Chapter 3

Idealogue – the Method

Psssst! I have a confession to make. Idealogue is not something I dreamt up in a moment of divine inspiration. Nor is it something I spent years perfecting in a dusty library through academic study. It actually emerged through work experience and I am extremely proud of it. The amount of times I personally have used Idealogue number in the thousands, and fortunately I fortunate to have colleagues who commonly utilize Idealogue too. Developing and fine tuning Idealogue was not all champagne and self-congratulation. The process actually began with a series of failures and lessons.

The First Failure

It was springtime, in 2002 and a large North-European print house was at a crossroads. They didn't know what to do with Barbara. Who you ask? Big Barbara, their huge old printing machine. Due to her advanced age, Big Barbara used an absurd amount of energy to operate and she just couldn't keep up with the pace of modern business. Therefore, the company ordered a smaller, faster, and more flexible machine. Despite her place in history and in the hearts of employees, Big Barbara was about to become unemployed.

I was asked to facilitate a creativity session with the goal to find new uses for the legendary and beloved Big Barbara. The turnout for the session was great,

with many different departments well represented. Everyone was well prepared for the session, which took place in the amazing 18th century island fortress of Suomenlinna, located in the Baltic Sea just off of the city of Helsinki. Everyone was comfortably situated in a brewery on the island with their favorite drinks in hand, ready to help decide the fate of Big Barbara.

Hundreds of ideas were generated using different brainstorming methods. Everyone was eager to share their thoughts on the best way to send Barbara off to retirement, and the walls of the brewery were soon covered in colorful papers, each with an idea written on it.

The best ideas were described, selected, further developed, and finally evaluated by all participants. When we closed the session everyone *seemed* happy, but unfortunately, looks can be deceiving.

Mr. Virtanen[3], who at that time was the Director of the printing house, had some concerns he wanted to discuss with me.

"Pepe, I think the session started off well, and there was no shortage of creative, usable ideas. But something went wrong when ideas were selected. The ideas that were chosen by the group are mediocre at best. We decided on these ideas together, but I still don't understand all of them. I don't know what happened."

Mr. Virtanen was left confused after the session and he was not entirely happy with the ideas the group decided on.

Lesson 1

While the session succeeded in creating many ideas, it failed to generate good understanding of the ideas. I learned that before the group can begin selecting or prioritizing ideas, I should help the group create a better understanding of the ideas.

The Second Failure

Flash forward a few weeks. The scene for the second failure brings us to the same island fortress of Suomenlinna, but in a different restaurant and with a new group. I was facilitating a creativity training workshop for a team of developers who were working on building the next great App that they hoped would take over the world, or failing that, at least domestic markets. We were in the process of creating ideas. I had the lessons from the first failure firmly in my mind, and I was trying to consciously focus on creating a good understanding of all ideas.

I thought that the answer was sharing ideas by back and forth conversation. I thought the answer was dialogue. I had read everything that was available on

---

[3] Name changed at the polite request of my dear customers

the art of conversation and I was ready to take the group into deeper conversational waters. The goal of adding dialogue to the session was to force participants to listen to each other. I hoped that by promoting dialogue in the session, a clear understanding of the ideas and motivations of others would come through.

With these thoughts running through my head I addressed the group.

"OK everyone, you all have done a great job so far. You have created many ideas. Now it is time to expand on these by discussing them with each other. You will not just state your ideas and then wait for while others do the same, instead in your groups you will *dialogue* with one another. This will help everyone understand and learn from each other. "

I continued on by starting to explain the ground rules of dialogue. One of the ground rules instructed participants to slow down the speed of conversation by speaking clearly and repeating anything that needed clarification.

One of the developers, a man called Mike, took this rule quite literally.

"Heeeeeeeey, how sloooow do youuuu expeeeect uus to speeaak?" he deliberately asked, as the rest of the group laughed.

What is Dialogue ?
- Dia and Logos (Greek) = through meaning
- Focused and intentional conversation.
- An exchange of ideas or opinions.

Ground Rules of Dialogue
- Listen to understand, even when you disagree
- Search for assumptions
- Others have the right to believe and feel differently than you
- Do not interrupt when others share
- Treat others with respect and as equals
- Slow down the speed of conversation
- Share your own views
- Try not to rush to judgment
- Look for common ground
- Keep dialogue and decision-making separate (dialogue comes first)

Figure 6: A definition of dialogue and its ground rules.

I broke the group down into smaller groups of four to five, and told everyone to get to work. The groups had twenty-five minutes for group discussion, with an emphasis on giving each and every person enough time to express their own ideas, and also to ask questions about what other people were thinking. In about five minutes Mike's group was ready. "Pepe, we have some good ideas and we want to develop them further with everyone else. We are done with this dialogue stuff."I couldn't believe that the group was ready and I told him that while I appreciated their enthusiasm to continue, I still thought that they could talk more in order to better understand each other's ideas.

Hardly five more minutes passed before another group started to complain.

"Pepe, we have slowed down the pace and everything but I think we have already covered everything." I knew that it was impossible to create understanding of multiple technical ideas and concepts in just ten minutes, but I gave up and brought everyone back together in one large group, where we continued to develop ideas until the session ended.

Lesson 2
I left this session a bit frustrated with the participants. People do not want to listen to each other! The challenge with this particular creativity session was that the participants were either not willing or not able to listen to others while they had their own ideas. Later on when working with other groups I learned that this was not an isolated problem that was unique to this particular creativity session, but a problem with people in general: we just do not want to listen to others when we feel that we have a good idea ourselves.

Success: Birth of Idealogue

While I was experiencing these failures during idea generation sessions, I had a very helpful mentor named Kari Helin, who is a guru on group facilitation methods. I thought he would be the perfect person to help me with this issue. I explained everything as I saw it from my perspective and he gave an interesting response. He suggested that the participants should copy ideas from each other.

"Just make sure everyone has a piece of paper and let them go around copying ideas," said Kari. It almost sounded like too simple of a solution, but I decided to give it a try.

I was back working with the print house for a second workshop as Big Barbara was still in danger of becoming unemployed. First, I asked the participants to write down their ideas concerning Big Barbara's next step and if she could be used for something else or be recycled in some way. Next, I simply instructed

participants to 'copy' ideas from others and write down what they thought the best of them were. This inspired the participants to be more competitive, and this competitiveness forced them to become inquisitive about other people's ideas. At the end of the session when the best ideas were selected and posted, the chosen ideas were already understood by almost everyone. The 'copying' had been successful in creating a shared reality among the participants. We had found a way that helped group members connect their ideas with other ideas. Idealogue was taking form, but it still was a long way from being ready.

The invaluable and generous help given to me by my colleagues helped me finalize Idealogue. I attended a workshop facilitated by Per Kristianssen from Denmark and he was talking about stealing with pride. I thought that was a fantastic ground rule for copying other people's ideas. Later on I learned that the phrase Steal with Pride was widely used by many organizational developers to fight the "not invented here" behavior which was stopping people from learning from other organizations.

Figure 7: The original Idealogue logo was designed by Pekka Leskelä.

I had one colleague who participated in the first trials of the method and who contributed a great deal. His name is Dr. Greg O'Shea, and in his work with groups he too was looking to improve group level comprehension of new ideas. He actually was the one who came up with the name 'Idealogue', by combining the terms 'idea' and 'dialogue', making Idealogue a conversation or exchange of ideas. Pekka Leskelä also helped in a significant way, by designing the very first logo for Idealogue.

Together we experimented with different variations of the method and different group sizes. Finally I stepped in by putting everything together and describing the process and its steps. Idealogue was ready.

In the beginning we used Idealogue in creativity sessions only. Quickly we discovered that people generally had problems connecting with others and understanding each other's ideas in other contexts too, so we began to use Idealogue in other types of meetings. Now we use Idealogue regularly in all sorts of different contexts, as it creates a good connection and creates a shared reality among group members.

I first introduced Idealogue at the 2003 conference of the International Association of Facilitators, which was held in Slovenia. Later on, it was published in *The Facilitator's Handbook* which I wrote in 2007. I have used Idealogue myself hundreds, if not thousands of times to get people to understand and connect around the best ideas produced in group settings, and I am proud to say that many other facilitators have added this method to their own toolboxes.

Now you probably got the point. I stole Idealogue. Or maybe it just emerged and was a happy accident of sorts. Anyhow, I now teach it and use it with pride and joy.

> **Dialogue= *dia+logos(greek)=through meaning***
>
> **Idealogue=Idea+dialogue = conversation to discover through meaning of ideas**

Figure 8: The definition of Idealogue.

The Method

Idealogue is made up of five stages; *Individual Stage, Steal with Pride Stage, Repeated Stealing Stage, Ideas Selection Stage,* and *Ideas Evaluation* Stage, which I will describe in detail below. The order of the stages always stays the same, but the amount of time spent on each stage can change, depending on the size of the group and the complexity of the topics being discussed.

Stage 1: Individual Stage

To begin, participants are asked to write down their ideas in silence.

People have different styles of thinking or reasoning. The same can be said about how they express their thoughts. Some people need to spend some time thinking before speaking while others can do both almost simultaneously. Therefore, it is vital to consider these differences and allocate time for individual thinking. For everyone, even for the most talkative extroverts, it is good to just sit down in silence and think; there will be more ideas and the logic behind ideas gets

stronger. Also, if you jump directly into group discussion, the first opinions tend to have an anchoring effect on new ideas and the ideas tend to become similar. The individual stage helps groups produce a more diverse set of ideas to begin with.

The amount of time given for the individual stage depends on the complexity and number of potential ideas. If I am leading an actioning session where people are expected to think of specific tasks related to a simple process, then one or two minutes of time for the individual stage is enough. If I am conducting a creativity session where ideas are more abstract and complex, around 5-10 minutes for the individual stage is fine. And sometimes even more time is needed for the individual stage, like when people are asked to try to explain and map out their own logic.

Stage 2: Steal with Pride

In this stage the facilitator introduces the ground rule, *steal with pride*, and places people into small groups.

The ground rule *steal with pride* gives permission to take other people's ideas. I typically explain that this would involve participants sharing their ideas, inquiring about the ideas of others, and then developing ideas together. In the small group discussions the ideas lose ownership and become common property of the group. This begins to create group consensus.

I've been asked more than once by facilitators if this ground rule could be worded more softly because participants might resist the idea of stealing. For some, the world steal has strong, negative connotations. People are taught from a young age not to steal, and some of us may have heard a story about a person who lost their job or ruined their career due to theft related reasons. In the ground rule of Idealogue, the word steal can be replaced with something softer like *take* or *exchange* if need be, but I have to say that "exchange ideas with pride" does not have the same ring to it.

While these doubts about the word steal may be worrying in theory, when using Idealogue in practice the participants never resist stealing. I told a facilitator friend of mine about Idealogue and that I was about to facilitate a session in Florida for a group of women that work in the public sector. My friend told me, "Pepe, the moment you tell them to steal with pride, they are going to throw you out of the room. The whole concept of stealing is against everything they represent and it just isn't going to work."

Luckily for me my friend was completely wrong, and the group of little old ladies had no problem following my instructions of 'steal with pride.' No one complained and everyone was happy. People like to have others listen to their ideas. People even like to have others take their ideas. I am not talking about stealing the plans for some new multi-million dollar invention. We all want to be influential

and to have an impact. Being influential is having your ideas understood, accepted and then passed on by others to a larger audience.

Steal with Pride
- Gives permission to take ideas from others, making ideas shared property of the group.

Collect the best ideas on your own piece of paper
- Individual competitive task with a clear objective
- In order to steal the best ideas you have to understand what the best ideas are; this makes people ask the magic question "why?" and understanding of ideas gets deeper.

Figure 9: Two key concepts of Idealogue.

A key instruction I give to the group during this stage is to *collect the best ideas on your own piece of paper*. This is the very core of the method and relates directly to the ground rule *steal with pride*. If I asked the participants to share, that would be a group task without an individual objective. If at this stage I asked the participants to agree on the best ideas, I would have a group arguing about what the best ideas are before they have had a chance to understand them.

Asking the group to collect the best ideas for themselves and on their own piece of paper makes it an individual task, and it makes each participant personally responsible to fulfil it. It has a clear goal and it is motivating. Also, there is no need to argue about the best solutions. If you find something that you consider to be a good idea you write it on your own paper, then you simply move on to the next idea.

The method shines because it is impossible to write down other people's ideas without first understanding them. This forces the participants to find out what logic lies behind ideas. People ask the important question, "why?" They are forced to think about the ideas in broader contexts and on a deeper level.

When I divide people into small groups, I instruct them simply to form groups of three. Why groups of three? Sometimes pair discussion just does not work. Based on my long experience working with groups around the world, I have seen people working in pairs struggle to maintain conversation. When you have more than three participants the silent ones tend to drop out of conversation and just fly under the radar. In groups of three you typically have enough diversity of ideas and shy or quiet people feel comfortable enough to participate without feeling overwhelmed. In most cases you can't have only groups of three because

the number of participants cannot be divided by three. In that case you may have some groups of two or four.

> ## Steal with Pride !
> - Collect best ideas on your own piece of paper
> - Talk, listen, develop
> - Work in groups of three
>   12 minutes

Figure 10: Instructions for stealing with pride.

The amount of time spent on this stage depends on the complexity of the session's context. A typical round of stealing takes about ten to twelve minutes. However, I have held creativity sessions where technical experts were sharing and discussing ideas for almost two hours in groups of three until we formed new groups to repeat the stealing process.

Stage 3: Repeated Stealing

New groups of three are formed and the ideas are further developed.

The simplest way of forming new groups is just to tell the participants to stand up and quickly find two new people to form a group with.

Why do we repeat the stealing stage again in different small groups? It is repeated again in order to further promote the exchange and comprehension of ideas. The first group of three now has a good understanding of each other's ideas and probably even a common understanding of the best ideas. But they don't understand what else is happening in the room, so you have to connect the first group and their ideas with the ideas of other groups by repeated sharing.

Idealogue is a consensus creating method. The more times people form new groups to share, the better understanding you create within the whole group. I sometimes joke that you have to keep changing groups and having people share again and again until the point of exhaustion, so that they are tired and will agree with just about anything! In practice I don't try to tire the group out quite that much, and I typically have three to four rounds of sharing in small groups. Anything past this and we reach a point of diminishing returns; the energy starts going down as people get a little tired of talking, thinking and developing each other's ideas.

If the first round of sharing takes ten minutes, you should give a bit more time for the subsequent rounds. This is because after each round of sharing, people

have more to talk about due to the ideas that they have stolen from others. On average about ten to fifteen minutes per round should be fine.

A lot of the time I place an individual stage of idea development between each round of stealing. In between stealing sessions I tell the group something like this: "Now take a careful look at your precious list of ideas, develop them and create new ones. You have four minutes."

I am just a strong believer on giving people an opportunity to think. We do not think enough! Well, at least I don't.

Stage 4: Ideas Selection

At this stage people remain in small groups and select the best ideas. Once a group has agreed on what the best ideas are, they post them at the front of the room so everyone can see what they came up with. The previous stages had an individual focus; to collect best ideas on your own piece of paper. Now the participants should seek agreement and consensus, which should come relatively easy after rounds of stealing and creating understanding of the logic behind ideas.

Choose the best ideas !

● Try to reach consensus.

● The number of ideas chosen is not limited but there can't be too many "best ideas".

● Write ideas down in large lettering on a piece of paper.

● When your group is ready, post the ideas in front of the room for everyone to see.

● 12 minutes

Figure 11: Instructions for choosing ideas.

The number of chosen ideas is not limited. You just can't ask participants to post a specific number of ideas, it is crucial that they are not limited at all during the selection stage by such requirements. What if the group has five excellent ideas or just one? Instead of forcing the group to agree on a certain number of ideas I ask them to simply post the best ideas. However, I often remind participants that all ideas can't be considered best, so they do need to reduce the total number of ideas.

Here is a small hint. Make sure that the groups have materials to write the ideas down in large lettering. Small post-it notes will not do. They need to be written on large pieces of paper in thick marker so that they can be seen by everyone at the same time. About fifteen minutes should be fine for choosing ideas.

Stage 5: Ideas Evaluation

During this stage the facilitator makes sure that the entire group understands the posted ideas by giving time for questions as needed. After it is clear that the ideas are understood, the group as a whole can evaluate them.

Interestingly, the participants do not need to present the ideas they posted with their small groups because a shared understanding of these ideas already exists on a group level. The repetition of group formation in the previous stages has guaranteed increased and inquisitive dialogue which contributes favorably to the chances of arriving at an understanding of the ideas. It is the facilitator who has not participated in group work who is tempted to hear long boring presentations of the ideas that everyone is already familiar with. It is enough to ask the group to read all ideas in silence and if some of the ideas are not understood, you may elaborate and reply to any questions.

At this stage many facilitators like to group ideas. Grouping or organizing the ideas beyond this point is not needed. I am an enemy of grouping ideas, and I will explain why by using the topic of what to have for dinner as an example. Pretend you are trying to make a decision on what you are going to have as main course for dinner. Your friends have suggested salmon, beef, perch, lamb, pork, and cod. Now you group the different suggestions as meat and fish. This will not help decision making at all. When you group ideas you lose the real content and it makes decision making more difficult. When defining a problem grouping can even be dangerous. You group the problem, it becomes something else and you cannot see the real problem anymore. Also, grouping ideas can be difficult due to people trying to group things that do not really belong together, which can lead to unnecessary arguing. However, you may group the ideas if there are a lot of ideas posted. Sometimes organizing ideas into groups can be useful to create an outline which may be easier to understand than a large number of individual ideas.

Now it is crucial to evaluate the results. For instance, if you are clarifying the problem, you ask the group: "do we have the problem here?" If you are creating a common vision, you inquire whether the group feels that the vision is common. If you have created new ideas, you ask whether the ideas meet the goals of the creativity session. And if you have created an action plan, you want to make sure the actions cover all the solutions you have agreed before actioning. And what if the group is not happy with all ideas? Then you ask for new ideas. For instance, you may have one more round of small group work in groups of three, with the discussion topic being how to improve the results of the session.

A typical Idealogue session takes about an hour and a half and consists of; introduction and focusing for 15 minutes, the individual ideas phase for 5 minutes, stealing with pride in changing small groups for 45 minutes, choosing and posting the best ideas for 15 minutes, discussion for 10 minutes, one or two minutes

to evaluate the results and get group feedback, and finally another minute or so to thank the group and end the session. The length of the session can vary depending on the number of participants and the topic. The longest Idealogue session I have been a part of was a creativity session which lasted about 5 hours.

Idealogue is perfect for groups ranging from 6 to 24 participants, although it can be used effectively with larger groups too. In very small groups you may have to use pairs instead of groups of three. Ideologue has been successfully used in groups of hundreds of participants. Even in a large group setting it will help people develop their ideas. However, in large groups building consensus becomes harder simply due to the number of connections that exist between participants.

In a workshop Idealogue can be used to clarify a message, problem or goal. It also can be used in creativity sessions and the action planning stage of a workshop. You will find more about how to use Idealogue in following chapters.

Stage 1: Individual stage
- Participants are asked to write down their ideas in silence

Stage 2: Steal with pride
- At this stage, the facilitator introduces the ground rule and small groups of three participants are formed
- Steal with Pride!
- Collect the best ideas on your own piece of paper
- Share, listen, and develop ideas

Stage 3: Repeated stealing
- New groups of three are formed and the second stage is repeated several times

Stage 4: Ideas selection
- At this stage, the participants remain in groups of three and select the best ideas
- Choose the best ideas
- Try to reach consensus
- Write down best ideas on a piece of paper with a marker
  (The number is not limited but just the best ideas can't be many)
- One idea per paper
- When your group is ready post your ideas on the wall

Stage 5: Ideas evaluation
- The facilitator makes sure the group understands the posted ideas and the participants evaluate the results

Stage 1: Individual stage

- Participants are asked to write down their ideas in silence.

Stage 2: Steal with pride

- At this stage, the facilitator introduces the ground rule and small groups of three participants are formed.
- Steal with Pride!
- Collect the best ideas on your own piece of paper
- Share, listen, and develop ideas

Stage 3: Repeated stealing

- New groups of three are formed and the second stage is repeated several times.

Stage 4: Ideas selection

- At this stage, the participants remain in groups of three and select the best ideas.
- Choose the best ideas
- Try to reach consensus
- Write down best ideas on a piece of paper with a marker (The number is not limited but best ideas cannot be many)
- One idea per paper
- When your group is ready post your ideas on the wall

Stage 5: Ideas evaluation

- The facilitator makes sure the group understands the posted ideas and the participants evaluate the results.

Figure 12: The stages of Idealogue.