



# Open Space Training

|                                       |    |
|---------------------------------------|----|
| Introduction                          | 4  |
| The Basics of Open Space              | 5  |
| Open Space at its Core                | 6  |
| Open Space is a Game                  | 7  |
| The Principles of Open Space          | 8  |
| Prepare to Be Surprised               | 8  |
| One Law:                              | 8  |
| The Law of Two Feet                   | 8  |
| Why and When to Use Open Space        | 9  |
| About Your Trainer: Robert Richman    | 10 |
| The Roles (Players in the Game)       | 11 |
| Open Space Roles                      | 11 |
| The Sponsor:                          | 12 |
| How To Pitch an Executive or Sponsor. | 13 |
| The Sponsor Picks the Theme           | 15 |
| Craft the Invitation                  | 16 |
| Determine the Location                | 17 |
| Room setup                            | 18 |
| Timeline                              | 19 |
| Room Set up - Visual                  | 20 |
| Bulletin Board                        | 21 |
| Sticky System                         | 22 |
| The Marketplace                       | 23 |
| Large Group Marketplace               | 24 |
| Posters to Set up.                    | 25 |
| The Schedule                          | 26 |
| Other Physical Elements:              | 27 |
| Initiating the Meeting                | 28 |
| During the Event: Holding Space       | 29 |
| The Report Form                       | 30 |
| The Closing Circle                    | 31 |
| The Proceedings                       | 32 |

|                           |    |
|---------------------------|----|
| Going into Action         | 33 |
| Storytelling, full circle | 34 |
| Checklists and Templates  | 35 |
| 1. First Email            | 36 |
| 3. Second Email           | 37 |
| 4. Second Email           | 38 |
| 4. 4th Email              | 39 |
| Sponsor Script:           | 40 |
| Facilitator Script        | 41 |
| 5. Reporting Template     | 45 |
| Master Checklist          | 46 |

## Introduction

Open Space is the greatest system of organizing people around ideas that I have ever come across.

If you haven't watched it yet, check out the video  
(Just go to YouTube type in "Open Space Robert Richman.").



Open Space was developed by Harrison Owen when he realized that he would spend a lot of time and money getting speakers for a conference, only to realize that people loved the coffee breaks the most.

### You can use it for:

- An engaging experience at your conference.
- A strategic planning session
- A company off-site
- An innovation exercise
- Crowdsourcing a goal or project.

## The Basics of Open Space

An open space event unleashes the best of ideas of your organization or conference. It's a well structured game combining strategy, team building and getting things done - all around issues people care about (and that's what creates engagement).



It begins in a large open space, with a circle of chairs.



A facilitator opens and sets the game.



People choose their own topics to lead and host.



Each host announces their idea then places it in the marketplace.



The marketplace is a wall of sessions with times and places.



They are highly engaged because they choose their sessions.



Sessions are filled with dynamic discussion, ideas and actions.



Even non-managers become leaders and take responsibility.



Insights and actions are put into a full report, by the next day!

## **Open Space at its Core**

Open space is as simple as this:

Sit in a Circle.

Create a Bulletin Board (to post topics).

Open up a Market Place (of ideas).

Go to work.

## Open Space is a Game

You don't have to know these concepts, but if you want to know more about why it works, this chapter is for you.

### Core Principles:

#### Co-creation

People take ownership for what they create. When you have people (at regular conferences) just sitting there, hearing information and waiting to be entertained, then they don't really own it. But if they co-create the experience they are highly engaged.

#### Experience Design

If you think of all your best learning, most of it likely happened as experiences with people (your jobs, relationships, events, etc). Rarely does it come from books or content. The open-space is a pre-fabricated experience design, with plenty of flexibility to make it unique to your people since they choose all the topics.

#### Game Dynamics

This is from the book *Reality is Broken* by Jane McGonigal, as cited in Dan Mezick's *The Culture Game*. They are the four principles of any great game.

1. Goal (Theme of the Open Space - Why we are all here)
2. Rules (How we play the game)
3. Feedback (We see who goes to what sessions, and where there is the most heat)
4. Opt-in (No one is forced to do anything)

#### 4 Happiness Factors

This is from *Delivering Happiness* by Tony Hsieh, who cited the themes in the field of Positive Psychology.

1. Perceived Progress (There is a clear beginning, middle and end)
2. Perceived Control (People get to choose which sessions they start or attend)
3. Strong Relationships (People bond according to their interests)
4. Shared Purpose (Everyone comes together, around a theme, without being forced)

## The Principles of Open Space

### **Whoever comes is the right people**

It's not about how many people, or who comes. It's the quality of conversation and interaction that makes the difference. If no one shows up, then the convener may think on their own, or join another group, or simply wait. "Some of the best conversations I ever had happened with me talking to myself." - Harrison Owen.

### **Wherever it happens is the right place**

Real learning and real progress happens will only take place when we move beyond our original agendas and convention-bound expectations. It is in moments of surprise when we grow.

### **Whatever happens is the only thing that could have**

The space is open. A great conversation can happen at the coffee area or others may start their own areas.

### **Whenever it starts is the right time**

Creativity and spirit don't pay attention to the clock. That's for work time.

### **When it's over, it's over**

Meetings usually stretch to the allotted time, but they don't have to. Notice when it's over and you can stop then.

### **Prepare to Be Surprised**

There's no way to explain this until you've experienced it.

## **One Law:**

### **The Law of Two Feet**

If you don't feel that you are learning or contributing, take your two feet and go elsewhere.



## Why and When to Use Open Space

It is a self-organizing practice of inner discipline and collective activity which releases the inherent creativity and leadership in people. By inviting people to take responsibility for what they care about, Open Space establishes a marketplace of inquiry, reflection and learning, bringing out the best in both individuals and the whole.

- Where conflict is holding back the ability to change
- Where the situation is complex
- Where there is a high degree of diversity
- Where there is an urgent need to make speedy decisions
- Where all stakeholders are needed for good decisions to be made
- Where you have no preconceptions of what the outcomes should be

### Not for:

- Linear planning (like building a system that has very set criteria).
- When you desire a set outcome
- When you want to limit who can come
- When you want to force people to be there.

### PROBABLE OUTCOMES:

- Builds energy, commitment and shared leadership
- Participants accept responsibility for what does or doesn't happen
- Action plans and recommendations emerge from discussions as appropriate
- You create a record of the entire proceedings as you go along

### GROUP SIZE:

To date, we know that Open Space accommodates groups from 5 to 1500 people. It can be run for a couple of hours to 3 or more days; consecutively or over time; at one site or at multiple sites connected by computer and/or phone and video. The longer the space is open, the more transformative the outcomes.

### REMEMBER:

An open-space must always be "opt-in." No one can be forced to go. It is only for the willing.

## About Your Trainer: Robert Richman



Robert Richman is the author of the [Culture Blueprint](#) a systematic guide to building the high-performance workplace.

He was a manager and culture strategist at [Zappos.com](#) and co-founded Zappos Insights, an innovative program focused on educating companies on the secrets behind its game-changing employee culture. He took Zappos Insights from an idea to a multimillion dollar business line. Robert trained under the founder of open space technology - Harrison Owen.

Robert has spoken to and consulted for Google, Toyota, Eli Lilly, Whole Foods, Intuit and many other companies. He developed the [Xpill](#), a pill and process that helps people break through their own blocks and access the power of the unconscious mind.

He's also a big fan of Improv comedy, the Muppets, and exceptional coffee.

## The Roles (Players in the Game)

### Open Space Roles

#### **Sponsor**

This is the highest authorized person. They give permission to the group to convene about whatever they deem important and that they may say anything they like. It's important to convey safety.

#### **Facilitator**

A 3rd party outsider who runs the open space.

#### **Assistants**

People who can help with all logistics.

#### **Convener**

A person who brings up a topic and puts it on the board. This person is willing to lead the discussion and report the results (or delegate that function). They do not have to have answers to the topic.

#### **Attendee**

Someone who attends a session who is willing either to contribute or to learn.

#### **Bumble Bee**

Someone who goes to multiple sessions, asking questions, giving ideas, cross-pollinating information.

#### **Butterfly**

Someone who stands to the side, perhaps alone. They are part of holding the space.

## The Sponsor:

The sponsor is the person who is authorizing the company to meet and talk openly.

### **For the Sponsor to work well, it is essential that:**

- A person with substantial formal authority is in the role.
- This person is willing to occupy the Sponsor role completely, by taking up all the tasks that come with it.

### **The Sponsor completes the following activities before during and after the event:** **Before:**

- Work with the Coach and Facilitator to bring people together to craft the Theme.
- Draft and issue the Invitation.
- Engage in storytelling about the event and the purpose of it.

### **During:**

- Welcome all participants.
- Communicate the opportunities and threats that the organization is facing.
- Signal that the work of the meeting is extremely important.
- Introduce the Facilitator and then hand off administration of the event.
- Participate in the event - Going from session to session, mainly watching.

### **After:**

- Put the Proceedings into everyone's hands, typically by sending an email with a link to the document.
- Call people together to examine *and immediately act upon* the Proceedings.
- Engage in storytelling that supports the ongoing aims of Agile adoption.

It is essential that the Sponsor and other formally authorized leaders continuously signal strong support for the entire process. The primary way to do that is to act, without delay, on the issues that the Proceedings identify.

## How To Pitch an Executive or Sponsor.

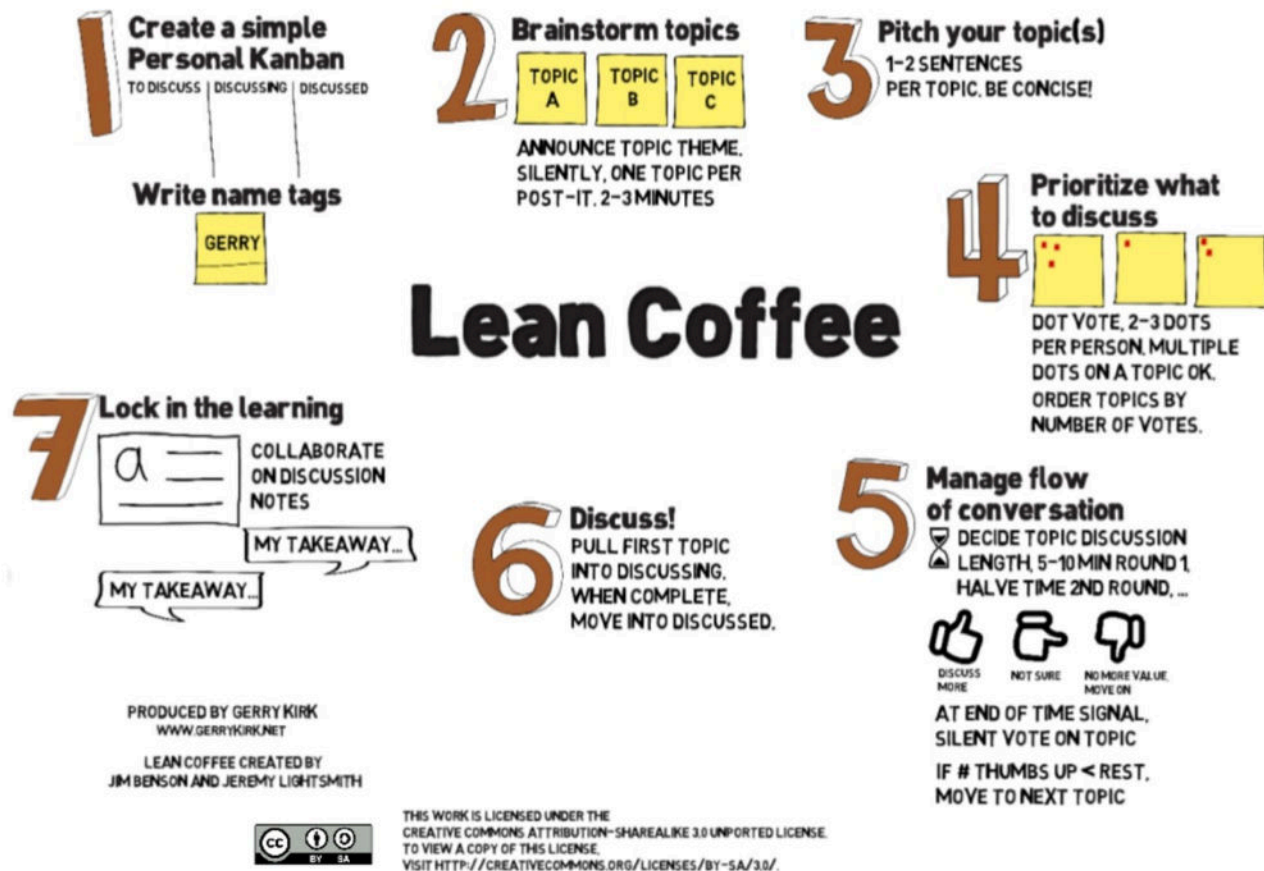
You may need to get “buy-in” on running an open space event. That can be in the form of permission and/or resources. Here are a few things you can do:

### 1. Send them videos

Google “Open Space Technology” and see the videos that most inspire you. You can use mine as well if you google my name with it.

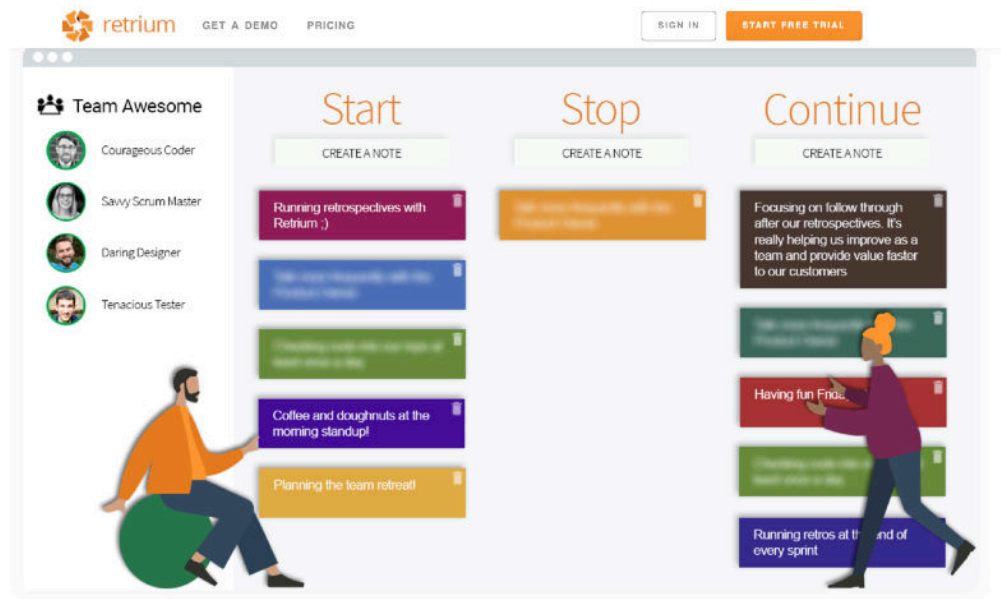
### 2. Run a small open space with the leadership team.

This is a practice called “Lean Coffee” when it’s a small group. The process is very simple. You have each person bring up the topic they’d like to discuss. You can do this as a basic Kanban board with sticky notes:

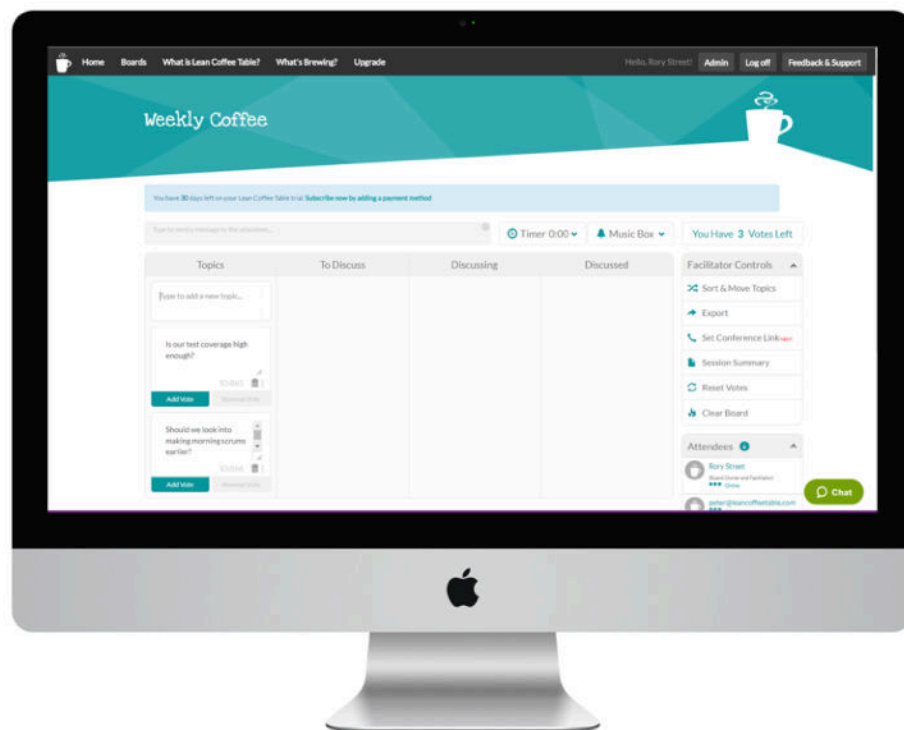


## Open Space Training

Or you can also run it virtually with Retrium:



Or with [LeandCoffeeTable.com](http://LeandCoffeeTable.com)



This will give them a taste for how engaging it is.

## The Sponsor Picks the Theme

### What is a theme?

The theme is what focuses the conversation, in the form of a question.

Not all open spaces have themes. You can use one if:

- You'd like to focus the conversations on a highly relevant topic
- You have a goal to accomplish. You know the What and Everyone is there to figure out the how.  
For example: "How do we become the market leader in education?"

If you have a real deadline, this can be useful as well. For example:

"How can we launch our 2.0 software by July 31st?"

Make sure that it's once sentence, in the form of a question to open the space.

### What to do with the theme

Discuss the theme with any necessary stakeholders (Leadership team, board members, etc).

Run it by a few people in the organization to make sure it makes sense to them.

Then the theme is used to craft an invitation.

## Craft the Invitation

### The Best Invitations are:

Provocative    Imaginative    Open Ended    Simple

### Consider:

- The purpose
- The emotion
- The why
- Who is needed for this? Who else?
- When and where will this happen?
- What will happen as a result of this?
- Is there another meeting planned after it?
- What will come of the report?

### The Theme:

Everything focuses on the theme, in the form of a question.

(very broad)

"How do can we be the best software company in the world?"

(narrower)

"How can we integrate our values (Openness, Optimism, Ownership) into everything we do?"

(focused)

"How do we deliver world class service while expanding from one product to six?"

The invitation is sent by email or in hard copy.

### It includes:

- Brief copy on what an open space is
- The theme
- Why this theme
- Why now?
- State clearly that all conversations are fair game
- No one has to come
- Date and Place (if decided. If not, then at least the date with location TBA)



## Determine the Location

The invitation is sent by email or in hard copy.

### Facilities Logistics

In order to provide enough room for an Open Space Technology meeting, you should secure a room that holds double your expected attendance. This means that in general, if you are expecting 50 people, you need a room that is rated for 100 “theatre style” at a minimum.

This is a minimum; the bigger the better. If you cannot get a room big enough, a room rated for at least the number you are expecting can do in a pinch, provided that you have a variety of breakout spaces available. These could include other rooms, nooks and crannies, gardens, restaurants and other meeting places.

It is essential that the room have one large blank wall that posters can be affixed to in some way. It pays to check this out in advance, as some facilities will not allow groups to stick things to the wall. It is also essential that the room be free of tables. Tables are not used in Open Space Technology meetings, even small ones, so it's important to find a room without a board room table in the middle. This is especially important for smaller meetings.

For meetings with large groups a quality sound system is important, as is a cordless microphone.

Non-essential, but useful room characteristics include:

- A squarish shape – the more square a room is, the easier it is to form a circle inside it.
- High ceilings – these help to reduce “cross talk” between groups.
- Windows – natural light helps to create a relaxed atmosphere.
- A door to the outside world – if your room has doors that lead outside, it is easier for people to take breaks in the fresh air. Also, groups may be tempted to use the outdoor space to meet if the weather is co-operative. This is a good thing!

## Room setup

Setup for an Open Space Technology meeting requires the following:

- Chairs in a circle in the middle of the room. One ring of chairs is ideal, concentric rings can be used if space is tight, but one should avoid more than two rings of chairs. Make sure there are lots of spaces for people from the back rows to get to the middle of the circle.
- A couple of tables either in the room or outside for food to be served on.
- One large blank wall kept free of obstacles so that people can reach it to post their agenda items.
- Breakout rooms should be free of tables and should have smaller circles of chairs arranged in a circle.

## What about food?

Ideally I like to encourage groups to eat and work at the same time. This means that at 12:00 or so, a buffet should magically appear which can stay out for a while, allowing people to grab food when they can. The food should be somewhat portable and not too prone to spills. Soup can sometimes work, but it can also be a problem. Sandwiches are ideal. Provide coffee and tea and snacks in the morning and more in the afternoon.

## Timeline

Here is the timeline of events, for a corporate open space.

### Open Space Time Line

| Stage                   | Time                      | Description  |
|-------------------------|---------------------------|--|
| Planning                | 3 weeks out               | Discussing the strategy, the open questions and how everything will be communicated  |
| Communications          | Every week before         | Building up the anticipation, sending information out about the Open Space   |
| Coaching                | Throughout the engagement | Especially in regards to the opening speech by leadership.   |
| Open Space Preparations | 3 hrs, 1 day before OS    | All the logistics, signage, and materials  |
| Open Space Meeting      | 1/2 Day                   |  |
| Report Production       | Day after                 | Preparing the print and digital report for distribution  |
| Report Review           | 3 hr facilitated meeting  | Trend analysis finding places for decisions, authorizations, de-authorizations, as well as new ideas and actions to support                          |
| Communications          | The next week             | The letters, calls or speeches to communicate the results and what happens next.   |
| Action Period           | 90 day or 6 month period  | A period of play and experimentation, ideally run as sprints with kanban as the method of tracking and communication. Stories of success are shared. |

## Room Set up - Visual

Ideally there is a separate big circle and breakout areas. But you can use the chairs from the big circle to form the meet up areas. Ideally keep everyone in the same room.





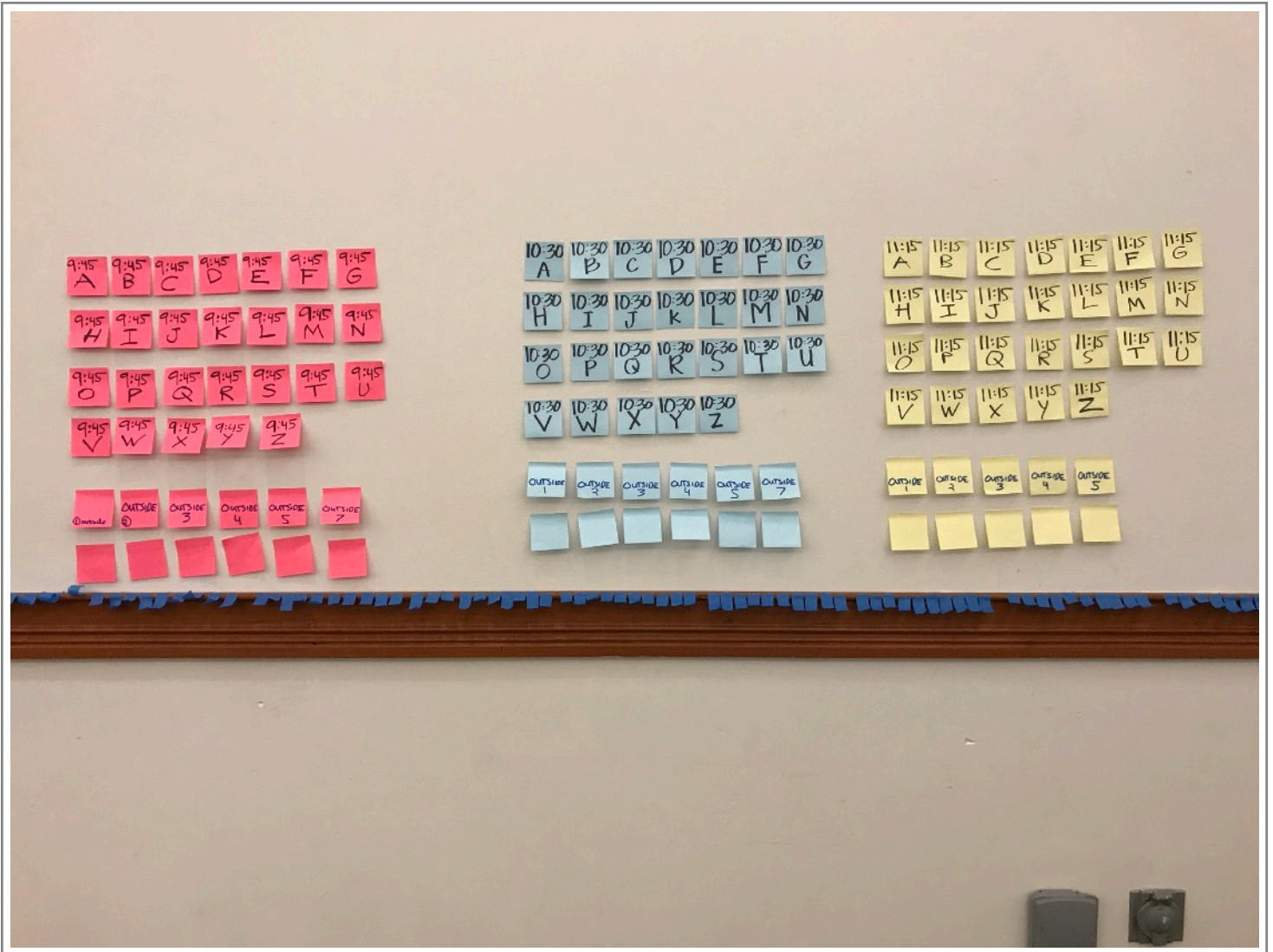
## Bulletin Board

This is the set up for the sessions before people have announced their topics.



## Sticky System

Having Stickies that show the area and time make it easy to keep track of how many sessions are open, and for balancing the number per breakout time.





## The Marketplace

The bulletin board turns into the marketplace of conversations.



## Large Group Marketplace

To show a large group the marketplace it can be helpful to have volunteers type them onto a spreadsheet and project them up on the wall (or to multiple rooms).

| AREA                      | 1   | 2  | 3   | 4  | 5  | 6   | 7  | 8  | 9   | 10   |
|---------------------------|---|--|---|--|--|---|--|--|---|--|
| <b>Session 1<br/>2:50</b> | How can we spend more time on creating value for customers? - Matthijs    | How can we create an awesome (engineering) workspace? Eelco                          | How to get 1.200 Curr ACC "jives" ASAP filled with customer names / addresses, etc. - Etrieda                           | How we leverage our payment request feature toward our business clients? - Niels           | How should we inform our customer his / her salary arrived? - Ron                      | How can we make direct debits "instant"? - Jyo  | How implement fingerprint payments? - David P  | What tech challenges must be resolved before Orange Bridge? Martyn   | How can we align activities between tribes? - Niece   | When do we see MY ING in English   |
| <b>Session<br/>3:30</b>   | How to start/grow continuous improvement - Risk/Jan                       | What is the fastest way to migrate NPS2 CMS - Rene                                   | How do we get the scrum teams to acknowledge their responsibility towards processes / LCM / Risk, etc. - Loet Van Eldik | Get rid of the idea success has many parents, failure is an orphan                         | How can we speed up delivery whilst working in unknown areas or unknown tools? - Paolo | How can we get rid of "Zišturing" - Jos   | How can we align business solutions with our Belgium colleagues in order to come up with one IT solution? - Branko | How can we become Dev-Ops vs. Ops-Dev Share knowledge - Said   | How can we create more and quicker value for our customers with model after 1 March? - Henrik | Agile performance reviews and benchmarks for judging why it worked?                              |
| <b>Session 3<br/>4:10</b> | How can we bring back the energy, fun and spirit into our work? - Ellen C | How to avoid mistakes other teams have already made? Share experience - Marcel       | Can we use cooperative gaming to improve collaboration in teams and between teams? - Danny                              | How can we get more insights in IT Knowledge (as CJE) - Kari                               | How could coaching help us create awesome payments? - Marielle                         | Why do we still focus on savings / loans CA separate? Why not one type of account to serve all? - Bob |  | Where to start with test automation - Sebastian  | How do we become better T-shaped engineers? - Albert  | How can we reduce multiple teams depending to implement a new feature - Shiva                    |
|                           | 11  | 12   | 13  | 14   | 15   | 16  | 17   | 18   | 19  | 20   |
| <b>Session 1<br/>2:50</b> | What can we destroy tomorrow? - Harry O.                                  | How can we communicate country-wide what the guilds there are? Michel K.             | How can we make the chapters work? - Michel L.  | How to know customer from customer   | Do we need (clear) core values for building a great tribe? - Amout M.                  | What features are awesome in payment? - Marie K.  | How can we make smoother the BILA and CHAIN testings? (coordination, know each other) Judit                        | How do we become a family? How can we move from I to we (Selova). How can we start to work together (Abelhay). How can you create an awesome team spirit - Amout |   | Customer 1st in customer service? waiting queue 20 min, incident 40% solved in 2 days - Bob Haan |
| <b>Session 2<br/>3:30</b> | Do you wanna be an artist? - Deepak                                       | How can we regain total ownership of our products to become really awesome. - Sander | How can we remove paper receipts? - Fran H.   |  | How can we do quick experiments in production. - Jacques                               | How do we get dollars out of data? - Harry  | How can we be a platform and still keep primary relationship? - Saloona  | Do we feel safe enough to experiment? - Paul   |   |  |
| <b>Session 3<br/>4:10</b> | How to get a strategic solution platform for SEPA DD by end of 2017 - Jyo | Switching team on a regular base - does that make us awesome?                        |   | How can we work agile when our external suppliers work with waterfall approach? - Peter H. | Why do I hardly know anyone from HSP-B wing by name?                                   |   |  |  |   |  |



NOTE: You can also use a conference app, AND/OR have the marketplace as a non-restricted Google sheet that anyone can see from their phones.



## Posters to Set up.

These are set up around the room.

If the group is large, a powerpoint can be used to display them on a screen during the opening circle.


**WHEREVER  
IT HAPPENS  
IS THE RIGHT  
PLACE**

**WHENEVER  
IT STARTS  
IS THE RIGHT  
TIME**

**WHOEVER  
COMES  
IS THE RIGHT  
PEOPLE**

**THE  
LAW of  
TWO FEET**

**WHEN  
IT'S OVER  
IT'S OVER**

  
**BUTTERFLIES**

  
**BUMBLE  
BEES**

## The Schedule

1/2 Day to 3 days

MINIMUM: 3.5 Hours

### Half Day Example Session

| Time    | Session                      |
|---------|------------------------------|
| 8:00am  | People walk in to the circle |
| 8:30am  | Sponsor begins               |
| 8:45am  | Facilitator begins           |
| 9:00am  | Bulletin Board is open       |
| 10:00am | First Session                |
| 10:45am | Break                        |
| 11:00am | Second Session               |
| 11:45am | Break                        |
| 12:00pm | Third Session                |
| 12:45pm | Break                        |
| 1:00pm  | Closing Circle               |

### Basic rules of thumb:

Breakout areas of about 10 people for small groups, 20 for above 300.

Assume an hour for everything before the first session.

Leave no more than 25 minutes for the closing circle.

## Other Physical Elements:

- Theme Sign
- Food and Coffee
- Chairs
- Tape
- Mic
- Bell chime
- Name tags
- Flip charts
- Pens, markers
- Laptops per session area or computer bank

NOTES:

## Initiating the Meeting

First the sponsor and facilitator sit, not talking.

They wait until all walk in and sit down.

Then the sponsor goes first

### **Sponsor covers:**

Reason we are convening

The theme and why

Authorizes the group to speak on anything

Commits to reading the report and taking action.

### **Basics of the facilitation**

1. Welcome
2. Focus the Group
3. State the Theme
4. Describe the Process
5. Create the Bulletin Board
6. Open the Marketplace
7. Get out of the way!

(See the script in the template section)

## During the Event: Holding Space

It even works if you don't know the language of the people."

### Holding Space:

1. Show Up
2. Be Present
3. Tell the Truth
4. Let it All Go

"Have a great time. Remember, if isn't fun, it isn't working."

### Self Preparation:

Your own state is very important because you are energetically holding space. Harrison would meditate for hours before it. What gets you centered?

NOTES:

## The Report Form

A very basic template (also see template section)

|                               |
|-------------------------------|
| <b>Topic:</b>                 |
| <b>Topic Champion:</b>        |
| <b>Those who will assist:</b> |
| <b>Insights / Next Steps:</b> |

## The Closing Circle

Everyone gathers in the circle at the end.



If the chairs were used for meeting areas, make sure to bring them back in time (you can enlist others to help)... The format is simple. Just open the space for people to share any reflections they'd like.

If the group is small enough (less than 50), they can simply had the mic around the circle. If it's a larger group, then either mic runners or a foam mic box is best. Make sure you sit down and let it happen. When it's done, say a few words and then hand it back to the sponsor who will close the meeting.

## The Proceedings

Make sure it gets printed, and include photos if you can.



**ING Payments Tribe**  
Open Space

Theme: How do we deliver awesome payments?



Confidential

ING Open Space 11/16

1



## Going into Action

Not all open spaces continue onto action, but it's a very powerful opportunity for it.

### **Prioritization (option 1):**

If it's important to prioritize the actions, then a final session can be done where sticker dots are given to each person (10 each), and they are allowed to allocate them to the topics on the bulletin board that they find the most important.

### **Prioritization (option 2):**

Another bulletin board of action items is created and then the sticker dots are used.

### **After the event:**

1. Make sure to get a hard copy of the proceedings in everyone's hands by next day.
2. Make sure the sponsors read the report, and/or assemble a team to find trends.
3. Use a Kanban Board to track action (virtual or physical)

### **Data to Notice in the Report:**

- Who are the leaders?
- What actions are outlined?
- Where does information need to be provided?
- What are low-hanging fruit?
- What are easy wins?
- Where do people not realize they are empowered?
- What context can be given to people? (e.g. if an idea has been tried before)

## **Storytelling, full circle**

### **Leader to Company**

The leader or sponsor will convey what they have learned, what they are doing and what they are not doing in relation to the report.

### **People to Leader**

Those who have taken action convey that to the leader.

### **Leader back to company**

Leader takes those stories and shares them back to the company. This is how culture feeds itself.

NOTE: A Communications director can help in this role.

## **Checklists and Templates**

1. First email
2. Second email
3. Sponsor Script
4. Facilitator Script
5. Reporting Template

# 1. First Email

---

Hey Everyone,

We have a very exciting opportunity to announce.  
At our gathering in May we will have our very first [Open Space Meeting](#), facilitated by \_\_\_\_\_.

To give you an idea of what you're in for, [check out the video here](#).



This will be your chance to participate in answering the central question we are pondering:

**How can we deliver the best in class experience?**

....for our customers  
....for our partners  
....for each other

Over the next few weeks I'd like you to consider this question and come to the session ready to discuss whatever it is you care about the most.

-Tooey

---

### 3. Second Email

---

Hello everyone!

**SUBJECT: A cowboy dancing with Shiva?**

We told you about Open Space,  
the event we will have at the Colorado Mastermind  
where YOU will pick our topics.

Are you curious about how this whole phenomenon started?

**Check out this video:**

<https://www.youtube.com/watch?v=APD7oQ3xrSA>



...

## 4. Second Email

SUBJECT: When magic happens...

Have you ever been to a conference where you're sitting for a long time, listening to speaker and after speaker and thinking to yourself, "When is dinner?"

Sometimes it's poor speaker selection. Sometimes the content is just relevant to some people and not to others. And sometimes we just want to be more active, move around, get into conversation.

That is the idea behind open space.

It was created by a person who used to throw conferences and saw on the feedback that everyone liked the coffee breaks more than anything. This format is like a structured coffee break where you get to move around, talk to people, and get into great conversations.

So there's just one question...

### **What do you want to talk about?**

What's interesting?

What's relevant?

What are you curious about?

Or think about this...

What have you learned that you're dying to share?

What problems have you solved that would help others?

What's the next level look like for you?

In order to participate, ALL YOU NEED IS TO BRING A QUESTION.

So think...

What is that for you?

How will you play?

What can you ask that will guide our conversations?

See you next week!

## 4. 4th Email

Hey everyone,

It's almost mastermind time!

Here's a recap of what we've shared (in case you've missed anything)

1. **Friday** we'll be having an open space event.
2. It's a pretty cool story - how it was created and all its uses.
3. **YOU will be creating the agenda**. That's right. We have NO IDEA what's going to happen. That's the beauty of it.
4. **Any topic** you find interesting or relevant, we can go there.
5. **This is all opt-in**. That means you can play at any level you'd like. You can be a leader, an attendee, you can bounce around, or you can just bounce! You'll see how you get to play the game in a way that suits you best.

Links:

<https://www.youtube.com/watch?v=APD7oQ3xrSA> (Open Space demo)

<https://www.youtube.com/watch?v=APD7oQ3xrSA> (Background of open space)

## Sponsor Script:

---

Thank you everyone for joining us here.

We've gathered to discuss How we can deliver a world class experience...

That means our customer experience,  
Our employee experience,  
Our partner experience.  
I mean every experience. Even when someone walks into our office.

(ADD PERSONAL NOTES OF WHY THIS IS IMPORTANT TO YOU)

You are free to discuss anything you'd like. No topic is off the table.

This is a chance to help shape the future of our company. My promise to you is that I will review the results of this, and I will take action where I feel it's appropriate.

There will be a lot of notes, so I will be looking for the themes. If there is something particular you want me address, just add my name or Steve's to that note and we will address that particular question.

As you can see there is no agenda except for our theme, which is a question I would like your help in answering. How can we deliver a world class experience?

---



## Facilitator Script

Sponsor goes first - why?

---

### “Welcome to open space”

(walk)

You may be wondering who I am... but that's irrelevant. Because today is not about me. It's about you. What you're passionate about, what you want to take responsibility for, and speaking the unspoken.

“Our theme for this gathering is \_\_\_\_\_.

Through the day, we are going to develop our best thoughts around the issues and opportunities associated with our theme.

#### **BLANK WALL**

As we start, I want you to notice the blank wall. That is our agenda. Just out of curiosity, how many times have you ever been to a meeting where the agenda was a completely blank wall?

(pause)

"To get 'from here to there' we will use a very simple mechanism.

### **The Marketplace**

#### Open Space Technology

Groups all over the world, some as large as 2000, regularly create their own agendas for multi-day meetings in less than one hour.

In a few moments, I will ask you to identify any issue or opportunity you see around our theme, give it a short title and write that down on the paper provided.

Then stand up in front of the group, say what your issue is, and post the paper on the wall.

Make sure that you have some real passion for this issue, and that it is not just a good idea for somebody else to do.

For you will be expected to take personal responsibility for the discussion.

- — Saying where and when the group will meet
  - — -convening the group
  - — -and reporting the results
- 

You may offer as many issues as you like, and if at the end of the day, you do not see your issue on the wall, there is exactly one person to complain to. Yourself.

You don't have to be an expert.

All you need is a question.

## Questions open up space.

No need for speech or explanation.

"Once all the issues are up, we will then open the Village Market Place, and everybody will be invited to come to the wall and attend as few or as many of the sessions as you'd like. From there on out you are in open space until our closing circle."

Though the space is truly open, there are some principles and one law that we need to cover:

**The Four Principles are:**

**Whoever comes is the right people**

Whoever is attracted to the same conversation are the people who can contribute most to that conversation—because they care. So they are exactly the ones—for the whole group-- who are capable of initiating action.

((What happens if no one shows up? )))

You could sit and feel hurt or angry. It could be a great idea but the wrong time.

Or the right time, but you're the only person who can deal with it.

You don't need even need to have people. You can sit and think about it, or just go to another group.

**Whatever happens is the only thing that could've happened.**

We are all limited by our own pasts and expectations. This principle acknowledges we'll all do our best to focus on NOW-- the present time and place-- and not get bogged down in what could've or should've happened.

**Whenever it starts is the right time**

The creative spirit has its own time, and our task is to make our best contribution and enter the flow of creativity when it starts.

When it's over, it's over

No need to keep rehashing things. When it's done, it's done.

**Butterflies**

may be off to the side. Seems they are doing nothing. But they are centers of non-action where silence can be enjoyed, or perhaps a new topic emerges.

**Bumblebees**

If at any time during our time together you find yourself in any situation where you are neither learning nor contributing, use your two feet, go someplace else.

**Law of Two Feet.**

If at any time during our time together you find yourself in any situation where you

are neither learning nor contributing, use your two feet, go someplace else.

## Be prepared to be surprised.

---

"Keeping the Four Principles in mind, along with the One Law, it is now time to get to work.

Along that line, there is one question to start. What are the issues and opportunities around our theme, for which you have real passion and will take genuine responsibility?

"Some of you may be finding a few conflicts, but it should be easy to work out. It is called negotiation. If you want to go to two groups meeting at the same time, find the group leaders and see if you can get them to merge their sessions or change their times. Of course, if they won't do that, you will just have to make a choice, but that is the way life is.

"As soon as you are ready, stand up where you are, read out your title, and tape it to the wall. Don't wait to be asked. Go when you are ready."

"While they are doing that, all the rest of you might also stand up and take a look at the various offerings. When you find one that interests you, where you could learn or contribute

### **We will have a closing session**

"From here on out -- you are on your own. As soon as your group is ready to go to work, go to it. We'll see you all back here at \_\_\_\_\_ pm for the closing Session.

---

## 5. Reporting Template

Using Google Sheets is very effective, everyone can type on the same document, and thus it will make it very easy to print quickly. And by using Sheets over Docs, people's cursors will not be effected. Just make sure to change it to portrait view dimensions.

**Open Space 2: Session #2 No...**

File Edit View Insert Format Slide Arrange

PRESENT SHARE

**Session 2 (2:00pm ET), Topic 2: Grnd Ball 3-4**  
**How can Pearson employees support their own children to achieve their goals?**  
**Penny Reeves and Jennifer Conway**

**Contributor Names:**

**Notes:**

- Penny hosted a session in Open space 1
  - Question is stemming from the Reconexus and sharing experiences/talents with students.
  - Would like to have her own children achieve their own goals. Are there resources for our kid
- FCC's are doing PenPal with the children of the FCCs.
- Would like to see inside support/network for families of kids with various needs.
  - Children with disabilities
  - Homework assistance/help - volunteer hours
- Would like to have school/student resources available for employees and families.
  - Khan Academy
  - Resources in the VL
  - Message boards
- Would like to have local summer camp and opportunities for children get togethers of employees.
- Would like college assistance for children of employees.
  - Can employees not using tuition reimbursement 'bank' tuition for family use?
  - College textbooks
  - Possible internship opportunities - shadowing, bring your child to work day
- Would like access to Special education help/advocates
- Idea: Pearson Parents in Neo
  - How can employees access and how do we know it is avail?

**Action Items:** What actions should be taken to address this? Who is going to own those actions?

- Coordinate with Open Space 1 (Penny and LalWanda) about the expansion of language and program to include OBL employees and families.
- Change the language the survey to include interests.
- Work with senior leadership to determine availability of volunteer hours and expansion of programs to Pearson OBL families (internship, job shadowing)
- House message boards with resources for OBL employees.

**DO NOT USE THIS SPACE**

# Master Checklist

## OPEN SPACE CHECKLIST

|                          | Date | Task  |
|--------------------------|------|---|
| <b>PLAN</b>              |      |   |
| <input type="checkbox"/> |      | Check open space criteria                                   |
| <input type="checkbox"/> |      | Set theme   |
| <input type="checkbox"/> |      | Set date of the event                                       |
| <input type="checkbox"/> |      | Select a space (where everyone can see each other, ideally) |
| <input type="checkbox"/> |      | Select food and drinks                                      |
| <input type="checkbox"/> |      | Create the invitation                                       |
| <input type="checkbox"/> |      | Send reminders  |
| <b>SUPPLIES</b>          |      |   |
| <input type="checkbox"/> |      | Masking tape  |
| <input type="checkbox"/> |      | Blank paper   |
| <input type="checkbox"/> |      | Markers   |
| <input type="checkbox"/> |      | Post its  |
| <input type="checkbox"/> |      | Clip boards   |
| <input type="checkbox"/> |      | Name tags   |
| <input type="checkbox"/> |      | Flip Charts   |
| <input type="checkbox"/> |      | Small circle stickers                                       |
| <input type="checkbox"/> |      | Pens  |
| <input type="checkbox"/> |      | Theme sign  |
| <input type="checkbox"/> |      | Principles signs  |
| <input type="checkbox"/> |      | Sound system or chime                                       |
| <input type="checkbox"/> |      | Mics and/or talking sticks                                  |

## Open Space Training

| BEFORE                   |  |   |
|--------------------------|--|---|
| <input type="checkbox"/> |  | Prep the sponsor  |
| <input type="checkbox"/> |  | Set up the circle   |
| <input type="checkbox"/> |  | Set up the bulletin board   |
| <input type="checkbox"/> |  | Name each breakout area   |
| <input type="checkbox"/> |  | Set up each area with flip charts and pens and markers              |
| <input type="checkbox"/> |  | Add a laptop to each area (or clipboards with proceedings template) |
| <input type="checkbox"/> |  | Set up name tags and welcome materials                              |
| <input type="checkbox"/> |  | Set up food   |
| <input type="checkbox"/> |  | Hang the signs  |
| <input type="checkbox"/> |  | Go over the facilitator script                                      |
| <input type="checkbox"/> |  | Center yourself   |

## Open Space Training

|                          |  |  |
|--------------------------|--|--|
| <b>DURING</b>            |  |  |
| <input type="checkbox"/> |  | Go over your script                            |
| <input type="checkbox"/> |  | Wait with the sponsor until everyone is seated |
| <input type="checkbox"/> |  | Have the sponsor speak                         |
| <input type="checkbox"/> |  | Walk in a circle silently to open the circle   |
| <input type="checkbox"/> |  | Go through script                              |
| <input type="checkbox"/> |  | Open the space                                 |
| <input type="checkbox"/> |  | Keep the space clean                           |
| <input type="checkbox"/> |  | Use the chime for start and end times          |
| <input type="checkbox"/> |  | Facilitate the closing circle                  |
| <b>AFTER</b>             |  |  |
| <input type="checkbox"/> |  | Copy and distribute proceedings                |
| <input type="checkbox"/> |  | Hold debrief meeting                           |
| <input type="checkbox"/> |  | Have the sponsor read the report               |
| <input type="checkbox"/> |  | Assemble trends team                           |
| <input type="checkbox"/> |  | Select quick wins                              |
| <input type="checkbox"/> |  | Communicate wins                               |