Metaplan®
Basic Techniques

Moderating group discussions using the Metaplan approach

Metaplan®

Leading Through Understanding

Contents

Companies and institutions today find that it is increasingly important for their employees/members to be able to reach a shared understanding. This is a typical requirement in today's organizations, with their flat hierarchies, cross-departmental collaborations, networks, team projects, and group work. People now find themselves more and more dependent on others, while not having the authority to issue directives to them.

The Metaplan moderation method is a proven and effective means of reaching a shared understanding in group discussions. The word "effective" has a double meaning. First, it means "rational," as in being economical with time. When the Metaplan method is used, results are achieved faster than with other discussion methods. Second "effective" indicates that the participants are more involved in the group deliberations. By considering all the opinions in the group, one creates the best opportunity for achieving results that also enjoy the backing of the whole group.

This primer is divided into three chapters that introduce and explain the Metaplan method:

Chapter 1 – Visualizing Discussions
Chapter 2 – Triggering and Guiding Interactions
Chapter 3 – Dramaturgical Planning Techniques

Visualization makes all the important contributions to the discussion visible for the entire group. These contributions can be recorded and organized, and any relationships between them will emerge.

The **interaction technique evokes** lively contributions which also have a clear structure. They ensure that the participants enter into a discussion that does not get out of hand or veer off course.

Dramaturgical planning techniques help moderators to anticipate the course a discussion will take. This allows them to guide the group along a continuous path to the desired objective.

This primer is intended as a memory aid for the main elements of the Metaplan method. It complements the basic training seminar "M1 Metaplan Moderation."

Chapter 1
Visualization Discussions

The Tools

Conducting a discussion using Metaplan techniques requires various tools to make the group members' thoughts and arguments visible to all. You will need:

- **pinboards**
- **large sheets of brown wrapping paper**
- **rectangular, oval and round cards**
- **map-pins to pin on the large sheets of paper and the cards**
- **marker pens** (**felt-tip pens**)
- **self-adhesive dots**

The large sheets of brown paper are pinned onto the pinboards. All contributions made during the discussion are written on the cards using marker pens, and the cards are then pinned onto the brown paper. The cards can easily be rearranged on the boards if the moderator wants to group them into clusters of similar statements or show a particular train of thought. The self-adhesive dots can be used to weight visualized statements.

The **pinboards** used in the Metaplan technique consist of a lightweight foam board and two stands. A Metaplan discussion with 8 to 12 participants will generally require 6 to 8 pinboards.

The large sheets are made of sturdy, light brown wrapping paper measuring 140 cm long and 122 cm wide. When pinning the sheets onto the boards, be sure to leave a free margin of 4 cm at the top where you can stick a few pins before starting the discussion. Then they will be handy when you need them.

The **rectangular cards** measuring 10 x 21 cm are used for recording individual statements and contributions to the discussion. Use the smaller marker pens for writing up to three lines or seven words on one card. It is expedient to keep three different colors of rectangular cards on hand for illustrating various relationships and interconnections between statements. For example, in analogy to a traffic light, you can use light green cards for ideas and positive arguments, orange cards for objections and weak points, and on the pale yellow cards you can record alternatives, steps that need to be taken, and conclusions.

Any additional comments, remarks, or objections to arguments on the rectangular cards should be written on white **oval cards** ("egg-shaped cards"). Use **round white discs** (14 cm in diameter) for the headings of card clusters.

For poster titles and propositions there are **long white strips** measuring 10 x 56 cm. The large **Metaplan clouds** are also very useful for chapter headings or the title poster of a group discussion.

The small **marker pens** are 5 mm wide at the tip. Narrower markers or pens with a pointed tip produce characters that are too light and cannot be read at a distance.

You will need both black and red markers. The large markers are 10 mm wide. Use these for writing headings on long strips and Metaplan clouds.

Self-adhesive dots are used for weighting visualized statements. It is a good idea to have two colors and shapes ready so that the participants can express two differing opinions if necessary. Map-pins with a round head are used for mounting the large **sheets of brown paper** on the pinboards and for temporarily attaching the cards bearing the participants' contributions to the boards. Later on, the cards can be permanently attached to the boards using a glue-stick. One short stroke of glue per card is enough to hold it on the board. Then, the cards can later be removed without damaging the wrapping paper .

Producing a visual image of the disussion – writing on the cards

When the Metaplan method is used to guide a group discussion, a visual image of the discussion is created on the pinboards.

Learning how to use the cards takes very little time. Since the cards must be legible from a distance of 6 – 8 meters, the writing on them should be as large and bold as possible. Use the broad side of the marker. Keep ascenders and descenders short. Never use all capital letters because this makes long words difficult to read. Printing the letters individually instead of using cursive also improves legibility.

Visualizations should be just as lively as the discussions. Straight lines and rigid card arrangements only *appear* to create order. When the cards are freely arranged but nevertheless reflect the logical flow of the discussion, we use the term "collage."

Here are some tips:

- **Write only one statement on each card.** If a contribution is too long for one card, divide it up into a main statement on a rectangular card and an additional statement on an oval card.

- **Catchwords are not very informative and require interpretation.** It is better to write short sentences that include a verb. They reflect the direction of the contribution and are more meaningful, because they force participants to formulate their ideas clearly. For example, in itself the word "costs" written on a card does not say very much. Whereas "The costs are out of all proportion to the benefits" is a statement that lends itself to further discussion. In turn, the statement "The costs are greater than our available budget" heads off in a different direction.

- **Cards with identical or similar content are pinned together in groups.** We refer to these groups as card clusters. A circle is used to designate a title which captures the content of the cluster. This title should also take the form of a short sentence. Leave plenty of space between clusters. This makes it easier to distinguish between clusters and to add cards to them later on. To ensure a clear layout, avoid using more than two dozen cards, ovals and discs on one sheet of wrapping paper.

- **To frame clusters** and to show relationships between them, draw lines directly onto the brown paper, but only once the cards have been put in their final positions

Visualization helps the participants to follow the oral discussion. But beware: do not use too many different colors, shapes or symbols. After all, the participants should not be distracted from a poster's content because it is too colorful or cluttered. Use the visualization materials sparingly.

Presenting Posters

People giving presentations, whether as moderators or participants, should show their best side to the group. Face the participants when you present a poster; don't give them the cold shoulder. Make sure that what you are saying corresponds to the content of the poster. Read the cards out exactly as they are written. This will allow the participants to concentrate on the meaning of each statement and not be distracted by any oral comments that are not on the card.

Addressing the audience as viewers makes it easier for them to focus their attention on the presentation. The presenter should touch the card he or she is reading with one hand. This synchronizes what the participants see with what they hear. Visual orientation is important for maintaining attention and makes it more likely that the statements will "sink in."

Short pauses and brief commentaries help the participants digest what is being said.

Metaplan presentation rules:
- face your audience
- point to the cards
- read everything out loud
- make short pauses, but keep commentaries brief
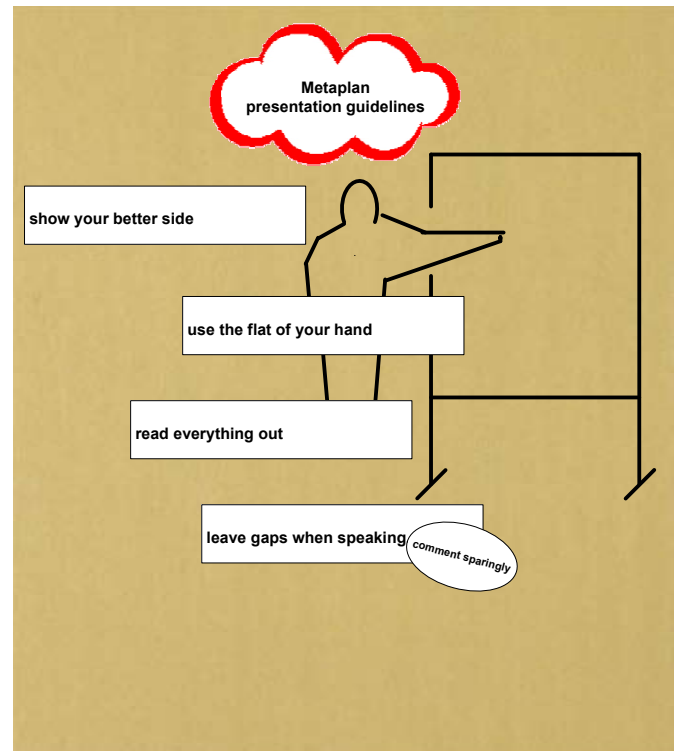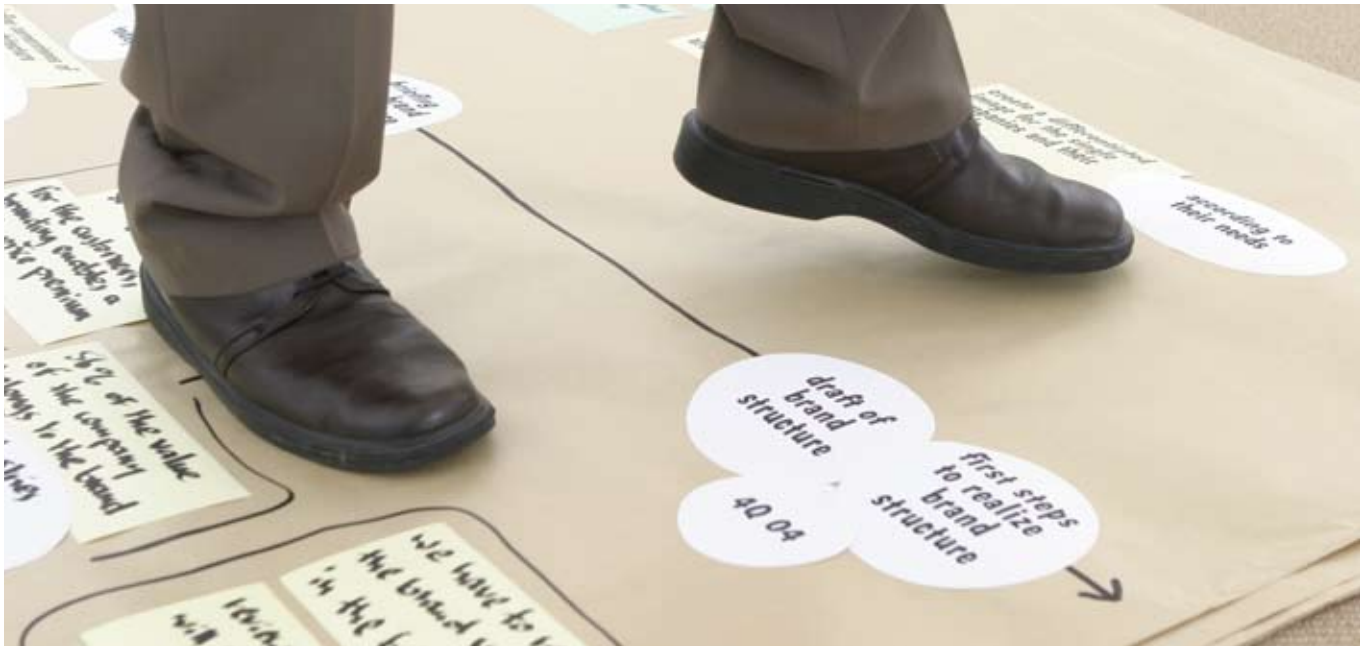
Creating photo minutes

The sheets of wrapping paper used for posters during a Metaplan moderation simultaneously serve as minutes that reflect the progress of the discussion. They provide a visual record of the flow of the discussion and its outcome. This means that there is a clear record not only of the end results achieved by the group as a whole, but also of the opinions and paths taken en route to the solution. If you want to roll up the posters for storage or transportation after the discussion, lay them all down flat in a stack with the glued-on cards facing down. Use a blank sheet of wrapping paper on the bottom. Roll up the sheets "against the grain," that is, with the cards facing outwards. Otherwise, the posters will be difficult to photograph later on; the cards will curl away from the wrapping paper when the posters are unrolled.

Photo minutes are created in order to reduce the large sheets of paper to a practical format for further use. The easiest way to do this is with a digital camera, although formatting and lighting may still pose some difficulties. High-quality images can be made using a special reproduction system.

The firm of AgorA offers the production of photo-minutes and can even deliver the images by email if the number of posters isn't too large. If your moderation entails more than 10 posters, it is more practical to transfer them to a CD-ROM.

The discussion rules

The Metaplan discussion rules are introduced at the beginning of the group discussion:

- limit speaking time to 30 seconds
- record the discussion in writing
- use flashmarks for objections

The moderator recommends that everyone should follow the rules for the duration of the discussion.

Limit speaking time to 30 seconds

A lively discussion requires a large number of contributions. 30 seconds of speaking time per contribution is ample to express the main point concisely. Adhering to a time limit means that many participants will have a chance to speak. People with a lot to say will speak more often and give others a chance to react to what they have said. If only one argument is put forward in each contribution, then the rule is easy to follow, and the clear structure of the discussion as a sequence of arguments and counter-arguments is preserved.

Record the discussion in writing

All statements are written on cards that are subsequently attached to the pinboards. There are some useful points to note in this regard. Use a separate card for each argument. This means that the contributions can be rearranged – you can group cards with similar statements together to form clusters. Writing down a catchword is not enough to make the thrust of a statement clear. The word "information" on a card of its own does not indicate what is actually meant; this would require further questions. By contrast, the short sentence "Our sales staff are not informed about annual targets" encapsulates the opinion of the writer in a few short words.

And, of course, you should write clearly so that everyone in the group can read what is on the cards.

Use flashmarks for objections

This short phrase expresses the most important discussion rule. Additions or objections to a statement are called out and indicated by a "flashmark," a lightning bolt drawn directly on the corresponding card. Flashmarks therefore indicate controversial areas of the discussion, where investing more time will be worthwhile. These are the points where the most intensive debates arise, but at the same time a basis for mutual understanding is forged. Simply adding a flashmark is not sufficient; the moderator should make sure that any counter-arguments are formulated precisely. The explanations of the flashmarks and the resulting chain of arguments are written down on ovals and arranged next to the original argument.

Chapter 2
Triggering and Guiding Interactions

The discussion rules provide power for the moderator

Of course, all these rules are not rigid regulations, but conventions which the participants agree upon in order to facilitate a lively, productive group discussion. Under no circumstances should you clock the length of a participant's contribution, but there is more to the discussion rules than meets the eye.

Metaplan's discussion rules only appear to be insignificant. Because the rules are introduced as housekeeping instructions, they initially do not provoke great debate. The participants accept them without much discussion. No one feels insulted if he or she has to be reminded about one of the rules – which would be different in the case of moralizing rules such as "we should be considerate."

If the moderator is not overly strict in applying the rules, they will provide extensive authority as well as a justification for taking the reins. The rules enable the moderator to . . .

- **limit speaking time to 30 seconds**
  ("Everybody gets only 30 seconds. Please let someone else have a turn now, and then you can continue.")
- **record the discussion in writing**
  ("We wanted to have a written discussion, otherwise everything you say will be lost.")
- **use flashmarks for objections**
  ("Let's formulate the argument for your flashmark precisely.")
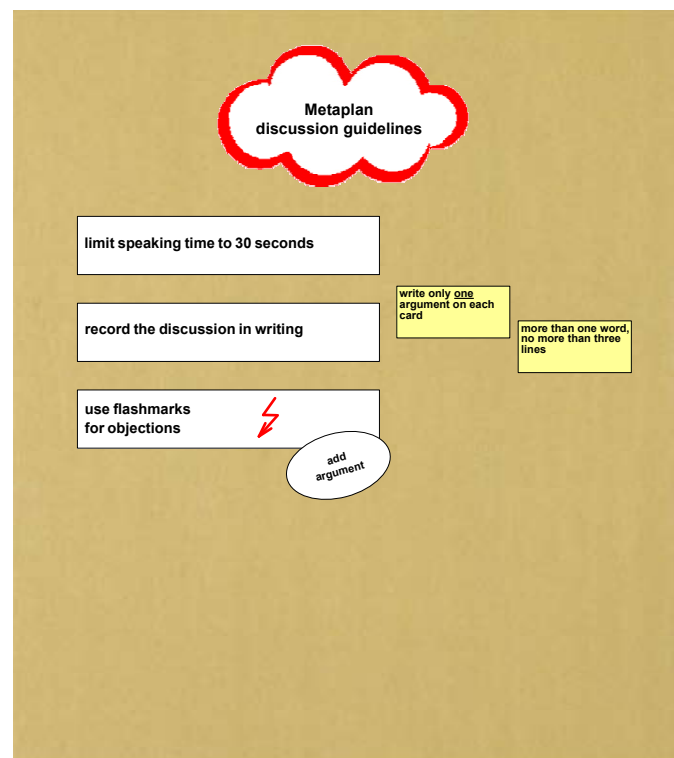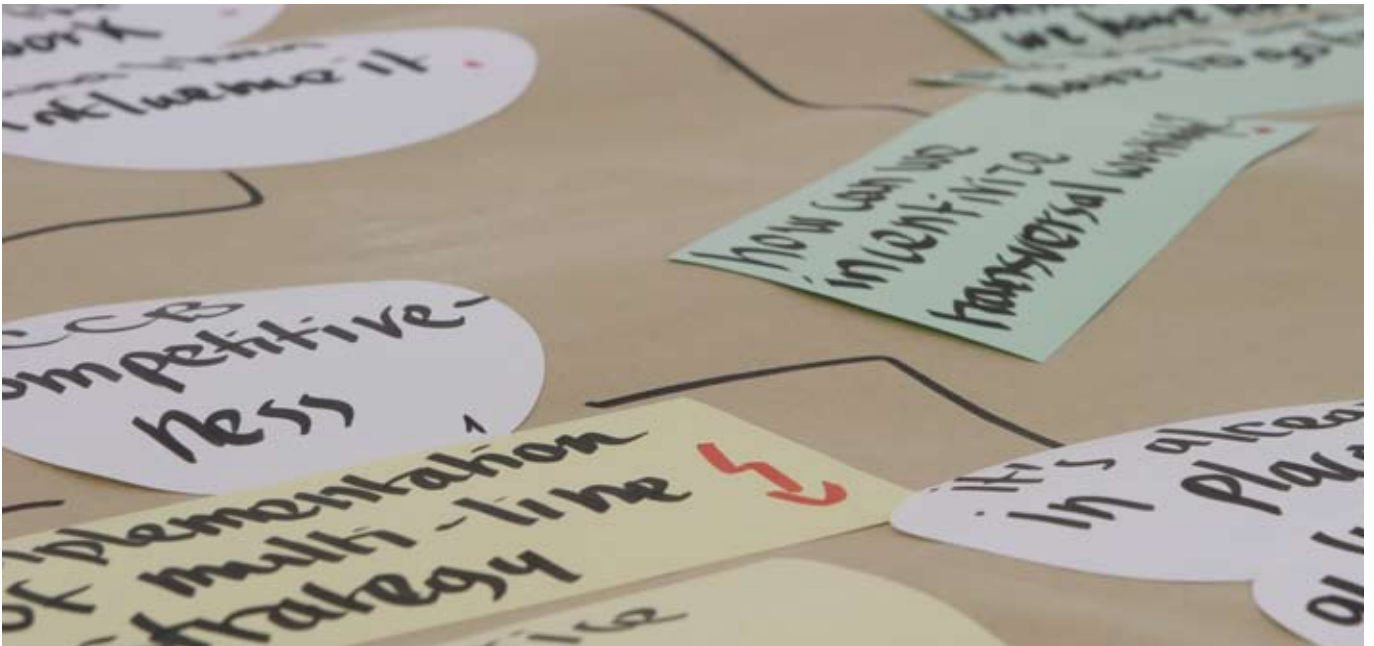
Flashmarks are the catalysts of understanding

Flashmarks are important in a discussion because they encourage the participants to express differing opinions. The divergent points of view are visualized and juxtaposed, without the moderator taking sides.

Also, flashmarks frequently encourage the participants to ask additional questions about a particular contribution if a card is not clear. In this way the thoughts expressed are made both more precise and more concise. Using flashmarks therefore means that additional contributions and comments are attached to the arguments of other participants. As a result, they become more precisely formulated, or are put to the test through opposition. The participant adds something to the discussion and in doing so assimilates the thoughts of others.

Signaling agreement to take joint action is enough, even if he or she does not share the idea in every detail.

Using questions to elicit interaction

The Metaplan method uses questions to stimulate debate between participants. The object is to arouse everyone's curiosity about what the other members of the group will say, and also to encourage everyone to take a stand on what the others have said. Thus, the moderator does not ask questions for the sake of receiving the answers themselves, but in order to stimulate interaction within the group, that is, to make the participants react to one another. If a question is to trigger interaction, it must meet certain criteria:

It should solicit opinions and suggestions rather than expert knowledge.

Each participant should be able to provide answers. A question that is so specific that only experts can respond will not result in a group debate.

It should be open and allow everyone to give several answers.

In fact, it is always wrong to ask questions that can be answered with a simple 'yes' or 'no' because they quickly bring the discussion to an end. Avoid leading questions such as, "Why is cutting the number of jobs the only way?" or questions that exclude some of the participants. If the question "strikes home," the group will accept it and tackle the content. It is helpful if the question leaves room for interpretation. This inspires everybody to think about it. On the other hand, the question must be concrete enough to prevent simple generalizations from being given as answers.

It should challenge the participants and have an emotional impact on them.

Questions must be relevant to the experiences of the participants and must not test the knowledge they have acquired from the media or instruction manuals. If the participants can relate to a question on a personal level, they are more likely to respond. If you were holding a seminar for production managers, your question would not be, "What difficulties arise in conjunction with participatory management?" but rather, "What problems do we face if we involve our employees more closely in our decisions?"

It should lead in the direction of the anticipated answers.
When formulating a question, anticipate the possible answers. The direction in which the question takes the discussion must correspond to the objectives of the meeting. Clarify whether your goal is to elicit ideas and solutions, reveal problems within a particular department or area, or compile arguments for and against a particular proposal. These considerations will enable you to verify whether the answers will be appropriate for the desired objective, and they will result in a broad range of answers.
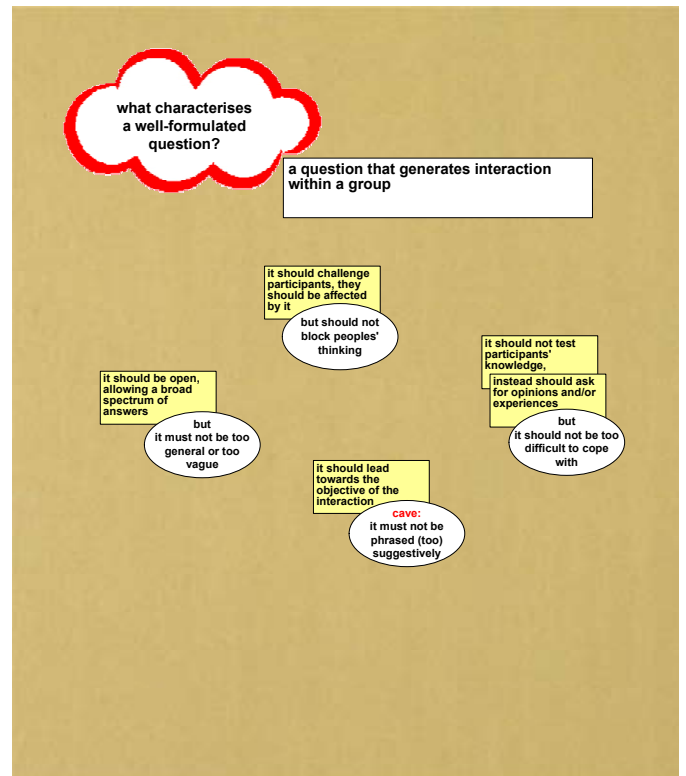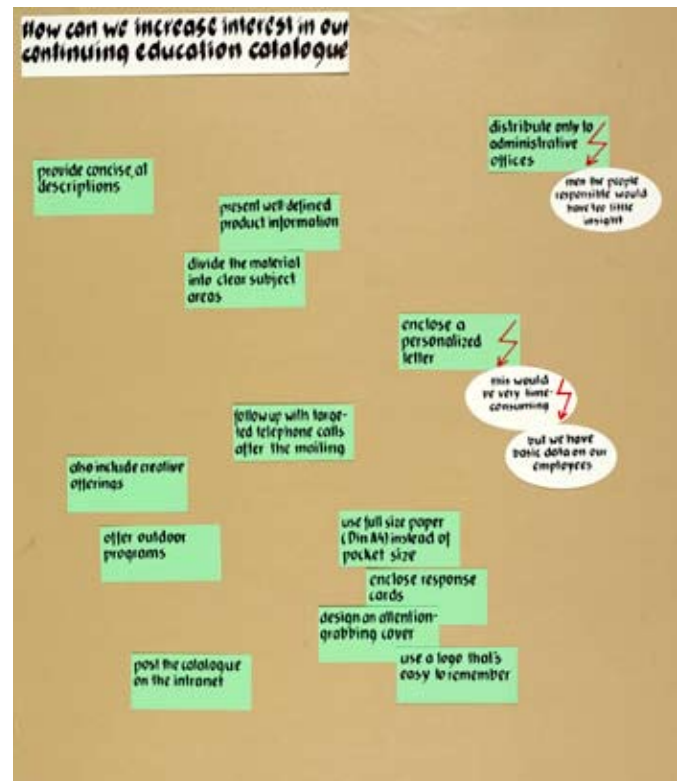
Moderating a card question

If the moderator's goal is for everyone in the group to contribute opinions and thoughts, the best method is to use a card question. Everyone writes their answers on a card at the same time, independently of the other participants, so that each person has written down his or her opinion before being influenced by the answers of others.

How to proceed:

The moderator introduces the question briefly, including a short explanation that puts it into context. However, he or she must be careful not to preempt any answers. Once the question has been read out loud, the moderator tells the participants how many answer cards are expected from each person. Normally this amounts to two or three cards per participant, so that the total number of cards remains manageable.

After giving the participants several minutes to write out their answers, the moderator collects the cards and reads all of them to the group one by one, at the same time showing the cards to the whole group so that everyone can read them. It is a good idea to shuffle the cards before reading them out loud. This lets you hold theparticipants' interest right until the end and increases their attention span. The participants are much more interested in hearing the reactions of others to their answers than in hearing the answers themselves.

Building clusters

After reading each card out loud, the moderator orders them according to their relationship to one another. The participants also have a say in the way the cards are arranged. Cards with identical or similar statements are clustered together in groups, which allows multiple statements to emerge clearly. Participants are then asked to express any objections they may have, and these are noted directly on the relevant cards using flashmarks.

Once all the cards have been pinned on the board, the moderator runs through them again. First, all the cards in one cluster are read out loud. When the moderator reaches a card with a lightning bolt, the group is asked to formulate the objection or counter-argument, which is then summarized in a few words on oval cards and pinned underneath the original statement.

When the moderator has read out all the cards in a cluster, he/she suggests a title. The title is written on a medium-sized disc, which is pinned just above the cluster. It should clearly indicate the direction in which the cards are moving. It is best to formulate a title that uses an active verb and does not merely consist of catchwords such as "staff," "production," "costs," etc.
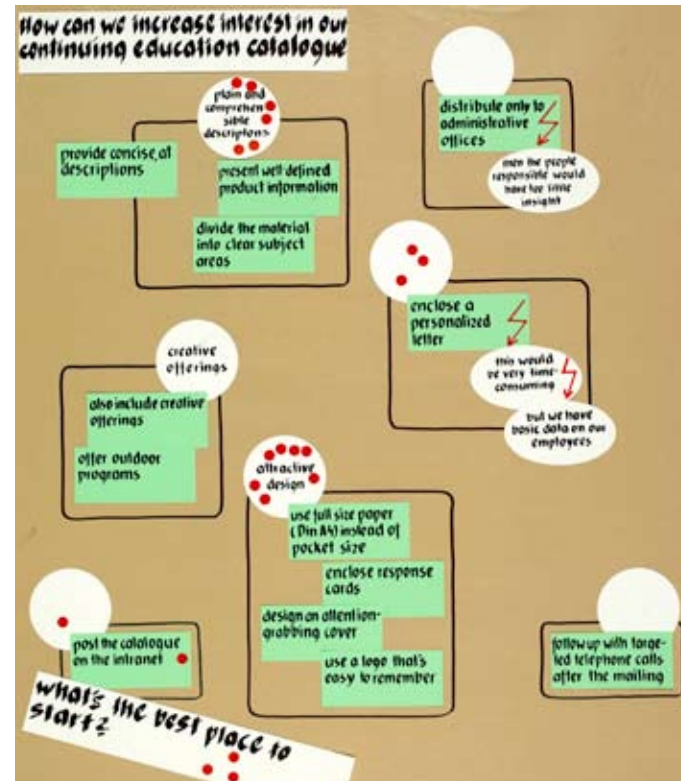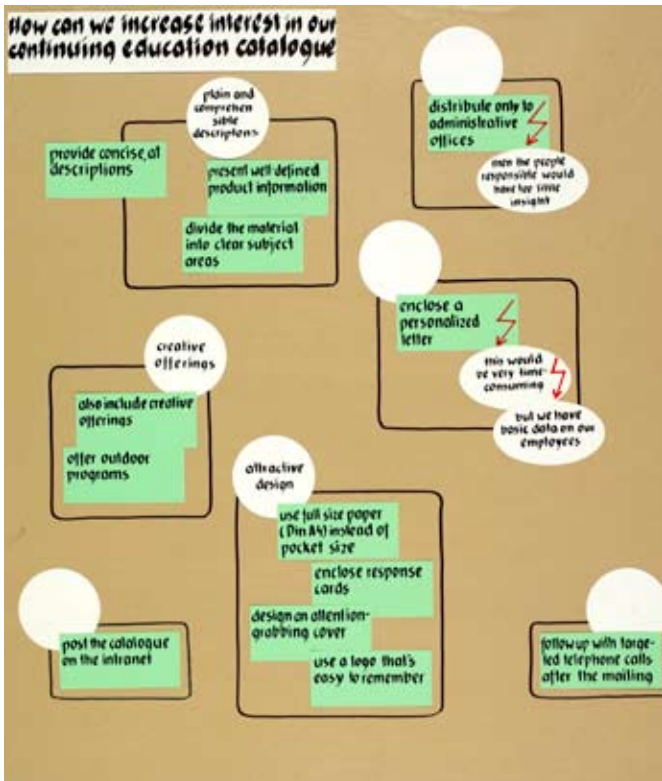
A card question in a group of 12 participants will generally produce 12 to 15 clusters. This will work out if you form small clusters of three or four cards each. Have the courage to let some cards stand on their own, if appropriate. This method results in concrete topics that apply to the tasks lying ahead, and it prevents the discussion from degenerating into general topics such as "organization," "strategy" or "skills." At first, most "Metaplan beginners" have difficulty forming clusters appropriately because they assume that there is more behind an answer than meets the eye. They think they must plan out an arrangement for the cards before they have even started, or else they look for the largest common denominator for as many cards as possible. Others would like to rearrange all the cards after pinning them on the board.

But the art of "clustering" is more a question of keeping the individual arguments separate and only forming clusters of those items that really belong together.

The moderator should have confidence that he/she will realize which cards express similar content, or else that the group will notice and speak up if the arrangement is not right. Similar wordings should be grouped together, and everything else should be kept separate. Use as much of the board as possible and leave a lot of space between the arguments.

The moderator's job is to arrange the cards for the group and not to ask the group where each individual card should be pinned. Rather, he or she should make suggestions and carry them out unless a member of the group comes up with a better idea.

After the first round, 90 percent of the cards will be in the right place. When you read through them the second time, devote most of your attention to formulating the titles and working through the flashmarks.

Variation: the double card question

This type of question requires participants to provide answers from two different points of view; it makes them think about the issue in greater depth. Each person must first argue the pros and cons of an idea for him/herself, thereby becoming more open and receptive to the opposing viewpoints of others.

When a double card question is used, the participants are asked to write down at least one argument supporting each point of view. If the question is of the pros-and-cons type, the moderator asks the group to write "pro" arguments on green cards, and "con" arguments on orange ones.

Variation: the serial card question

In this variant, several directions for the answers are specified. This ensures that group members reflect on all aspects of the issue. Since the moderator has already preempted general statements through the categories supplied, the answers produced are usually more concrete. This technique also helps to make the participants apply their imagination to various aspects of the subject which have not been the center of attention and which the participants have overlooked ("blind spots").

The answer categories are written on large discs. The moderator then asks the participants to write down answers for at least three of the categories indicated on the poster. This ensures that the problem is addressed from as many angles as possible. When the moderator arranges the cards, it is no longer necessary to write any new headings because they have already been indicated by the categories provided. When preparing a serial card question, it is important to leave one field open for answers that tend in yet another direction. This will give you flexibility when arranging the cards.

The serial card question is especially useful in shedding light on all aspects of a subject. For example, problems in production can be addressed using the question, "What could be responsible for the quality issues? It is the people, the equipment, the material, the methods, or management itself?

Focusing with
a weighting question

To advance a particular topic, you have to make the group select certain aspects from all those complied on the pinboards and mark the ones they would like to work on further. Weighting questions serve several purposes:

- **The participants reflect on the discussion again.**
- **They are given a say in determining the direction of the discussion.**
- **It becomes clear where the group's priorities lie.**

Since weighting questions in particular set the course for further efforts, they must be fine-tuned with respect to achieving the objectives. They can lead in the following directions:

- **Selecting topics for small groups or implementation:
  "What should we examine in greater depth?"**
- **Emphasizing topics that have not been dealt with in sufficient detail: "What topics need further review?"**
- **Assessing feasibility:
  "Which subjects can we push through to completion?"**
- **Revealing controversy:
  "Which subjects will management refuse to support?"**

Sometimes you can use double weighting questions to separate the wheat from the chaff. A typical question would be, "Which ideas only sound good, and where should we continue?

The moderator reads out the weighting question, which he or she has formulated carefully in advance. The participants receive small, self-adhesive dots to stick on the title discs of their choice. Every participant should have the following number of dots:

- **3 dots, when there are up to 12 clusters to choose from;**
- **4 dots, when there are up to 20 clusters to choose from;**
- **5 dots, when there are more than 20 clusters to choose from.**

The moderator ensures that all the participants consider beforehand where they will place their dots. For this reason, the participants are asked to write their choices on a slip of paper while the moderator numbers the clusters/cards that the participants can choose between. When a participant has written down the required number of choices on the slip of paper, the moderator hands out the self-adhesive dots. Once all the participants have their dots, the moderator asks everyone to come up to the pinboard at the same time so that they are not influenced by the choices of other members.

When the last dot has been attached, the moderator visually emphasizes the titles with the most dots, without counting their exact number let alone creating the impression of a statistical evaluation.

Visualizing a discussion using a call question

If a group discussion is developing freely – that is, without the participants being asked to write their thoughts on cards – it is still possible to moderate it and create a visual record. This technique can be used in any discussion where Metaplan materials are available.

The moderator introduces the topic, which has already been written on a long white strip using a thick marker pen. It is even better to propose a question that triggers a discussion right away. A trigger question should be formulated using the same criteria as a card question.

The moderator records the participants' contributions on cards and immediately pins them on the board. This allows the thread of the discussion to remain visible at all times, which helps to keep the big picture in view and to expose repetition. (See also the chapter on visualization techniques.) At the same time, minutes of the discussion are created. Later, all that is required is a photo, and you can send a copy of the record to all participants.

If there are more than four members in the group, the moderator will find it useful to ask one of the participants to assist in visualizing the discussion. In this case, the moderator repeats the contributions in summarized form – but not just using catchwords. The assistant then writes the condensed contribution on the card, which the moderator pins to the board.

It is important to ensure that the summary correctly captures the meaning of the contribution. Capturing the essence of a statement on a card is not an easy task. Many moderators believe that they have to reformulate the participants' contributions, express them in more abstract terms, or reduce them to a single word. Sometimes the thread of the discussion can be lost, particularly if the participants keep debating back and forth without allowing the moderator to capture the essence of what they are saying.

Writing on the cards becomes easier and more authentic if the core of the statement is written down in the participant's own words, even if the moderator happens to think that the contribution is not "good" enough. The idea is to pick out a short phrase from the participant's comment and write it down. But if you wait 30 seconds, it will become impossible! Our short-term memory only lasts for 15 seconds. Write something down as quickly as possible. If the participant comes up with a better formulation of the core idea a little later, record it on a second card. If participants express themselves using catchwords only, the moderator must insist that they formulate short sentences.

Visualization is a good idea when only the most important ideas are required to continue the debate, and if you want to make a quick list of the points raised. Often the participants know the causes of a particular problem, in which case it does not need to be spelled out in every detail. Taking time to develop solution proposals is more important.

Using call questions is also a suitable method when the moderator wants the seminar participants to reflect again on the essential ideas. In this case, only a few contributions are required.

Kicking off with a proposition

A proposition is a suitable means for introducing a subject or for taking a snapshot of the opinions in a group.

The moderator writes a mildly provocative statement on a strip of paper using a broad marker. Below this, there is a second strip that has been divided into four fields. These are marked using a red felt tip pen with the symbols ++, +, -, and - - . The moderator then reads the statement to the group and asks each participant to express complete or partial agreement (++ or +) or complete or partial disagreement (-- or -) by placing a sticky dot in one of the four fields.

If the moderator wishes to start off with a proposition, that is, generate willingness to address a topic, the proposition must be phrased very carefully so that there will be a balance between opinions in favor and those against; this, after all, is what triggers interaction. The participants who agree with the proposition will be curious to find out why others hold opposing views, and vice versa.

The proposition should be formulated in the affirmative. This will avoid confusing combinations of negatives and bring out each person's agreement or disagreement quite clearly. To produce a broad spread of dots expressing the group's opinions, the proposition should not be phrased in absolute terms. A statement such as "All of our customers will buy our new product" in effect only allows the participants to disagree, because some exceptions will always exist. "Our customers will buy our new product" leaves open the question of whether every single customer will buy.

If you have highly spontaneous participants who want to attach their dots right away, ask them to remain seated until you are sure that everyone else has thoroughly considered the proposition and decided which field represents their opinion. Once the group has placed their dots in the appropriate fields, the moderator asks the members to tell the reasons behind their individual opinions. Each argument is then recorded on a card and arranged close to the relevant field on the pinboard. In general, one does not become involved in differentiating between partial and complete agreement or disagreement. It is more important to ask the participants to call out their reasons for favoring the left or the right half of the strip with their "opinion dots." Begin with the side that has fewer dots, and do not force any of the participants to reveal their opinions in front of the others. It is better to focus your questions on the arguments, because partial agreement/disagreement always indicates a degree of doubt.

Finally, the moderator asks for the opinions of those who have placed their dots on the center line of the strip – those who were unable to make up their minds – and then those arguments are visualized as well. It is unnecessary to ask everyone to put forward an argument. Even if you only have a few statements for and against, that is enough to shed light on the range of opinion.

If everyone places their dots in the same field, then either the proposition was not well formulated, or nobody wanted to take a definite stand. In this case, the dots will most likely be placed in the fields of partial agreement/disagreement, indicating "yes, but" or "no, but." If the moderator first asks about the "buts," he or she can moderate the proposition in the usual way.

The moderator guides processes of reaching shared understanding

Moderators using the Metaplan method have three tasks to fulfill:

1. Visualizing debates

As a rule, the moderator is supported by a co-moderator who writes down the arguments coming from the participants. This ensures that the argumentation becomes visible to everyone. It also allows you to cope with greater complexity. Writing down the arguments slows the discussion, which, in fact, helps to defuse emotions and to focus attention on the actual content of the discussion.

2. Guiding the discussion

The moderator guides the discussion along a certain path which has been mapped out. He/she must make sure to avoid superficial discussions. Often, a pseudo-consensus emerges that subsequently collapses when the time comes for the participants to implement the ideas. Questions such as "Can you give an example to illustrate this idea?" or "Could you express your opinion in more concrete terms?" force participants to come up with more precise wordings. It is frequently the case that the entire group agrees in a general sense. Who would oppose "greater flexibility?" But as soon as the moderator delves a little deeper, and it becomes clear that "greater flexibility" means extending office hours to 10:00 p.m., marked resistance arises.

Another scenario is that the group discusses problems in general terms, e.g., "Our systems are not coordinated with one another." Here, too, the moderator should follow up by asking questions such as, "Does that really apply to all of the systems?" or "Is this problem relevant for the success of the business?"

3. Planning a moderated discussion sequence

The moderator's choice of a discussion topic depends on the assignment he/she has been commissioned to perform. When preparing the moderation, he/she deliberates which points should be discussed in order to achieve the designated objective. The moderator considers which interests the participants might have, and what resistance might arise. This information can then be converted into suitable questions.

Chapter 3
Dramaturgical Planning Techniques

Planning a group discussion in advance

Group discussions can arise spontaneously. If Metaplan materials are available, the moderator can write the participants' contributions on cards and arrange the cards on pinboards. Or he/she can pose a question at an appropriate moment and have everyone write down their own answers on cards.

   If you know in advance that a group discussion has been scheduled, plan the course of the discussion in advance and prepare a dramaturgy. A dramaturgy is a sequence of question and statement components that are aimed at enabling the group to think their topic through and arrive at a result. A dramaturgy represents the thread that runs through the discussion and allows the moderator to lead it to a conclusion.
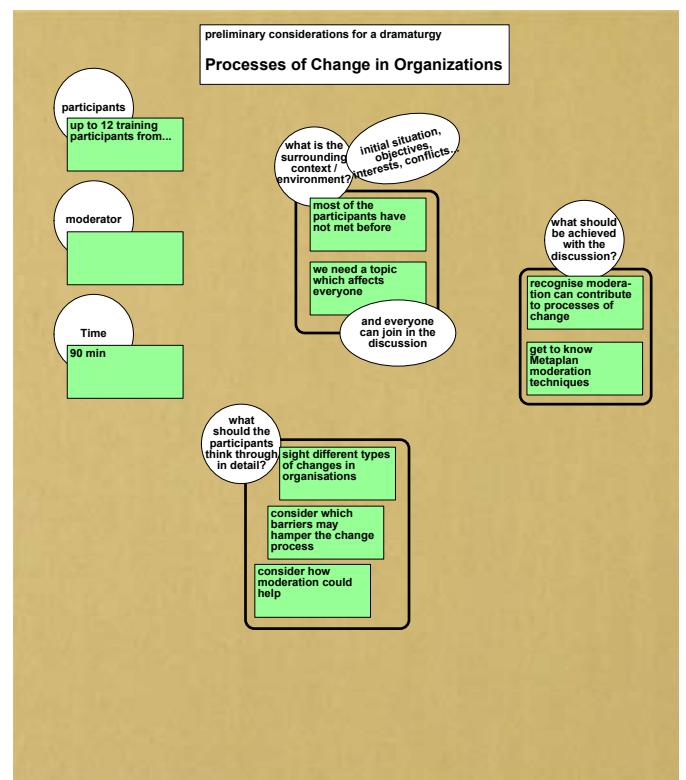
As the moderator, you should have a clear picture of the reasons for the meeting and its objective before you start to plan and formulate your questions and statements. Ask yourself the following questions:

- **What is the proposed topic of the discussion?**
- **Who is supposed to participate? How many people might attend?**
- **How much time is available?**
- **What is the discussion intended to achieve?**
- **What problems need to be considered?**
- **What are the questions the participants must think through?**

It is especially important to clarify what the meeting can and should really accomplish. The goal may be to achieve results such as pinpointing the causes of a certain defect, finding solutions for a problem, developing proposals for further action, etc. But the moderator's goal can also be to improve relationships between the participants, reduce tensions, generate enthusiasm for an idea, etc. You may want the participants to elaborate a solution while at the same time involving them in its implementation.

However, when making your preparations remember that in the average group discussion (lasting about two hours) you cannot achieve all of your goals right away! You should therefore weigh very carefully what the meeting can actually accomplish. Sometimes you will have to be content with getting the participants to open up to the topic and obtaining their agreement to a follow-up meeting at a later date.

To design a moderated discussion so that each interaction "strikes home," the moderator should have a clear picture of the problem and its overall context. Consider questions such as: "What interests do the participants represent?" "What possible forms of action do they perceive?" "Are there any tensions between individuals or departments?" "Are there any external threats, such as a collapsing market or new competitors?" "Has management issued any new directives that require compliance?"

The best method is to visualize your preparations on a sheet of brown wrapping paper. This makes it easier to involve others during the planning stage and to coordinate your activities with your client.
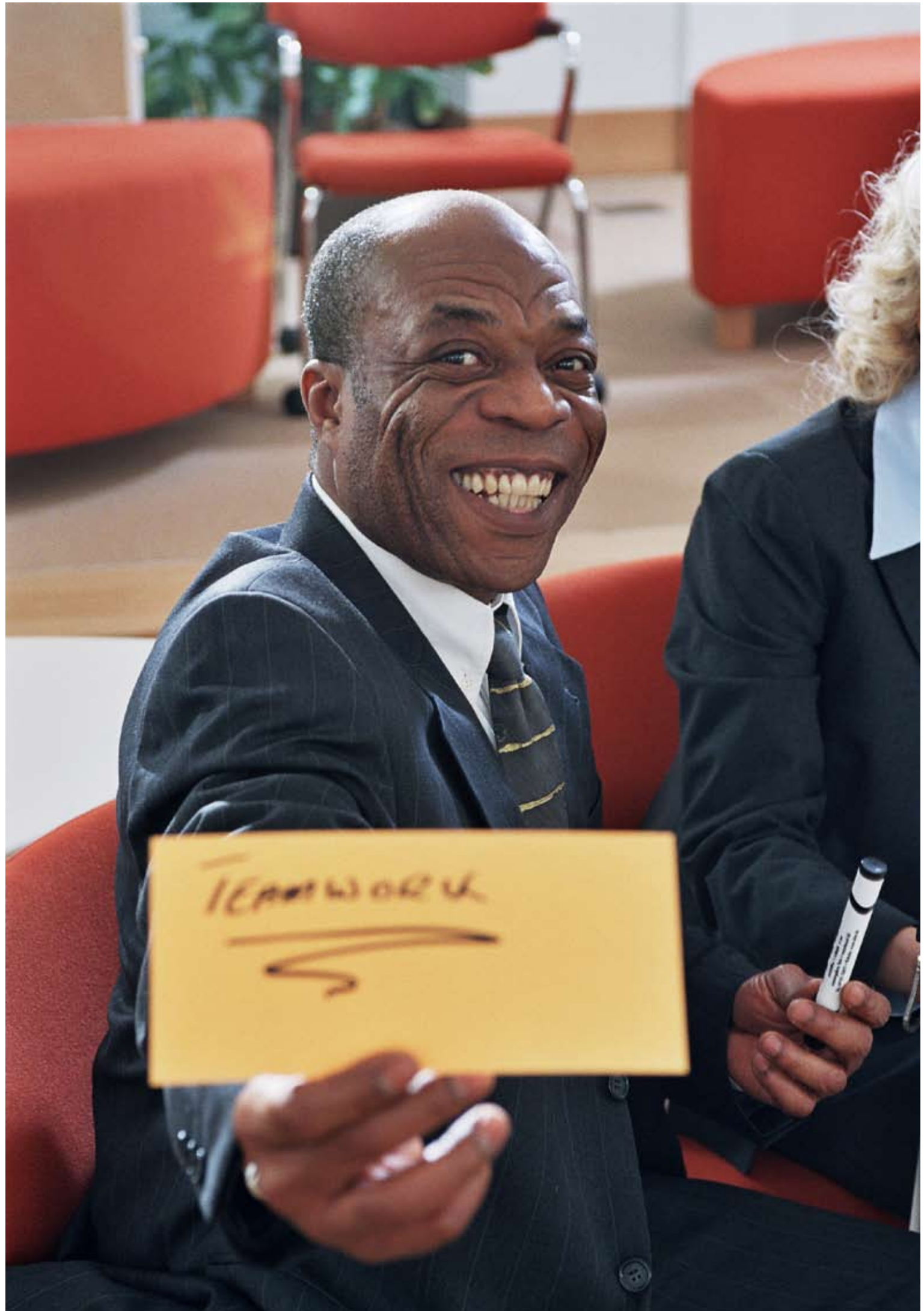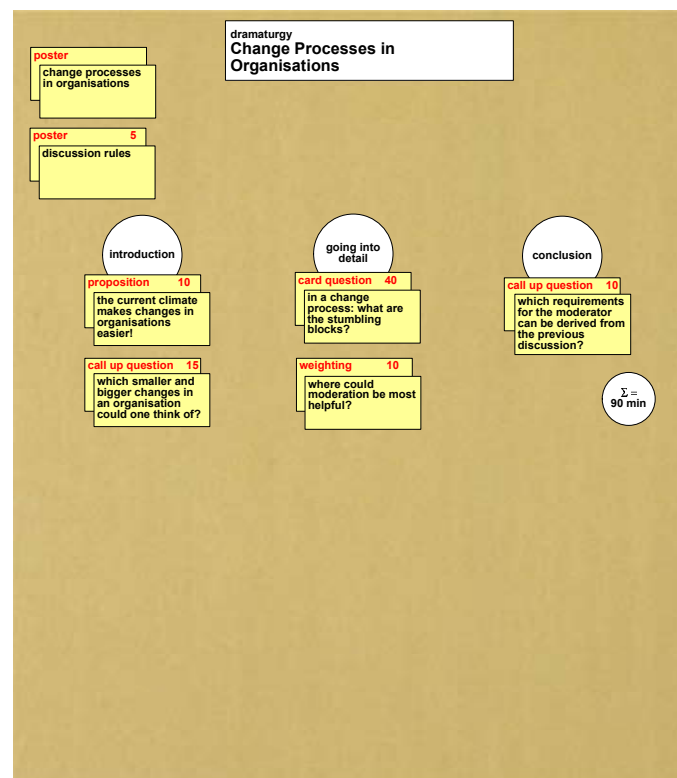
Designing a moderated discussion sequence

Once the moderator is clear on the topic and objectives of the discussion, knows how much time is available, and has made an effort to understand the problem situation, the process of drafting a moderated discussion sequence can begin. This refers to a chronological plan that spells out the moderation techniques intended for use, the exact wording of each question or information element, and the way the individual interactions will build on one another.

Time requirements for individual moderation techniques

The moderation techniques are described in the chapters on visualization and interaction techniques. The amounts of time allotted for the various techniques are based on the experiences of skilled moderators. We recommend observing these time limits to ensure that you establish the right pace and introduce a group dynamic into the discussion:

- **presenting a poster with a maximum of two dozen cards: 5 min.**
- **moderating a card question: 30 min.**
- **moderating a double card question: 45 min.**
- **posing a weighting question: 5 min.**
- **moderating a proposition: 10 min.**
- **a discussion visualized by the moderator: 10-45 min.**

A moderated discussion consists of three phases: introduction, development, and conclusion. If the participants have never experienced Metaplan moderation, you will have to open with a poster introducing the Metaplan discussion rules before progressing to the discussion itself.

poster
change processes in organisations

poster   5
discussion rules

dramaturgy
Change Processes in Organisations

introduction

proposition   10
the current climate makes changes in organisations easier!

call up question   15
which smaller and bigger changes in an organisation could one think of?

going into detail

card question   40
in a change process: what are the stumbling blocks?

weighting   10
where could moderation be most helpful?

conclusion

call up question   10
which requirements for the moderator can be derived from the previous discussion?

Σ = 90 min

Introduction

Keep the opening brief. A proposition which has been dotted by each participant is a suitable tool for attracting attention and arousing curiosity. At the beginning it is important to get the participants interested in the topic, but without going into too much detail. Otherwise the group might want to discuss the proposition for much longer than the moderator has planned.

Instead of using a proposition, the moderator can also start the discussion with a question that is expected to elicit only a small number of contributions, which are then visualized. But remember: a visualized discussion – especially when it is dominated by individual participants – can come too close to the heart of the matter and thereby easily exceed the scheduled 10 minutes.
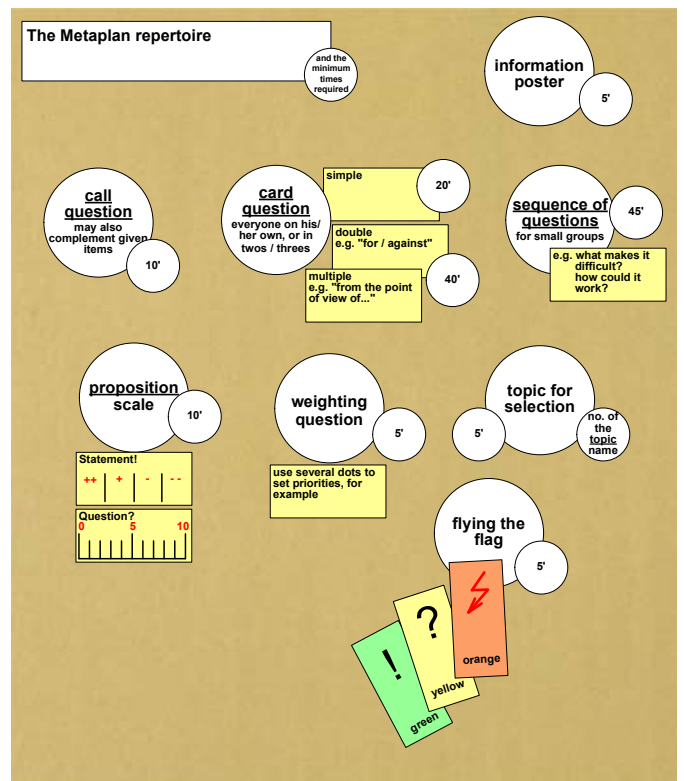
Development

During the development stage all members of the group should collaborate on the subject. Use a card question so that everyone contributes his/her ideas. If the subject is very controversial, formulate a double card question requiring all participants not only to give answers supporting their own point of view, but also to provide arguments for an opposing position.

    If the aim of the meeting is to identify solutions, it is a good idea to start by inquiring about the defects and difficulties that lie at the root of the problem. There is a greater chance of finding suggestions for appropriate solutions against the backdrop of a joint problem analysis. Sometimes, using a card question to analyze a problem triggers a rush of spontaneous solution ideas. The moderator can save time by collecting the ideas that are called out and writing them on cards.

Conclusion

Ideally, a group discussion should close with a plan of action for the near future. The plan should identify who will implement which proposals, when, and with whom. However, this does not have to be the case after every discussion. A meeting can just as well end with the participants reaching a shared understanding of the strategic guidelines, task descriptions, or the rules governing cooperation.

In any event, the conclusion of a moderated discussion should also include determining what should be done with the ideas the group has collected. This can be accomplished with a weighting question. The participants are asked to use self-adhesive dots to indicate what action should be taken after the meeting. In this way, the moderator steers the participants' thoughts in the direction of subsequent activities. He/she can follow up with a short visualized discussion to elicit suggestions for further work on the topic, or on how the results can be translated into action.

At the end of a group meeting, the moderator again reads out the results of the closing interaction (weighting question, short visualized discussion) and announces what should be done next. The moderator refrains from passing a value judgment on the content.

Checklist for a successful moderation

To check whether a moderated discussion has been successful, the moderator should consider the following questions:

- **Did the participants reach a shared understanding of the facts and the situation?**
- **Did they express a range of different opinions?**
- **Were the new proposals subjected to scrutiny?**
- **Was it clear where the disagreements lay?**
- **Have the options for possible courses of action been explored?**

These questions focus on the handling of the content. The question of whether the group was satisfied with the moderator is irrelevant. On the one hand, a group can be satisfied because the discussion remained on a general level where no one was hurt. On the other hand, the group can reject a moderator because he/she exposed uncomfortable truths they would have preferred to avoid. As long as the basic consensus needed for taking action is not put at risk, the moderator can also push the group into work which they find unpleasant. All these scenarios entail the danger that some group members will make negative comments about the performance of the moderator, even though they have made progress during the moderated discussion. Others, however, may take the moderators position. This could lead to the group breaking up and would endanger the basic consensus required for taking action. Whatever you do, start with something small. Your first moderated discussion should be on a topic that is not tremendously important.

Tips for your first moderated discussion

Whatever you do, start small. Your first moderated discussion should be on a topic where the stakes are low.

Simpler topics might consist of:
- **preparing an event or a party**
- **internal discussions about the next steps to take**
- **brainstorming about product features**

More demanding topics might include:
- **a restructuring**
- **strategy development**

Take plenty of time to prepare. This will give you a chance to speak to participants and acquaint yourself with their interests and ways of thinking. As soon as you have drawn up an initial outline for the discussion, take a break and discuss your ideas with others.

A moderated discussion will have lasting effects. The activities agreed upon will gain credibility if critical voices are also invited to attend the meeting and can participate in the discussion.

Most firms do not have rooms suitable for moderated discussions. They tend to have either conference rooms or training rooms with tables. Arrange your space so that the tables do not get in the way when you and the participants need to move about. Check in advance whether there is a sufficient supply of marker pens and other visualization materials. In general, try to create a pleasant working environment that will stand out from the usual meetings.

Metaplan – Leading Through Understanding

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