

Aitkin County

Sensing Sessions Guide



Dear Revitalization Team,

This guide serves as a comprehensive manual for executing effective Sensing Sessions, a cornerstone in the Workout methodology. You'll gain practical insights into role clarification, idea sourcing, and how to navigate challenges. The goal is to foster aligned, actionable plans by engaging multiple stakeholders in meaningful dialogue.

Within these pages, you'll find tools for dealing with diverse idea origins, mitigating potential tensions, and crafting a well-defined Workout Charter. This guide aims to equip you with the necessary frameworks and questions to make your Sensing Sessions not just productive but transformative.

As always, I'm here to coach and help you develop mechanisms that make this aspect of revitalization more meaningful and less time-consuming!

Enjoy!



Dr. Bill Brendel
bill@tlinstitute.com

Contents

- Introduction to Sensing Sessions 1
- Role Clarification..... 1
 - Should I be a Facilitator or a Participant? 1
- Origin and Prioritization of Workout Ideas..... 2
 - Idea Origins 2
 - Focusing the Session’s Goals 2
 - Scenario 1: Ideas Introduced by Workout Facilitators..... 3
 - Scenario 2: Ideas from Employee Submissions..... 3
 - Scenario 3: Ideas from Sponsors or Planning Team 3
 - Prioritization by the Planning Team 3
- 'What-If' Scenarios..... 4
 - Example Questions for Dealing with 'No' 4
- Navigating Technical, Political, and Cultural Tensions 4
 - Script for Navigating Tensions 4
- Tips and Tricks 5
 - Ground Rules and Data Utilization..... 5
 - Sample Ground Rules Script..... 5
- Co-Creating the Workout Charter 5
 - Workout Charter Template 6
 - Charter Development Questions & Tips 7
 - Example Script for Finalizing the Charter 8
- Hypothetical Examples of Workout Charters 9
 - Talent Acquisition and Integration Enhancement 9
 - Agile Scheduling Program for Health and Human Service Employees 10
 - Review & Optimization of Government Policies 11
 - Developing a Strategically Impactful Department Meeting Agenda..... 12
 - Optimization of Printer and Workflow Processes 13
- Helpful Resources..... 14
 - Getting to Yes..... 14
 - Other Helpful Books 15

Introduction to Sensing Sessions

The Sensing Session is a critical component of the Workout methodology. It serves as the initial step where sponsors, Revitalization Team members, and sometimes even potential participants converge to clarify the scope and objectives of the forthcoming Workout. The session aims to dissect and define the problem or opportunity that the Workout will address. A well-executed Sensing Session sets the foundation for a successful Workout by fostering alignment among all stakeholders. It's vital for all participants to come prepared with a preliminary understanding of the issue at hand, as well as open-ended questions that can stimulate discussion and bring forth key insights. Sensing Sessions are not merely a logistical discussion but rather a strategic conversation aimed at pinpointing organizational issues that merit immediate attention.

Key Points

- Sensing Sessions dismantle ambiguity, paving the way for structured dialogue.
- Facilitators should prepare probing questions and dialogue strategies to elicit meaningful contributions.

Role Clarification

In a Sensing Session, the Revitalization Team member's role is to guide the conversation, ensuring that it remains on topic and moves towards fulfilling its objectives. They are also the process expert in the room but should maintain neutrality on the content. If needed, potential Workout participants generally bring subject matter expertise and contribute to the content of the discussion. The sponsor, who will typically be an Aitkin County Department Head, provides organizational context and resources and often has the final say on the actions to be taken. It's crucial to clarify these roles at the outset of the Sensing Session to ensure a smooth and productive conversation. Misunderstandings about roles can derail the session, causing confusion and loss of focus.

Should I be a Facilitator or a Participant?

The facilitator's role is to guide the conversation, ensuring focus, productivity, and inclusivity. The participant's role is to bring subject matter expertise, contributing depth to the discussion. Here are a few helpful questions for role clarification:

1. "As we begin, let's clarify our roles. Who among us is the subject matter expert today?"

2. "As the facilitator, my role is to guide us toward a clear and actionable outcome. Is everyone clear on their roles?"
3. "Is anyone here wearing multiple hats? For instance, are you a participant but also a stakeholder in another department?"

Origin and Prioritization of Workout Ideas

Ideas for Workouts can come from multiple sources, including Revitalization Team members who have a broad view of organizational issues, frontline employees who experience challenges firsthand, and sponsors or Planning Teams who understand the strategic direction of the organization. Each source brings its own advantages and challenges. For example, Revitalization Team member-driven ideas might be well-structured but may lack grassroots details. Conversely, employee-driven ideas might be highly relevant but may lack a strategic viewpoint. The Sensing Session acts as a filter and alignment tool, scrutinizing these ideas for strategic fit, feasibility, and impact. It's the setting where these different perspectives can be harmonized into a cohesive action plan.

Idea Origins

1. Facilitator-Introduced Ideas: Often rooted in systemic observations or aggregated employee feedback.
2. Employee-Introduced Ideas: Less polished but usually highly relevant, requiring validation and scope definition.
3. Sponsor or Planning Team Ideas: Usually aligned with strategic goals but may lack ground-level insights.

Focusing the Session's Goals

- If the idea is complex and involves multiple departments, then focus the Sensing Session on scoping and stakeholder identification.
- If the idea is specific and narrow, then validate its relevance and feasibility in the Sensing Session.

Scenario 1: Ideas Introduced by Workout Facilitators

When ideas originate from Workout facilitators, these are often rooted in systemic observations or through aggregating employee feedback. The facilitator's role in the Sensing Session is to present this idea with sufficient background data and context.

- If the idea is complex and involves multiple departments, then the Sensing Session should focus on scoping the problem and identifying key stakeholders.
- If the idea is straightforward and contained within a single function, then the Sensing Session can be more focused and aim for rapid alignment and action planning.

Scenario 2: Ideas from Employee Submissions

Employee-driven ideas often come from the front lines and may be less polished but are usually highly relevant. These ideas need validation and scope definition, making the Sensing Session crucial for refining and aligning these raw ideas with organizational goals.

- If the employee idea is broad and multi-faceted, then the Sensing Session should aim to distill it into actionable components.
- If the employee idea is specific and narrow, then the Sensing Session should validate its relevance and feasibility, potentially fast-tracking it to the Workout stage.

Scenario 3: Ideas from Sponsors or Planning Team

When ideas come from sponsors or the Planning Team, they're often already aligned with strategic goals. However, they may lack ground-level insights. The Sensing Session serves to flesh out these high-level ideas, infusing them with operational realities.

- If the idea is strategic and long-term, then the Sensing Session should focus on defining key milestones and performance indicators.
- If the idea is tactical and short-term, then the Sensing Session should aim for rapid action planning and role assignment.

Prioritization by the Planning Team

Given that all sponsors serve on a Planning Team, a formalized prioritization process becomes essential. The Planning Team should evaluate each proposed Workout idea against set criteria such as alignment with organizational strategy, potential impact, and feasibility.

- If multiple ideas have similar strategic importance, then prioritize based on feasibility and impact.
- If the Planning Team is faced with a mix of short-term and long-term ideas, then aim for a balanced portfolio approach, accommodating both immediate wins and foundational projects for future gains.

'What-If' Scenarios

The Sensing Session, while designed to be a constructive dialogue, often comes with its set of challenges, including objections or reservations from the sponsor or participants. Anticipating these 'What-If' scenarios is a hallmark of effective facilitation. When a sponsor says "No" to a proposed idea in a sensing session, it's not the end of the road; instead, it's an opportunity to delve deeper into their reservations and adjust the proposal accordingly. The facilitator should be equipped with a series of probing questions to explore the underlying concerns. Being prepared for these contingencies keeps the Sensing Session productive and ensures that even if an idea is initially rejected, the underlying issues are brought to light for further refinement.

Example Questions for Dealing with 'No'

1. "Can you help us understand what specific elements of the proposal are causing concern?"
2. "Are there modifications that would make this idea more aligned with your expectations?"
3. "Is the timing an issue, or are there other initiatives that should take precedence?"
4. "Would additional data help in making this decision?"
5. "Are there budgetary constraints we should be aware of?"

Navigating Technical, Political, and Cultural Tensions

Tensions in Sensing Sessions can manifest in various forms—technical disagreements about the feasibility of an idea, political tensions stemming from departmental rivalries, or cultural tensions due to differing organizational or personal values. Navigating these tensions effectively is crucial for maintaining a focused and constructive Sensing Session. The facilitator must be skilled in conflict resolution techniques, which might involve realigning the group's focus on common organizational goals or facilitating a compromise. The objective is to prevent these tensions from sidelining the primary focus of the Sensing Session, which is to define and agree upon the scope and objectives of the upcoming Workout.

Script for Navigating Tensions

1. "I sense some tension around this point. Can we focus on what's best for the organization?"
2. "Let's park our departmental hats at the door and focus on the larger organizational goal."

3. "It seems we have some differing opinions. Can we find a common ground to move forward?"
4. "Could we take a moment to clarify the technical jargon for everyone's benefit?"
5. "I'm sensing some political undercurrents here. How can we navigate this constructively?"

Tips and Tricks

Effective facilitation is more than just having a good grasp of the process and objectives; it involves subtle techniques that make the session productive and engaging. Establishing ground rules upfront can set the tone for a respectful and constructive dialogue. Ground rules may include guidelines for speaking time, decision-making protocols, or confidentiality agreements. The use of real-time, empirical data can lend objectivity to the session, serving as a common reference point that can help resolve disagreements or clarify ambiguities. Additionally, time management is crucial; adhering to a well-planned agenda ensures that all critical topics are covered.

Ground Rules and Data Utilization

- Ground Rules: Establish norms around speaking time, confidentiality, or the use of data.
- Data Utilization: Use real-time, empirical data to inform the session.

Sample Ground Rules Script

1. "Before we dive in, let's agree on some ground rules. Are we all comfortable with confidentiality?"
2. "Can we agree to limit speaking time to ensure everyone gets a chance to contribute?"
3. "Is everyone comfortable with using real-time data to inform our discussion?"

Co-Creating the Workout Charter

The goal of a Sensing Session is to create a well-informed, detailed Workout Charter. This document outlines the agreed-upon objectives, the scope of the Workout, and the roles and responsibilities of each participant. It serves as the guiding blueprint for the subsequent Workout phase, ensuring that everyone is aligned and that the actions to be taken are clear. The Workout Charter is often finalized with the sponsor's approval, signifying organizational commitment to the objectives laid out during the Sensing Session.

Workout Charter Template

Facilitators should be sure to bring a copy of the Workout Charter Template to every sensing session. Each section of the template is important to complete before the finalization of the charter. If you are unsure about whether you have enough information it is OK to set time aside to collect data and then schedule a follow up sensing session.

Problem Statement

- Why is this project important to the organization?
- One or two sentences that describe the gap between expected performance and actual performance.

Aim Statement

- Major goal(s) of the Workout project (limit 1-2)

Measures of Success

- Key metrics (how will you measure the goals?)

Scope

- What's in and out of scope? (processes, topics, aims, procedures, systems)
- Process (beginning/ending)

Boundaries

- Constraints (anything non-negotiable for the project such as "FTE neutral" or "no capital expenses > \$500")

Timing

- Start Date
- Planned End Date

Key Stakeholders

- Sponsors
- Rev Team Facilitators
- Coach(es)
- Change Champions (Participants)
 - Name/Role/Department

Charter Development Questions & Tips

Before each Sensing Session, review this list and add questions of your own as you seek to crystallize the Workout's problem, aims, measures of success, scope, boundaries, timing, and key stakeholders.

<p>Problem Statement The critical issue that the project aims to address. It should articulate the gap between the current state and the desired state of performance.</p>	<ol style="list-style-type: none"> 1. Is the problem statement specific enough to focus the team's efforts? 2. Does the problem statement align with organizational priorities? 3. Is the problem quantifiable, and can it be measured? 	<ul style="list-style-type: none"> ✓ Use clear, concise language that avoids jargon. ✓ The statement should be problem-focused, not solution-focused. ✓ Validate the problem statement with data where possible.
<p>Aim Statement The primary goals of the Workout project. It should be narrow in focus to ensure that the project has measurable and achievable outcomes.</p>	<ol style="list-style-type: none"> 1. Are the goals SMART (Specific, Measurable, Achievable, Relevant, Time-bound)? 2. Do the aims align with the Problem Statement? 3. How do these aims contribute to organizational objectives? 	<ul style="list-style-type: none"> ✓ Limit the number of goals to keep the team focused. ✓ Ensure goals are actionable. ✓ Align aims with organizational strategy and stakeholder interests.
<p>Measures of Success Key metrics used to evaluate the success of the project. These metrics should align closely with the Aim Statement.</p>	<ol style="list-style-type: none"> 1. Are the metrics clearly defined and easy to measure? 2. Do the metrics give a comprehensive view of project performance? 3. How will you collect data for these metrics? 	<ul style="list-style-type: none"> ✓ Choose metrics that are directly related to the aim. ✓ Make sure metrics are realistic to gather and analyze. ✓ Regularly review and, if necessary, adjust metrics as the project progresses.
<p>Scope What is included and excluded in the project, such as processes, topics, aims, procedures, and systems (starting and ending points).</p>	<ol style="list-style-type: none"> 1. Is the scope too broad or too narrow? 2. How does the scope align with available resources? 3. Are all necessary elements included in the scope? 	<ul style="list-style-type: none"> ✓ Be explicit about what is in and out of scope to avoid scope creep. ✓ Validate the scope with key stakeholders. ✓ Ensure the scope is aligned with the aim and problem statement.
<p>Boundaries This section details any constraints that are non-negotiable for the project. These could be financial</p>	<ol style="list-style-type: none"> 1. What are the potential bottlenecks given these constraints? 2. Are these constraints well-communicated to all stakeholders? 	<ul style="list-style-type: none"> ✓ Clearly define each constraint. ✓ Develop a contingency plan for each constraint.

constraints, resource limitations, or time-bound requirements.	3. How do these boundaries impact the project's success metrics?	✓ Regularly reassess constraints as project conditions change.
Timing The Timing section notes the start and planned end dates for the project. This sets the timeline for all project activities.	1. Is the timeline realistic given the scope and resources? 2. Are there any external factors that could influence the timeline? 3. How flexible is the timeline?	✓ Align the timeline with stakeholder expectations. ✓ Build in some buffer for unexpected delays. ✓ Regularly update the timeline as the project progresses.
Key Stakeholders This section lists all the key individuals or groups involved in the project, outlining their roles and departments. This includes Sponsors, Rev Team Facilitators, Coaches, and Change Champions.	1. Are all key roles identified and filled? 2. Do stakeholders have clearly defined roles and responsibilities? 3. Are there any missing stakeholders who should be involved?	✓ Ensure stakeholders are committed and available. ✓ Clearly define roles to avoid confusion or overlap. ✓ Engage stakeholders early and often for feedback and alignment.

Example Script for Finalizing the Charter

Once you have filled out your template, it's time to finalize and agree upon next steps, responsibilities, and timelines. Here are a few ways to kick off this discussion:

1. "Let's finalize our Workout Charter. Can we summarize the objectives we've agreed upon?"
2. "Who will take responsibility for each next step?"
3. "Can we agree on timelines and key milestones for this Workout?"

Hypothetical Examples of Workout Charters

Talent Acquisition and Integration Enhancement

<p>Title: Talent Acquisition and Integration Enhancement</p> <p>Problem Statement The existing talent acquisition and integration processes are inefficient, leading to lengthy hiring cycles and high turnover rates among new employees.</p> <p>Aim Statement The aim of this project is to redesign and optimize talent acquisition and integration processes to improve efficiency and reduce turnover.</p> <p>Measures of Success Reduction in hiring cycle time by 30% Decrease in turnover rate by 15% Positive feedback from new hires regarding the onboarding experience</p> <p>Scope The project will focus on revamping job posting procedures, candidate selection methods, and onboarding practices.</p> <p>Boundaries The project will not compromise legal compliance or similar HR efforts.</p> <p>Timing The project will commence on January 1st and is expected to be completed by April 15th.</p> <p>Key Stakeholders</p> <ul style="list-style-type: none">• Sponsor: HR Director• Participants (Champions): HR employees, select hiring managers, recent new hires.• Workout Facilitators: Names here
--

Agile Scheduling Program for Health and Human Service Employees

Title: Agile Scheduling Program for Health and Human Service Employees

Problem Statement

Health and Human Service employees face scheduling challenges, impacting their work-life balance and departmental efficiency.

Aim Statement

This project aims to develop an Agile scheduling program that enhances employee scheduling, employee well-being, departmental productivity, and employee growth opportunities.

Measures of Success

- ✓ 20% improvement in scheduling efficiency
- ✓ Increased employee well-being
- ✓ Reduction in scheduling-related strains on employee time

Scope

The project will focus on designing and implementing an Agile scheduling program for all Health and Human Service employees.

Boundaries

The program development must align with labor laws and prioritize employee well-being.

Timing

The project will commence on February 15st and is expected to be completed by May 15th.

Key Stakeholders

- Sponsor: HHS Director
- Participants (Champions): HHS Supervisors, select employees.
- Workout Facilitators: Names here

Review & Optimization of Government Policies

Title: Review and Optimization of Government Policies

Problem Statement

Aitkin County government has a large number of policies, some of which may be outdated or no longer relevant, causing confusion and inefficiency.

Aim Statement

This project aims to conduct a comprehensive review of government policies to differentiate between essential policies and outdated rules, enhancing clarity and reducing bureaucracy.

Measures of Success

- ✓ Identification of outdated policies and their removal
- ✓ Improved understanding of essential policies among employees
- ✓ Streamlined policy documentation and communication

Scope

The project will focus on reviewing and categorizing government policies.

Boundaries

The project will not compromise legal compliance or disrupt essential government services.

Timing

The project will commence on March 15st and is expected to be completed by August 20th.

Key Stakeholders

- Sponsor: HHS Director, HR Director
- Participants (Champions): Select Supervisors
- Workout Facilitators: Names here

Developing a Strategically Impactful Department Meeting Agenda

Title: Development of a New Meeting Agenda for a Department

Problem Statement

Departmental meetings lack a clear strategy driven structure, and may be redesigned for greater impact and more efficient use of time.

Aim Statement

This project aims to design and implement a new meeting agenda format that enhances the strategic value of departmental meetings, improving collaboration and decision-making.

Measures of Success

- ✓ Increased participation and engagement in meetings
- ✓ More strategic discussions and decisions made during meetings
- ✓ Reduced meeting duration without compromising effectiveness

Scope

The project will focus on redesigning the department's monthly "All Staff" meeting agenda.

Boundaries

The new agenda must align with departmental goals, remain time-efficient, and be amenable to remote/hybrid working arrangements.

Timing

The project will commence on March 15th and is expected to be completed by August 20th.

Key Stakeholders

- Sponsor: County Administrator
- Participants (Champions): Select Supervisors
- Workout Facilitators: Names here

Optimization of Printer and Workflow Processes

Title: Optimization of Printer and Workflow Processes

Problem Statement

The (fill in name) department is experiencing inefficiencies in printer usage and workflow processes, resulting in time wastage and operational challenges.

Aim Statement

This project aims to streamline and optimize printer and workflow processes within this department to improve efficiency and reduce operational costs.

Measures of Success

- ✓ Reduction in paper and printing-related costs by 20%
- ✓ Decreased printing queue times by 30%
- ✓ Enhanced document routing and tracking capabilities

Scope

The project will focus on optimizing printer usage, document management, and workflow processes.

Boundaries

The new agenda must align with departmental goals, remain time-efficient, and be amenable to remote/hybrid working arrangements.

Timing

The project will commence on December 12th and is expected to be completed by February 1st.

Key Stakeholders

- Sponsor: IT Director
- Participants (Champions): Select employees with significant printing loads
- Workout Facilitators: Names here

Helpful Resources

Getting to Yes

The book, "Getting to Yes" by Roger Fisher and William Ury provides a principled approach to reaching mutually beneficial agreements while maintaining positive relationships. The book offers a set of key principles and strategies that can be adapted for conducting effective sensing sessions:

1. **Separate People from the Problem:** "Getting to Yes" emphasizes the importance of separating the people involved in a negotiation from the problem at hand. In sensing sessions, this principle can be applied to maintain a collaborative and constructive atmosphere, even when discussing sensitive issues or conflicts.
2. **Focus on Interests, Not Positions:** The book encourages negotiators to look beyond stated positions and uncover the underlying interests and needs of all parties. In sensing sessions, this approach can help participants better understand each other's perspectives and motivations, leading to more productive discussions.
3. **Generate Options for Mutual Gain:** "Getting to Yes" advocates for brainstorming and creating multiple options for mutual benefit. In sensing sessions, this principle can be applied to explore a wide range of possibilities and solutions, fostering creativity and innovation.
4. **Insist on Using Objective Criteria:** The authors emphasize the use of objective criteria or standards to evaluate proposed solutions. In sensing sessions, this can help participants make data-driven decisions and ensure that agreements align with clear and fair criteria.

Applicability to Sensing Sessions: "Getting to Yes" offers a structured and principled approach to negotiation that can be adapted to the context of sensing sessions. By applying the book's principles, participants in sensing sessions can:

- Foster open and constructive dialogue.
- Explore underlying interests and concerns.
- Generate innovative solutions to challenges.
- Base decisions on objective criteria and data

Other Helpful Books

"Difficult Conversations: How to Discuss What Matters Most"

by Douglas Stone, Bruce Patton, and Sheila Heen

This book focuses on handling challenging conversations with skill and empathy. It provides practical tools for addressing conflicts and finding mutually beneficial solutions, making it a valuable resource for sensing sessions.

"Getting More: How You Can Negotiate to Succeed in Work and Life"

by Stuart Diamond

Stuart Diamond offers a unique perspective on negotiation by emphasizing the value of relationships, emotions, and cultural understanding. The book provides practical strategies for achieving better outcomes in negotiations and communication.