Redesigning Routines.

facilitator’s guide

Joint routine workshop
Good day Ink’er!

Awesome that you are going to facilitate a routine workshop and welcome to your personal guide to executing a magical session. You will be helping your client to gain overview of their routine, to understand their behaviour and to create a new routine that is aligned with the company vision. “But how do I do this?” You might ask. Well, you have come to the right place. This manual provides you with all the information you need to prepare and facilitate the workshop. It contains:

- General information about routines. Your client might wanna hear this, so study up!
- A tool to help you choose the right workshop format. Every client is unique.
- A tool to select the right participants. Let’s get those early adopters in the room.
- A facilitator’s guide for the workshop. From material to instructions, we got you covered.

Cheers and good luck!
About routines.

Routines are “repetitive, recognizable patterns of interdependent actions that involve multiple actors”. They always work towards a goal and always happen between people.

While organisations and people try to describe what they do through ostensive representations of routines (checklists, procedures, artefacts), their actual behaviour is different (performative part of routines). It is driven by habits, beliefs and values, of which they are often unaware.

We need to understand these underlying processes before we can change our behaviour. This can be done by removing or creating triggers to provoke different behaviour. For example, by putting your phone in your bag and thus removing the visual cue, you will check your messages less.

The more challenging way is to replace an old habit with a new one. This is way more challenging, since you need to change your convictions and beliefs. But with great willpower, you can eventually succeed.

Most importantly, you need to experiment with the new routine and try out what works best!
Choose the right format.

Every client is unique and therefore you might need a different approach in different routine workshops. This flowchart will help you to decide which format is best for your client.

START HERE!

Is your client in the midst of a change process?

Yes

Go for the joint routines! Make sure to decide on the vision first.

No

Does your client want to reflect and feedback on employee behaviour?

Yes

Go for the individual routines! Make sure to decide on the vision first.

No

Your client is not ready for this workshop. Explain the added value of reflecting on routines.

Does your client want to focus on employees' individual routines?

Yes

Win the ultimate workshop! Your client is doing an awesome job. Offer to design a cool visual to share results.

No

Go for the individual routines workshop!

Does your client's employees have trouble to translate this vision to their daily work?

Yes

Relax! Your client is doing an awesome job. Offer to design a cool visual to share results.

No

Go for the individual routines workshop!

Did you already design a visual of the company vision?

Yes

No

Does your client's employees have trouble to change their own routines?

Yes

Go for the joint routines workshop!

No

Go for the individual routines workshop!

Every client is unique and therefore you might need a different approach in different routine workshops. This flowchart will help you to decide which format is best for your client.
Selecting participants.

Trying to redesign routines with employees who are in total denial or resistance, is like flogging a dead horse. You need change-willing people in your workshop. Together with your client, make a selection, using the personas below. Aim for a mix between people who are exploring or committed to the change. Feeling adventurous? Add one or two resistant participants.

“Business as usual”
“They don't really mean it”
“We have no budget”

“Here we go again”
“It used to be better”
“What are you doing to me?”

“I am learning new things”
“I have some ideas”
“Let’s try this”

“I have focus”
“What can I do to help?”
“How can we work on this?”

It's almost time for the real deal now. Make sure you gather all required materials on this page and you will be good to go.

- Visual of company vision
- A3 papers
- Post-its
- Pens
- Lighter
- 1x Old Routine Template A0
- 1x Empathy map A1
- 1x Value map A1
- 1x New Routine Template A0
- 1x Trigger List A1
- Closure Bucket
**Goal:** To prime participants to the topic of routines

**Instructions:**

1. Let the participants choose a personal vision or goal that they want to achieve.

2. Let them choose a routine that does not comply with that vision and let them write/draw it on their paper.

3. Let everyone share their routine. Discuss why it does not comply with their vision. “Why do you think you still do this anyway?”

4. Explain what routines are, what is needed to change them and why that is hard.

**Tips and remarks:**

Participants can choose routines from their personal life or work life. Try to discuss topics that will come back in the workshop: urgency to change, interdependencies in routines, underlying values and triggers.
Goal: To align participants on the vision and the routine to redesign

Instructions:

1. Discuss the company vision as the theme of the day. Use the visual.

2. Discuss which work routines fall under this vision. Choose one routine to redesign. “Which goal did you set, that you did not reach yet?”

3. Write down a one sentence description of the routine on the Old Routine Template. “How would you describe this routine in one sentence?”

Tips and remarks:

Make sure the participants recognize and understand the vision.
Make sure everyone is invested to change the chosen routine (urgency to change!).
3. Empathy.

**Goal:** To gain insight in the behaviour, thoughts and needs of employees

**Instructions:**

1. Let participants name a fictional character who could be their coworker (persona).
2. Let them write down characteristics on post-its and map them on the Empathy Map. Follow the order indicated on the Map. “What thoughts may this person not be willing to vocalize?”
3. Discuss the Empathy Map, draw conclusions on what kind of person the persona is.

**Tips and remarks:**
Keep the exercise light and fast, deep discussion here is not relevant (yet).
**Goal:** To get overview of the current (old) routine

**Instructions:**

1. Let participants write down actions on post-its and map them on the Old Routine Template.

2. Let participants indicate phases and interdependencies whenever possible. “During which actions are you dependent on someone/something else?”

3. Let participants plot an emotion line: indicate the emotion at each action with a dot, connect the dots with a line.

4. Let participants identify key actions. “Can you identify the most important actions in this routine?”

5. Take a picture of the template!

**Tips and remarks:**

Make sure participants write down phrases in the form of actions on Post-its: it must be something they can influence. Make use of visualisations like arrows or dolls to indicate effects and interdependencies between actions. It does not have to be perfect: save your time for the Value Map and New Routine.
Goal:
To discover the added value of actions and understand the underlying needs.

Instructions:

1. Take the Post-its with key actions and map them on the Value Map. Let participants instruct you on where to map them. “How much do you gain from this action? How much does it cost you?”

2. Identify effortful actions in the grey triangle.

3. Discuss why people do this. Write down underlying values on Post-its. “This action costs you more than it yields, why do you think you do this anyway?”

4. Let participants put Post-its with underlying values on the Empathy Map. Reflect on how this enriches participants’ understanding of their behaviour.

5. Take a picture of the template!

Tips and remarks:
Quickly map the key actions, based on gut feeling. Help participants to be critical, there should be at least one action in the grey triangle. This is the moment when you can change from an objective approach (with the persona) to a more personal feedback moment. Help participants to critically reflect on their behaviour.
6. **Closure ritual.**

**Goal:** To say goodbye to old, undesired behaviour

**Instructions:**

1. Let participants choose the actions that they need to let go of. 
   “Which actions are undesired behaviour that you really need to stop doing?”

2. Let participants ritually burn the Post-its on which the actions are written. 
   “Are you ready to let this go? How are you feeling?”

**Tips and remarks:**
Make sure you have access to an outside area to burn the Post-its safely. 
Do not hold the Post-its at the sticky edge when you burn them. 
Make the moment earnest and monumental. Make sure participants are committed.
7. New routine.

**Goal:** To redesign the routine, taking into account underlying values

**Instructions:**

1. Let participants transfer the Post-its with actions that they want to reuse to the New Routine Template. “Which actions are good to keep?”

2. Let participants decide which actions need to be improved or created. Formulate “How Might We” questions: “How Might We improve this action?” This stimulates to think in possibilities.

3. Let participants ideate on new actions.

4. Let participants select the new actions intuitively and decide on the new routine. Discuss the result.

5. Take a picture of the template!

**Tips and remarks:**

Use random stimuli to boost participants’ creativity. Take time to explore all possibilities. Be ambitious to design the best routine! Participants can make multiple new routines: they can experiment with them and choose the best one in their real working environment.
8. **Triggers**

**Goal:** To evoke desired behaviour

**Instructions:**

1. Let participants take the Post-its with new actions from the new routine and place them on the Trigger List.

2. Let them think of a way to create a trigger to evoke these new actions. Write down next to the Post-its.

3. Do the same for old actions and let them think of a way to remove a trigger to prevent this old behaviour. Write down next to the Post-its.

4. Make someone responsible for each trigger. Write down their names.

**Tips and remarks:**

Triggers can be multiple things: from checklists, to a poster, to (the removal of) a pop-up.
Goal: To end the workshop with a concrete, first step to take

Instructions:

1. Indicate an imaginative line on the ground and let participants stand on it. This is the old routine. Let participants think about it for a moment and experience how it feels.

2. Let participants walk to an imaginative line at the other end of the room. This is the new routine. Let them experience how it feels.

3. Let participants turn around. Walk to the spot where they are now. Maybe this is on the old routine, maybe this is already some way forward. Let them look at the distance between now and the old routine. Let them think about what they already did to get here.

4. Let them turn around towards the new routine. Take one step forward. Let them think about what this step is, something that they can do tomorrow. Let them write it down on a Post-it. Let them put the Post-its on the Trigger List and share with the group.

Tips and remarks: Not everyone is open to this kind of experiential exercise. You can also do this exercise by drawing a line and indicating the spots (old routine, new routine, current position, first step) on that line.