exercises what this project can help with and what it can’t realistically improve or change. | 20 minutes |
| Objectives Synthesis: Work together to synthesize problems, perfect world, and reality into project objectives. | 60 minutes |
| Roadmap: Brainstorm the steps necessary to reach the objectives and map them to a timeline; have each person say where they think they need to be involved and how. | 60 minutes |
| Recap and Next Steps: Summarize the progress you made in the session and what will happen next. | 15 minutes |

For the session participants, write the general agenda on a wall sticky or whiteboard for reference. Here’s an example:



## Activity Instructions

As always, modify the exercises as you see fit. You’ll need the following supplies for the activities:

• Wall stickies and/or lots of whiteboard/wall space

• Regular-sized square stickies

• Slightly larger stickies (for example, 4x6)

• Dark-colored markers that can be read from several feet away

• Scratch paper

• Pens and pencils

### Background, Ground Rules, and Introductions

Give some background on the project and explain the purpose of the meeting. Your introductory email (Tool 4.2) can serve as your talking points.

Walk through the ground rules you’d like everyone to follow. Write them on the board or a wall sticky if you think it’s necessary. Here are the ones from the book:

• No laptops, no phones (unless you need them to participate).

• Avoid interrupting.

• Every opinion is valid, and no idea is a bad idea when brainstorming.

• Asking for clarification is OK.

• Everyone talks, and everyone listens.

• No side conversations.

Ask everyone to introduce themselves, even if it’s likely everyone knows each other. Participant should share their name, title, and their perception of why they were invited to participate.

### Individual Exercise and Discussion

Hand each participant a worksheet (you’ll find a version you can print at the end of this document). Walk through each question, and ask if anyone needs clarification, more explanation, and so on. Give participants 15 to 20 minutes to complete the worksheet. Then, take 10 minutes or so to have participants share their responses. During that time, you or your co-facilitator should take notes on similarities and differences between answers.

### Problems Post-Up and Grouping

Ask participants to brainstorm on their own a list of problems they are having related to content. Tell them to be as specific as possible and not limit their thinking to their role or department. Then, ask participants to choose the top 10 problems from their list to translate to sticky notes. (You want approximately 35 sticky notes to work with, so the number from each person may be more or less depending on the number of participating people.)

Next, ask each person to read their sticky notes one at a time, with other participants asking for clarifications as necessary. Once all the sticky notes are on the board, invite participants to come up to the board together and start grouping the individual problems into categories. When they finish forming the groups, ask one person to describe the first group as a problem statement. Ask if everyone agrees with the statement, and facilitate discussion as necessary. Write the statement on a larger sticky note, and place it above the grouping. Repeat with each grouping.

Finally, make a list of the problem statements on the whiteboard or on a wall sticky (or stickies), and set it to the side. Keep all the sticky notes in groups for reference later.

### Perfect World Post-Up and Grouping

Ask participants to brainstorm on their own a list of what will be better if the project is successful. Tell them to be as specific as possible and to not limit their thinking to their role or department. Then, ask participants to choose the top 10 items from their list to translate to sticky notes. (You want approximately 35 sticky notes to work with, so the number from each person may be more or less depending on the number of participating people.)

Next, ask each person to read their sticky notes one at a time, with other participants asking for clarifications as necessary. Once all the sticky notes are on the board, invite participants to come up to the board together and start grouping the individual items into categories. When they finish forming the groups, ask one person to describe the first group as an opportunity statement. Ask if everyone agrees with the statement, and facilitate discussion as necessary. Write the statement on a larger sticky note, and place it above the grouping. Repeat with each grouping.

Finally, make a list of the opportunity statements on the whiteboard or on a wall sticky (or stickies), and set it to the side. Keep all the sticky notes in groups for reference later.

### Reality Brainstorm

Make two columns on the whiteboard or on two wall sticky sheets. Label the first column with **This project can…** and the second column with **This project can’t…**. Then, for each problem and opportunity statement, facilitate a discussion about how the project can or cannot help with that statement, and make notes in the corresponding columns (or on the corresponding sheets).

### Objectives Synthesis

Using the “This project can …” list as a starting point, facilitate a discussion to get alignment on three to five objectives for your project. Once you’ve come to consensus on an objective, write it on the board or on a wall sticky, and answer the following questions for each objective. Then lead a discussion to complete the following statement for the objective: “We will know we succeeded when/if….”

### Roadmap

Create a common understanding of the tasks, time, and staff resources required to accomplish the objectives by creating a high-level roadmap for the project. To do this, you may want to break into small groups so that each group is responsible for one objective. Or, you can go through each objective with the larger group.

For each objective, start by brainstorming and writing on sticky notes the individual tasks required to achieve the objective. Then, plot the tasks on a timeline by week or month (depending on the complexity of your project). Once the tasks are plotted on the timeline, draw lines between tasks that are dependent on other tasks to show the relationship. And finally, write on or near each task sticky note who will need to be involved with each task by name, department, or other descriptor (such as consultant or agency).

If small groups tackled the objectives separately, have each group present their roadmap.

