

# Strategy and Innovation Workshop Preparation

## HOW WE DO IT

The size and length of workshops depend on your situation. This will be determined in our initial scoping meeting.

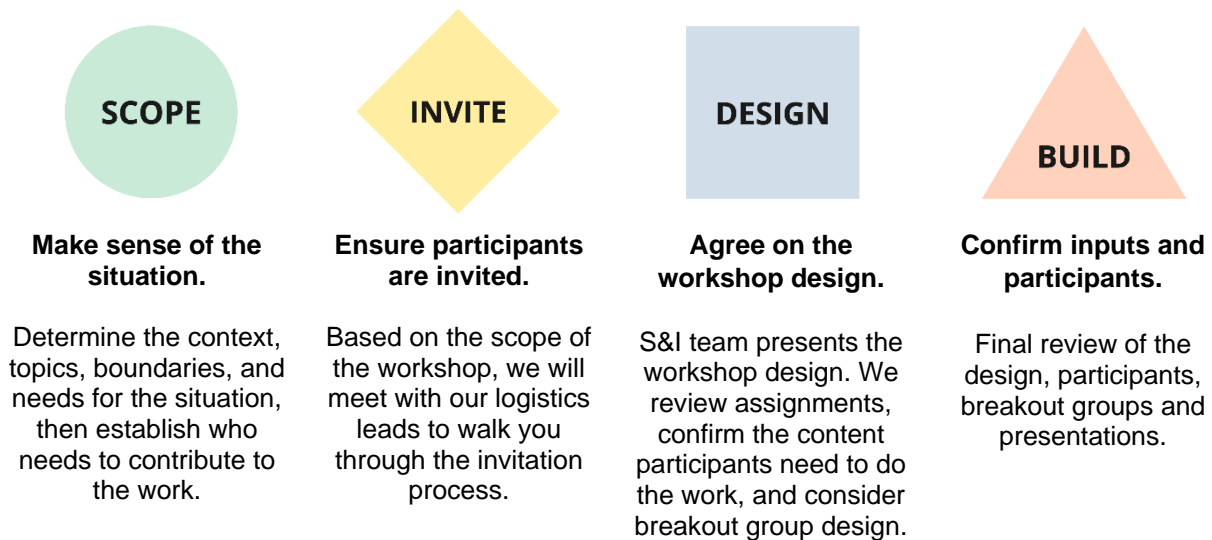


We will facilitate your group through activities utilizing small breakout groups with each activity building on the next. The pace and sequencing of activities vary based on needs.

It is beneficial for teams to have 3-7 people in each breakout to explore different vantage points simultaneously, then come back together to iterate, reflect, and move ideas forward collaboratively, under our facilitation.

## PLANNING A WORKSHOP

We will schedule a series of meetings that allows us to establish the scope of your workshop, review the workshop design, and finalize the content and flow of the workshop.



### Scope

To help us design your workshop, we ask a series of questions to get a clear scope. Please review the questions below to prepare for your first scoping meeting.

- In one breath, why do you want to bring people together?
- What observations are you making that are relevant to this situation?
- What are the institutional needs related to this situation?
- What do you expect from this group as a response?
- Where are the boundaries within which this situation exists? What DON'T you want to talk about or change?
- What specific topics do you want to work on with this group? Are these topics strategic opportunities, challenges, or risks? How will addressing these topics amplify or accelerate your work?
- When is the best time to do this work?
- Who might be affected by the work we accomplish in this workshop? How might those people be represented?

### Participants

We will discuss who might need to attend the workshop to move your work forward. We look for a diversity of thought: decision-makers, informal leaders and influencers, spokespeople who get the word out, reasonable skeptics, and people affected by the work.

## **Deliverable**

Our team will document your work and deliver raw work files to you and any summaries we agree to provide.

## **Sponsor Team**

We ask that you consider inviting 1-3 additional people who will help design an effective event. Together, they are the Sponsor Team who participates in the planning meetings and should:

- Include the person who is accountable for the results and who is asking everyone to take the time to participate. This person will be the Lead Sponsor. The lead sponsor will be ‘the face’ of communications.
- Include a reasonable skeptic who can add balance and/or opposable thinking about the topic and process.
- Commit time and attention to the planning and the event.
- During the workshop, sponsors participate and guide breakout groups to keep them on time, on track, and documenting the work.

## **Logistics, including scheduling**

We will work together to ensure the logistics go smoothly.

You will assign a Logistics Lead who will work with our Logistics Lead to schedule planning meetings, schedule the event, and invite participants.

Most importantly, everyone involved in this work must see this process as a call to action from the Lead Sponsor and Sponsor Team. We will provide draft invitation templates for you to edit and send to participants that explain the workshop you are inviting them to attend.

## **Costs**

Our services are at no charge to our clients. The Strategy and Innovation Office pays for the essentials of space, staffing, parking.

Clients pay for catered meals (lunch). When the work supports a grant funded project, we may ask sponsors to pay for some of the other direct costs VUMC pays.

*Our services are available to VUMC clients for VUMC business only. Work involving external partners is rare and requires executive approval.*

## GOOD RULES FOR THE ROAD

From our 20 years of experience at VUMC, successful workshops have:

- Well-crafted scope to deliver next step actions.
- Scope your workshop with the ideas and actions that are within your control.
- The smallest number of people in the shortest amount of time to get the highest impact you need. (We will help you know the sweet spot.)
- One or more participants are designated as responsible for the implementation and communication of ideas that the workshop generates.