

**Goal:** This is a protocol that any leader, in any industry, at any time, can use to build consensus on a clear and compelling vision for the ideal future of the team, organization, program, or project.

**Time required:** Varies; 30-60 minutes for each of 1-3 sessions.

**Materials:** Chart paper (sticky kind is best) and markers for each sub-group

**Participants:** Invite a representative (or more) from each stakeholder group - in some cases, this might involve the entire stakeholder group

### Session 1

**Pre-meeting:** Compile book excerpts, articles, videos, and other resources that highlight the research and information about this topic. Engage in collaborative inquiry with participants (and others, as appropriate): read together, discuss the research, debate and challenge each other, and review the big ideas together.

**\*Note:** Pre-meeting (as well as Step 1, below) can last a week or two, giving stakeholders an opportunity to truly wrap their heads around the big ideas, exchange preliminary thoughts, and prepare to engage in rich dialogue.

### Session 2

**Step 1:** Bring participants together to share their experience and/or expertise with the topic at hand. Address, in a free-flowing dialogue, any questions, concerns, ideas, personal anecdotes, hopes, and dreams that arise. If needed, pose discussion-starters such as, "What surprised you in the readings about this topic?" or "What ideas might we consider as we dig deeper into this topic?" Set a time limit on this conversation and stick to it - this step is simply to get the creative juices flowing.

**Step 2:** Individually, all participants journal their thoughts and ideas about any or all of the questions below (and/or create your own prompts as well) in subgroups of 4-6 people:

When this work goes spectacularly well...

- ...what will we have accomplished?
- ...what will we see? hear? notice? feel?
- ...what will be different? better?
- ...how will our business be changed?
- ...how will we be more successful?
- ...how will our market presence be different?
- ...what impact will we have?
- ...how will we know?
- ...what outcomes will we observe?
- ...how will this impact the greater community?

**Step 3:** In each subgroup, select a recorder to write down the brainstormed ideas, descriptions, goals, and ideal outcomes of the topic at hand on a giant piece of sticky-note chart paper. Notes for recorders:

1. Every suggestion is written down (concisely, without contributors' names)
2. Separate ideas by writing the items in a bulleted list (this is critical formatting for a future step)
3. Use additional sheets of chart paper as needed

**Step 4:** One by one, a reporter for each subgroup shares aloud the group's bulleted list of brainstormed ideal outcomes. As needed, the reporter takes and responds to questions from other participants, engaging in enough discussion to obtain clarity (not necessarily agreement). As each subgroup reports, the recorders for all remaining subgroups writes a line through any items on their lists that are duplicates. In the end, when all lists are posted on the walls, only unique items remain un-crossed-off.

**Step 5:** Individually, participants take time to engage in a gallery walk, examining the items and organizing their own thoughts in relation to the list of ideal outcomes.

*\*Note:* If desired, Step 5 can last a week or two. Keep the posters available for all stakeholders to view, to process, and to discuss. All participants must be comfortable understanding the ideas before moving to Step 6.

### Session 3

**Step 6:** Using the "dot protocol," participants prioritize the elements. Distribute three sticky-dots (the kind you can pick up at an office supply store) to each participant. Instruct them to place their sticky dots on the chart paper next to the written responses that a) they are most passionate about, b) are the highest-yield approaches, and/or c) have the greatest likelihood to achieve success. Participants can "vote" for three different items, or they can combine their votes for an extra-powerful written responses.

**Step 7:** Together, participants scan the distribution of dots to identify the items that received the most dots. The facilitator can determine how many of the ideal outcomes to include in the list of ideal outcomes that will be re-written on a new piece of chart paper to post. (Typically, this ranges from 3 or 4 items to 6 or 7 items.) This revised list becomes the consensus description of the most compelling elements of the collective vision.

**Step 8:** As the facilitator/leader, establish the understanding that this list has authentic power - it is the will of the group - and it now serves as the beacon of the collective vision. Follow a formal process of setting the expectation that all participants will commit to this vision (even if the revised list does not contain any elements that a given individual participant voted for). This vision can now be used to guide professional development efforts, performance expectations, strategic plan development, coaching support, and other pursuits.