

CHREATE



Forces of Change Learning Map

FACILITATOR GUIDE

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Executive Summary of Experience

Background:

The Global Consortium to Reimagine **HR**, **Employment Alternatives**, **Talent**, and the **Enterprise (CHREATE)** is the collaborative effort of a group of creative CHROs, along with a small group of academics and other thought leaders, focused on defining – and accelerating – the future of the HR profession.

The work of CHREATE began in 2013 by identifying the forces that are predicted to emerge and produce disruptive change in society, business, and work. Building on this foundation, the CHREATE teams defined how these disruptive changes would impact the nature of work, workers, and organizations, and then translated that impact into implications for the future of HR in terms of the roles and capabilities that will be needed by organizations that “win” in this new world of work. Most recently, the CHREATE teams have developed a number of practical tools and assessments for use by CHROs and other business leaders to address the forces of change and prepare for the future.

This guide was created to accompany the deliverables from a CHREATE project team that was tasked with developing an assessment tool to help CHROs position their organizations to address the emerging forces of change.

Purpose:

This suite of tools is designed to initiate facilitated discussions with your peers, your leadership team, and other appropriate stakeholder groups to bring awareness and open up the possibilities for exploring how the forces of change will affect your business and therefore how you need to prepare the organization for that change.

It is the start of the journey and intended to be used to gain a common understanding of the impact of the changes and shared meaning around what your organization will need to do to operate in a different world.

The tools consist of materials and content developed by a collective group of CHRO professionals and business transformation consultants. They are by no means ‘fixed’ or ‘final’ in terms of content – they are generic and designed for you to supplement with your own industry/organization data, to ensure appropriate relevance to your organization. Which means some pre-session preparation will be important to realizing the greatest benefit from conducting the session.

Target Audience(s):

- *CEO and top team:* You might prefer to have a facilitator run the session so that you are an equal voice in the discussion with the C-suite team. The facilitator would not need to be a content expert, but should be familiar with and skilled at managing the process.
- *HR Leadership team:* You might want to run a session with your HR leadership team prior to the C-suite team; this could allow you to enrich the content and utilize the team for further data gathering.

Getting Started:

- Gather additional content to enrich the card deck. You might want to reach out to your strategy/marketing teams for data, as well as gather inputs from your own research. Card decks have been designed to allow you to supplement the existing materials.
- Refer to print instructions in the facilitator guide to ensure correct production of materials.
- Ensure that the facilitation methods are clearly understood so that the tools are utilized effectively.
- Refer to meeting room set up – this is designed to be a facilitated session with 6-10 people positioned around one set of materials; if you run a session with a larger number of participants, you will want to print additional sets of materials and have a facilitator per table.

Facilitation Overview

When we know how our business works – the marketplace, the financial challenges, the strategy for winning – we can better understand the powerful impact of our own actions and accept changes as part of our company's growth.

The more we learn about our business, the easier it is to see our role in its success. The *Learning Map®* process you are about to facilitate is a very different kind of learning.

- It's interactive. Participants don't just sit and listen.
- There is no textbook or wordy presentation – the focus is an illustration or visual that tells a story.
- Participants share ideas and opinions by exploring information in a group.
- And it's fun!

As a facilitator, you will help make this learning happen – and this guide will show you how.

In this facilitation overview, you'll find:

- A description of the facilitator's role.
- The basics of the *Learning Map®* process.
- Tips and techniques to help you facilitate effectively.

Then, for each *Learning Map®* session, this guide provides:

- The objectives that the session is designed to address.
- A list of materials you will need.
- The visual.
- The dialogue questions that guide the discussion and give instructions for conducting activities.
- Timing suggestions for each section of the dialogue questions.
- The card exercises and any answers you will need to know.
- Notes to help you with particular questions or exercises.

See the Appendix for special considerations for participants who are deaf or sight-impaired.

The Facilitator's Role

As a *Learning Map*® facilitator, you're a guide on a learning journey. You will not be filling the role of teacher or business expert. In fact, once the session begins, you will be doing very little talking.

Throughout the session, your main duties are to:

- Keep the group focused on the discussion.
- Encourage people to participate honestly and openly.
- Ask probing questions to increase understanding.
- Manage the time.

Elements of the *Learning Map*® Experience



The visual
An illustrated metaphor represents aspects of business issues. With images as references, participants can speak a common "language."



Dialogue questions
Target questions lead participants through the exercise. Participants learn by listening to each other and forming their own conclusions.



Facilitation
By bringing all these elements together, facilitators make it possible for participants to discover the learning themselves.



Card exercises
Card exercises can provide further information, which keeps the discussion focused on facts rather than perceptions, or scenarios to help participants consider the impact of decisions. They increase the interactive and collaborative nature of the experience.



Group interaction
With six to ten participants, the group is big enough for a variety of ideas and small enough so everyone can take an active part.

Tips and Techniques for Effective Facilitation

A few days before the session...

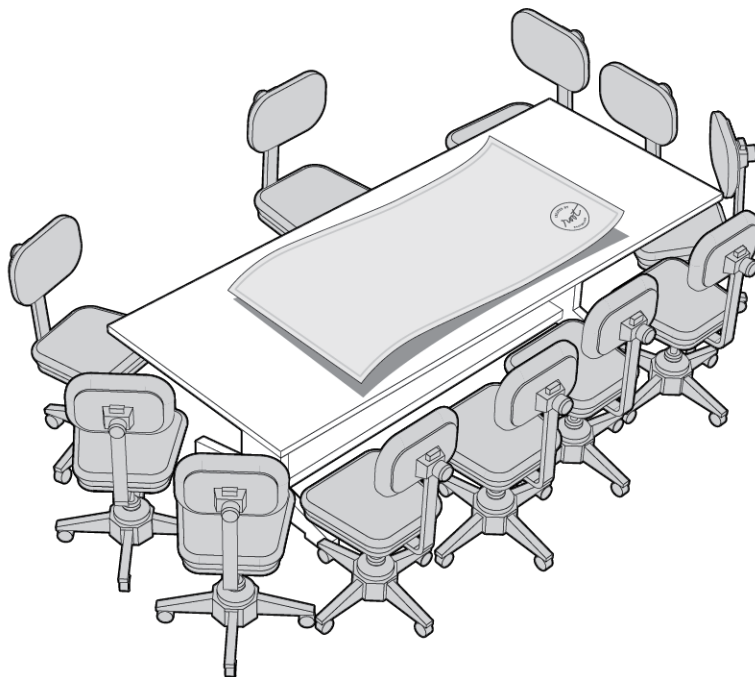
Review the materials so you are familiar with them. This will make facilitation easier for you and more effective for the participants.

On the day of the session...

Prepare the workspace. Place the visual face down on the table and arrange the cards in the order in which you will use them. Be sure you have other materials you need, such as pencils and nametags.

As the participants arrive...

Welcome them and create a relaxed environment. Seat them in a U-shaped fashion around the visual. You should sit at the top of the U so participants have the best view.



As the session begins...

“Set the stage” for learning. Participants should understand:

- Why this learning activity was created.
- How long the session will last.
- Ground rules – such as turning off cell phones, staying at the table during the session, and not judging others’ ideas.

Ask participants to introduce themselves. If you think it’s necessary, conduct an ice-breaker exercise to raise the comfort level.

Explain the process, your role as facilitator, and their role as participants. You can say:

“In our session today, we’ll engage in a unique learning experience [*mention the overall purpose if desired*]. There is no teacher or trainer. My role is to keep the conversation on track and on time. You will learn from each other and the materials, not from me. We’ll use:

- A visual, which we will turn face up in a minute.
- Dialogue questions [*hold up the 8.5 x 11 pages or the table-top ease*].
- Cards that add information or are used in activities [*hold up an example*].

As participants, you’ll take turns reading the dialogue questions and cards and join in the discussion and activities.

We’ll work as a team, helping the session run smoothly by participating, taking turns talking, respecting others’ thoughts and opinions, explaining brief comments, and keeping the conversation on track. Who would like to volunteer to read first?”

Then, ask for a volunteer to begin reading the dialogue questions aloud. When participants are directed to look at the visual, turn it face up on the table.

During the session...

Control the card exercises. Keep everyone involved by asking different participants to read.

- For card exercises that require answers, the answers are printed below the cards in this guide.
- For cards with text only: Distribute these one at a time so participants can focus on the information and don't read ahead.
- For ranking or matching exercises: Place all the cards across the visual. Allow the group to make more than one attempt at correct placement before revealing the answers.

Maintain a high level of energy.

- Add enthusiasm to the process by keeping a positive, energetic attitude. Your energy sets the tone for the rest of the group.
- Encourage participants to stand as much as possible throughout the experience. This keeps the group's energy high and gives participants a better view of the visual.
- Let participants know that they may change their position around the visual during the experience for a new perspective. You may consider asking them to move around between sections of the dialogue questions.

Be an active listener. Participants will offer opinions more often when they see that you, the facilitator, are paying close attention. When someone offers a relevant but brief statement, restate it to encourage the speaker to elaborate. Or ask, "Why do you think that happens?" or "What leads you to that conclusion?"

Keep the group focused. If the discussion wanders off topic, ask the reader to repeat the question, or simply remind the group about the need to stay on time.

Control participation in the discussion. Everyone should be involved in the conversation. If one participant dominates:

- Avoid eye contact with more vocal participants.
- Assign more reading to participants who talk too much. This seems to limit the amount of talking they do after they read.
- At a break, privately explain the importance of allowing others to be involved.

Also, gently encourage participants who aren't talking at all. "What do you think about that?" usually gets a response. Or ask the quiet participant to read a card or question. If you are unsuccessful, don't worry. Some people don't like to read aloud, and others prefer to learn silently.

Remember that you are not a teacher or a participant.

- Direct compliments to the group, not to any one participant. If you say "Great point!" to an individual, others may feel that their ideas are not as valid.
- If a question arises, ask participants what they think, or say, "Let's talk about that at the end of our discussion."
- You may be tempted to jump into a lively discussion, but when the facilitator is giving ideas and answers, participants don't take part in their own learning and may feel like students instead of explorers.

After the session...

Address any concerns that have been raised, if you can. If you don't know the answers, ask a volunteer to investigate and report to the group, or take this on as a personal task.

Thank the participants for sharing their ideas.

If applicable, distribute takeaways and let participants know about follow-up sessions or next steps.

Ask participants to help gather the materials and use the materials checklist to confirm that all pieces have been returned.

In Summary



Do

- Relax and have fun.
- Sit at the top of the visual, so you view it upside-down.
- Explain the essentials of the session.
- Clarify your role and the group's role.
- Ask for a volunteer to read.
- Keep the group focused.
- Keep track of time.
- Ask questions that draw out opinions.
- Be sure everyone is involved in the discussion.
- Maintain a high energy level.



Don't

- Provide your own opinions.
- Give answers that are not in this guide.
- Make teacher-pupil responses like "Great point!"
- Let one person control the conversation.
- Ready any materials yourself.
- Distribute cards in advance if they require lots of reading.

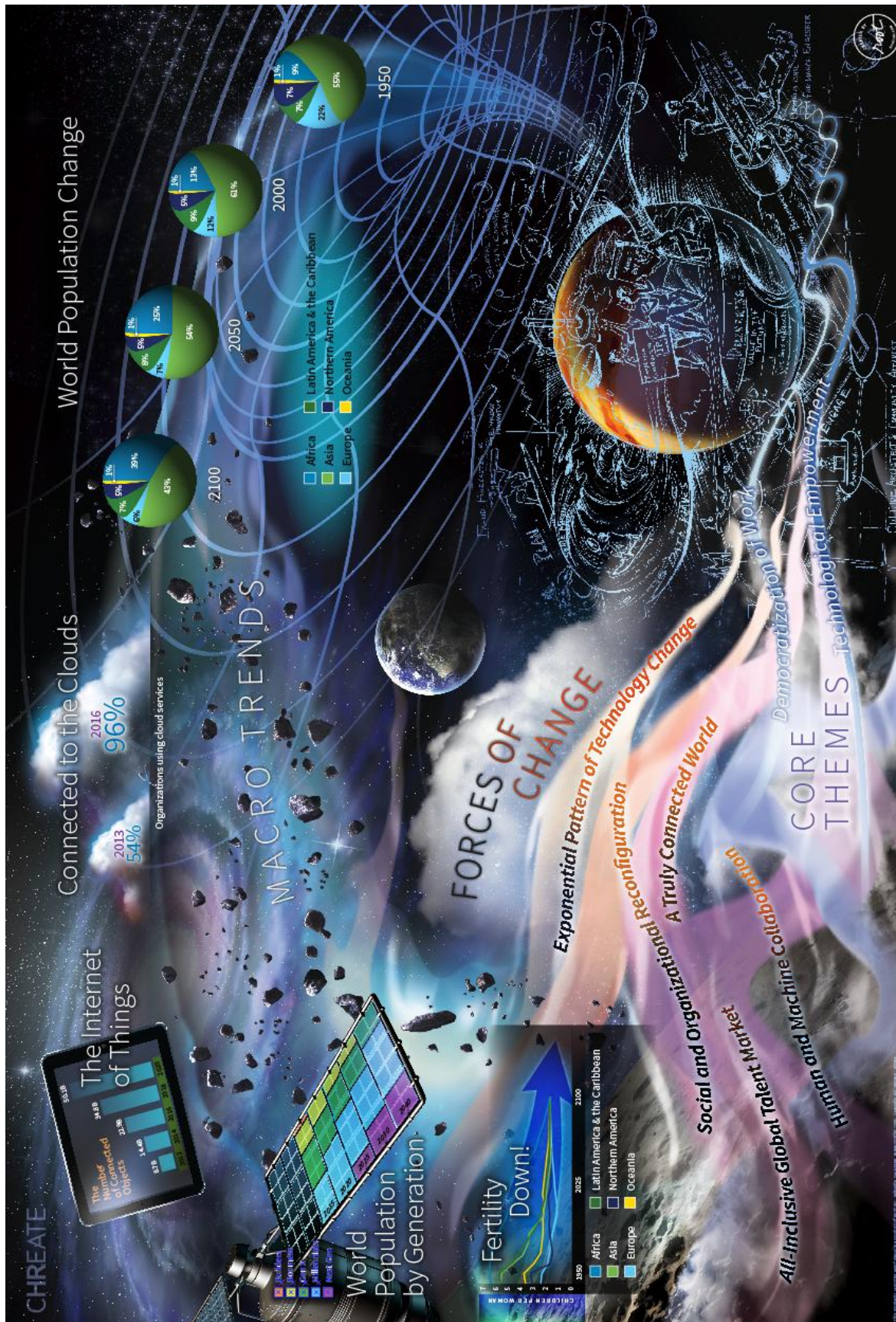
Module Overview

Learning Objectives

- Macro trends emerging in the world
- Forces of Change that directly impact how work gets done today and in the future
- Examples of business responses to the Forces of change
- Your views on the impact of these forces on our organization
- The strategic priorities we must consider to enable our organization to embrace the changes ahead

List of Materials

1. *Learning Map*® visual
2. Facilitator Guide
3. Dialogue Questions
4. Card and Poster activities, including
 - Macro Trends (3+)
 - Forces of Change (5)
 - Core Themes (2)
 - Sample Strategies (5)
 - Discussion Starters (5)
 - Strategic Priority (12)
 - Forces of Change Assessment handout (10)
 - Forces of Change Assessment poster (1)
 - Gap Assessment poster (1)
 - Strategic Priorities poster (1)



Forces of Change

Welcome to the Forces of Change *Learning Map®* session. This experience includes a visual, data cards, and a set of dialogue questions designed to facilitate our discussion on changes that are affecting how organizations will get work done now and in the future. Included in the experience are a set of break out activities to assess how these forces of change impact our organization, and how we can begin to close the gaps.

In this experience, we will explore:

- Macro trends emerging in the world
- Forces of Change that directly impact how work gets done today and in the future
- Examples of business responses to the Forces of change
- Your views on the impact of these forces on our organization
- The strategic priorities we must consider to enable our organization to embrace the changes ahead

Let's stand, turn over the visual and describe what we see.

Facilitator Note: Make sure the group points out all areas of the visual. Point to specific areas and ask, "What do you see in this area?" The purpose of this is to give participants a basic orientation to the visual.


A. Winds of Change (20 minutes)

1. Locate and read the *Macro Trends* on the visual and on the *Macro Trends cards*.

Facilitator Note: Ask participants to describe the Macro Trends infographics on the visual. When finished with the infographics on the visual, ask participants to read the additional infographics on cards and place them around the visual.

Africa Up!

In 2100, 10 of the 20 most populous countries will be in Africa.



Macro Trends


Social Responsibility

Consumers are seeking a greater level of social responsibility and it affects who they choose to be associated with and how they spend their time.

Macro Trends

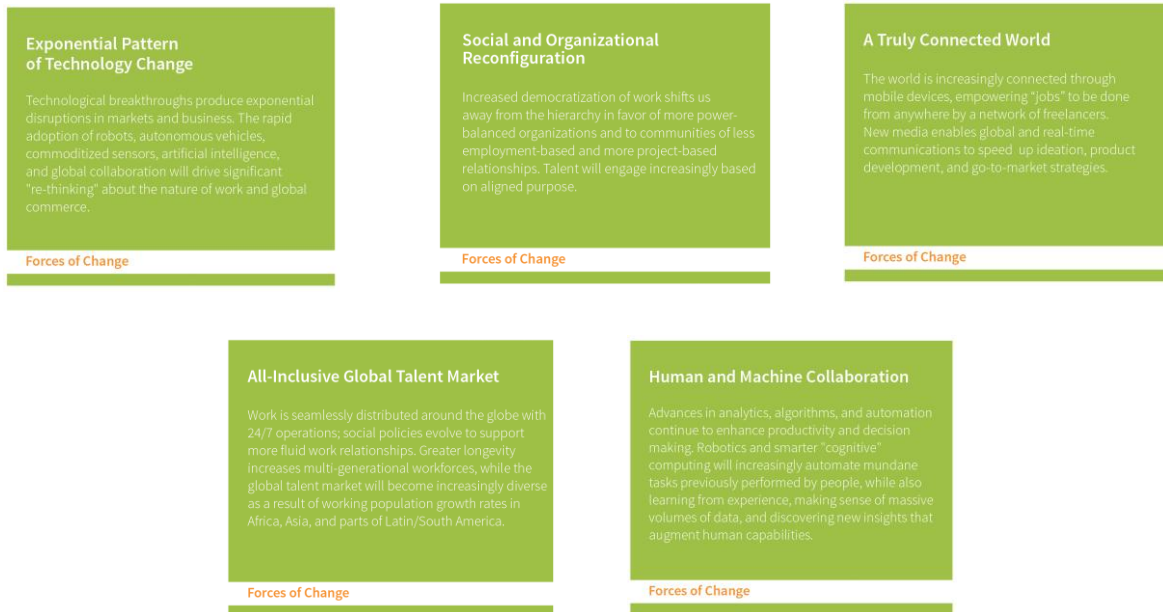
Population Down

The population of the world is set to age significantly over the coming decades.

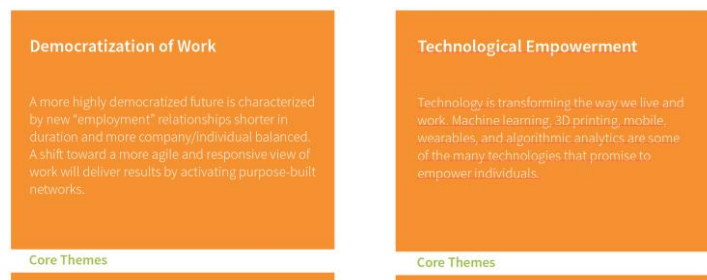


Macro Trends

2. What are your immediate thoughts about the impact of these trends?
3. There is a recognition that these trends will require us to think differently about how work gets done in the future. Read the *Forces of Change cards* and place them on the corresponding labels on the visual.



4. Which of these forces do you see as potentially having the biggest impact on our industry and why?
5. These forces can be captured in two central themes. Read the *Core Themes cards* and place them where they are represented in the visual.



6. How would you describe our organization in the context of these two themes?

B. Organization Impact (50 minutes)

- These macro trends and forces are changing the nature of work now and in the future. Let's consider our own views about the impact of these forces on our organization. Each person should get a *Forces Assessment handout* and follow the instructions to complete your own assessment. While you do this, start to create a mental picture of what our organization will look like in the future, five to ten years from now. When everyone is finished, move on to the next question.

Facilitator Note: Have each individual take 5 to 10 minutes and fill out the *Forces of Change Assessment handout*.

Forces Assessment Handout CHREATE

Instructions

Each of the Forces of Change is summarized by four brief statements that describe the expected impact on the future of work and the workforce. For each statement of expected impact, select from a scale of 1 (low) to 5 (high) how much you think it will impact your organization in the next five to ten years. Be prepared to explain the reasons for your ratings.

Exponential Pattern of Technology Change

Technology breakthroughs will produce rapid, continuous disruptions in business models, products, services, and markets; organizations will need partners to form robust ecosystems.

Robotics and cognitive technologies will automate most routine (and many skilled) jobs, eliminating jobs and raising the overall skill levels required for those that remain.

Reshoring jobs (and new ones) will require increases in critical thinking, behavioral skills (e.g., empathy, collaboration, cross-cultural competency), and learning, creating, working, and...

Broad access to technology will reduce barriers to entry and some of the benefits of scale; small, agile competitors and more fragmented supply chains will change how value is created.

Social & Organizational Reconfiguration

Organizational authority will become more distributed and structure less hierarchical to improve the flow of ideas, speed of decision making, and cross-organizational inventory collaboration.

Workforce will demand more purpose-driven (beyond work) and will be drawn to organizations aligned with their values.

Consumers and business partners will seek more socially responsible organizations with which to engage; customer work will be more project-based, requiring continuous reconfiguring of teams across functions, communities, workers and teams will need workspaces that foster creativity/collaboration.

A Truly Connected World

Work will be able to be performed anywhere, reducing real estate needs and increasing the need for developments that enable a mobile, globally distributed workforce.

Global and real-time communications and networked organizations will accelerate innovation, product/service cycles, and repatriation of talent and agility from all stakeholders.

Increasingly fragmented work platforms become less about organizations and more about aggregating/connecting tasks and on-demand resources across multiple employment models.

The volume of things left will create continuous streams of data about people and things, providing real-time feedback and opportunities for learning and self-correction.

Global Talent Market

Globally distributed work will enable global sourcing of talent (along with their competition for attracting and retaining the best talent).

Increased longevity will keep people in the workforce longer (older workers able to contribute longer and will have continuing financial needs), further complicating workplace demographic shifts.

Greater diversity in the workforce (age, culture, race, gender, etc.) and expectations of new customers (employment value propositions) will require new policies, practices, work design, etc.

Globally distributed workforces will face organizations from constraints of time zones and work schedules to enable 24/7 operations and enhance/enrich local interactions with global clients.

Human & Machine Collaboration

Advances in analytics, algorithms, and automation will drive significant improvements in productivity and decision-making; this will require deep skills in data science and human judgment.

Data and analytics will make measurements in, and expectations about, the consumer and employee experience, making these capabilities critical to an organization's competitive edge.

Work will be increasingly fragmented into tasks that are routed and assigned by cloud software to a mix of humans and cognitive technology (AI, automation, robotics, etc.).

Machines will evolve from "tools" to "partners," augmenting and complementing human capabilities; machines will increase efficiency and safety; machines will also replace (and create) jobs.

- Place your individual assessments beside one another on the wall or table. Where are the biggest differences? Discuss why that may be.
- Where are we most aligned?
- Get the *Forces Assessment poster* and follow Instruction 2. Come to a consensus on the positioning of the impact of the forces. Plot your aligned assessment.

Facilitator Note: You may want to have this chart up on the wall in advance of starting the session.

Forces of Change Assessment 1.

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Assessment

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Workforce will demand more purpose-driven (beyond work) and will be drawn to organizations aligned with their values.

Consumers and business partners will seek more socially responsible organizations with which to engage; customer work will be more project-based, requiring continuous reconfiguring of teams across functions, communities, workers and teams will need workspaces that foster creativity/collaboration.

A Truly Connected World

Work will be able to be performed anywhere, reducing real estate needs and increasing the need for developments that enable a mobile, globally distributed workforce.

Global and real-time communications and networked organizations will accelerate innovation, product/service cycles, and repatriation of talent and agility from all stakeholders.

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Machines will evolve from "tools" to "partners," augmenting and complementing human capabilities; machines will increase efficiency and safety; machines will also replace (and create) jobs.

Where are we now?

For _____ Now

For _____ Now

For _____ Now

For _____ Now

For _____ Now

For _____ Now

5. Organizations are already responding to what is happening at varying degrees. Read the *Sample Strategies cards*. Then, follow Instruction 3 to create our future state organization description to capture how we will successfully operate while embracing the Forces of Change, relevant to your impact assessment.

<ul style="list-style-type: none"> — Look for opportunities to disrupt industry/business models by bringing together existing technologies to create new value for customers (e.g., Nike is creating a digital ecosystem for enhancing personal fitness/performance through the wearables market; bringing together consumers, developers, and hardware/software partners will give Nike the ability to both create and capture value from all parts of the ecosystem) — Analyze jobs to identify those where the skills required can be automated by existing technology (e.g., Narrative Science is a solution being used by many companies to transform data into narratives that automate the writing of product descriptions, financial/sales reports, news articles, etc., improving both efficiency and accuracy and freeing up people to do more value-adding tasks) — Assess workforce for the skills, competencies, and behaviors that will be critical to the changing work demands (e.g., collaboration, creativity, cross-cultural competence, etc.) and modify hiring and development strategies accordingly <p>Sample Strategies: Exponential Pattern of Technology Change</p>	<ul style="list-style-type: none"> — Utilize social media platforms to crowdsource strategic thinking/idea generation and promote knowledge-finding and sharing, etc., from employees across the globe (energizing creative talent and increasing employee engagement) — Rethink culture and employment brand to ensure they promote the sense of purpose and values that will attract and retain great talent; assess organization practices, policies, programs, and messaging to ensure they are aligned with the desired culture/brand — Develop a robust set of data and analytics that quantify the inventory of skills, capabilities, and experience represented in the workforce so that talent supply can be matched with/deployed in response to the demands of business opportunities — Redesign workspaces – and provide tools – to support virtual and physical teams, globally mobile workers, and creative/collaborative work processes <p>Sample Strategies: Social and Organizational Reconfiguration</p>
<ul style="list-style-type: none"> — Consider how technology can assist in building and enabling virtual teams to increase productivity/reduce cycle times (e.g., on-line collaboration, file-sharing, video-conferencing, task management, etc.) — Establish a knowledgebase/platform that captures and shares information about the workforce and individuals' capabilities, experience, and interests so that people with expertise can be located and engaged in opportunities for collaborative ideation and problem-solving — Explore how to make data and analytics accessible in 'real time' to people across functions and geographies so they can leverage them to enhance (or correct) service and performance (e.g., this can be seen in the healthcare and life science industries where physicians are using real-time data to monitor, predict, and treat medical conditions, wherever a patient is located) <p>Sample Strategies: A Truly Connected World</p>	<ul style="list-style-type: none"> — Review current talent acquisition strategy and tools to ensure you are able to find and attract the best talent, wherever it is located, and whether it consists of active or passive employed job seekers, internal employees, or freelancers; technology disruption has been greatest in the recruiting function (mobile apply, video-interviews, AI in predicting candidate success, etc.); become familiar with these tools to enhance the talent acquisition process and engage with your marketing organization to determine how you can best communicate your brand — Assess the challenges of — and proactively prepare to manage — a truly diverse workforce with varied backgrounds, experiences, and expectations about work and the employment relationship (e.g., where work is performed, how rewards are structured, what kind of business information is shared, how employee 'voice' is solicited, career mobility, learning opportunities, feedback frequency, etc.) <p>Sample Strategies: All-Inclusive Global Talent Market</p>
<ul style="list-style-type: none"> — Develop new productivity strategies that integrate the work of both technology-based resources/systems and people-based resources. E.g., as more logic- and analytical-based tasks are assigned to robots and computers, information-sharing and decision-making can be accelerated using social network analysis to identify individuals who are known for being 'coordinators' and 'integrators' – the 'go to' people in an organization — Incorporate a design-centered approach to the development of all processes, tools, systems, etc. and hire people with 'user experience' capabilities so that a consumer-quality experience is delivered to the workforce — Define an automation strategy that optimizes the use of AI, cognitive technologies, etc. by considering and balancing opportunities to, for example, reduce labor costs, increase value by assigning people to new roles, increase engagement by eliminating tasks that people don't enjoy, improve safety by eliminating dangerous tasks, introduce new services and price points by varying the mix of labor and technology resources, etc. <p>Sample Strategies: Human and Machine Collaboration</p>	

6. Complete Instruction 4 on the *Forces of Change Assessment poster* to determine where we are now. As you do this, discuss how big a change this is for our organization. What are the implications?

C. Closing the Gap (40 minutes)

1. Change requires identifying the important strategic factors to take into consideration as we determine how we will operate in the future. Discuss what you believe are the most important factors we need to address as an organization and why. Brainstorm your ideas on a flipchart. Use the *Discussion Starter cards* as thought-starters of factors we may need to consider (these are not exhaustive lists).

Facilitator Note: These *Discussion Starter cards* are not exhaustive lists.

<p>Brand/Employment Value Proposition</p> <ul style="list-style-type: none"> How clearly have we defined what we want to be known for as an employer (our brand) and how well do our employment-related programs and practices align with that? (currently and in the future) What is our employment brand? How would our employees and candidates describe it? Do we have a brand that will appeal to a more "purpose-driven" labor force? What would that look like? What is our presence on social media? How well is social media integrated into our communication and engagement practices? What can we learn from our marketing organization? Do we have marketing-savvy, brand-knowledgeable roles/resources in HR or partnering with us? What is our external customer experience today? How technically and socially advanced are they in their business? How do they get work done? How are we viewed by our external communities? How is our external brand supporting, hurting, or being impacted by our employment brand? <p>Discussion Starters</p>	<p>Employee Experience</p> <ul style="list-style-type: none"> What is it like to work in our organization? Is there a different employee experience in various entities/ hierarchies/ functions/ roles/geographies? How do we compare to our competitors? Do we provide the kinds of tools and technology that allow our employees to be as productive as possible? What do we do to support collaboration and work across various organization and hierarchical boundaries? What are we doing to enable employees to work from anywhere at any time? Do we have any examples of "just in time" working, virtual team collaboration, etc.? Do our employees identify with our social responsibility culture? Is there a strong culture of teamwork? Are our people leaders/managers great ambassadors for enabling diverse teams to achieve great results? <p>Discussion Starters</p>	<p>Talent Inventory and Workforce Architecture</p> <ul style="list-style-type: none"> What do we know about our talent? Have we defined the skills and capabilities and attitudes that will be most critical to us in three to five years? Have we begun to imagine what they will look like in 10 years? What are our plans for making sure we have them? (e.g., developing versus acquiring?) How robust are the data and analytics we have/use to quantify the inventory of skills and capabilities and experience represented in our workforce? Do we have roles/resources with advanced data/analytics skills/experience in HR and throughout our organization? Are we developing these skills broadly across the organization? What are our plans for acquiring and developing them? What percentage of our workforce is "employed" versus "contingent" or engaged through some other relationship (e.g., business partner)? How do we expect that to change in the next five to ten years based on current trends? How has our workforce architecture changed in the past 10 years? How has that impacted: <ul style="list-style-type: none"> Our cost of labor? Our agility? Our ability to attract and retain critical talent? What are the key drivers for defining our future workforce architecture? <ul style="list-style-type: none"> Cost of labor? Flexibility? Availability of critical skills? Proximity? Role impact? Talent scarcity? Sourcing difficulty? <p>Discussion Starters</p>
<p>Social and Organizational Reconfiguration</p> <ul style="list-style-type: none"> How prepared are our managers and leaders to guide a more diverse workforce (e.g., culturally, generationally, human and machine, etc.)? How prepared are our managers and leaders to provide coaching to our workforce as people seek more fulfillment from their work and interpersonal relationships/uniquely human traits become more critical? How concerned are we about our managers' and leaders' abilities to adapt to new ways of managing talent to get work done? How well are these new priorities represented in our recruitment, performance management, learning/development, and promotion/success management practices? How prepared/skilled are our managers and leaders to manage virtual teams, remote workers, and a workforce that consists of multiple employment relationships (e.g., employees, contingent workers, freelancers, partners, etc.)? How prepared are they to address the impact of constantly changing and evolving work teams on morale and group/team dynamics? How will they maintain the cultural integrity of our org/brand? How prepared are they to manage/drive collaboration and innovation through these disparate individuals/teams? <p>Discussion Starters</p>	<p>Automation of Work by AI and Robots/Human-Machine Integration</p> <ul style="list-style-type: none"> Based on current trends and predictions for automation of various sets of tasks, work, roles, etc., what are the likely areas where further automation is possible and what is the likely impact on our workforce? What parts of our business, roles, etc., provide the greatest opportunity and what is the estimated magnitude of the impact? What is our strategy for addressing the effects of automation? <ul style="list-style-type: none"> Do we anticipate workforce reductions? Retraining? Repurposing/reassigning? Reducing hours? Natural attrition? Reconfiguring of the organization? How will this impact our brand and how well-prepared are we to mitigate the effects? What does this mean in terms of scale of transformation for us? What external partnerships do we see in terms of outsourcing automated activities? <p>Discussion Starters</p>	

2. Use the *Gap Assessment poster* to capture your top ideas of what needs to change and the priorities that surface as a result.

Facilitator Note: You may want to have this chart up on the wall in advance of starting the session.

Gap Assessment	
CHREATE	2.
1 List what needs to change in terms of statements for each business aspect.	2 Closing the gap: What are the critical questions we need to answer? What opportunities, challenges, or obstacles do we need to address?
Brand/Employee value proposition	
Employee experience	
Talent inventory and workforce architecture	
Social and organizational reconfiguration	
Automation of work by AI and robots/ human-machine integration	
Other	

3. As you look at the strategic factors and opportunities you've identified, which are the most compelling?
4. What are the biggest challenges and why?
5. Now that we have identified priorities we must address, let's consider at a high level the impact on our organization of closing these gaps. Transfer the items you captured on the right hand column of the poster (strategic questions, obstacles and opportunities) to the *Strategic Priority cards*. We will place them on the *Strategic Priorities poster* where they best fit and discuss our realities.

Facilitator Note: You may want to have this chart up on the wall in advance of starting the session.

Strategic Priority	CHREATE Strategic Priorities 3.
	<p>Instructions</p> <p>1 Lay the Strategic Priority cards with respect to their strategic importance and our ability to execute on them as an organization.</p> <p>2 Identify the priorities you will take action on.</p> <p>Strategic Impact</p> <p>Ability to Execute</p> <p>High</p> <p>Low</p> <p>Difficult</p> <p>Easy</p>

6. We will require further strategic planning efforts to take our initial assessments to another level of detail in determining our way forward. For now, what are you most excited about?

Appendix

Special Considerations

If a participant is deaf or hard of hearing...

Whether the participant is speech-reading or using an interpreter, explain to the group that speakers should:

- Face the participant or interpreter when speaking.
- Talk at a normal pace and in a normal manner.
- Keep objects and hands away from the face. Don't talk while resting your chin in your hand with your elbow on the table.

As a facilitator:

- Make frequent eye contact to be sure the participant feels included.
- Recruit a volunteer to help the participant know where to look and what to read.
- Be sure the light source comes from above. Back-lighting makes speech-reading difficult.
- Give the participant as many visual cues as possible – point to images or gesture to indicate the speaker.
- Repeat questions or comments that may have been missed.
- If possible, make copies of the questions and card exercises for the participant.
- Allow time for the participant to ask or respond to questions.
- Because the participant can't speech-read while taking notes or completing written exercises, allow a little extra time for these activities.

If a participant is sight impaired or blind...

As a facilitator:

- Ask the participant to arrive early so you can describe the visual.
- Recruit a volunteer to make sure the participant understands what you are describing and record any questions that need writing.
- Encourage other participants to describe images and charts in detail.
- If the participant is partially sighted, enlarge cards that require writing.

Print Specifications

This module has the following components:

- Root *Learning Map®* Visual
- Card Exercises
- Dialogue Pages
- Facilitator's Guide

Below is a description of how each component is produced and collated together to create a complete set.

The Root Learning Map® Visual

- Printed from hi-res PDF file.
- Print the shorter side out at 36" and let the longer side scale proportionately. The final size for digital output is usually close to 36" x 55".
- The visuals are printed in 4-color process on a wide format inkjet plotter or press.
- The visuals are printed on a foldable synthetic paper.
- This module has non - *Learning Map®* Visual posters. For these, print the short side out at 36" and the longer side will scale proportionately as well.

The Card Exercises

- Printed from a PDF file and/or PowerPoint file if any additional *Macro Trends cards* have been added.
- There are multiple pages in this module. There are single-sided color pages and fill-in-the-blank pages.
- The color pages are to be printed in full color on card stock. The cards are trimmed down to size and rubber-banded into decks.
- The fill-in-the-blank pages are to be printed on a text weight paper stock. These are "disposables" or "write-on" cards because they are usually written on and discarded. These are printed and either rubber-banded or made into a tear-off pad. In the case of this module, only the *Strategic Priority cards* are disposable.
- This module also has a hand-out which can be printed on an 11"x17" text weight paper stock.

The Dialogue Pages

- Printed from a PDF file.
- There are 2 pages of Dialogue in this module. They are all single-sided color pages.
- The pages are to be printed in full color. They are printed on a heavyweight plastic material.

The Facilitator's Guide

- Printed from a PDF file.
- There are generally 22 pp. in this Facilitator's Guide.
- It is to be printed on normal stock, 4-color process.
- It is to be printed in booklet form – 2-sided on tabloid size sheets, folded and saddle-stitched down to an 8.5 x 11 finished size.

Collation

- For each set, 1 of each of the above components should be gathered together.
- The Card Decks, Dialogue Pages, and Facilitator's guide should all be inserted into a large re-closable poly bag.
- The Visual and other posters will be folded down and placed with the bag of other materials.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

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About Root

Root is a strategy execution company that helps organizations engage people as a catalyst for change using a proven framework that consistently achieves clarity, ownership, and results.



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