



HOW TO RUN A TEAM WHY DISCOVERY SESSION

When it comes time to discover and articulate a team why, follow these steps to run a discovery session. This is largely the cliff notes version of the best resource I've found on this subject. If you want to go deeper and really get all the best practices be sure to read it. [*Find Your Why: A Practical Guide for Discovering Purpose For You and Your Team*](#) By David Mead and Peter Docker.

1. Find a facilitator

Your facilitator doesn't need to be a professional. Just someone who has objectivity, genuine interest in the success of the group, and a capacity to ask non-leading questions. It could be the leader, but it often produces different results when it isn't. The facilitator is merely there to run the process, not dictate content. Sometimes a leader will drive the content even if they don't mean to.

2. Invite participants

You want to choose the people who truly represent the spirit of the team or organization, these are the "torch bearers," they don't have to be the top performers or even at the top of the hierarchy. As a general rule no more than 30 people should be invited.

It is better to have a critical mass of people who have been in the team or company for a long enough period of time to have stories to share. New people contribute something different to the process, they may see with fresh eyes, but won't have stories that contribute to the WHY.

When you invite them, you want to give them an overview of what will happen. And ask them for only two things:

- 1) Trust the process
- 2) Keep an open mind.

Not everyone will understand the need for or even care about the WHY of your team or company. Your job isn't to convince them, just invite them to be open.

Tell them the session includes three basic parts:

- 1) **Introducing the Power of Purpose:** We will explore the importance and impact of articulating a shared higher purpose as a group.
- 2) **Story Sharing:** You'll be asked to share your experience and stories of the team/organizations positive contributions to people over time, and the impact of those contributions.
- 3) **Drafting the Team Why:** The goal is to take these stories and themes that emerge and draft a purpose statement for the group that captures them.

3. Run The Discovery Session:

- Block at least 4 hours, 5 is better if you can get it.
- Arrange the room in a horse shoe or circles depending on the size
- Ensure you have slideshow technology to show "story prompts"
- Provide large easel pads for each group to capture story content and share

PART 1: SET THE CONTEXT (45 minutes)

Step 1: Leader Welcome (5 to 10 minutes)

The Leader should start the meeting before handing it over to the facilitator.

- *Thank them for being there:* It's amazing how much a thank you for something that is compulsory helps people show up.
- *Give permission to focus here:* Remind them that this is their work right now amidst everything else they have going on. Sometimes people need permission from leaders to set their "daily responsibilities" aside.
- *Frame the session:* Here the leader may wish to locate where this work lives in their life.

For example, if you are a team leader within a company you would want to link what you're doing to the company's purpose. If the company doesn't have a clearly articulated purpose, you can skip this.

If you're running this in a company, you may want to make distinctions between things like "vision," "mission," "purpose," "business goals," and your "WHY." Or how this work is designed to transcend and include those.

Consider showing the recommended sequence of elements in this order so they have context for the focus of today and how it relates to all the other elements you may already use.

1. **VISION:** *Why we exist, our contribution and intended impact*
2. **VALUES:** *How we concretely express the vision (rules of life together)*
3. **GOALS:** *What business metrics we want to achieve by when*
4. **STRATEGY:** *What initiatives and approaches will achieve those goals*
5. **STRUCTURE:** *Who we will organize in what way to support the strategy*

Each of these should be informed by the former. In this session, you are only focused on the first one—Vision or WHY:

Step 2: Facilitator Introduction (10 minutes)

The facilitator then takes over (if it isn't the leader running the session). They should share their WHY. Or if they haven't done that work, share any of the examples I've given in these trainings (Wolff Olins, Southwest Airlines, Aspen Heights, my personal or company WHY, etc.). Any of these are succinct, clear, and compelling. This shows them the output.

This is where the facilitator shares the importance of a team having a clear sense of WHY. Help the group understand that people don't follow or buy the WHAT of an organization, they are moved by the WHY. Perhaps share the Costco vs. Sam's Club example to indicate the power of WHY financially.

Alternatively, you could show any of the videos from this module that seem relevant and provide context. (Or you could show Simon Sinek's TED talk https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action)

Step 3: Conversation Prompt (10 minutes)

Have participants to pair up and respond to this question:

- If you think back to the time when you joined the organization, what inspired you most? What inspires you to keep coming back?

After a the time is up, have them return and ask each group to share one answer that come up.

PART 2: STORY SHARING (2 to 2.5 hours)

Break your gathering into three groups of people and ask them to respond to following prompt:

Prompt #1: (20 Minutes)

“Tell specific stories of when you felt most proud to work for this organization (or team, or group).”

- Before they begin to respond to this prompt, instruct them to capture the stories on the flip charts, just a word or two.
- Generalizations don't do much good “I was really proud of our last launch.” Instead tell them to share the stories of specific events with specific people and how it felt. “When Justin and I were racing to launch the product, we weren't sure we were going to make it and he and I stayed here till 1am, ordered pizza at midnight, became delirious, and made the deadline. It was exhausting but great to have a partner in the experience, we certainly learned a lot.” This is better.

Have the groups share with each other two to three stories (30 minutes).

Prompt #2: (20 Minutes)

“In each of your stories, what was the specific contribution your organization made to the lives of others?”

Follow the same instructions as above capturing the ideas, followed by 30 minutes of group sharing. Be sure to have them phrase the contributions as action words in the present tense, for example:

To engage
To build
To connect
To enrich
To inspire
To inform

Prompt #3 (15 Minutes)

“What did the contributions of your organization allow others to go on to do or be?”

Follow the same instructions as above capturing the ideas, followed by 15 to 20 minutes of group sharing.

The goal here is to capture the real human *impact* of the contributions from the stories above. (i.e. “we were able to build community,” or “help people feel more alive,” or “we spread important ideas,” etc.)

4. Draft Your Group WHY: (35 to 45 minutes)

Take the flip chart pages from PROMPT #2 with the contribution verbs and the flip chart pages with PROMPT #3 with the impact phrases post all of these at the front of the room.

Step 1: Produce “Candidate WHY Statements” (25 minutes)

Split the group into two equal size teams to draft candidate WHY statement for others to consider. They are to use all the material generated during the conversations and express it using the WHY formula

To _____ [CONTRIBUTION] _____ so that _____ [IMPACT] _____.

Be sure to spell out for them that PROMPT #1 and #2 serve to populate the CONTRIBUTION section, and PROMPT #3 is for the IMPACT section. They don't need to get hung up on dictionary definitions but rather the *feeling* is what matters.

Their goal is to create a why so compelling and simple that everyone in the room will say “let's use yours!”

Step 2: Present “Candidate WHY Statements” (10 minutes)

Each team presents (using no more than 2 minutes) the WHY statement with no explanation. They are allowed to link two of the stories surfaced to support their WHY, but nothing more.

Then everyone votes on which one is better. Sometimes it will be a combination of the two to create a third. Whatever the case, allow this to be a Draft, it should be about 75% of the way there.

Step #3: Finalize the WHY Statement (2 to 3 weeks)

After you have the agreed upon draft, assign a group, either the senior leaders, or a group of torch-bearers at any level to take this draft WHY statement and refine it over the next few weeks to finalize it.

The goal is to capture the visceral feeling of it rather than the exact words.

Next we move to the HOW or values.