ON
THE SPOT

# Designing for Collaboration
## With Dr. Penny Pullan

On the 26th February 2021, Dr. Penny Pullan joined me on an edition of 'On The Spot' to discuss the important topic of *selling change.* You can see the original broadcast here. If you'd rather read an edited transcript of our discussion you'll find that below. You can view previous episodes by visiting onthespot.today

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**Dr. Penny Pullan**
*Speaker, Author, Mentor & Consultant*

**Adrian Reed**
*Principal consultant*

**Adrian Reed:** Hello, and a very warm welcome to this episode of "On The Spot", the 15 minute coffee break shaped conversational show about all things business change related, business analysis related and everything inbetween. I'm really pleased to say we have Dr. Penny Pullan with us today. I'm sure many of you will know Penny from her keynote presentations, workshops, courses and more. She is very well known in our community, and today, we're going to be talking about "designing for collaboration". Penny, thanks very much for being here today.

**Penny Pullan:** It's lovely to be with you. And what fun. 15 minutes!

**Adrian Reed:** I know. It is always fun Penny, but my main concern is I don't think we've ever spoken for such a short time. So we're going to have to be really disciplined with the clock! So the first question, Penny, that strikes me when thinking about this topic, is what types of collaboration can be designed for?

**Penny Pullan:** Well, my thoughts are pretty much all types of collaboration, but of course, you can't design every aspect down to the nth degree. I should probably explain that I'm coming from the perspective of having spent pretty much the last year locked away writing a book all about designing for collaboration, and especially thinking about workshops. Most of what I say, going forward, will be related to collaborative workshops, whether they are in person, virtual or a hybrid.

**Adrian Reed:** Yeah. I suspect we're going to hear more and more about hybrid as we return to some level of social contact. That leads me on to think about stakeholders. If I think about designing an in person workshop, I tend to think about different styles. So when we are designing for collaboration, hybrid, or whatever, how important is really knowing our stakeholders, and how can we achieve that?

**Penny Pullan:** It's absolutely fundamental because you want to know the people, you want to know what their preferences are. When it comes to getting a virtual or hybrid session: what are their preferences with it with regards to communication, virtual and so on, you want to have an idea of where they're coming from, for their context, be able to see a little bit of the world from their perspective. So much that you really need to know! But of course anyone who knows anything about business analysis will know that actually, stakeholders are absolutely fundamental. You need to get to know them, you need to understand the world from their perspective, to be able to design for the best collaboration that you can have.

**Adrian Reed:** Yeah, because I suppose different people will come at the subject matter from different perspectives, and there will be different ways of teasing information out. Eliciting without interrogation in a way! Eliciting without dragging people through kicking and screaming!

**Penny Pullan:** Yes, I know when I started, I used to ask so many questions that it did seem more like the Spanish Inquisition then actually eliciting requirements. I'm a little bit gentler now.

**Adrian Reed:** Yeah, absolutely! Are you able to suggest some tools, ideas or concepts that are particularly helpful when designing for collaboration. And, if possible Penny, are there any general patterns and trends that are particularly relevant in a virtual and/or hybrid type environment?.

**Penny Pullan:** Okay, I'm going to start off with with answering things around virtual and hybrid. I think one thing to think if you're designing collaboration is how you mix and match between doing things live (at the same time), like us having this conversation. But also asynchronous, which is a big word that we're hearing a lot about, and that I've been talking about for years, and suddenly it seems that everybody else is beginning to talk about it in 2021. Which is how can you design collaboration so some aspects are done together, and then other aspects are done in people's own time, or at times to suit them. How can you do things at separate times, and then come together and work on those things together. There are lots of collaboration tools that support that as well. And I'm reading, particularly for people who are introverted, who like to think and really polish things on their own first, it can be quite good to have periods of working together, but then also periods where you're apart. You have time to think and work together using collaboration tools, that can be quite useful. Something that works really well both in when you're virtual or hybrid, and when you're in a room is to use visuals: help people to see what they mean, with ideas, help things to stick, help people to get a holistic view of the whole thing in one place quickly. And think about facilitating collaboration. How are you going to do that? One aspect that came up in the book is, how much should you as the facilitator, or the Business Analyst running a workshop, how much should you aim to be in control? So lots of BAs really like feeling: "Yeah, I've got this in control. I've got five minutes of that, then we've got five minutes of that" Yep. You know, Oh, it looks like perhaps you've been there, Adrian?

**Adrian Reed:** Yeah, absolutely. You probably know me well enough to know my natural approach is to be a bit of a.... well "control freak" is the wrong word, because that implies I want to control other people. But I like to try to control uncertainty. Even when I (well when we could all travel) I had checklists for what to pack, and this is the time I need to leave if I'm going from Heathrow or Gatwick and all of these types of things. So I think there is a similar element to it?

**Penny Pullan:** Absolutely, but if you try to control everything,...

**Adrian Reed:** Exactly!

**Penny Pullan:** ...then you completely squelch the collaboration.

**Adrian Reed:** Exactly. And I think that's it, it's selecting the tool for the for the context, and there needs to be that spontaneity in the collaboration. Just rewinding, one thing that particularly jumped out at me of the many things, Penny, was the asynchronous element. And I do think that's so important, because at the beginning of the pandemic, everyone (almost overnight) just went to synchronous. Completely synchronous. I'll bring here a comment from my good friend, Vince, who says, that "time to think is so underrated". I suppose that asynchronous means that people can actually reflect rather than having to do everything with a self view of themselves on the screen as well.

**Penny Pullan:** You can turn off the self view in, in most video collaboration tools, so yeah, absolutely. But also, humans do not work incredibly well if they spend the whole time sitting down in front of a screen. I'm sitting here, in a darkened studio in part of my office, with three LED light banks shining at me. It's not healthy, you know, perhaps we can do it two, three hours a day, but there are people doing it from 9am to 9pm, which is mad. So think about how can we help people to be effective, to be productive, to be the best version of themselves. They're not going to be that if they're scrunched up with sore backs and they haven't moved for hours.

**Adrian Reed:** Well, that's another really interesting point, isn't it? You mentioned collaboration technology as well, and of course, one of the great things is we have so many tools. One thing I found myself doing more and more often is communicating asynchronously with video. So if there's a presentation or something that is more complex, I will actually record a screencast of me going through it once. And the person can watch it, rewind it, and so on. You can do that with whatever meeting platform you have. It's not a tricky one.

**Penny Pullan:** Can we get back now, and I know, this is making you feel uncomfortable, because you like to be in control. But let's go back to control. In the book, I talk about how people often try to do this, we've got to be in control. I've got to be in control, actually and have this mentality. And I find people when they're leading collaboration, when they're facilitating, that actually leads to huge amounts of stress. Whereas if you can switch from, "I've got to be in control" to "we are in this together".

Hmm. Then actually, all of a sudden, it means that if it feels like you're walking through a field of black treacle, then just say that actually, this isn't working too well, at the moment, it feels like we're all you know, a herd of elephants walking through a field of golden syrup or whatever it might be. Actually, it's fine. You don't have to be perfect. So it's letting go of that illusion of perfect control. And instead, yes, doing all the preparation, all the checklists, they're great, as Linda says [in the comments], they're being organised. But let's actually draw people in, let's remind people, Yeah, I'm doing this. I'm here to help you to come up with the best things that you can.

**Adrian Reed:** And that's it, isn't it? Because I think, for me, that organisation is about cultivating the conditions in which innovation can actually thrive. And it's important to make sure that doesn't overspill into a control freak, although Vince, who I work with quite a lot says, nope, control freak is fairly accurate. So there we go! First-hand critique! And bringing in a comment from Lyn who says virtual conference collaboration is great, but can only get you so far, we still need that body language to really help the collaboration along. So I suppose that there's an underlying feeling that virtual collaboration is always going to be inferior to face to face. Do you think that virtual will or hybrid will ever be on par with face to face collaboration? Or are they just different?

**Penny Pullan:** They're different, and actually, hybrid is harder than virtual. Now, I think for some things, virtual can be just as good. I think some things, perhaps it's better, but perhaps that's because you can access people who wouldn't necessarily be able to be there live in person. But we just need to be better at running things virtually in a way that works with people. Yeah, there are some people doing it really well. But there are most people doing it really badly.

**Adrian Reed:** And that's it, isn't it? I think I firmly believe the question shouldn't be "how can we convert this real world thing into virtual" the question should be what outcome do we want and how can we use the virtual capabilities we have to create the best possible experience the best outcome".

**Penny Pullan:** Understand the problem! Understand your stakeholders! Decide what's gonna work, it's bog standard business analysis really...

**Adrian Reed:** It really is... so we come full circle to business analysis as I predicted that we would! So Penny, our time is almost up. I am certain that people will want to stay in touch with you. I've already mentioned your book "virtual leadership", but how else can people find out more about what you do and stay in touch?

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**Penny Pullan:** As they're on LinkedIn. It makes sense to connect on LinkedIn, if you connect, please say hello and explain who you are. I get so many connection requests that at the moment I'm ignoring most of them. But if you are somebody who's interested in this stuff, absolutely I'd love to connect that would be super. I have a book coming out in July, and the BA summit, which normally happens in January, will be happening in July in conjunction with that book launch, which is all around collaboration. It's called Making Workshops Work: Creative Collaboration For Our Time.

**Adrian Reed:** Fantastic I can't wait to get my pre order of that! Penny thank you very much, It is always an absolute pleasure to chat with you. If you are watching this and want to hear more from Penny, head over to the Blackmetric YouTube channel as there are other videos that Penny and I have done together. Also check out onthespot.today to see other recordings and transcripts from "On The Spot". So thank you everyone for tuning in. Thank you Penny and take care, stay safe and see you next time.

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