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DRAFT

Guidelines for Conducting a Focused Workshop

Characteristics

Method	Focused Workshop
Use a focused workshop when:	Aiming at revealing information and insights about our users, the use of a product or the product itself.
Preparing time	From a couple of hours to two days (depends on topic)
Time set aside for the workshop group	1.5 – 2 hours.
Time for analyzing	Approx. five hours for written notes – more if video recodring.
Number of participants	Min. 3 participants. Preferable 5 – 10 participants.
Number of conductors	2
Participant characteristic	Preferable a homogenous group of people
Environment	Comfortable, circle seating
Record(s)	Audio and/or video recording and written notes
Analysis	Systematic analysis, verifiable procedures, appropriate reporting
Data	Subjective, Qualitative

Use when:

- Relatively little is known about a given subject, product, service etc.
- Prioritize topics, features, ideas etc.
- You want to gather feedback or generate new ideas.

Do <u>not</u> use when you:

- Would like to understand what people really do (not what they say they are doing).
- Would like to test usability or UX.
- Worry about people influencing each other.

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Description

The focused workshop can access the users' needs and feelings both before designing e.g. a feature and long after implementation.

A focused workshop is a small group of participants –preferable between five to ten participants. The participants are led through an open discussion by a moderator, which is assisted by a note taker. Focused workshops require several representative users, because you need a flowing discussion and various perspectives. The workshop typically lasts from 90 minutes to a couple of hours.

The group interaction is a double edged sword, meaning that ideas can be bounced around and developed in during the workshops, leading to the creation of new ideas. It also means that the data collected are not always totally reliable, since one dominant person in the group can influence what everyone else thinks.

Typically, you should run more than one, preferable three to four focused workshops, since the outcome of a single session may not be representative and discussions can get sidetracked. You will know you have conducted enough workshops (with the same set of questions) when you are not hearing anything new.

Gain of during a focused workshop:

- Help you get feedback from lots of users fairly quickly.
- Can help you get a clearer idea of your target users, what they think and what they want.

The guide is divided into three phases: planning and preparing, execution and analysis of the workshop.

Planning and Preparing

Planning a focused workshop involves a number of activities, which is listed below:

1. Define the topic to be discussed and worked with during the workshop
2. Formulate questions
3. Moderator and note taker roles and responsibilities
4. Identify and invite participants
5. Prepare Script
6. Booking and logistics
7. Finalize event details
8. Prepare all necessary resources needed

1. Define the topic to be discussed and worked with during the workshop

The workshop should address a specific topic. The selection of the topic should lead to the workshop's objective. The objectives will determine the scope of the workshop and should deal with those areas that are pertinent to the achievement of the workshop objectives.

2. Formulate questions

A rule of thumb is that you will have time for no more than four or five key questions in a focused workshop lasting 1.5 to 2 hours.

The questions should be:

- Short and to the point
- Focused on one dimension each
- Unambiguously worded
- Open-ended or sentence completion types
- Worded in a way that they cannot be answered with a simple "yes" or "no" (use "why" and "how" questions to prevent this)

There are three types of focused workshop questions:

1. **Engagement questions:** Introduce participants to and make them comfortable with the topic of discussion
2. **Exploration questions:** Get to the point of the discussion

3. **Exit question:** Check to see if anything was missed in the discussion

For examples of questions, see appendix I.

3. The role of the moderator and the note taker

The moderator facilitates the discussion; the note taker takes notes and runs the recorder. Both moderator and note taker are expected to welcome participants, offer them refreshments, help them make their name tags, and direct them in completing pre-group paperwork.

Moderator: The moderator runs the workshop, secures that the agenda and time plan is followed, ensures that all group members contribute to the discussion and avoids letting one participant's opinions dominate the group.

The ideal moderator has the following traits:

- Has adequate knowledge of the topic and is someone the group can relate and still give authority to.
- Can keep personal views and ego out of the facilitation and is able to listen and think at the same time.
- Believes that all group participants have something to offer no matter what their education, experience, or background is.
- Can appropriately manage challenging group dynamics and is skillful in group discussions.

Note taker: Has the responsibility for the logistics and assisting the moderator.

- Allow the moderator to do all the talking during the focused workshop, can ask questions when invited.
- Operate recording equipment and takes notes throughout the discussion.
- Help with equipment, refreshments and arranging the room.

4. Identify and invite target participants

The characteristics of participants will influence the structure, content and activities undertaken in a focused workshop. Some key questions to be taken into consideration when identifying target participants are:

- What are the size and the composition of the group? (If it is possible to choose group size go for between five to ten participants).
- What are the working background and experience of the participants?
- What are their experiences with our devices? (e.g. first time users, service technicians).
- Are there dependences between the participants? (If possible avoid boss/employee relationships).
- What is the best way to get the message across? (e.g. difference if it is nurses vs. service technicians)

Initial contact the participants identified to attend the workshop, includes:

- Workshop outline (e.g. the agenda)
- Requirements for eligibility
- Deadline for response

5. Prepare Script

- Agenda
- Welcome (see appendix II)
- Icebreaker (to have the participants settle) (see appendix III)
- Workshop method:
    - Presenting information:
        - Basic workshop
        - A debate
        - Prepared media
        - Separating the Idea Generating Phase from the Critical Phase
    - Eliciting audience reactions and responses
        - Brainstorming
        - Buzz Group
        - Card-Sorting
        - Structured Case / Problem Scenario
        - Worst Case Scenario

For more details see appendix IV.

6. Bookings/logistics

Room(s):

The type of workshop being presented will influence the room(s) that is chosen. The facilities of the room should be able to comfortably accommodate the participants while taking into consideration the needs of the moderator.

Points to consider:

- Capacity
- Audio/visual requirements
- Computer accessibility
- Lighting and Acoustics

Refreshments:

Order refreshment through the proNestor portal on the intranet (found under Information -> Ugens Menu)

7. Finalize event details

Make an agenda and determine:

- Equipment needs (posters, prototype etc.)
- Handouts and other learning material for participants
- Breaks (good for transition to another topic)

The following should be considered:

- Seating arrangements (preferable circle/round a table)
- Presentation style
- Visual Aids

8. Prepare all necessary resources needed

All resources required for the seminar are acquired or sourced at this stage.

Checklist:

- Agenda
- Laptop
- Flip charts
- Software – Microsoft PowerPoint
- Stationery – markers, pens, notepads (workshop toolbox is located at TINAPs desk)
- Handouts
- Name tags

Execution

This is the phase where the actual conducting of the focused workshop takes place.

Arrive early at room to ensure the following

- Furniture is arranged as desired
- Name tags of participants are laid out
- Participants' informational packets are laid out
- Equipment and material required by moderator are ready and working
- Completion of Registration forms (if necessary)

Welcome and introduction of the moderator and note taker

- The moderator formally welcomes all participants to the workshop (template in appendix II).
- The moderator gives a brief synopsis of the session.
- Explanation of their role in the session.
- Going through the agenda
    - The time schedule
    - Refreshment times and location
    - What they are expected to do
- Answer any questions the participants may have.

Conduct the workshop

- Icebreaker
- The workshop method chosen

Pay attention to

- Time management

Analysis

After the session, data analysis can be as simple as having the note taker write a short report summing up of the workshop including a few quotes. You can also do more detailed analyses, but the unstructured nature of the workshop makes this difficult and time-consuming.

Put your thoughts in writing

Start while still in the workshop

- Listen for inconsistent comments and probe for understanding
- Listen for vague or cryptic comments and probe for understanding
- Consider asking each participant a final preference question
- Offer a summary of key questions and seek confirmation

Immediately after the focused workshop

- Conduct moderator and note taker debriefing
- Note themes, hunches, interpretations, and ideas
- Make back-up copy of taped material
- Label and file field notes, tapes and other materials

Soon after the focused workshop:

- If necessary go through the recorded material , review field notes and read transcript if available
- Use template to prepare report
- Share report for verification with other researchers who were present at the focused workshop
- Conduct a report out

If a series of workshops have been conducted

After the last workshop:

- Compare and contrast results by categories of individual focused workshops
- Look for emerging themes by question and then overall
- Use template to prepare report
- Share report for verification with other researchers who were present at the focused workshop
- Conduct a report out

Appendices

Appendix I: Examples of Questions

Questions for a focused workshop on the use of an ABL.

Engagement questions:

- In which ward are you working?
- Which type of ABL are you familiar working with?
- How long experience do you have with operating the specific ABL?

Exploration Questions:

- Are there any parameters missing in the ABL you use?
- Is something annoying you in the design of the ABL?
- Are you used to replace the sensor cassette and/or the solution pack?
- Is there any problems using the ABL?
- Are there any problems when cleaning the ABL?

Exit question:

- Is there anything else you would like to say about the handling and use of the ABL?

Appendix II: Welcome Speech

Example of a welcoming speak

Hallo and welcome to this session. Thanks for taking the time to join us to talk about _____. My name is _____and assisting me is _____. We're both working at Radiometer.

We are to get some information on _____. We would like to know_____. You were invited because you have experience in _____.

There are no wrong answers but rather differing points of view. Please feel free to share your point of view even if it differs from what others have said. Keep in mind that we're just as interested in negative as positive comments, and at times the negative comments are the most helpful.

We're recording the session because we don't want to miss any of your comments. People often say very helpful things in these discussions and we can't write fast enough to get them all down. But you may be assured of complete confidentiality. The findings from today are only to be used internally at Radiometer to improve our device.

Are there any questions so far?

Well, let's begin. We've placed name tags on the table in front of you.

Let's find out some more about each other by going around the table. Tell us your name and where you work.

Appendix III: Ice Breaker Methods

Interviews:

Pair the participants up and tell them to spend 5 minutes interviewing each other. The group reconvenes and the interviewer introduces the interviewee to the group.

The Little Known Fact:

Ask the participants to share their name, department or role in the organization, length of service, and one "little-known fact" about themselves. This "little-known fact" becomes a humanizing element for future interactions.

Appendix IV: Workshop Methods

The methods used in the session must suit the objectives of the workshop. Objectives can be classified as knowledge, skills or attitudes.

Presenting information

1. Basic workshop

Brief presentation of the topic to be discussed followed by questions. This method works well when participants know enough about the topic to generate stimulating questions.

2. A debate

This is an engaging method for presenting material, since the participants themselves take part. Debaters should be encouraged to focus on convincing one another of their arguments rather than on discrediting or attacking their opponents.

3. Prepared media

This method is used to stimulate conversation and not to replace it. A popular form of videotaped presentation for use with small groups is the "trigger tape", a brief, dramatic presentation that triggers interaction among participants. Slides or graphical information can be used in this way as well.

4. Separating the Idea Generating Phase from the Critical Phase

The group is split into smaller groups, each of which addresses a problem, question or an issue. They are encouraged to generate as many solutions as possible, but not to be critical of any of them. Each group passes its solutions on to another group, who's task is to critically examine the solutions for feasibility, cost effectiveness and to suggest ways that the various solutions might be tested.

Eliciting audience reactions and responses

1. Brainstorming

This is a creative thinking technique. A recorder lists the ideas while the leader keeps vigilant to remind contributors when the rules are violated. The rules are: no critical judgments until later; do not be concerned with quality of ideas, quantity is all that counts; wild ideas are encouraged and improvements on someone else's idea are legitimate. Only one participant can speak at a time.

2. Buzz Group

This technique is highly effective for getting participation from everyone in the group. The leader divides the group into small clusters of three to six people and then provides each cluster with a question or two. A recorder in each group reports to the larger group and a discussion usually follows. In brainstorming only one participant can speak at a time, in buzz groups a participant can be speaking in each cluster.

3. Card-Sorting

"Card sorting is a great, reliable, inexpensive method for finding patterns in how users would expect to find content or functionality." [2]

There are two primary methods for performing card sorting.

Open Card Sorting: Participants are given cards showing content with no pre-established groupings. They are asked to sort cards into groups that they feel are appropriate and then describe each group. Open card sorting is useful as input to information structures in new or existing sites and products.

Closed Card Sorting: Participants are given cards showing content with an established initial set of primary groups. Participants are asked to place cards into these pre-established primary groups. Closed card sorting is useful when adding new content to an existing structure, or for gaining additional feedback after an open card sort.

4. Structured Case / Problem Scenario

A case or problem scenario is presented to the whole group or, if the group is large, to subgroups of three or four participants. After this the groups discuss the problem for 5 or 10 minutes, the moderator walks around the room listening to their solutions, approaches, and conclusions.

5. Worst Case Scenario

Similar to brainstorming, participants are asked to offer the worst idea they can possibly think of, as a solution to the problem at hand. The bad ideas are then presented as stimuli to the group. The group is then prompted to turn the bad ideas to good ideas, since people are often better at determining what they do not like as opposed to what they like. In addition, it allows the group to come up with solutions without as much pressure. The moderator and the research team review reactions and perceptions that surface during the exercise. With these insights, a development team gains valuable solutions.

Unplanned strategies

Opportunities may arise for spontaneous interventions during the workshop. If so – go for it!

Sources

1. http://www.reform.gov.bb/website/images/guidelines%20for%20planning%20and%20conducting%20workshops%20%20and%20seminars.pdf
2. http://boxesandarrows.com/card-sorting-a-definitive-guide/