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March 2012

Sticky Notes Workshop

How To

What is it?

- A workshop where discussions are done Face-to-Face with a group of key stakeholders using auxiliary items like sticky notes to enhance the outcome of the proposed solution and gain better buy-in

Why go for it?

- Interactive & a unique way to engage the client
- Number of open activities need to be discussed before placing them in the roadmap
- Involvement of client in finalizing various activities in the roadmap is critical
- When multiple teams (client side) are involved and getting client buy-in on the proposed roadmap is key to the success of the engagement
- Prioritization of activities is hazy and needs client call

When to use it!

- Multiple teams on the client side are involved in the roadmap
- Communication between the various teams at client side is not transparent
- Each team on the client side have their own on-going and planned activities overlapping with the roadmap to be proposed
- Clients overall vision & efforts have not been shared with in its entirety with the consulting team
- Less clarity is observed while building the roadmap with respect to dependency & impact of various sub-projects
- Collaborative effort is a priority to ensure success of the proposed roadmap
- Number of activities to be prioritized and placed under various phases

When not to use...

- When the consulting team has already prioritized the activities based on facts from the analysis phase
- High clarity around on-going and planned activities is available
- Not too many activities to put in the roadmap
- Client buy-in is not an issue or straight forward as they can be backed by hard facts

What do you need?

❖ Items needed

- Sticky notes (2 or more colors)
- White board or large flip board
- White board markers
- Projector

❖ Pre-Preparation

- Plan rules of the workshop (*pick the variant*)
- Kick-off presentation
- Draft categorization (Time based, quadrant, buckets, etc.)
- Clear understanding of activities places in each sticky

How to conduct!

Before the Workshop:

- o Place each activity or line item that needs to be discussed on individual sticky notes
- o Use the white board to mark/draw the categories Ex. Timeline, Quadrants, buckets
- o *Place the stickies under their respective categories pre-decided based on analysis [OR]
- o *Place the stickies in a corner of the white board (based on the variant selected)

During the Workshop:

- o Kick-off Presentation to include:
 - Objectives of the workshop
 - Accomplishments (based on analysis)
 - Expectations from the audience
- o Rules of the game/workshop
 - What to do & What not to do
 - Explanation & Justification for the categorization adopted
 - Legend for the different colors used in stickies
 - Initial arrangement of the sticky notes (if applicable)

Variant 1

Client Controlled

- o In this variant, the sticky notes are placed in a corner of the white board or on a flip board (completely uncategorized)
- o Categories are pre-drawn/marked on the white board
- o Each activity or a set of activities would be briefly explained by the consulting team before it is picked up by the client
- o Client will place the sticky in a category they deem is the best-fit
- o The consulting will ensure the dependency between activities is intact

Caveats

- o The consulting team must be well versed with each activity, its dependencies and the impact prior to the workshop
- o Deep-dive analysis phase is a must. Quantitative analysis is preferred
- o Quick on-the-spot analysis might be required if the client comes up with a totally new option

Variant 2

Consulting Team Controlled

- o In this variant, the sticky notes are placed in one or the other category before the workshop starts based on the consulting teams analysis
- o The flow of activities under each category is briefly explained
- o Client teams are then allowed to discuss or challenge the placement of a sticky and move them around
- o Movement of sticky notes will be aided by the consulting team to ensure the dependency between the activities is intact

Caveats

- o The consulting team must have analyzed alternative options if the changes are high
- o Quick on-the-spot analysis might be required if the client comes up with a totally new option
- o Partial clarity on roadmap is available and workshop is conducted for better client buy-in

Comparison

Variant 1 (Client Controlled)	Variant 2 (Consulting Team Controlled)
In depth knowledge of clients environment is available	Information available but a fair amount of unknowns are still present
Too many on-going/planned activities & low clarity is available to the consulting team	Partial clarity on the roadmap is available based on analysis
Workshop duration is mostly a full day	Workshop duration is short (half day)
When a highly interactive workshop mode is required to gain client-buy in	Quick decision needs to be made at the end of the workshop with a fair amount of client involvement



Thank you!