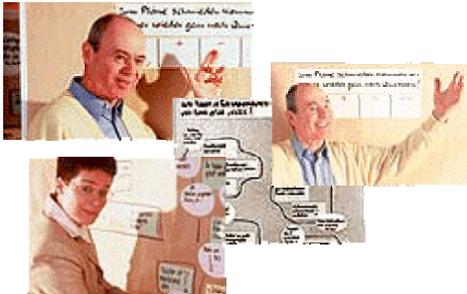

Primer for the Metaplan Technique



How to Moderate Group Discussions Using the Metaplan Technique

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Review and download the Primer for the Metaplan Technique under:
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The Metaplan technique is a tool to make group discussions more effective. Here, "effective" has a double meaning: on the one hand it implies saving time. In discussions moderated with the Metaplan technique results are achieved faster than by traditional methods. On the other hand it also implies that the participants are more deeply involved in the group process, in considering all opinions, and in working towards jointly supported results.

In this primer the Metaplan technique is presented in three sections:

Visualization techniques

With visualization all important contributions made during the discussion become visible to the group. They can be sorted and organized jointly.

Interaction techniques

The interaction technique leads to lively and fruitful discussions, encouraging active involvement among the participants.

Dramaturgical planning techniques

Certain rules governing the dramatic process assist the moderator in thinking over the course of the discussion in advance, in order to lead the group down a continuous path to the conclusion.

This primer is meant to be a memory jogger for the main elements of the Metaplan technique, it complements the basic training sessions for Metaplan moderators.



Visualization Techniques

Preparing the visualization equipment and tools

For a discussion using the Metaplan technique, visualization tools are needed to make the group members' thoughts and arguments visible to all:



- pinboards
- large sheets of brown kraft paper
- rectangular, oval and round cards
- map-pins to pin on the large sheets and the cards
- markers (felt pens)
- self sticking dots
- glue-sticks.

The large sheets of brown paper are pinned on the boards. All contributions throughout the discussion are written on cards, using marker-pens. These cards are pinned on the brown paper. The cards can easily be re-pinned on the boards if we want to form groups with similar statements (clusters), or if we want to show a specific train of thought. The visualized statements can be weighted using self-adhesive dots.

Pinboards used for the Metaplan technique consist of lightweight foam-core boards and two stands. If the boards are likely to be moved from one location to another, it is best to get foldable boards which can easily be packed in shoulder-bags. Generally speaking, half as many boards as there are participants are needed for a Metaplan discussion.

The large sheets are made of sturdy, lightbrown packing paper, 57 inches (145 cm) long and 49 inches (125 cm) wide. When pinning a sheet on a board, you should leave the top 1.5 in (4 cm) of the board visible, and stick a few pins in that space before starting the discussion. You will then have them handy when you need them.

The rectangular cards 3.7 x 8 in (9.5 x 20.5 cm) are for statements and contributions made during the discussion. The small marker -pens are used to write up to three lines or about seven words per card.

It is useful to have the rectangular cards available in three colours, in order to be able to point out differences in context. Ideas and positive arguments are recorded on green

cards; doubts, objections, difficulties go on orange cards; the yellow cards are used for alternatives, next steps and conclusions.

Any additions, comments, or criticism referring to a statement written on a rectangular card should be written on white oval cards, these are 7.5 in (19 cm) wide. Cluster headings are written on round white discs (5.5 in/14 cm in diameter).

Poster titles and propositions are written on long white strips, they measure 4 in by 22 in (10x56 cm). The big marker-pen is used to write up to two lines of text on these strips.

There are also large Metaplan clouds that are very useful for chapter headings, or for title posters for group discussions.

The small markers are 0.2 in (5 mm) wide at the writing tip. Smaller or pointed markers result in characters that are too light faced and that can not be read at a distance. Both black and red marker-pens are needed. The large markers have a writing tip 0.4 in (10 mm) wide. They are used to write bold headings on strips and Metaplan clouds.

Self-adhesive dots are needed for the weighting of visualized statements. It is a good idea to have them in two colours or shapes, because if it is appropriate, participants can show their opinions according to two different perspectives.

Map-pins with a medium size round head are used to pin the large sheets of brown paper on the boards, and to pin on the cards holding contributions and comments. Later, all cards are glued on the brown paper, it is enough to use just one short stroke of glue per card. Thus cards can later be removed without damaging the brown paper if this proves necessary.

Creating a visible image of the discussion

Whenever a group discusses something using the Metaplan technique, a visible image of the discussion is created on the pinboards.



Writing on cards

Learning how to use the cards takes very little time. Since the cards should be legible even from 20- 25 ft (6- 8 m) away, large, bold-faced letters should be used. The broad side of the marker, and all upper and lower extensions of the letters should be short. Never use capital letters only, otherwise long words become practically unreadable.

Arranging clearly



Visualization helps participants to follow the oral discussion more easily. But beware: do not use too many different colours, shapes and symbols. Participants should not be distracted from the content by visual clutter. Therefore, visualization tools should be used purposefully.

To create a clear arrangement, a moderator should answer the questions asked on the poster shown on the page opposite, and follow the suggestions.

Finally, when the moderator considers the visualization to be well done, the cards should be fixed, using a glue stick: the poster is finished!

Presenting posters

The moderator should show the group his/her good side: face the participants while presenting the poster. The moderator should ensure that the presentation corresponds to the actual content of the presented poster. To achieve this, the cards should be read exactly as they are written. The participants can thus concentrate on the meaning of the statement, without being distracted by elaborations and oral interpretations that deviate from the written text.

The presenter should touch the card being read with one hand. Thus, eye and ear coordination is achieved. Directing the participants' visual attention increases the degree to which oral statements impress.

Short pauses and scarce commentary help the participants to mentally digest what is presented.



Making photominutes

The posters worked on during a Metaplan-moderation represent an instant record of the meeting. As a visual representation of the discussion the posters record the course of the discussion as well as the results. Thus, not only does it ensure clear results but also captures the atmosphere of the discussion and demonstrates the methods used to achieve those results.

Photominutes are produced to reduce the large posters to a standard A4 format that is handier for follow up work. The posters can be photographed with any 35 mm camera. Mount the camera on a tripod, about 13.5 ft (3.5 m) from the poster. There should be good indirect lighting, e. g. from 2 utility lights of 65 watts each. It is not advisable to use a flash since it creates reflections on the brown paper.

The most suitable film for this kind of work is a fine grain black and white film for prints. The f-stop should be set at 2.8 and exposure time at 1 second (use a cable release). A yellow filter improves the picture quality. Developing and enlargement to 8x10 in (20x25 cm) can be done by a photo lab. To save unnecessary expense, prints should be ordered on single weight photo paper, instead of the usual heavier paper. The enlargements can be copied on any standard photocopying machine.

If the posters are rolled up for transportation prior to making the photos, it is important to do this in such a way that they can later still be photographed well.

The stack of posters should be placed face down on the floor, i.e. with the cards facing the floor, with a blank sheet at the bottom of the pile. Then the stack is rolled up, all cards facing the outside. If the posters are rolled face up, photographing them becomes very difficult because the cards curl away from the brown paper once the posters are unrolled again.

Instead of photographing the posters yourself, you can use the photominutes service of Metaplan's U. K. office. The requested number of photominutes is sent out within five days of receipt of the poster roll. If it is urgent, Metaplan's U. K. office can also send the photominute pages by fax. Here is the address:

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Interaction Techniques

Metaplan discussion rules

At the beginning of a group discussion the Metaplan discussion rules are introduced:

- 30 seconds speaking time
- written discussion on cards
- flashmark for objections

The moderator suggests that everyone abide by these rules for the duration of the meeting to make the discussion more efficient.



30 seconds speaking time

Many oral contributions result in a lively discussion. 30 seconds per contribution is enough to concisely state the main point. This time limit allows numerous participants to speak. Those who have much to say must ask for more opportunities to speak, giving others the opportunity to react to their statements. If only one point is made at a time, the rule can easily be followed. The resulting discussion, a sequence of contributions and reactions, remains organized and clear.

Written discussion on cards

All statements are written on cards which in turn are pinned on the pinboards. It is important to keep some points in mind:

Each statement goes on a separate card, thus, the contributions can be sorted, similar ones can be pinned together in clusters.

A contribution should be more than a catchword in order to show a direction. The word "information" on a card does not indicate what is meant, a clarification would be necessary before the contribution could be incorporated. On the other hand a short sentence such as "our salesforce lacks information about sales targets" is a clear and concise expression of the writer's opinion - in 7 words!

It goes without saying that the writing should be done legibly, so each group member can easily read the cards.

Flashmark for objections

The "Flashmark" is an expression used for the most important discussion rule. Qualifying additions or objections to a statement are called out and marked with a lightning bolt on the respective card. Flashmarks denote areas of controversy that warrant more discussion time. At these points there is a need for debate or to understand each other better. Questions about a card may also be posed with a flash. Flashing alone is not enough; the moderator will be careful to precisely extract the arguments behind the flashes. Those arguments, as well as any ensuing sequence of replies and additional arguments are written on ovals and pinned next to the original statements.

Be your neighbour's butler

This is not a discussion rule, but rather a suggestion for mutual courtesy. Its aim is to create a pleasant atmosphere in the group by being more aware of one another in order to create an environment in which different opinions will be accepted. Allowing others to finish their sentence is part of it, as is helping to record the arguments of others or even offering to get your neighbour a drink.

Obviously, these rules are not meant as rigid regulations, but as conventions agreed upon to make a lively and fruitful group discussion possible.

Using questions to create interaction

The Metaplan technique uses questions to start a debate among the participants. Each group member should be curious as to what the others in the group will say, and should be stimulated to also take a stand and explain it.

Therefore, the moderator does not pose the question to get an answer for him-/herself, but to start interaction within the group.

To trigger interaction in the group a question has to meet certain criteria:

- It should ask for opinions, suggestions, not for expert knowledge. Each participant should be able to provide answers. A question that only an expert can answer will not result in a group debate.
- It should be open, allowing several answers from each participant. It is always wrong to ask a question answerable with "yes" or "no", because the discussion would quickly be over.

Blatantly leading questions such as "Why is piece-work the only way?" or any question that might insult the participants should be avoided. A question that "strikes home" will be accepted by the group and will result in a stimulating debate.

It is useful if the question leaves room for interpretation. This stimulates each person to think about it, and a broader spectrum of answers can be collected. However, the question must be concrete enough to avoid answers that are too general and commonplace.

- It should challenge and concern. The question should be relevant to the personal experience of the participants, it should not ask for information anyone can read about in the newspapers. If it concerns me directly I am much more interested in contributing answers. In a discussion with manufacturing managers a question such as "What difficulties are inherent in participative management?" should not be used, but rather "What difficulties could arise if we let our workers have more of a say in our decisions?".
- It should guide in the intended direction. When phrasing a question, possible answers should already be anticipated. The direction of the discussion triggered by the question should be in accordance with the goals for the meeting. The moderator should decide whether to pinpoint problems in a work area, ask for ideas and solutions, or collect pros and cons to a known suggestion. These considerations help to decide whether the expected answers will lead towards the discussions intended results.

Suggested questions

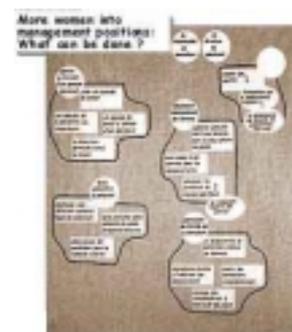
Question	1	2	3
Why are there so few women in management positions?	11	3	1
Quelles raisons à l'absence de femmes à l'échelle de la haute direction ?	15	-	-
Quelles sont les raisons ?	6	3	6
Quels sont les effets de la structure organisationnelle ?	10	3	2
Quelles complications en ont été observées dans l'entreprise ?	5	9	1

Moderating a card question

If the moderator wants each group member to contribute opinions and thoughts, the card question technique will best accomplish this. Participants simultaneously write several answers, each on a separate card. Thus everyone has to write down his/her opinion before being influenced by the others.

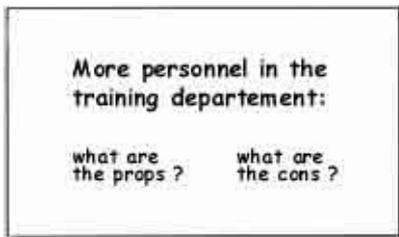
Here is how the moderator should proceed:

- Introduce the question with a few words, with a brief explanation to put it into context. However, be careful not to give any answers in advance. After having read the question, the moderator should indicate how many answer cards are expected from each: usually two to three cards per participant will result in a manageable quantity. Try to limit the number of idea cards to no more than 30- 40.
- After allowing a few minutes for writing, the moderator collects the cards and reads them one by one to the group. The cards should be shown so that participants can read them too. It is useful to shuffle the collected cards prior to reading them, thus, there will not be series of cards by the same author.
- After reading a card, the moderator sorts it according to content with the help of the group. Clusters of cards with the same or similar meaning are created. Thus, items mentioned several times become obvious. Objections or questions are solicited from the group; they are noted as flashmarks on the respective cards.
- After this first preliminary card sorting follows a second and more detailed analysis. First all cards in a cluster are read again, one by one. When you get to a "flashed" card, ask for the reason for the objection or counter- argument, summarize it, write it on an oval, and pin it next to the original contribution.



- Once all cards in a cluster are dealt with, look for a title that encompasses all contributions in this block. It is important that the principal theme of the contributions is highlighted. It is best to phrase a heading as a short sentence, including a verb. Avoid catchwords such as "co-workers"; "manufacturing"; "costs" as headings. Single cards do not need a heading.

Variation: The double card question



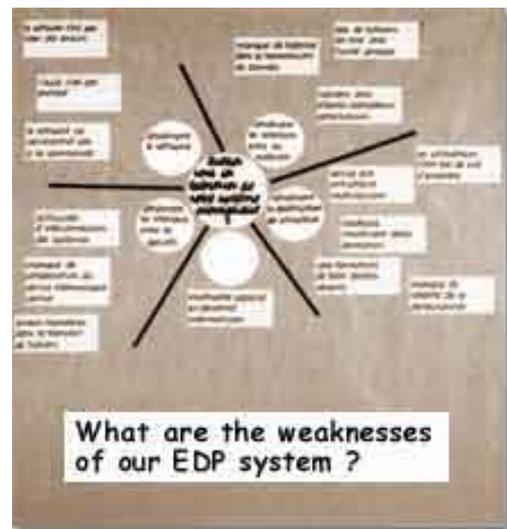
This type of question asks all participants to provide answers from different viewpoints. This will ensure more in-depth consideration of a particular issue. Each participant has to consider the pros and cons of an idea with him-/herself first, and thus, will be more open towards others' differing points of view.

When using the double card question all participants are asked to give at least one answer in each direction. In the case of a pro-and-con-question the pros should be written on green cards, the cons on orange cards.

Variation: The card spider

In this case several answer categories are pre-set. Thus, we can ensure that an issue is thoroughly considered from many different angles. Furthermore, the answers we receive in such cases usually turn out to be more specific, as the general statements will have been anticipated in the answer categories given.

The question itself represents the spider's torso, the answer categories are demarcated by the spider's legs. Participants are asked to provide answers in at least two of the given directions, so that they think about the problem considering various aspects. When the cards are sorted there is no need to form new headings, since they already exist, they are the given answer categories.



In preparing to use this technique it is important to leave a blank area for any possible additional category, this allows for more flexibility during the sorting process. The card spider lends itself particularly to a cause analysis. A circle striving for quality improvements could analyze an unsatisfactory situation using the question "What could be the causes for this lack of quality? Is it to do with the people, the machines, the material, the methods, the management?".

Focusing with the weighting question

To further analyse a topic it will occasionally be necessary to ask the group to mark the more important aspects among those spread out on the pin boards. The discussion can then centre on these items.

The card question guidelines also apply to the weighting question:

- It should ask for opinions, not for expert knowledge
- It should identify several items
- It should challenge and concern
- Results should be channelled in the desired direction

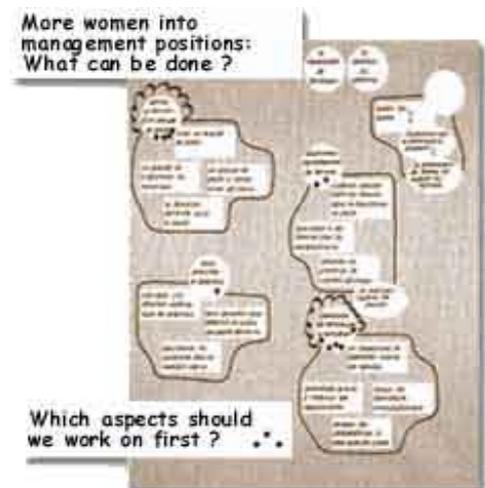
Therefore, it is better to ask, "Which problems should we approach first?" instead of asking very generally "What are important problems?"

The weighting question, that has been carefully prepared in advance, is read out. Participants receive small self-adhesive dots and stick them on the title discs of their choice. Each participant should receive the following number of dots:

- 3 dots if there are up to 12 clusters to choose from
- 4 dots if there are up to 20 clusters to choose from
- 5 dots if there are more than 20 clusters to choose from.

The moderator ensures that participants decide where to place their dots while they are still seated. Participants are then asked to go to the pinboards all at the same time, so that placement decisions are made independently from one another.

When the last dot has been placed, the moderator uses a big marker to visibly emphasize the frequently dotted titles, without making a precise count of the dots. It is important to avoid anything that suggests this to be some kind of statistical evaluation.



Recording a moderated discussion (call up question)

A talk that runs freely in a group, i.e. without participants writing their thoughts on cards themselves, can still be moderated and visualized. This technique can be used in any meeting at which the Metaplan tools are available.

The moderator names the topic which he/she has also written (using a big marker) on a long white strip. It is even better to immediately ask a question that will start the discussion. Such a kick-off question is phrased according to the same criteria as a card question. The moderator then records participants' contributions on cards and pins these on the boards right away. Thus, a running visible record of the discussion is made (see also the Visualization Techniques chapter). This helps to keep everything moving forward and to notice repetitive arguments. This record of the meeting can be referred to afterwards by the participants. Metaplan Ltd will photograph the posters and distribute copies.

If the group consists of more than 4 persons, the moderator is well advised to ask a participant for assistance in writing. In this case the moderator repeats a shortened version of the contribution. The assistant records this summary on a card, which is subsequently pinned on the board by the moderator.

It is very important to check that the summary still accurately reflects the sense of the original contribution. Authenticity will be increased if some of the contributor's exact words are used. In a recorded discussion it is again important that the group faces the pinboards.

Kicking off with the proposition

For introducing a topic, or to get a snapshot of the group's opinion, the proposition technique is particularly suitable.



The moderator writes a moderately provocative statement on a strip (using the big marker). The strip is pinned onto a sheet of brown paper, and below it a second strip, divided into four areas. The symbols ++, +, -, --, respectively, are drawn with a red marker into these four areas.

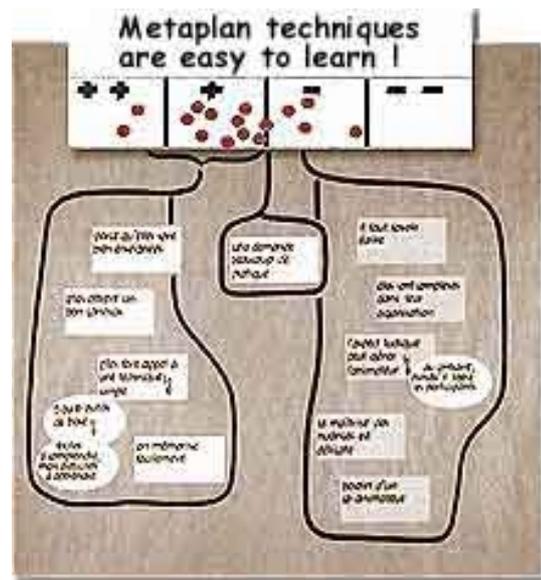
The moderator now reads the proposition and asks each participant to indicate his/her complete or limited agreement (++ , +), or complete or limited disagreement (--, -) by placing a self-adhesive dot into one of the four areas.

If a proposition is used as an opener, i.e. to create readiness to discuss a certain topic, it must be carefully phrased in such a way that agreement and disagreement will probably be balanced. This is how interaction develops: those agreeing are curious to find out why others have an opposing point of view -and vice versa.

The proposition should be phrased affirmatively, otherwise you risk confusing the participants with double negatives.

In order to get a wide spread of opinion dots, the proposition should not be phrased too categorically. If we state "All customers will buy our new product!" participants have no choice but to disagree with the proposition, since there will always be exceptions. On the other hand "Customers will buy our new product!" allows for wider interpretation.

Ask any participants who want to show their opinion right away, to remain seated for a while, until all other participants have also decided which opinion area to go for.



After the group has placed their dots, the moderator solicits the reasons behind the different opinions expressed. He/she writes each argument on a card which is then attached to the respective opinion area.

As a rule we differentiate neither between limited and complete agreement, nor between limited and complete disagreement, but we ask participants to state their reasons for the left or for the right half of the dotted strip. The moderator should begin with the side displaying the smaller number of dots, thus, the minority's reasons will be followed more attentively. Finally, those who placed their dots on the middle line, who did not want to make a decision, should be asked for their opinion, and those arguments should be recorded as well.

It is not necessary to ask everyone to comment. A few statements on the "pro" side as well as on the "con" side are enough to illustrate the spread of opinions.

Dramaturgical Planning Techniques

Preparations for the group discussion

Group discussions can happen spontaneously. If the Metaplan tools are at hand, the moderator can record participants' contributions and visualize them on pinboards. He/she can also - at the appropriate time, of course! - ask a question that participants answer by writing cards themselves.

If a group discussion is planned in advance, the sequence and timing of the discussion should be anticipated and a dramaturgy should be designed. The dramaturgy is the sequence of interactive questions and directions that should enable the group to think over their topic and to arrive at a result. It is the unbroken path along which the moderator leads the discussion to its conclusion.

Before beginning to design a detailed plan of what will be discussed, the moderator needs to have a clear understanding of the reasons for having the meeting and of its purpose. He/she should consider the following questions:

- What should be the subject of the discussion?
- Who should attend?
- How many participants should there be?
- How long should the discussion last?
- What is to be accomplished by this meeting?
- What problem needs to be considered?

It is particularly important to clarify what really can and should be accomplished by this meeting. It could be striving for results concerning a specific matter, such as determining causes for a deficiency, finding solutions to a problem, making suggestions for how to proceed in this matter... On the other hand the moderator could also aim at improving relations between the participants: eliminating tension, generating enthusiasm for an idea ...Often both is wanted: to find solutions, as well as to inspire the group to follow the path mapped out.

However, the moderator doing the planning should be aware of the fact that not everything can be accomplished in a group discussion of



average duration. i.e. in one to two hours! He/she should make a sober assessment of what can really be accomplished in one meeting. Sometimes it is necessary to be satisfied just with introducing participants to a topic and getting their agreement to a later meeting.

To design the moderated discussion in such a way that each interaction "strikes home" the moderator should be aware of the problem's context. Are we dealing with external factors that require us to adapt? Is there tension between individuals, or between departments?

It is best to visualize the preparation and design process on brown paper. This makes it easier to involve others in the planning, and you could also show the group at the end of the meeting how the preparation was done.

Planning a moderated discussion sequence

Once the discussion's topic and purpose are clear, and you know the length of time available, and you are familiar with the problem's context, you can start designing the course of the moderated discussion. This is a chronological plan in which the techniques that will be used, the exact text of all question and information elements, and how the interactive steps build upon each other.



Time needed for the individual moderating techniques

The length of time specified for the following techniques are based on experienced moderators. It is advisable to stick to these times, to ensure the continuity and dynamic flow of the group discussion.

Presenting a poster holding a maximum of two dozen cards	5 min.
Moderating a card question	30 min.
Moderating a double card question	45 min.
Asking a weighting question	5 min.
Moderating a proposition	10 min.
A discussion that is recorded by the moderator	10- 45 min.

The discussion has three phases: introduction, development and wrap-up. If participants have not yet experienced a Metaplan-type discussion, it is necessary to begin with a poster of the Metaplan discussion rules, and to ask everyone to try out writing cards.

The introduction

The opening should be short. A proposition which is dotted by each participant is an adequate tool to gain attention and arouse curiosity. At the beginning it is important to draw participants into the topic, but without going into too much detail at this stage; otherwise participants might wish to discuss the proposition much longer than the moderator anticipates.

Instead of using a proposition the moderator can also open with a call up question to which probably only a few answers will be given. But be careful: particularly during a recorded discussion it is easy to move too close to the heart of the matter too soon, and the discussion - dominated by a few - would run well over the 10 minutes planned for this phase.

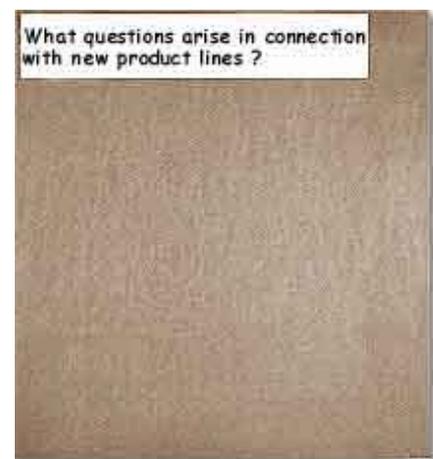


The development

During this phase everyone in the group should work on the topic. To enable everybody to contribute their own thoughts, the card question should be used as an interactive technique.

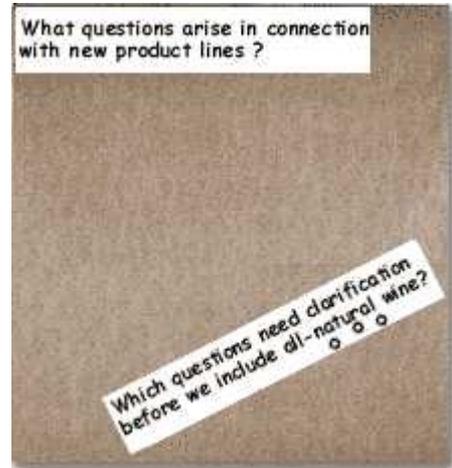
If the topic is highly controversial it is best to use a double card question. This technique not only lets participants answer according to their own point of view, but also gets them to come up themselves with arguments that can be held against their own opinion.

If the objective is to look for solutions to a problem it is wise to first ask the group about the deficiencies and difficulties that are at the root of the problem. Based on such a joint problem analysis, suggestions for problem-specific solutions will be easier to come by. Sometimes the ideas for solutions start to flow spontaneously, following the card question on the problem analysis. In such cases time can be saved if the moderator captures the suggestions and writes them on cards him-/ herself.



Wrap-up

It is the exception, not the rule, that a group discussion ends with a final result. Instead, the moderated discussion should be wrapped-up by finding out what should be done next with the ideas and material gathered. Here, the weighting question can help; participants are asked to dot those items upon which further work should be done after this meeting. Thus, the moderator focuses participants' thoughts on the progress made. A short visualized talk could follow, to gather suggestions as to how the topic could be pursued further, or how the results can be put into action.



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