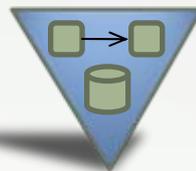


# Building Bridges with Collaborative Open Planning

Mike Leamon  
Independent Consultant



Mike Leamon Consulting  
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# Executive Summary

- Each of the 2 war room sessions voted on the 3 most important items in each of the following categories. These represent key “take-aways” from the session:
- Key Elements / What makes a War Room special?
  - > Group 1
    - High Involvement – Leverage broad knowledge, perspectives, experiences etc.
    - Active - Participants stand, walk around the room and contribute
    - Story Based - Create stories which communicate visions, plans & strategies
  - > Group 2
    - High Involvement - Leverage broad knowledge, perspectives, experiences etc.
    - Transparent – Expose problems and avoid the need for politics
    - Leveling – Ability to check your role / status at the door
- Supports/Enablement / Key items to be successful?
  - > Group 1
    - Management Support & Involvement
    - War Room Facilitation / Management Skills
    - Customer / Beneficiary Knowledge & Involvement
  - > Group 2
    - Management Support & Involvement
    - Participant Availability
    - Importance / Sense of Urgency
- Potential Problems / Once you are holding the War Room, what might go wrong or be missing?
  - > Group 1
    - Low Management Support & Involvement
    - Lack of War Room Facilitation / Management Skills
    - Insufficient Customer / Beneficiary Knowledge & Involvement
  - > Group 2
    - Dominant participants
    - Momentum Loss - plans without actions
    - Un aligned Rewards & Measures – “My goals and measures of success are not aligned with the plan”

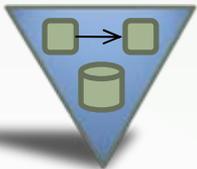
# Agenda

<b>Topic</b>	<b>Duration</b>	<b>Start</b>	<b>Finish</b>
○ Introduction	20 min	:00	:20
○ Battle Cry	10 min	:20	:30
○ Ecosystem	10 min	:30	:40
○ Charter	5 min	:40	:45
○ Definition	5 min	:45	:50
○ Elements	10 min	:50	1:00
○ Break	15 min	1:00	1:15
○ Support	10 min	1:15	1:25
○ Chartering Questions	10 min	1:25	1:35
○ Problems & Fixes	10 min	1:35	1:45
○ Learning Curves	5 min	1:45	1:50
○ Exercises	15 min	1:50	2:05
○ Conclusion	10 min	2:05	2:15

# *Introductions*

*Name*

*Why Here?*

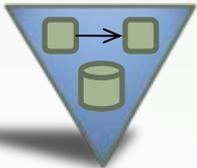


Q&A  
10 volunteers  
Ground Rules  
20 min

# Ground Rules

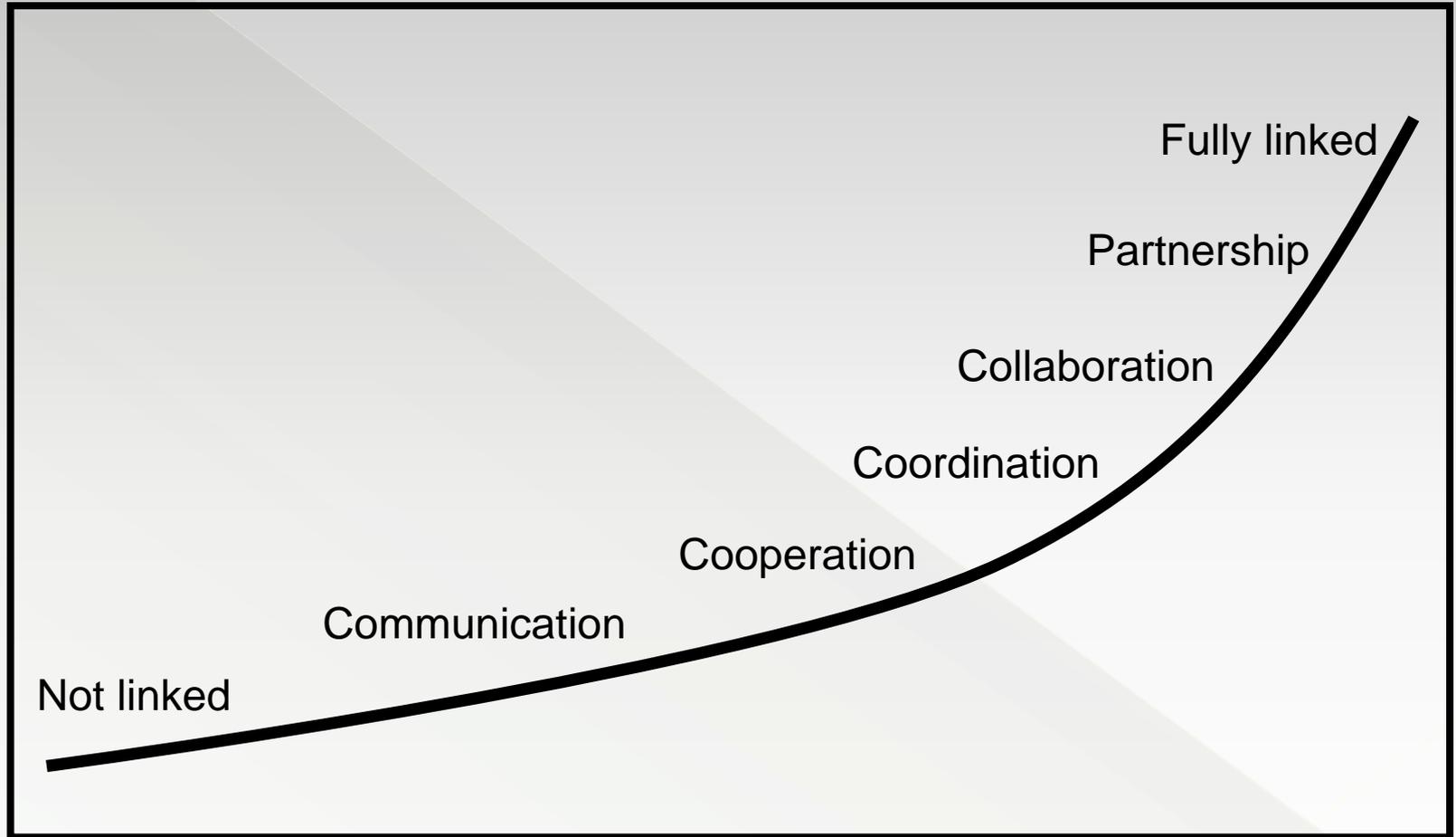
- ⦿ More than 12 people is too many!
- ⦿ Headlining – 60 second inputs
- ⦿ Avoid side conversations
- ⦿ Phasers on stun (Muted phone)
- ⦿ Scheduled 15 minute break
- ⦿ Bio breaks
- ⦿ Raise your hand to contribute

# The Battle Cry





# Program Linkage Curve





# Life Cycle / Progression Detail

- Not linked or integrated at all – We do not work together at all and have separate program goals.
- Communication – We share information only when it is advantageous to either or both programs.
- Cooperation – We share information and work together when any opportunity arises.
- Coordination – We work side-by-side (independently) to achieve common program goals.
- Collaboration – We work side-by-side and actively pursue opportunities to work together.
- Partnership – We work together with specified responsibilities to achieve common program goals.
- Fully linked or integrated – We mutually plan, share staff and/or funding resources and evaluate activities to accomplish our common goals.

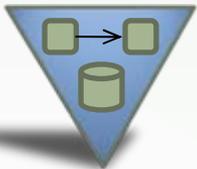
# Principles of Program Integration

- Do no harm to categorical program integrity.
- Clearly identify and state mutual benefits and opportunities.
- Be guided by efficiency-oriented processes.
- Be focused on health outcomes.
- Evaluate integration outputs and health outcomes.
- Engage stakeholders.
- Mobilize leaders.

# War Room Workshop Objectives

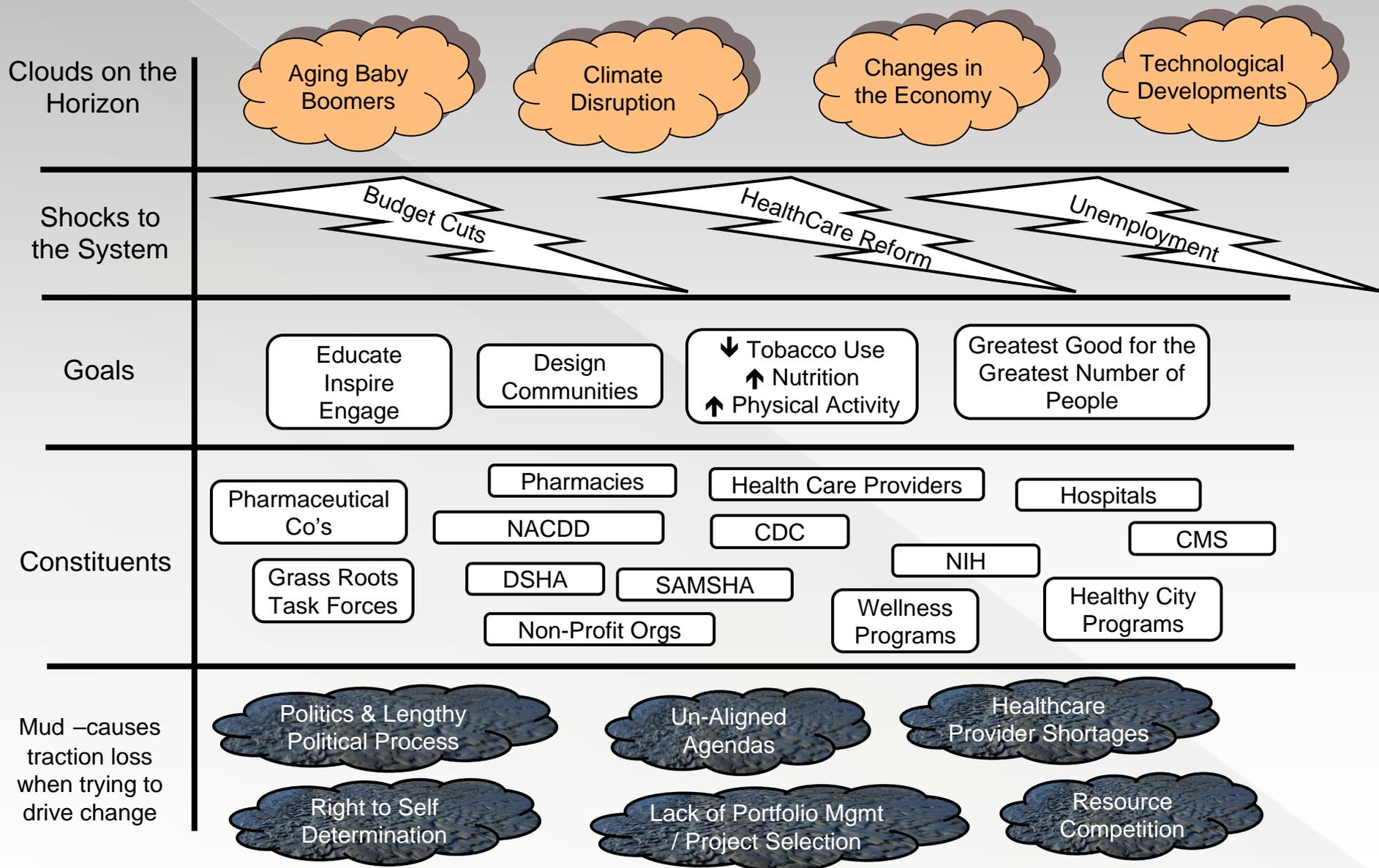
- Identify when and where to use collaborative open planning spaces (a.k.a. War Rooms) within a public health or health care program and/or to integrate programs.
- Describe 3 elements in the War Room format that support the identification of common objectives among diverse partners and build consensus.
- List the top 3 support/enablement elements for success in the context of the participant's own work environment.
- Identify the top 3 most likely ways a war room can be misused or fall into avoidable traps and the countermeasures for avoiding the issues.

# Program Integration Ecosystem



# Program Integration Ecosystem

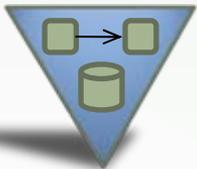
There appears to be enough complexity to call for War Room use!



# Charter

# Define The

# Effort

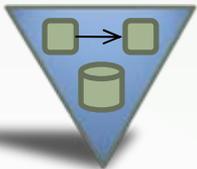


5 min  
:45

# Purpose / Charter: "War Room on War Rooms"

<b>Location</b>	Wyndham Garden Conf. Room	<b>Participants</b>	Building Bridges Conference Attendees - Self selected breakout attendees	
<b>Opportunity Statement</b>	Improve program collaboration and integration by enabling conference attendees to safely use war rooms for their own opportunities			
<b>Sponsoring Body</b>	Conference Planning Committee	<b>Approach:</b> Use a war room to explain how to utilize war rooms! Materials on the walls will step participants through conceptual building blocks needed to understand and lead collaborative War Room sessions. Prepared materials will be on the walls but participants can add ideas or challenge anything that has already been posted. After the session, electronic versions of the materials (in PowerPoint) will be updated and the final version distributed for their ongoing post-conference use.		
<b>DSHS Sponsor</b>	Remmy Morris			
<b>War Room Lead</b>	Mike Leamon			
<b>Support</b>	Lisa Morgan Andrew Cahoon			
<b>Qualitative Benefits</b>	<ul style="list-style-type: none"> <li>• Improved approach for managing dynamic programs with many moving parts</li> <li>• Clarity</li> <li>• Momentum</li> <li>• Strong commitment and agreements without mandates</li> </ul>			
<b>Quantitative Benefits</b>	<ul style="list-style-type: none"> <li>• Compressed time for project and program planning</li> <li>• Decreased resources as a result of faster, clearer integration</li> <li>• Improved quantity of favorable healthcare outcomes</li> </ul>			
<b>Schedule</b>	Concept Agreement: Feb 2010	Gen. 1 War Room Development May 27, 2010	War Room: June 16, 2010	Completed PPT with Gen. 2 Design By July 15, 2010
<b>Sign-off</b>	DSHS Sponsor:		War Room Lead:	

# War Room Definition



5 min  
:50



# What is a War Room?

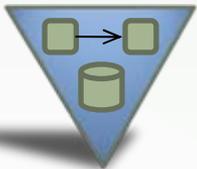
## Definition

- The fundamental goal of a War Room is to help people get organized even when they don't know where they are going.
- It does this at three levels:
  - First, it is a place which geographically and physically organizes people.
  - Second, it is a disciplined process for attacking a complex problem. The objectives of this process are to
    - (1) identify the problem to be solved
    - (2) generate an approach to the problem
    - (3) physically display that approach and
    - (4) collectively brainstorm with all concerned to develop executable solutions
  - Third - The highest level of a War Room is where a story is told and an army of story tellers are created. Stories organize people—they affect the way people identify themselves, collect data, and most important, how they behave. Thus, pictures, graphics and other dramatic techniques for the sake of the story are crucial...

# Project Management Connection

- Project Definition: Projects have a managed life cycle (beginning, middle and end) and a defined purpose
- Structuring work into projects helps focus resources and activities
- Any work stream can be “projectized” by defining cycles of work with clear objectives, deliverables and milestones
- The War Room format / tool can be used to collaboratively produce and communicate deliverables for ANY project methodology (Six Sigma, Lean, etc.)

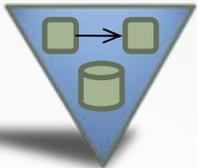
# War Room Elements



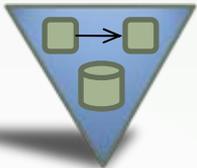
# War Room Elements (cont)

- **Low tech** – Tech out of the way of face to face interaction
- **Results oriented** – Charters, expected outcomes and actions keep everyone clear on how results are defined, achieved and measured
- **Relational** – Getting into a room and collaboratively tackling a problem builds and repairs relationships
- **Steerable** – Management charters the war room, provides course corrections and approved designs
- **Story based** – Tell powerful stories from history and data. Create stories which communicate visions, plans & strategies
- **Synchronous** – Build shared understanding & agreements
- **Transparent**
  - › Participants “call BS” and deliver insights by exposing problems and unpopular / painful facts and data
  - › Agreements depend less on politics and agendas and more on facing the tough facts, avoiding blame culture and supportive solutions
- **Visible** – Grabs attention with “in your face” format
- **Visual** - Information / content is posted on the walls as storyboards, models, prototypes etc.

# War Room Support



# Chartering Questions



# When should I choose to use a War Room?

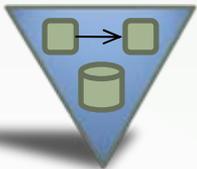
(as opposed to other tools / approaches)

- ⦿ The challenge has lots of moving parts
- ⦿ The environment is dynamic / changing
- ⦿ The following are important:
  - > Speed
  - > Visibility
  - > Communication
  - > Momentum
  - > Involvement
- ⦿ Meetings, emails and electronic documents are not sufficient

# More Relevant Chartering Questions

- What is the best timing for my War Room?
  - > Not too early
    - Not adequately chartered – don't know
      - Sponsor
      - Resources
      - Who will follow through
  - > Not too late
    - Plan is developed and input cannot be incorporated
- When should the war room be used within a program?
- When should a war room be used to Integrate programs?
- **Chartering questions such as these depend on the context and are answered through exploratory conversations**

# Potential problems and fixes



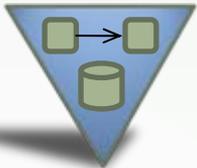
# Potential problems and fixes

Issue	Description	Fix
Competitive Debate	Facilitators or participants fighting for their approaches and stifling creativity	Use true brainstorming to develop brand new ideas Empower the War Room facilitator to be a tie breaker when needed
Dominant participants	Several participants can dominate conversation	Call on quiet participants. Integrate written input mechanisms
Hijack!!!	Short term demands drag important participants out of the process	Pre-position management not to hijack participants. Arrange for backups. Communicate backups.
Impatience	What is REALLY getting done? This is all Blah Blah Blah	Post decision and action lists. Implement quick wins Constantly update management
Momentum Loss	War room goes stale Action lists not completed	Clear war room owner and sponsor accountability and availability
Overwhelmed participants	Some people would rather poke their eyes out than be in a large group of collaboratively planning people.	Let them work on the war room 1:1 with the host but if they are key, they should participate.

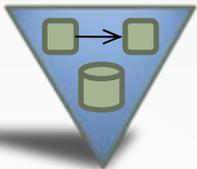
# Potential problems and fixes

Issue	Description	Fix
Rat Holes	"Diving in" too early in the war room preventing full coverage	Brief all participants on the ENTIRE war room before starting the detailed work
Safety	Anything that makes it unsafe to contribute ideas or perspectives	Remove / mitigate the threat Facilitate a return to safety
Too Complex / Messy	Content on walls is overwhelming and/or cluttered	Remove all content, distill and repost using graphics and storyboarding where possible
Trust <small>(FUD – Fear, Uncertainty and Doubt)</small>	Skepticism (especially based on failed previous attempts) about follow through or that "My Opinion Matters"	War room a well scoped problem knowing very well that a key goal is to start building or rebuild trust
Unaligned rewards & measures	Incentives and measures conflict with coordinated effort	Uncover in Chartering or War Room and resolve with strong sponsor support Establish shared / <u><a href="#">Superordinate Goals</a></u>
Victim of the Urgent	Short term pressures must be addressed at the expense of long term strategic thinking	Consider 2 charters or teams Consider "triage phase" before addressing deeper issues

# Learning Curves



# Exercise: Scope it & Sketch it



# War Room 'Scope and Sketch' Exercise

Step 1) Opportunity Statement:  
(Idea for your War Room)

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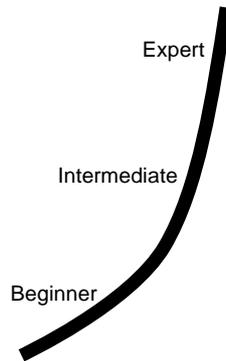
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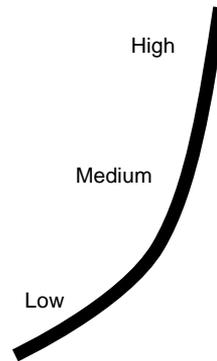
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Step 2) Rate your current status:

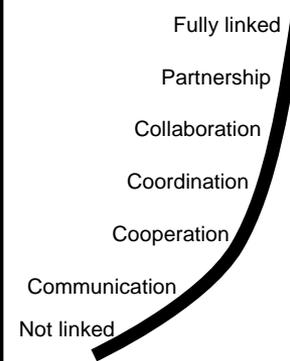
Facilitator's War Room Competence



Group's War Room Competence



Program Linkage



Step 3)  
Does the opportunity you want to tackle in Step 1 make sense when compared to the assessment in Step 2?

If not, choose a different opportunity (usually smaller)

## **Step 4) Sketch it: War Room Layout / Design**

Use this box as a representation of your war room space  
Decide what will be posted on the walls / developed with the participants

# Exercise Example

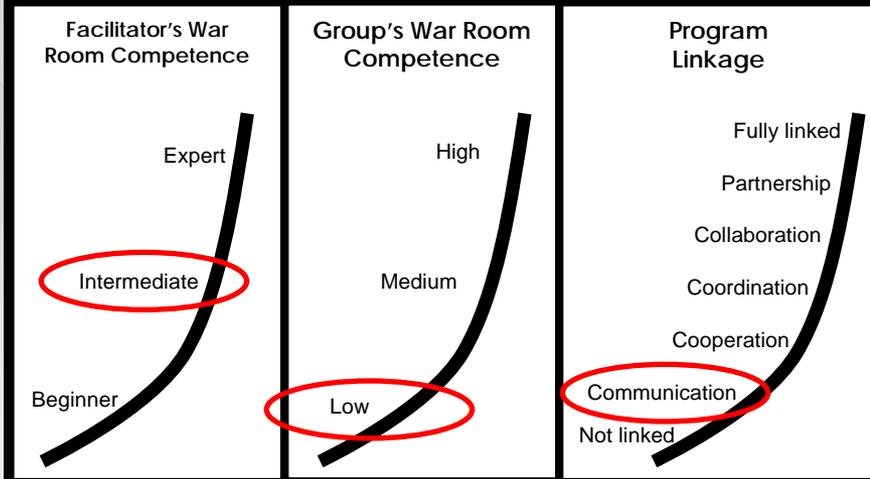
This is an example of a completed War Room Scope and Sketch Exercise

Step 1) Opportunity Statement:  
(Idea for your War Room)

Solve World Hunger

Help East Austin food-related charities move from communication to coordinated use of volunteers.

Step 2) Rate your current status:



Step 3)  
Does the opportunity you want to tackle in Step 1 make sense when compared to the assessment in Step 2?  
  
If not, choose a different opportunity (usually smaller)

Project Charter  
(Problem statement, Participants & Sponsors)

List of Relevant Orgs

Charters for each org.

"Current State" Volunteer Mgmt Life Cycles

Potential Volunteer Coord. Opportunities

Step 4) Sketch it: War Room Layout / Design

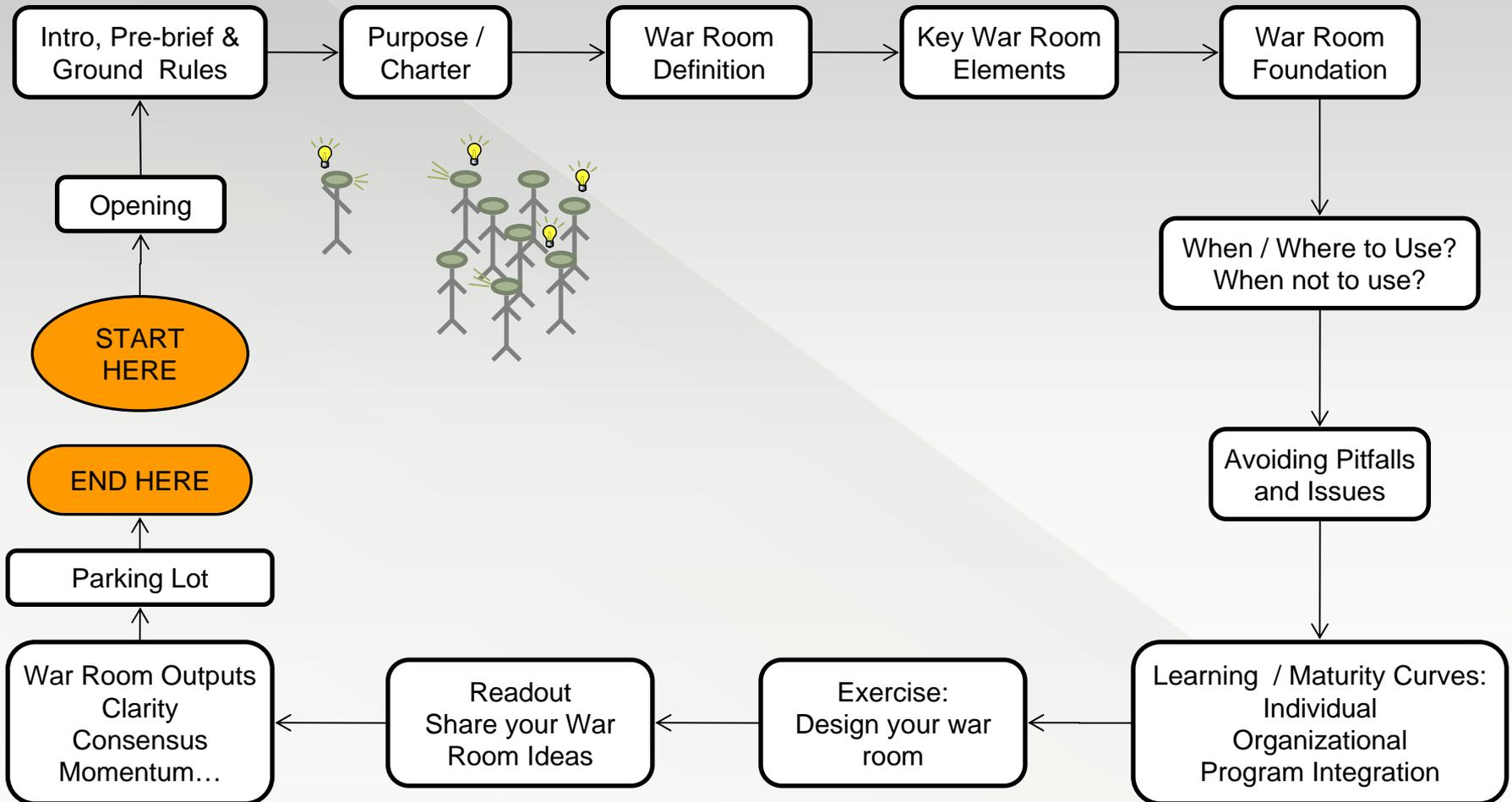
**Start AND End Here:**  
Desired Outcomes

Implementation Plan & Action List

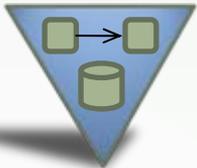
Implementation Timeline

"Future State" Volunteer Mgmt Process

# Design: The War Room on War Rooms



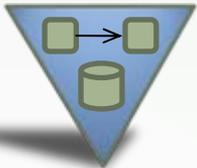
# Conclusion & Outputs



# Key War Room Outputs

- Trust
- Improved / repaired relationships
- Uncommon shared understanding
- Better decisions and stronger strategies in less time and with less effort
- Managed / Organized complexity
- Buy-in leading to easier downstream implementation
- Synchronous agreements owned by the group
- Shared / public commitments to action
- Incubated ideas – Mature ideas and designs prior to further resource investment
- Facilitated Communication
  - › Faster orientation and reorientation
  - › Distilled strategic messages which are quick and easy to understand
  - › Easy format for executive briefings without extra documents

# Appendix



# War Room Resources

- Mike Leamon Consulting
  - > War Room Facilitation
  - > War Room Facilitator Coaching
  - > War Room Training Workshops
  - > General Facilitation and Change Management Services
  - > [www.mikeleamon.com](http://www.mikeleamon.com) (512) 496-2965
- Mike Leamon Reading Recommendation
  - After attending the conference and the challenges your organizations are trying to tackle, the following book is highly recommended:
  - Influencer: The Power to Change Anything
    - > <http://www.amazon.com/Influencer-Change-Anything-Kerry-Patterson/dp/007148499X>
- 3<sup>rd</sup> Party Online War Room Resources
  - > Strategic War Room 1.0
  - Thomas Secheyaye – Hands-On Graphics
    - <http://www.scribd.com/doc/959390/The-War-Room-Report>
  - > The War Room Planning Center Process
  - Strategic Insight
    - > <http://www.stratsight.com/WR%20Process%20Mar19%20V2.pdf>

# Research on Base Methods

- Shorten Meeting Time
  - > Visual language shortens meetings by 24% <sup>1</sup>
- Promote Group Consensus
  - > Presenters who used verbal plus visual presentations were seen as 17% more convincing than a purely verbal presentation. <sup>1</sup>
  - > Presenters who used visual aids are 43% more effective at persuading their audience to take a desired course of action <sup>2</sup>
- 2003: Amount of information each person deals with has more than tripled in the last three years! <sup>3</sup>

1 Global Communication for the 21<sup>st</sup> Century by Robert Horn, Stanford University

2 Univ of Minnesota school of Management

3 School of info Management Systems at UC Berkley

# DRAFT: War Room Life Cycle

- Choose It
  - > Comprehend It
  - > Need it
  - > Sponsor it
  - > Select it
- Charter It (Plan it)
  - > Staff it
    - Define it
    - Structure the process for it
  - > Sketch it
  - > Socialize it (before you set it up)
- Execute War Room
  - > Prepare for it
  - > Understand it: Gather & Share Data on it / Analyze current state
  - > Storyboard it
  - > Plan / Design it: Future state
  - > Distill it
  - > Keep it moving
- Follow through with War Room output