Problem Prioritization Toolkit

Facilitator's Guide

Problem Prioritization

NEW HAIRCUT

Welcome to the guide

The Facilitator Guide was designed to assist and inspire the facilitator tasked with leading the activities contained within the Problem Prioritization Toolkit.

In this guide you'll find a step-by-step walkthrough, including:

- ✓ **Get set** with a snapshot of the step
- ✓ **Why** you're conducting the step
- ✓ **What** the overall step looks like
- ✓ **How** the step will run
- ✓ **Pro tips** for you to review and conduct
- ✓ **Outcome** that you want to get to

Get set!

At the start of each step are some visual indicators to help you quickly prepare for what's coming.

Suggested timing

Focus: Team, Business, User

Step difficulty

Important info

What to expect

By following this guide, you'll ensure the success of your Problem Prioritization session - a workshop for discovering and prioritizing your team's most important opportunities to tackle.

What's inside

1. Problem Discovery
2. Problem Sensing
3. Problem Categorization

Problem Prioritization

0. Pre-Work & Background
4. Context Analysis
5. Stakeholder Mapping
6. Target Definition
7. Opportunity Exploration
8. Problem Reframing
9. Reflection & Next Steps
10. **Extra!** Problem Leveling

Problem Framing

Includes Problem Prioritization steps, **plus** remaining 6 steps within comprehensive Problem Framing process.

Click to get access.

Best practices

Within each section you'll find pro tips to consider, use, and remix. In addition, below we've provided some universal best practices.

- At the opening of each activity, plan to spend about 5 minutes explaining why the team is performing the exercise, how it fits into the overall arc, and where they should to be at the conclusion (how it fits into the next step).
- At the close of each activity, allow time for the group to reflect, ask questions (of you and one another), and feel confident about moving forward. You can additionally invite them to individually reflect; e.g. quietly journaling ideas and concerns.
- Remind the team to capture 1 idea per post-it. They should use a Sharpie and write in headlines (not paragraphs). They can additionally add a drawing to help visualize their ideas.
- For larger groups (8+) or for groups that notoriously spend lots of time deliberating, you can recoup time by asking them to self-select only their top 1 or 2 ideas to share. This minimizes time to share out and keeps the discussions focused on the most important ideas; i.e. improves signal to noise.
- Additional time and energy sinks occur when team members ramble on endlessly. Avoid this by (1) being clear on timing for all activities, (2) using a visual time indicator, and (3) during share-outs, inviting team members to read their ideas vs. telling elaborate stories.

Best practices

- To help maintain energy and engagement, consider establishing a practice where the last person to share chooses the next person to share.
- Avoid bias during voting by inviting team members to first record their vote (e.g. write the number / label of their selection) and then have the team share / post their votes all at once.
- There are several instances where you'll be asked to make copies of the group's post-its for use in a future activity. This allows you to keep a record of the original layout. For digital workshops, simply copy & paste the digital post-its. For paper, take a picture of the post-its in their current activity & layout before moving them to the next activity.
- Colors are your friend! Be mindful of the colors you and the group use. This includes post-its, stickers, markers, etc. You can use color to connect or differentiate ideas / groups of ideas, to represent a scale or priority, to indicate team member ownership of ideas, and lots more.
- Create an "open work space" - a place where team members can jot down ideas, notes, or Q&A during the workshop.
- Create a "google it" space - a place where team members can jot down things you won't go into during the workshop, but they can explore more on their own.

1. Problem Discovery

Activity: *Smart Sailboat*

This problem surfacing activity is used to drive team-wide awareness & understanding of various problems (opportunities) each member of the team is interested in potentially exploring.

Get set!

45 min | Business | Easy | Optional if target problem is established

Why?

To get clear on a range of opportunities the team is interested in tackling, based upon a shared vision.

What?

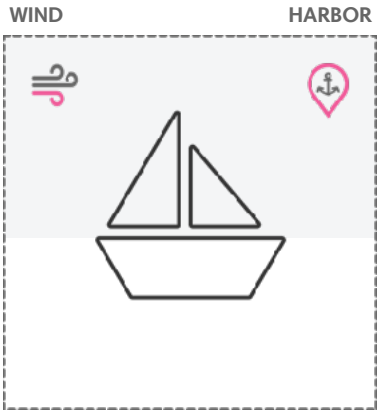
The group has the opportunity to individually consider:

- ✓ **Harbor -** Our desired destination (also scope)
- ✓ **Wind -** Positive aspects propelling us forward
- ✓ **Anchors -** Problems holding us back (opportunities to explore)
- ✓ **Icebergs -** Potential future threats (also opportunities)

How?

Harbor

- Each team member individually generates harbor ideas by considering, **'What destination are we excited to land at?'** - *2'*
- Each team member reads their harbor ideas - *1'*
- The group brainstorms and/or votes to arrive at a single harbor (theme or goal). This provides a lens / constraint to focus them during the subsequent steps of this activity - *5'*



Wind

- Each team member individually generates wind ideas by considering, **'What's propelling us toward the harbor?'** and **'What's been working for us?'** - *2'*
- Each team member reads their wind - *5'*

How?

Anchors | current problems

- Each team member individually generates anchors by considering, '**What's holding us back?** and **'What might we solve / innovate that would then turn into wind?** - *2'*
- Each team member reads their anchors - *5'*
- The group eliminates duplicates and then clusters similar anchors. Stop to clarify group-wide understanding. The facilitator suggests titles for each cluster - *8'*

Icebergs | upcoming problems

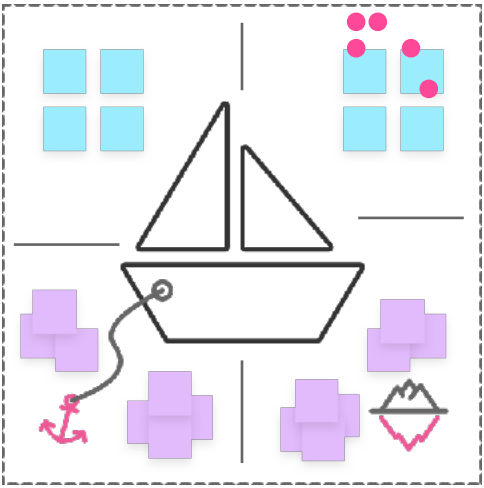
- Each team member individually generates iceberg ideas by considering, '**What emerging threats do we face in reaching our harbor?'** and **'Which future risks should we plan for?'** - *2'*
- Each team member reads their icebergs - *5'*
- The group eliminates duplicates and then clusters similar anchors. Stop to clarify group-wide understanding. The facilitator suggests titles for each cluster - *8'*

Facilitator Pro Tips

- ✓ Work with major stakeholders prior to framing to decide if there should be an overarching theme (harbor) to help constrain the wind, anchors, and icebergs; i.e. defining range of problems that are in scope vs. out of scope.
- ✓ Help the team get unstuck during harbor brainstorming by inviting them to consider submitted ideas by asking, **'Why is this important?**' If needed they can also vote to choose 1 idea.
- ✓ Wind is nice, but the priority is the anchors and icebergs - give the team more time here if needed

Outcome

The team establishes a shared vision, develops confidence from past success, and aligns on the spectrum of current and upcoming problems they're interested in exploring further.



Completed canvas showing harbor, wind, and affinity mapped anchors and icebergs.

2. Problem Sensing

Activity: *Cynefin Framework*

This brainstorming activity is used to sense problems according to their level of complexity - the first step of two in prioritizing the top problem for the team to explore further.

Get set!

 30 min  Business  Difficult  Prioritization, part 1

Why?

Step 1 generated many potential problems. Now we'll prioritize the top **one** problem that we're interested in exploring further.

What?

Prioritization will first happen by building a shared understanding of the complexity of the many problems from Step 1. The team works together to move problems (anchors & icebergs) to the appropriate Cynefin quadrant, according to their complexity.

- ✓ **Simple -** Known knowns
- ✓ **Complicated -** Known unknowns
- ✓ **Complex** - Unknown unknowns
- ✓ **Chaotic** - Unknowable unknowns

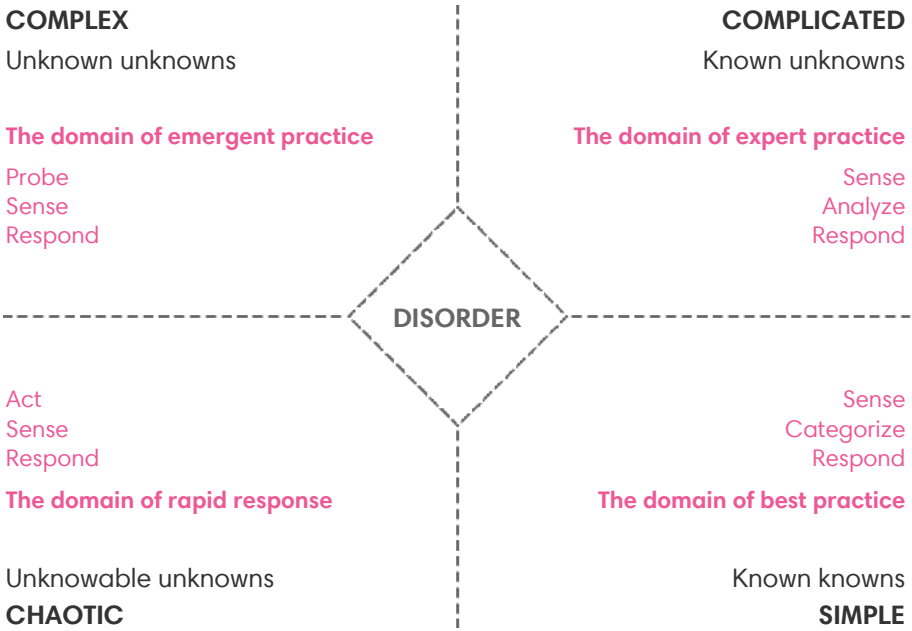
What?

To gain a deeper understanding and appreciation for the Cynefin:

→ Watch this video by the inventor, Dave Snowden

→ Watch this video - a bit easier to understand than Snowden's

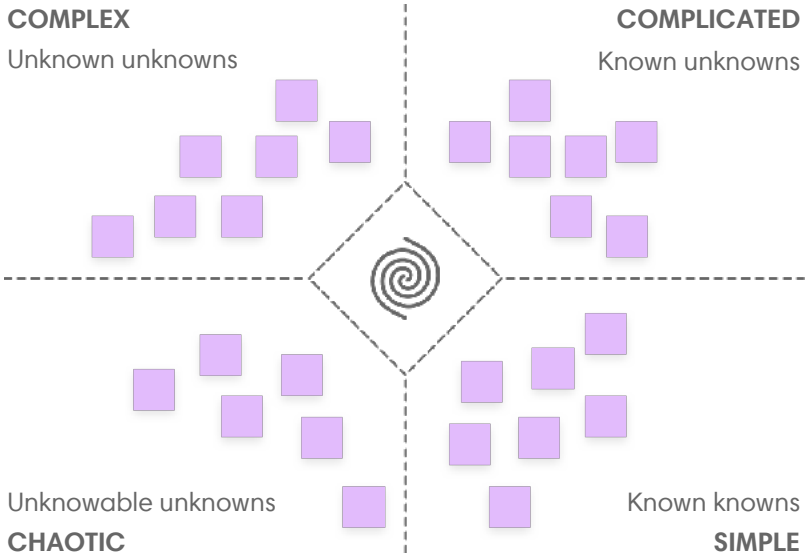
Refer to the following visual; also available in the Presentation Deck



How?

Plotting

- The facilitator makes a copy of the Anchor post-its from Step 1 and add them below the Cynefin *- 1'*
- The facilitator chooses the first post-it (individual or cluster), reads it to the group, and asks, 'How complex do we think this one is?' *- 1'*
- This process repeats until all of the anchor problems have been plotted in the Cynefin quadrants *- 10'*
- This entire process then repeats for all of the iceberg problems *- 10'*

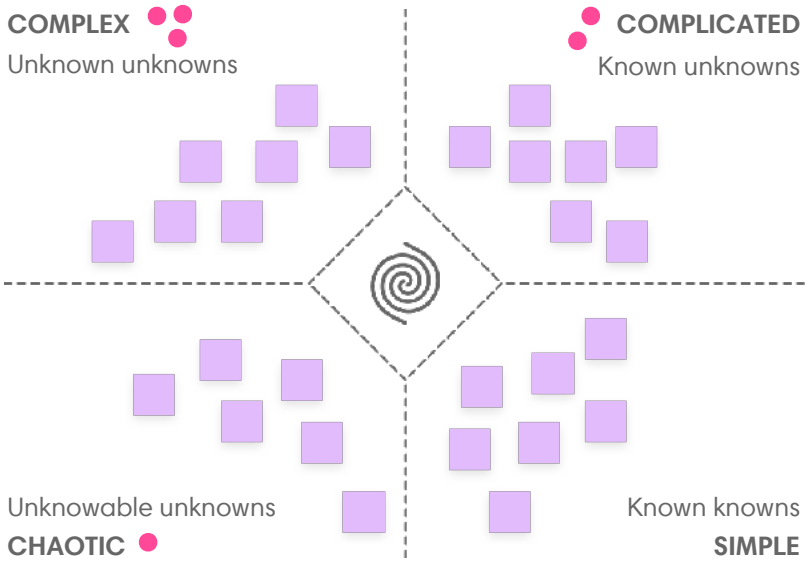


Previously defined anchors and icebergs laid out based on their level of complexity

How?

Domains

- The facilitator leads the team to decide which domain or domains align with the level of complexity the company / stakeholders expect the team to tackle during this framing session - *5'*
- You can alternatively / additionally invite 1 key stakeholder to join you at this stage to review the information and share her ideas about which domain / domains align with their expectations of this framing session



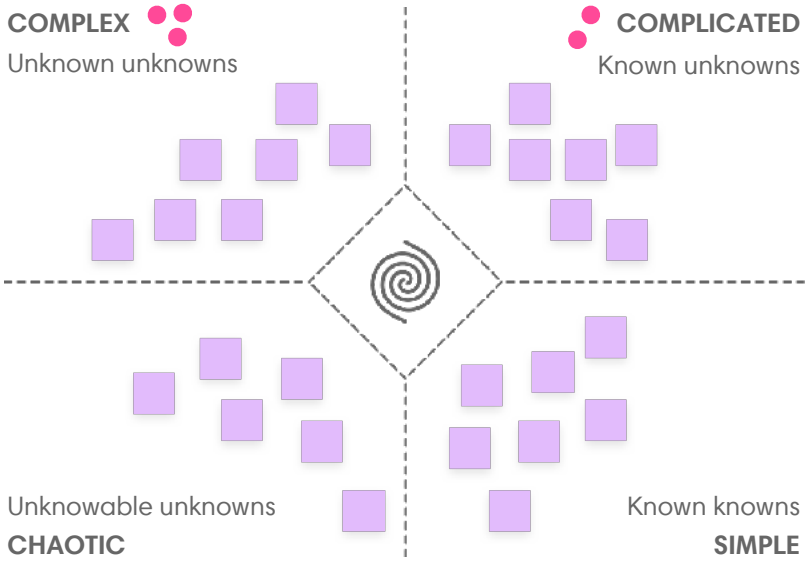
Domains the team should continue focusing on

Facilitator Pro Tips

- The team often struggles to understand the difference between Complicated and Complex - refer to the examples provided in the associated toolkit video, and this video
- Encourage the team to complete a first pass of all problems, before deliberating (>2 mins) to discuss individual problems
- If there are many problems (>20 for anchor & iceberg, each) you can split the group in half and invite 1 team member / co-facilitator to lead the other group
- Encourage the team to resist overthinking the placement of each individual problem, and instead consider the relationship between them all; e.g. if problem X is simple then problem Y must be complex
- If the group is stuck, you can ask them to notice the degree of agreement among them regarding and the best way to address it. You can also ask them to notice the degree of certainty and predictability about results. The less agreement and certainty, respectively, the more complex the problem is.
- Help the team resist leaving problems un-plotted or plotted across domains
- Be sure to plot all of the problems before having a discussion about which domains to carry forward to the next step; this will reduce bias toward placing problems in those domains
- When selecting a domain, you can suggest that incremental innovation goals are typically problems plotted within Simple or Complicated | Disruptive innovation are problems within Complex | Chaotic problems should be funneled to an execution team to be handled next or placed at the top of the backlog
- From a time & energy management perspective it's best if the group / stakeholder can select a single domain - this minimizes the volume of problems to sort through in the following step

Outcome

The team has plotted all problems across the 4 domains and selected 1 or 2 domains to carry forward to the next prioritization activity, Problem Categorization.



10 min

Break

Encourage the group to spend 10 minutes moving around, using the bathroom, getting some air, and refueling with snacks & beverages.

Give them a time to report back to the group.

3. Problem Categorization

Activity: Impact - Difficulty Matrix

This 2x2 matrix helps the team plot problems by their relative importance & difficulty - step two of two of problem prioritization.

Get set!

 30 min  Business  Average  Prioritization, part 2

Why?

To help establish which problems are worth exploring from a business perspective, based on their impact and effort.

What?

The group categorizes the sensed problems from the chosen Cynefin domains of Step 2, based on two criteria:

- ✓ **Impact -** to either the company or user / customer
- ✓ **Difficulty -** the relative effort required to solve the problem

How?

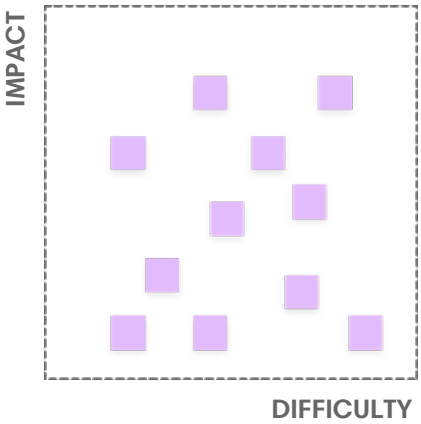
Impact axis

- The facilitator makes a copy of the problems from the chosen Cynefin domain(s) and add them below the 2x2 grid - *1'*
- Starting with any problem of the group's choosing, the facilitator drags the post-it to the center of the Impact axis - place on top of '1st Problem' post-it - *1'*
- The facilitator drags the next problem from below the grid, prompting the group, **'Will solving this problem create more or less impact than the first problem?'** Plot this post-it based on the group discussion either directly above (if more impact) or below (if less impact) the first post-it - *1'*
- The facilitator drags the next problem from below the grid, prompting the group, **'Will solving this problem create more or less impact than the plotted problems?**' Plot this post-it based on the group discussion - *1'*
- This process repeats until all problems have been plotted along the Impact axis - *5'*

How?

Difficulty axis

- Working from the 2nd most top post-it, the facilitator prompts the group, **'Will solving this problem be more or less difficult than the top most post-it?'** Adjust the first and/or second post-its based on their relevant difficulty to each other - *1'*
- The facilitator moves to the next post-it down and repeat this process, and so on, until all problems have been plotted along the Difficulty axis - *5'*

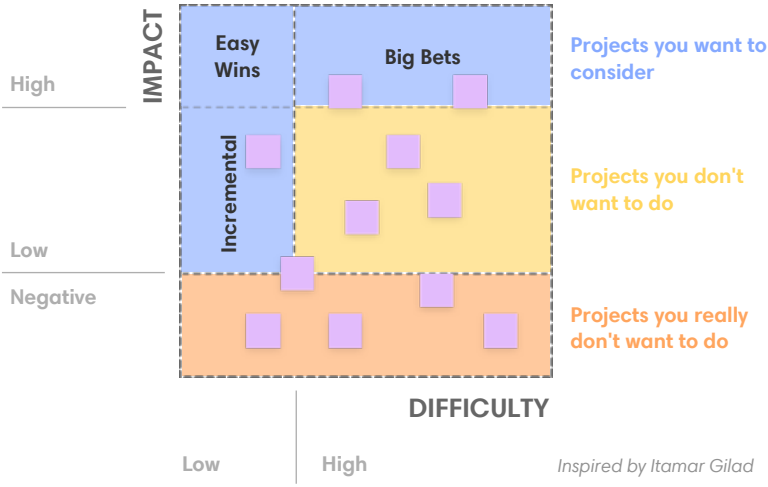


Grid overlay

- Following the example visual on the next page, the facilitator adjusts your grid accordingly (more info in Pro Tips) - *3'*
- Allow the group time to adjust the revised grid - *3'*
- The facilitator invites the group to openly discuss any questions or concerns about where problems have been plotted - *3'*

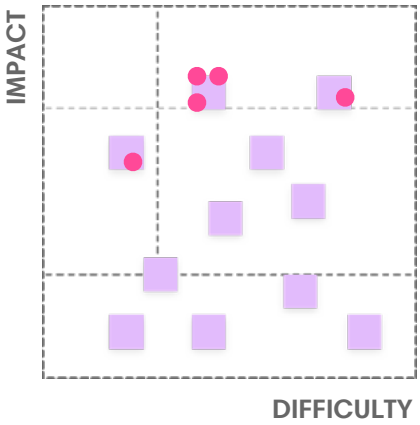
How?

Grid overlay (continued...)



Vote

- The facilitator invites the group to vote on the top problem they'd like the group to prioritize and move forward with - *1'*
- After the vote, allow the group time to reflect and be ready to move on - *3'*



Facilitator Pro Tips

- ✓ While plotting Impact, continue to vertically center the sum of the post-its along the Impact axis
- ✓ While plotting Difficulty, continue to horizontally center the sum of the post-its along the Difficulty axis
- ✓ For the grid overlay, you (or a designer) can add in the additional context manually or (in digital templates) drag the overlay up from the bottom of the template - **avoid** sharing the grid overlay until after all of the post-its have been plotted
- ✓ For small groups or groups who express concern over voting on only 1, provide each team member 2 votes; otherwise 1 vote per team member is sufficient
- ✓ If providing multiple votes per team member, remind them that they can split their votes or use both votes on 1 entry
- ✓ For tiebreakers, you can invite the group to vote another round on the the problems that had the top-most votes on the first round
- ✓ To help maintain group trust and ensure no one's problems / votes feel unheard, remind the group that they're selecting a single problem to work on for the rest of this session; they can run another framing session afterward on the next problem(s)

Outcome

The group has moved from many proposed problems from Step 1, to a single, top-prioritized problem to continue exploring.

Next Steps

Prioritization to Framing

Problem Prioritization incorporates the first 3 (of 9) steps of the comprehensive Problem Framing process.

The remaining 6 steps will equip your team to reframe that top problem into a human-centered opportunity that aligns with your business vision.

Click here to access the complete Problem Framing Toolkit.

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For additional ideas or questions, contact us:

+1 (732) 339-3864 | start@newhaircut.com