re obviously going through changes right now, but they're not always communicating them well, or reaching the people they need to reach. So this is gonna walk through a pretty straightforward tool that I've used in person a lot. And we're gonna show how you can use this tool in Mural, which is another online program. It's an online whiteboarding and sticky note tool that's great for brainstorming.

01:47: But just for right now, I'm gonna show you how I set up some of the blocks in SessionLab, so you can see a little bit about how the tool works. The first thing I'm gonna do is I'm gonna give this guy a title and I'm gonna call this Strategic Communications (Powered by Mural), and personal naming convention is I like to put the client name up front. Then it gives me the option to either create a block or a group, and if you look up here, you can also create a day if you want. So you could have multiple days and then you can get this nice overview of what all the days look like, and then you can change the names of each day... Day one, day two, day three... But I'm only working with one day and a pretty short session, so I'm just gonna show you how to organize that.

02:36: So the first thing I'm gonna do is add the time. What time does it start? This starts at 1 o'clock. It uses military time, so I'm actually gonna put 13:00. Maybe that may not jive with you if you have long days and you can't read military time, so maybe that's a deficit of the program. But it does start at 1 o'clock and I usually, personal preference, is to add a block above it. Just enter in zero time and call this Setup. [UPDATE: It is possible to change the time setting in your account settings]. And in the setup time, I like to put any housekeeping things, like log in early, make so-and-so the host to manage breakouts, review any tricky steps in the process, things like that. Make sure we know who is kicking off. All of those things that are really... You always forget up front, I just put them there and that way they're really easy to access. And then I always put in time for welcome and kick-off, so I do my big blocks first. So I am going to do welcome and kick-off. I like to keep this a little bit longer if I can, just to leave time for a buffer and people logging on late, but for now, we'll leave that as just five minutes and hope for the best.

04:02: This is also where I might do my outcomes, my meeting agreements or ground rules, however you like to say that, and agenda walkthrough, and roles. So this is kind of a riff on the Grove OARRs chart, except instead of rules, we use agreements. Then I wanna do some kind of short intros. Now I know this is going to be a big group, probably around close to 50 people, and we only have an hour and a half. We're gonna do some kind of quick intros, but just because I'm trying to get this outlined, I'm not gonna worry about what I'm gonna do yet. I'm just gonna leave this as quick intros. And then if I have time, I wanna do some kind of brief energizer here. I'm not sure what it is yet, because I haven't outlined the session. As you can see, I'm basically just adding the times in and the titles, and it's automatically telling me what I have. So let's say I wanted to add a final activity, and I know that this session ends at 2:30 and I know that that last activity is gonna take me five minutes to do, then I'm gonna put in... If I'm doing my time right, I click the time marker and I can enter a time lock, 14:25. Now I know I have 76 minutes of content to play with, and then I'm gonna change that to five minutes so that this time at the bottom, it shows my session end time. I'm gonna be quiet for a second 'cause I need to think, and then... But you can kinda see as I enter information, how I'm doing this.

[pause]

06:31: Sometimes what I like to do is I like to use this space for additional information to highlight any questions I still have for the client or that I need to come back to later. So for instance, I think I wanna do a poll for my energizer, but I'm not sure what the question is, so I'm just gonna put, "Come up with the question," here. So I know that anything in the right column is things I need to come back and do.

[pause]

08:12: I know that one of the first things I'm gonna do is... 'Cause I'm gonna have people actually work in the template, is I'm gonna introduce a scenario. I'm not sure if this is the exact right place for it, but for instance, I want people to know that... We're gonna assume that we know who our stakeholders are. If you're familiar with strategic communications, you know that's a first step, we have to know who our audiences are, and if we don't, there would be an activity before you would do the one I'm gonna show.

[pause]

09:05: We're assuming we have an initiative to communicate because otherwise we would have to do a little bit more drawing out of the current issues to come up with what actually we're gonna do, but we're assuming we know what we wanna do, we just have to communicate it. We have a goal in mind. We're also gonna assume that this is a top-down communication. It's a tell, it's not a co-created message. And the reason for that is because if we were working in a co-created experience, we may be doing this totally differently. We might be planning a whole different kind of meeting. We might be planning an open space or a future search style conference. But in this case, we're assuming that we're working with maybe some senior leadership or a group of folks in HR and we already know this has to get out, and we're not necessarily looking for a change to our initiative or goal, but we need to make sure it's communicated in a way that people will understand, which is often the case, fortunately or unfortunately for our organizations.

10:36: Okay. So that's what I wanted to offer there. So I'm gonna introduce a scenario. It'll probably take five minutes, maybe less, but I'm giving myself a little bit of a buffer. I often like to just stick a five-minute buffer in here, 'cause you know you're gonna need it. Stick it there for now. Oh, the other thing I wanna know, what we do at the end is promote the branding workshop, which is coming up at the end of October. It's more focused on individual facilitators rather than organizations, but I wanna make sure I speak to and promote the branding workshop at the end, so I'm gonna add that. Okay, now it's time to introduce the template. Now, this template is gonna be more or less a matrix with the headers for audience or role, current pains of that audience, and instead of pains, we could also say challenges or wishes or needs.

You can change out that language, but this is just a bit of an empathy piece, to think deeper about this audience. You can make that whatever you want.

12:09: What do they need to hear? This is also known as the messaging or the "What's in it for me?" The WIIFM, and then connects best through, this is the challenge... Or the channel, sorry... The channels. And we wanna make sure that we have multiple options, because best practices in marketing says that people need to hear things seven ways in order to really understand the message. Now it doesn't have to be seven, but two or three is better than one. And if you don't know what I mean, just ask anybody in a big organization the last time they read the corporate newsletter. The other thing is, I wanna speak to a use case here, which I made a note of for myself. Always nice to lead or incorporate stories, and so I do have a current client who's experiencing the need to promote their coaching program, their coaching training program, and I wanna speak to that in terms of how they have communicated that. I'm actually gonna put that up here 'cause I think it makes more sense to be in that area.

13:44: Okay, now I can see I have 51 minutes left to play with, and I've gotten through a lot of the preliminaries, which is great, and took about the first half an hour, which makes sense. Often, it does take 15-30 minutes to really set the stage. Okay. So I know that what I wanna do here is introduce instructions for activity, and that probably won't take five minutes but we'll always leave time just in case there's some questions, and I actually want... Well, let's see, 20 minutes may be generous, but let's see how we do. Something just came up for me, which is, we can do our breakouts. Always good to have a tech host because managing breakouts and leading a group, two different sides of the brain, so we need support on that. Okay, feeling pretty good about this. So I do breakouts, and then let's do a quick reflection after the breakouts. Maybe we'll do this in chat just to save time.

15:16: Again, if this was a longer day or one that was with a smaller group of people, I might have some popcorn spoken reflections, or potentially even report-outs, which would take longer time from each group, which would be nice. I may think about incorporating that instead of the reflection, but we'll see how much time. Let's just get this thing outlined.

15:40: Let's see, so the next thing I wanted to do is introduce a roll-out plan template. And for this, I may actually use the Grove Graphic Game plan. Why? Because it's awesome, it's the template that I use the most whenever I facilitate, and it's absolutely fantastic for thinking about any kind of action planning, and so, why re-invent the wheel? Use what you have. So I may introduce to them to that tool and where they can purchase the template. Always good to respect IP and actually purchase things. And so, I know that what I wanna focus here is how to use a game plan template or project planning template like this to go to the next step. So now that we have this template mapped out, then we should be able to answer these questions. What resources are needed? And then the first Phase one of planning could be establish resources and kick off. So I'm gonna make a suggested roll-out plan, but of course, we can always change this, we have to be flexible. I'm gonna make sure... And then... Let's see... Phase two: Targeted launch plan plus gathering feedback. And phase three, I always like to say, "Don't fill in your roll-out plans completely, but leave at least one part of it blank." So that you can create it once you've gathered some of the learning.

17:32: Now, one thing that I didn't do is I would say whenever you're starting a new template like this is start with the goal. And so, we already have that because we've said, we're assuming that we have a goal, up here, but we wanna articulate that down in the roll-out plan to make sure that it's captured. Note any known challenges. If you're familiar with this template, you'll know they go on the bottom in the mountains. What resources are needed? So we have phase one, phase two, and phase three, and then note any milestones or quick wins. And one thing that just came up for me is gathering feedback and this should also just say highlighting success stories. We don't default to the positive enough, but that is so key for a change management, and this would come in phase two with that targeted launch plan. And the targeted launch plan, you would build that based on this matrix that you had, who you're trying to reach, how are you trying to reach them, and when is that going out. Okay.

18:51: So now I have the key content outlined, and I have done zero design left. You know, maybe it's gonna take me 10 minutes to actually speak to this template, which is probably about right, and then I have an 11 minute here. And I don't think we're gonna have time to do anything necessarily with this template, so that's good. That means that I can actually just speak to this for this workshop, and then maybe we'll actually do a longer reflection up here, and we will fill in... Actually, instead of a buffer, I'm gonna put Q&A. Yes, I'm sure. If you delete it, it goes away. Look, let's make this 11 minutes so that little indicator goes away and let's say question and answer just at the end. Okay, so now I have an outline. Let me show you the other thing, so this is what I do first. I just get all the times in there, loosey-goosey, and even if you don't wanna put times in there, you can just still do the blocks and then figure out the times later, but that's just kind of how I roll.

20:03: Let me show you what's over here. So the only parts I really... Yes, there's a comments feature. You can add attachments. I use the notes feature to add any ideas, and look, if I decide if I wanted to take out this energizer, I can drag and drop it over there and it holds it without deleting it, which is nice. I always forget to do that. I can also, if I'm working with multiple people, I can assign anyone else who's in this document to different parts. You can also, if you click this, I can categorize it. So if you wanna see... For instance, you make your own categories, so for any discussion or debriefing, I have those in red, and I know that if I have a lot of red in my program that I probably need to add some more breaks for engaging moments. And then this is the... Let me show you how you can add collaborators, which seems to have moved. Isn't that interesting? There's usually a little icon over here that says, "Add collaborators to this" and I'm at a loss because I don't know where it went. Where did you go? That pops in and out. Let's see if we can find it. What did you do, SessionLab?

21:30: Let me see if I can show it to you, I'll go to my Nova Scribes. Isn't that interesting? Oh, look, it's up here now. Sure, [chuckle] they moved it. So glad that you were here to see that, so let's go back and add collaborators. It's up here now, share. It was over here before. Now it's up here, I'm embarrassed. Okay, so there's two ways. I can enter somebody's name, and so I know my colleague, Brian is a member of SessionLab, so when I put Brian Tarallo up here, it pops up, he's not doing this workshop with me, so he doesn't get to see this. Then I can also create a visitor link, so this says sharing it with people who aren't in SessionLab, and that's awesome. So you can create a visitor link, grab that link and then send it to people and they can use the program too. So that's how you add a collaborator, glad we figured that one out. Then block details. This is the next part. Once I have the outline and you might... If you're working with a very hands-on, high-touch client, then they may want to weigh in at this stage before you go anywhere else, but assuming that you are, you like your outline. Then I build out the details of each block, so it's a little ellipsis thing, and look, you can add materials, you can add goal.

22:56: I usually don't do the goals and I love the materials section, I love the instructions, so if you are a facilitator who likes to script things or even just add special notes, then you can add those here. You can also upload attachments from a lot of different sources. So if you wanna upload your PDF templates or worksheets, you can have them all in one place, which is awesome, because then this becomes a whole knowledge repository of everything that you need. If you have links that you wanna share in chat, I will often put them either in the instructions materials, so that they're easy or on the right column, just so that they're ready to go, and you can also figure out where you wanna add tech host notes. So sometimes I'll use the right side to just put tech host notes in it. And so it's just such a great program.

23:50: And then look what you can do. You can export it as a PDF or a Word document. I usually export it as Word, and I like to print out my agendas, I always recycle them afterwards because we shouldn't waste paper, but check it out, you can export this as a Word document, I don't know if it'll show it to you, but... Now, the one tricky thing about exporting it as a Word document is that it often adds a few other spaces, and so that's a little bit annoying I have to say about this program is that it adds weird spaces. But I like that it gives you this first high level overview, so you can just see at a high level, but let's enable editing, I like that, and then it'll give you the detailed breakdown. So my complaint is that it adds all these weird little spaces, and so I end up doing extra work to undo those spaces and make it shorter. The other thing is it's really teeny-tiny font, so I find myself often highlighting all of this text and just increasing the font size by two. Now, you're gonna end up with long agendas. I mean, really, my full day agendas are pages and pages and pages, but I like that. So that's just kind of my style, I like having that.

25:13: The last thing that I do is I add into the instructions any time I have slides, and so I actually build my slide content in here, then I create the slides, which makes it super easy, always do design last. So I add in when I have a slide, and this is a slide about with our OARRs on it, and then I might add the outcome agreements, agenda and roles, so and I might maybe just bold this. Now, a lot of times what I'll do is in the export, anything that's slide content, I will leave un-highlighted and then I like to highlight any talking points that might not be covered in the slides, that way I end up with a document with just highlighted areas, so I know really quickly when I need to speak to something versus when the slide is gonna cover it and I can just read off of the side or just augment what's on the slide.

26:20: So that has become how I've danced with SessionLab, and that's it. It's super easy, you can send everyone your facilitation guides, really great run of shows. And that's how I use this program. So I hope this was helpful. I will include a link with this video, if you're interested in purchasing the SessionLab program, I am a SessionLab affiliate, so if you do decide to purchase it, I get a little bit of a boost in that. I hope you enjoy this, and I hope you come to the MAFN workshop. I'll also include a link to that workshop. This is gonna take place both on the dates here. That'd be good, right? October 16th and November 6th, it's the same workshop on both days. Enjoy.