

# ***Cat Herding 401***



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@davidpoteet #eduiconf





# David Poteet



- President, NewCity
- UX Architect
- @davidpoteet

@davidpoteet #eduiconf





***Cats are awesome.***

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***Cats do what they want.***



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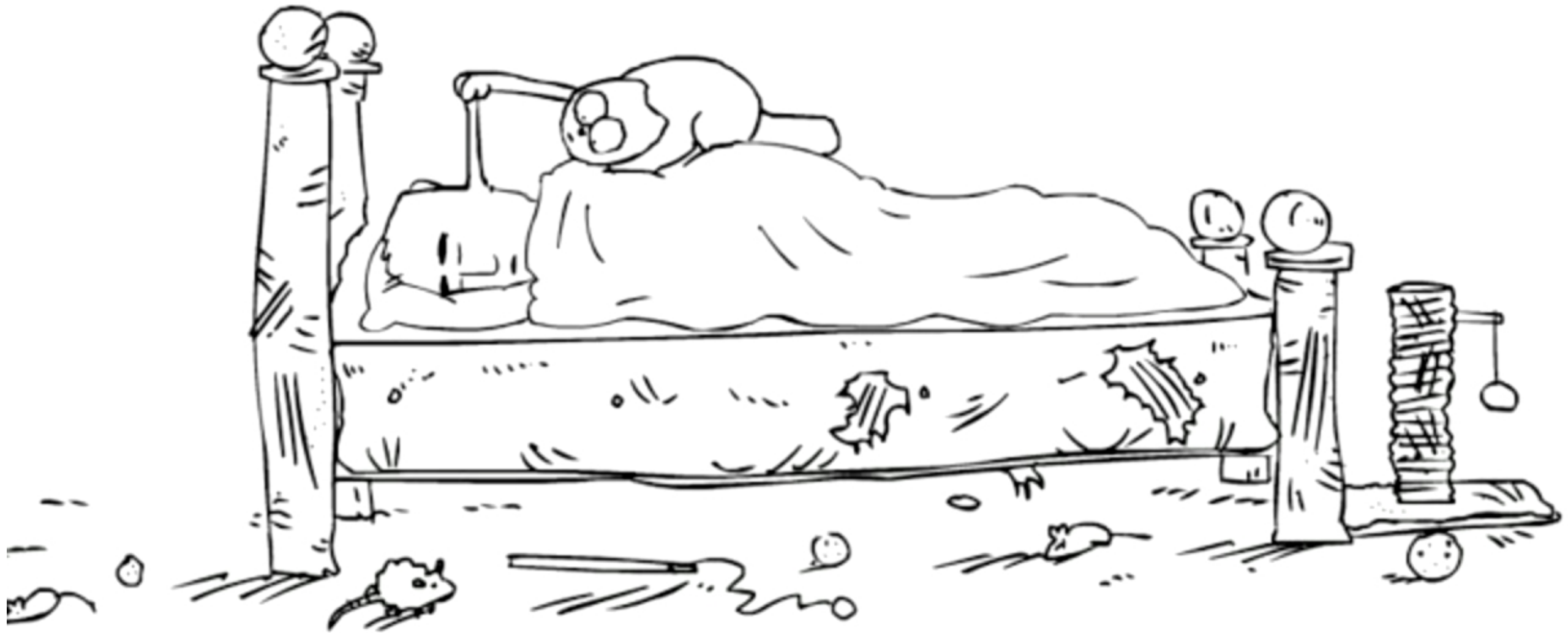
***Everybody wants to feel smart.***



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***Everybody wants to be heard.***



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***Everybody wants their work to matter.***



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# ***Thank you Simon!***

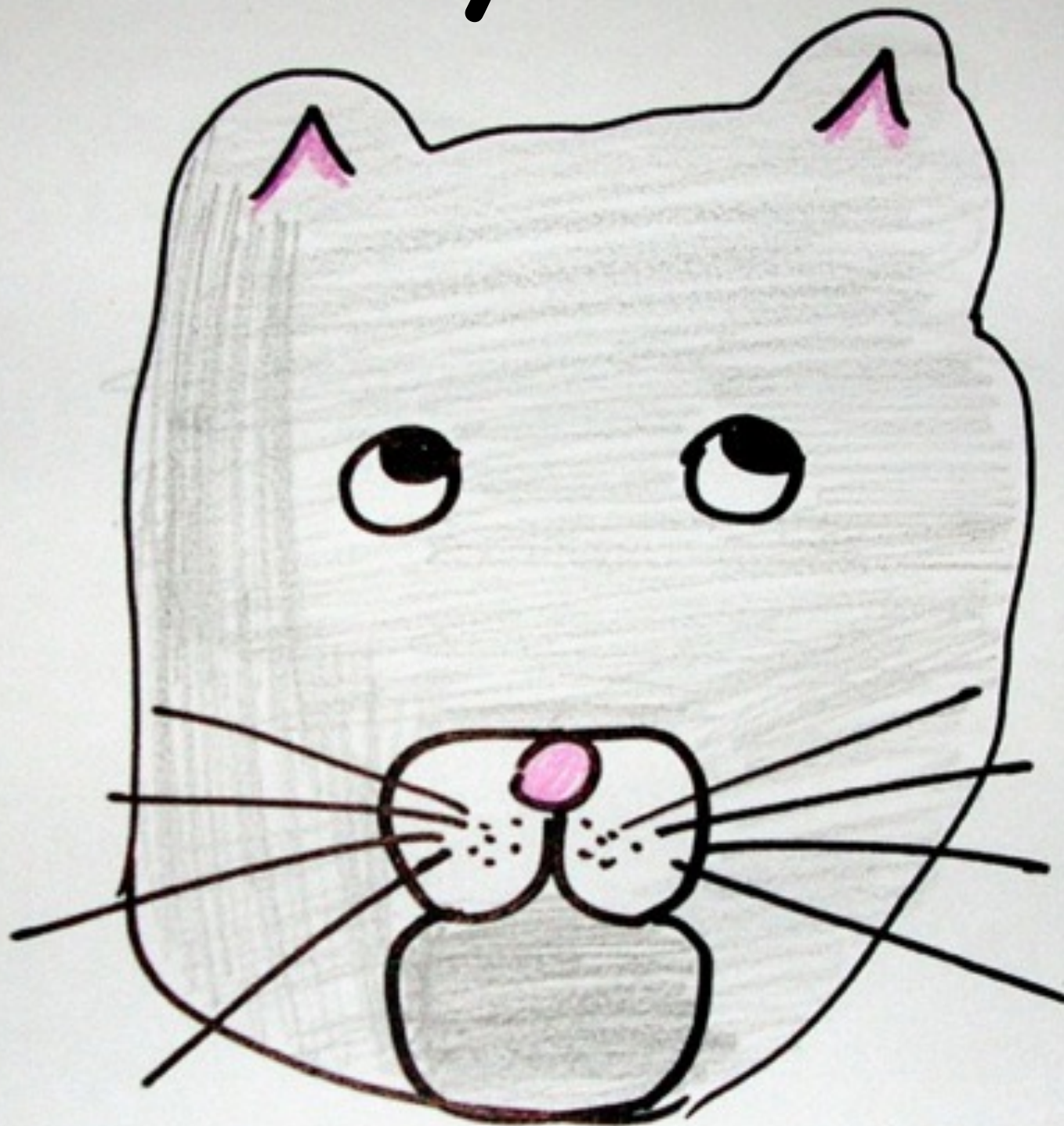
<https://www.youtube.com/user/simonscat>

*Simon's  
Cat*



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# Draw your cats.





# Grumpy Cat











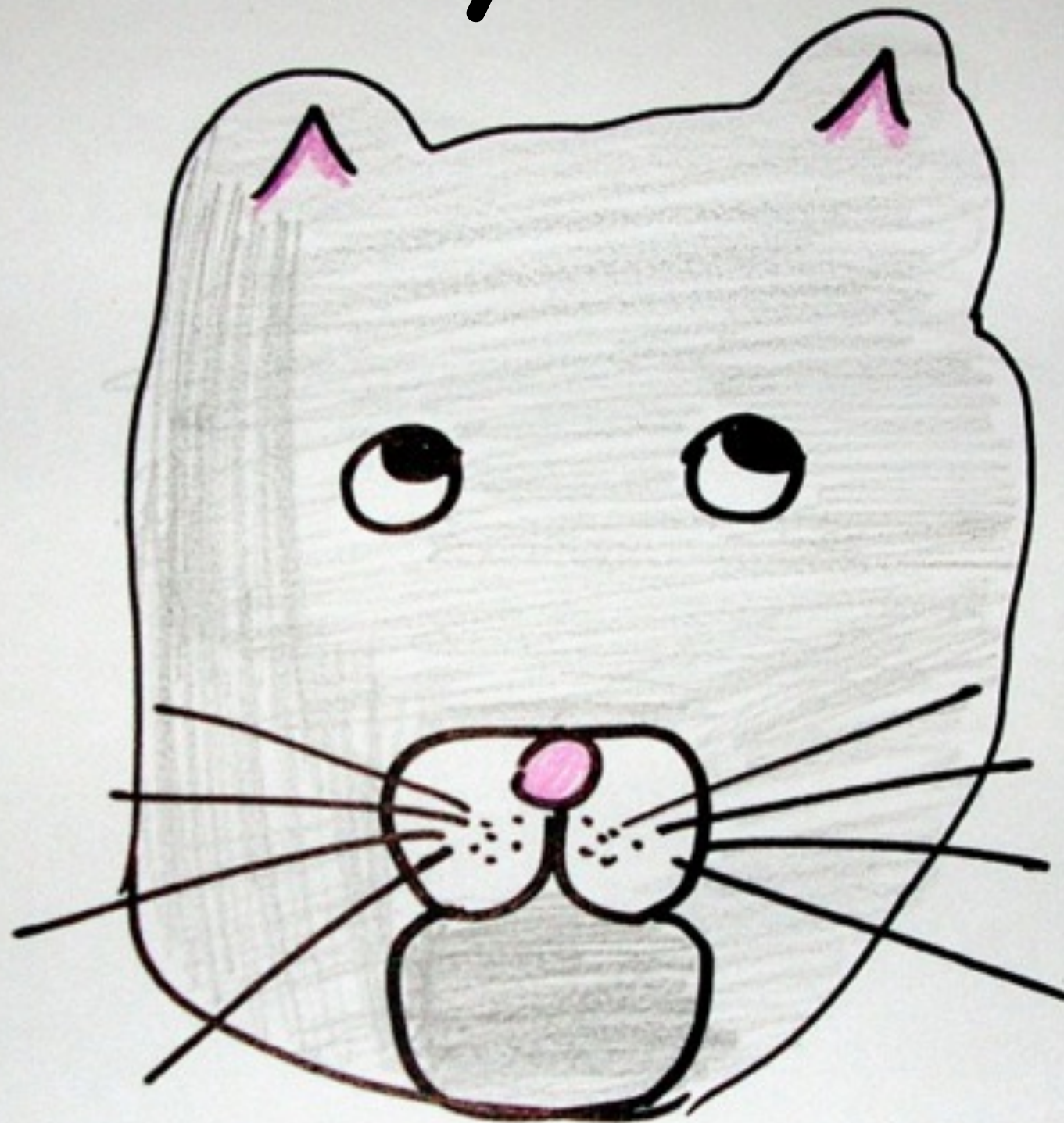
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# Draw your cats.





**Cat Herding**  
Over the life of a  
project or team









# Over the life of project or team



- Build trust, communication skills BEFORE moving to the harder tasks.
- Use a process that supports communication and sustains energy.
  - If you don't communicate...
- Agile does this well, but it's not the only way.
- Involve people in process of creation.
- Stakeholder communication plan





Cat Herding  
Preparing a  
Workshop



# Learn about the participants



- Interview stakeholders 1-1 beforehand
- Get to real goals
- Use those to shape workshops





“My favorite thing is pain. I try to get my stakeholders to selfish as quickly as possible. I'm going to try to ease stakeholders' pain with design solutions. I'm going to try to overlap my solution with easing their pain as much as I can.”

**Dan Willis @uxcrank**

***Not everyone may  
agree yet on the real  
problem you're  
trying to solve.***





***Know how you want to end.***



***Choose the tools most likely to get you there.***



# Plan the Time

## The Flow of a Good Workshop



- Warm up, build trust
- Scope the challenge for the day
- Explore the problem
- Break (give yourself time to think!)
- Generate possible solutions
- Filter
- Next steps

# Planning for Large Groups



- I like sub-groups of 3-4.
  - May want to assign ahead of time.
- Break up the problem into subsets for each group, OR
- Have each group tackle the same problem and present solutions to each other.
- You'll probably want co-facilitators.



# Know Your Job Description



- Master of Ceremonies
- Manage the clock
- Manage the energy of the room
- Make sure listening is happening
- Keep end goal in view, adapt if needed to get there
- Be curious and learn
  - Come expecting your own “Aha” moments.
- Consider a partner to help with workshop logistics so you can focus on ideas.

# ***Facilitating a Workshop***

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# Introduction



- Lay out the process, but don't give away too much.
- Connect today's workshop with big picture strategic goals – WHY we're here.
- Frame the problem we've got to solve.
- Describe the end goal for today's workshop. What will we leave with?
- Ground rules?

# Warm Up



- Introduce everyone.
- Some sort of icebreaker can be helpful, even if you work together every day.



# ***Explore the Problem***







**Mix Individual and Group Work**

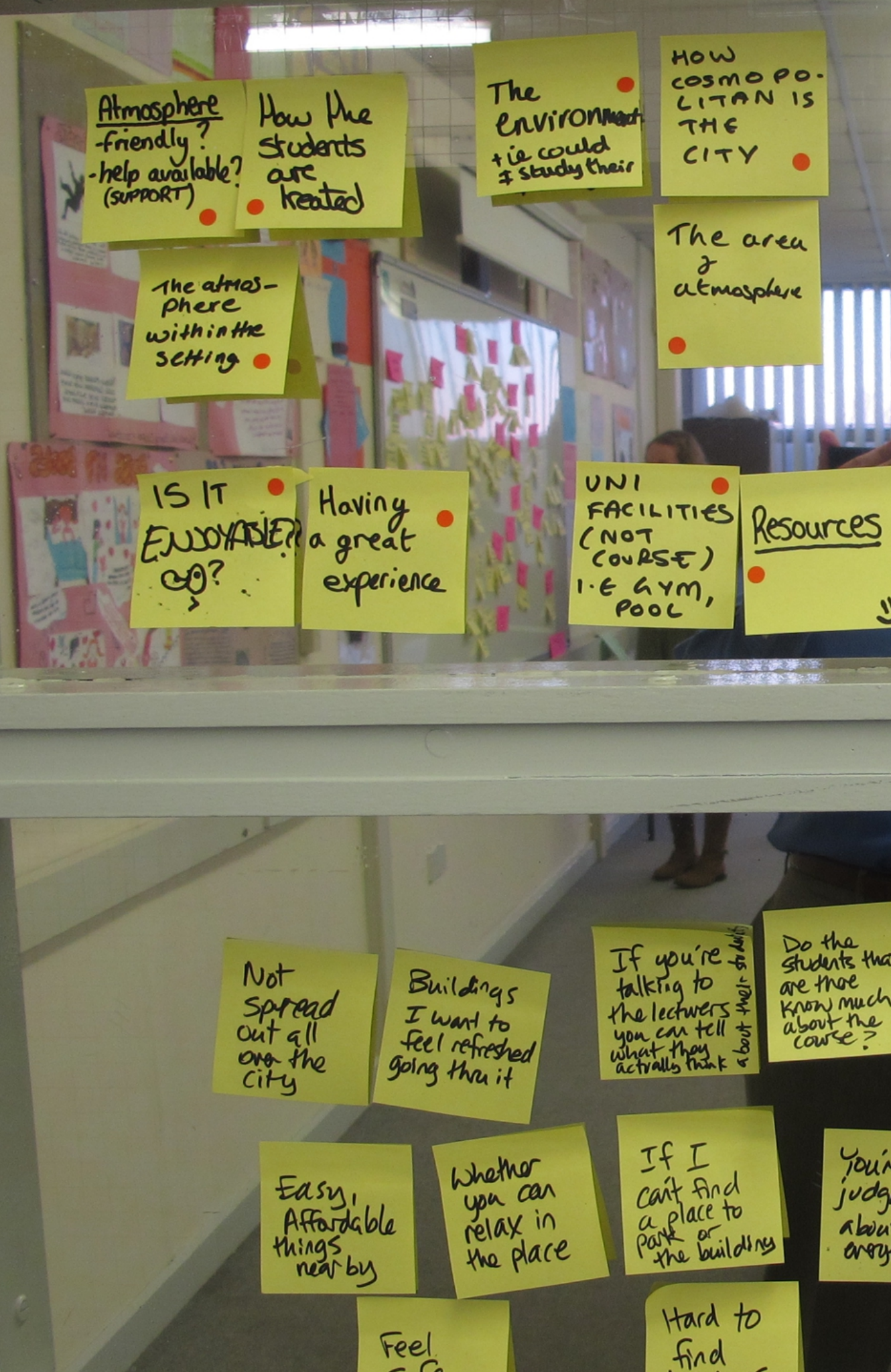
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# "KJ" Method



1. Gather 6-10 people
2. Ask a focus question
3. Put answers on Post-it<sup>®</sup> notes
4. Put Post-it<sup>®</sup> notes on the wall
5. Group similar items
6. Discuss & Name the groups
7. Vote on priorities





Step 4 of 9 10:36 Next

4 College #2: Go to [Oxford College of Emory's website \[click here\]](#). Same questions as before: Have you heard of this school before? If so, what's your impression (good or bad) of this school?

oxford.emory.edu

EMORY | OXFORD COLLEGE

OXFORD RESOURCES SCHOOLS LI

Oxford Direct Previous Remember: Tell us what you're thinking Help

Oxford College SEARCH

A DISTINCTIVE PLACE ADMISSION ACADEMICS FINANCIAL AID LIFE AT OXFORD ATHLETICS GIVE TO OXFORD

Prospective Students

Current Students

Faculty & Staff

Alumni & Friends

Parents & Families

Orientation

OXFORD NEWS

**Postcards to Oxford: Hello from two continents and an island**

Kevin Quarmby, assistant professor of English, has spent the summer immersed in endeavors surrounding Shakespearean studies, his chief focus of scholarship. Here he sends postcards from London, UK; Pforzheim Germany; Vermillion, South Dakota; Hamilton

OXFORD EVENTS

**Orientation for incoming international students**  
Mon., August 17 - Thu., August 20

**New Student Orientation**  
Fri., August 21 - Tue., August 25

**Classes Begin**  
Wed., August 26

User Testing

11:22 25:30

1.0x Send Video

- 0:16 "I don't know what I want to go into, but I did really well on my ACT, so I want to make sure that I am going somewhere that is really going to challenge me and will give me the opportunity to look at a lot of options and look at what I want to do."
- 0:42 "I've never actually heard of Davidson College before, I'm from Michigan so I am not familiar with this one."
- 0:53 College #1: Davidson
- 1:02 "This is a weird thing, but I love that it just says Davidson up at the top, I think its very modern and interesting."
- 1:24 "I'm really interested in leadership opportunities, any sort of student government, anything that sort of fits in the realm is interesting to me, and also doing service projects is interesting to me."
- 1:44 "Small classes is nice."
- 1:49 "Fast Facts, there we go. This is really handy right here on the side, just all the information I want, o great, leadership is right here."
- 1:56 "Charlotte North Carolina, oh my gosh, I love charlotte north carolina, I've been there before. I think its beautiful, that's a great location."
- 2:48 "90% of kids live on campus which is good because I want to live on campus."
- 2:57 "15 class size, oh my gosh."
- 3:09 "Major options are going to be smaller, but that's okay."
- 3:24 "The stuff on the side here is very helpful, oh I want to study abroad too, that's great."
- 3:35 "I want to look at some sort of Biology or English, one or the other. But I am also interested in anthropology and potentially some sort of art."
- 4:11 "Classics? I'm not sure what that is but that's alright."
- 4:12 "Dance Minor, oh that's good. I want to dance too, that's really helpful actually."

# Watch Usability Tests

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# Ad-Hoc Personas

- \* FAC
- \* RESEARCH
- \* BIO MAJOR
- \* "OUTDOORSH"
- \* CAREER PATH?

"COLEEN"

35 y.o.

MOTHER OF 2

INTERESTED IN EDP →

ALREADY ATTENDED 4 COLLEGES  
OPTIONS

\* FINANCIAL STRAIN \$\$\$?

\* TIME CONSTRAINT.

MAY NOT HAVE

"LIFE EXPERIENCE"





## ***Design Card Sort***

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# ***Generate Solutions***

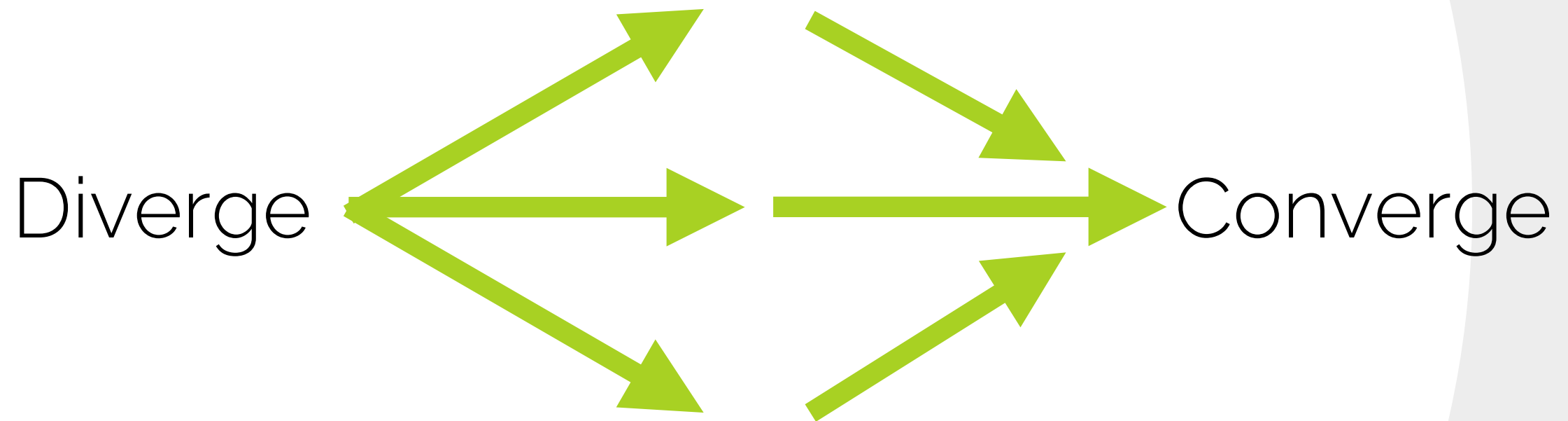


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# Generate Solutions



It can be anything,  
but at the end of the day  
**it has to be something.**

# Better Brainstorming



- I'm sorry but there are bad ideas.  
**I have them all the time.**
- Create comfortable distance.
- Person  $\neq$  Idea.
- You have to get through the less good ideas to get to the better ideas.



# Better Brainstorming



- Brainstorm individually first.
  - Write answers on sticky notes.
  - Sketch or storyboard.
  - Generate several ideas quickly.
  - Short timeframe (3-7 minutes)
- Create distance
  - Put them on the wall
  - Explain to a partner, have partner describe
  - Partner builds on what you sketched, creating next step

***Don't stop at the  
first good idea.***

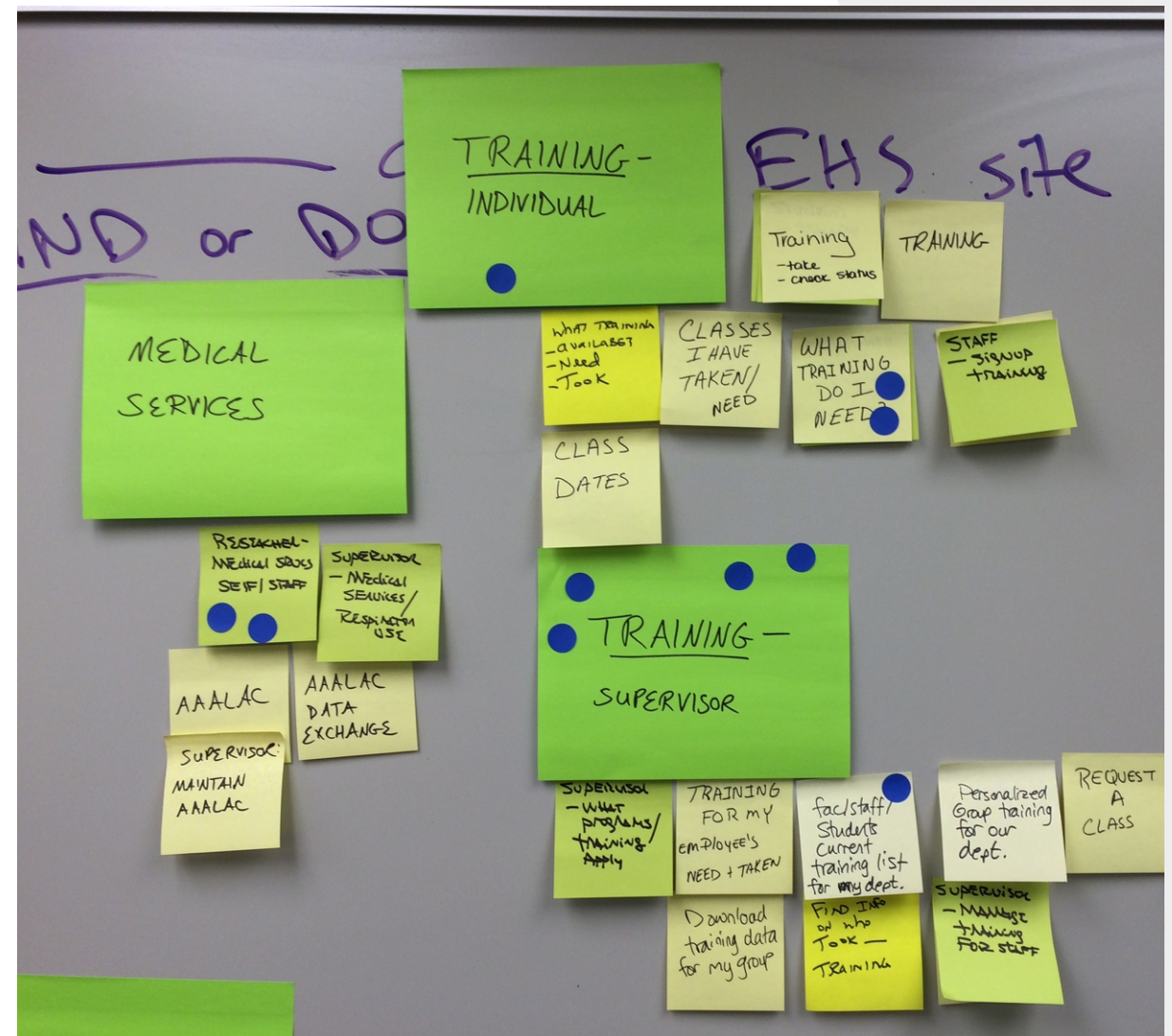


# Filter first, then discuss.



Give the group some way to prioritize, like

- Voting in KJ sessions
- Sub-group selects one idea to present to rest of the group
- Whole group selects ideas to move forward to next stage







curio ~~comu~~ active lifestyle

HEADING

around margins

For other heading

Prospective Students

Current Students

Alumni, Parents

Two alumni talking for an hour about rare fruit trees. (now)

Benji

FALCONS  
TPHP  
CROSS COUNTRY

Jenny



***NOT you in front of  
a flipchart writing  
down everything  
people blurt out.***





Facilitating  
Discussion



# Facilitating Discussion



- Remember your job as listener #1
- Use artifacts to focus discussion
- Don't let the HIPPO or extroverts control the discussion
- Help your team learn to argue well
- Time is your commodity
- Parking lot for things you need to dig into at another time





UNION

NEW DOMINION BOOKSHOP  
EST. 1924

Bliss  
Massage

openQ

My  
Chocolate  
Shope

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***Not all cats are like you.***



# The Four Temperaments



<b>Guardian (SJ)</b> [M 43%, F 50%]	<b>Idealist (NF)</b> [M 14%, F 17%]
<b>Artisan (SP)</b> [M 21%, F 22%]	<b>Rational (NT)</b> [M 22%, F 11%]



# The Four Temperaments



# The Four Temperaments



<p><b>Scotty(SJ)</b></p> <p>Outline the game plan. Remind where you are in the process.</p>	<p><b>Bones (NF)</b></p> <p>Help them get comfortable with disagreement. Enlist their help.</p>
<p><b>Kirk (SP)</b></p> <p>Keep it moving, bias to action – let's make something!</p>	<p><b>Spock (NT)</b></p> <p>Connect what you're doing to the big picture.</p>



# Extroverts & Introverts



## ■ Quiet cats (Introverts)

- Send some “think about these ahead of time” questions beforehand.
- Individual brainstorming during workshop.

## ■ Noisy cats (Extroverts)

- Let them talk out their ideas with a partner or sub-group.
- Structure who gets to talk when.

# Communication Skills

E	I	S	N
<p>Need a good verbal presentation</p> <p>Want to engage you to learn about the project; allow for questions, interruptions, dialogue</p> <p>May decide quickly and verbally; watch for this and do not "oversell"</p> <p>Cover the major points at a fast pace; do not go into too much detail</p> <p>Do not presume that an E will remember you next week; use reminders like phone calls, mailings, updates; this feeds the E need for variety, contact, action</p> <p>E's want to do something now about an external need or a crisis; be ready to deliver</p>	<p>Need a good written proposal to review</p> <p>Need time to reflect about detail or implications of a project</p> <p>Do not usually decide quickly unless they have thought it through beforehand</p> <p>Should not be bothered too much with phone calls, literature, updates; tell him/her in advance about next planned contact</p> <p>Even in crisis or urgent needs, I's will take time to do the right thing after deliberating; do not rush</p>	<p>Begin with facts, build to "big picture"</p> <p>Use simple, practical examples</p> <p>Emphasize implementation, the next step</p> <p>See systems as a number of facts, projects</p> <p>Stay in here-and-now</p>	<p>Begin with "big picture", fill in facts</p> <p>Make connections between facts and ideas</p> <p>Comment on unseen implications, future projections</p> <p>Discuss project as part of system</p> <p>Show interest in creative ideas or enthusiasms</p>
T	F	J	P
<p>What you say counts more than how you say it</p>	<p>How you say it counts more than what you say</p>	<p>Justify project through precedent</p>	<p>Allow for last-minute adjustments</p>



<p>action</p> <p>E's want to do something now about an external need or a crisis; be ready to deliver</p>			
<b>T</b>	<b>F</b>	<b>J</b>	<b>P</b>
<p>What you say counts more than how you say it</p> <p>Be logical, researched</p> <p>Be low-key, conservative, businesslike</p> <p>Emphasize soundness, reliability, statistics</p> <p>Avoid generalizations, repetition, incoherence</p>	<p>How you say it counts more than what you say</p> <p>Emphasize human benefits</p> <p>Use eye contact, smile, be warm and personal</p> <p>Support service or project with first-hand testimonials, personal feedback</p> <p>Show genuine interest in the client as a person</p>	<p>Justify project through precedent</p> <p>No surprises</p> <p>Find out the schedules, priorities, criteria, goals of the client and stick to them</p> <p>Stay organized</p> <p>Give feedback so the J "stays on track" towards goals</p>	<p>Allow for last-minute adjustments</p> <p>Concentrate on keeping P's present adaptability, options</p> <p>Diplomaticcally remind P that a decision must be made within certain time constraints</p> <p>Allow time for enjoyment</p>

# Next Steps



- Reconnect today's work to strategic goals.
- Describe how you'll use today's results, and when they'll see something next.
- Describe next actions clearly, with a time when you will regroup.
- Assign an individual owner to every action.

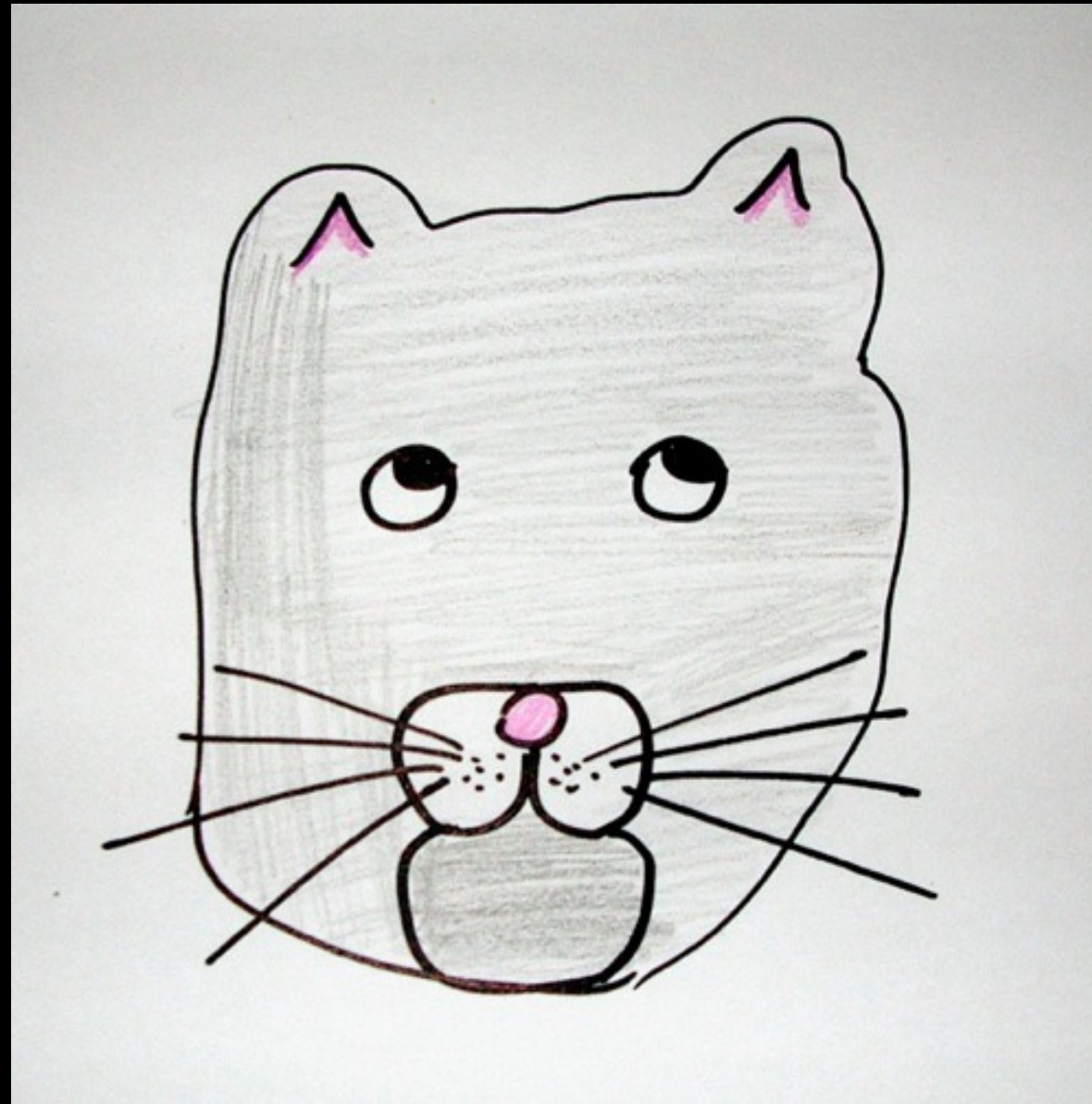


***Practice with friends.***



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What about  
your cats?





# Thanks!



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