

Align a team on near-term priorities

1 **Capture your data** **15**
minutes
using Rose, Thorn, Bud

Have your team reflect individually on your offering's strengths, areas for improvement, and untapped opportunities.

- Bring together a group of people involved in a current project or effort.
- Give each participant a marker and three sticky note pads (pink, blue, and green).
- Orient the group to the goals of the session.
- Encourage people to individually reflect on the current state.
- Ask the participants to include only one issue, insight, or idea per sticky note.
- Capture positive aspects of the project using pink sticky notes (Roses).
- Describe issues and barriers using blue sticky notes (Thorns).
- Highlight untapped opportunities using green sticky notes (Buds).
- Suggest that participants start by writing at least two notes of each color.
- When finished, have people arrange their sticky notes onto sheets of paper.

2 **Reveal thematic patterns** **45**
minutes
using Affinity Clustering

Discuss each observation as a group and create clusters of like items to help identify the key themes among the observations.

- Gather participants around the whiteboard with their sticky notes in hand.
- Kick off the discussion by asking someone to share a Rose, then place it on the whiteboard.
- Take turns individually sharing notes, placing similar items in proximity.
- Discuss each note as it gets added and rearrange them as groupings emerge.
- Discourage side conversations or sticky notes added to the whiteboard without discussion.
- Don't label the clusters too early. They may shift.
- Repeat the pattern until each sticky note has been discussed.
- Revisit the clusters and look for opportunities to create subgroupings.
- Label the clusters that finally take shape with a theme or insight.

3 **Flag the best options**
using Visualize-the-Vote

15
minutes

Vote to quickly reach consensus about the key topic areas for the team to focus on next.

- Gather the entire group around the Affinity Clusters.
- As a group, reflect on the themes that emerged.
- Pass out three voting tabs to each person.
- Ask participants to place votes on the cluster names most deserving of the group's attention.

- Give people a minute or two to revisit each cluster and view the notes up close.
- Make sure everyone has decided where they want to place their votes.
- Count down from three and have everyone quickly place their votes at the same time.
- Review the votes. Invite discussion of what people voted for and why.
- With a clear picture the group's preferences, select 7-10 areas of focus.
- Write each cluster name on individual sticky notes to prioritize in the next step.

4 **Agree on priorities**
using Importance/Difficulty Matrix

45
minutes

Discuss the relative importance and difficulty of addressing each of the proposed topics to create an action plan.

- Move the sticky notes and place them next to the Importance/Difficulty Matrix template.
- Rank each idea by relative importance or impact along the bottom of the template.
- Encourage debate and deliberation as each idea is considered, ignoring cost or difficulty.
- Next, keep each item's horizontal position, and plot them vertically by relative difficulty.
- Force teams to rank every item, even ones that feel similarly impactful or difficult to execute.
- Once finished, ask teams to divide the matrix into four quadrants, and label them accordingly:

○ **“High value” or “High return on investment” ideas are in the bottom right quadrant.**

○ **“Strategic” ideas fall in the upper right. Compared to the other ideas, these are the moonshots.**

○ **“Targeted” or “low-hanging fruit” ideas are in the lower left. These are often quick wins.**

○ **“Luxurious” or “low return on investment” ideas are in the upper left quadrant.**

○ **Consider drawing connections between related concepts.**

○ **As a group, align on near-term priorities and discuss next steps.**

○ **Shoot photos of the matrix and share it with the group to document what was agreed upon.**

Materials

Sticky notes & paper

Pink sticky notes (Roses, or positives)

1 pad per person

Blue sticky notes (Thorns, or negatives)

1 pad per person

Green sticky notes (Buds, or opportunities)

1 pad per person

Sheets of paper (8.5"x11" or A4)

A few per person

Small voting tabs (dots, index tabs, or small brightly colored sticky notes)

3 per person

Templates & wall space

A whiteboard to create clusters on (or paper surface)

1 large working area

Importance/Difficulty Matrix activity template to plot voted upon sticky notes (print or draw your own)

1 Importance/Difficulty Matrix Template

Markers

Bold markers to write with (Sharpie or equivalent)

At least 1 per person