Theory and Practice in the Large Group:

Guidelines for Consumer + Client Workshops

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Introduction

We want to describe our experiences working with large groups. We have several reasons for doing this. First, it has been one of the most interesting and difficult professional journeys we have undertaken with results sometimes exceptional and at others disappointing. Second because we think it opens our whole field of qualitative research up to a new form of inquiry, a new set of possibilities and in this respect offers the tempting idea that we might be able to work in depth with a great many people at the same time.

Third, it has been the experience of our practice that clients can participate directly in this work with consumers in a way that brings a freshness of insight that only spontaneous contact can do. We have always had a concern about the splitting created by the one-way mirror or the presence of a silent client in a living room group. Fourth, it has given us the opportunity to work with multinational communities simultaneously in the same room and to witness at first hand the effects of cultural differences. Fifth, in the case of Roy Langmaid, throughout his years as a moderator he became more aware of the limitations of the standard focus group procedure, to a point where after more than 3,000 group discussions and innumerable depth interviews he knew it was time for something new!

For the purposes of this discussion, a large group consists of 16 or more members. This is not an invariable figure, some people feel that 16 is still quite a small group, others feel quite lost among fifteen people. Moreover, the social facts about this group will influence whether you feel comfortable or inhibited. Whether you know the other members will have a big effect as will other things like age, gender and the purpose of your coming together. However, the number 16 is based on a consensus from our own experiences and the work of pioneers like Pierre Turquet at the Tavistock Institute for Human Relations. It is mainly to give the reader a rough guideline for the lower limit of the distinction ‘large’ in group terms. If it will help, we believe that you do not fully experience large group dynamics completely until you get up to about 30 people in number. But from 16 onwards you will start to experience elements of the large group effect and there will be moments when the kind of leadership and facilitation we describe later will work best to move you on or to resolve a sticking point.

Having settled on a lower limit we need to mention the upper. How many people can you include in this kind of group? Perhaps it would be wise to spend a moment reflecting on the kind of group we are talking about: we are looking to create a group or community to participate in an inquiry dedicated to a task determined by a series of objectives. This we may call a Work Group (W). It is important to recognise that the results may as easily be sourced from emotional experiences, unexpected insights, different interpretations, struggles within the group or things like ambiguity and speculation as any one single answer to a particular question. We are seeking to create a rich encounter on many levels where the opportunity for discovery is maximised. At the outset we do not know what the answers will be, nor in what form. Having said this, we do have objectives for our study and to fulfil these we must be able to view our group as an intelligible field of study. We must be able to make some hypotheses about the factors contributing to the group’s behaviour, opinions and decisions; otherwise the group’s reactions will defy analysis.

The largest group we have worked with so far was just over one thousand in number. It proved one of the richest and most rewarding of all the large groups we have facilitated. As far as we can see there is no upper limit to the number of people you can work with – or none that we have encountered thus far - to conduct an exciting and meaningful inquiry. How you design the work to allow for the size of the group will be determined by important constraints like logistics, costs, timing, venue size, communicating the task clearly, facilitating the work, capturing and organising results and giving the group a realistic opportunity to feedback and complete their experience. The nature of the process with 1,000 participants is inevitably very different from that with thirty but many of the guiding principles outlined here will work as well for the massive group as for the large one.

Having described these limits, most of our sessions have involved between 25 and 80 participants, numbers equivalent to the amount of respondents in a four to ten group sample in a conventional procedure. Unless otherwise specified, it is between 25-80 that we are referring to for the remainder of this paper when we refer to a large group.

The Key Difference Between Small and Large Groups

One of the features of qualitative research is that the researcher is part of the inquiry. It is perfectly permissible, even desirable in many cases for the knowledge, observations and feelings of the researcher to form part of the inputs and outputs of the study. This principle of interrogating our own experience affords a wonderful starting point for getting to grips with large group methodology. Ask yourself: ‘what large groups have I been a member of?’ ‘What is my experience of being among 25 or more people?’

Our own reflections on such questions prompted some realisations that formed the basis of our approach. The first thing we noticed was that there seemed to be a form of strength in numbers. If there were 40 or so people queuing at the airline check-in we would wonder:

> *"Can't they see us all here, why don't they open another desk? We have a right to better treatment than this!'*

From earlier experiences as fans in football crowds we remembered that we did our utmost to drown out the opposing supporters. We felt invincible as we chanted our anthems, perhaps like soldiers chanting their motto before battle. The feeling was one of expanded strength, of limitless possibility.

Somewhat surprisingly we noticed that there was an accompanying yet opposite feeling. We could feel exceedingly vulnerable and anxious in a large group. 'Who are all these others?' 'What will they think of me if I talk about myself or my opinions?' Here the feeling was one of contraction, a desire to remain invisible, unnoticed and safe in the centre of the crowd. We found confirmation of our own reflections in the seminal text on large group dynamics. (Le Bon, Gustave (1895/1960),

Whichever of these feelings dominates at any one time is probably a function of each group member's psychic (inner) dialogue coupled with the observable activities and emotional climate in the larger group, especially the style and activities of the leader, if there is one. From these observations we realised that large groups were capable of, and were drawn towards, fluctuating extremes of emotion: that here we had a situation which allowed for forms of experience and expression that were inhibited in the small group. Many of these expressions contained passions and desires you might otherwise only see in private places. The mind was drawn back to childhood days in the sitting room of our family homes where we learned the social conventions and where small talk dominated the proceedings. These dull moments contrasted with the school playground where, out of the sight of the moderating influence of the authorities, we brought our full spontaneous self-expression to our activities. We were swept away by the realisation that in the market research group discussion we had created a scene that – like the sitting room conversation - might easily be dominated by small talk. Yet if we could recapture (and impose structure on) the spontaneity and inventiveness of the playground, there we might find the passions and desires that were the source of our motivations. It was from this insight that the name for our large group process, the Big Talk, was born.

Like us you might ponder the relevance of this; do we really want to contact consumers' spontaneous, unorganised, irreverent, unconsidered aspects? Most market research effort has conventionally been directed towards eliciting their opinions and preferences. Yet for all their information about consumers, for all the countless studies done, the prominence of one word in recent times gives us a clue to what clients are really looking for. Insights. Much of our approach has been devoted to the study of insight and the optimum conditions for creating it. More directly, what is an insight and is it to be found in the domain of preference and opinion or in another place, somewhere less evaluated, mannered and ruled by convention? Such a place might be the volatile atmosphere of the large group.

One of the strange things about insight is that it is hard to define. That is because it is a process not a thing. It is an awareness phenomenon. Suddenly, for whatever reason, you are able to perceive something you were unaware of before. It may be a new perspective, new information, a new feeling, being able to link previously unlinked phenomena, whatever it is, it leads to seeing more into the heart of a matter. You gain access to the nature or meaning of something at another level, although at first it may be hard to put into language what you know that you did not know before. An insight is not the truth; it is simply a new level of awareness. It may not even matter whether it is more true or less than the previous state of awareness, often it is simply that a new explanation unleashes a whole set of resources and activities that were not possible before (see Appendix: the Arrivals Lounge). This new energy in and of itself often leads to further new discoveries. Communities in an insightful state have a sense of ‘wow’ and ‘anything’s possible’ about them which may be lacking from the workaday world. This quality of energy is particularly helpful to stuck, tired or falling brands. It is also vital as a source of direction for the energy of adolescent brands, those that have not realised their potential.

Whatever our perspective on insights and their nature, in the end the proof of the pudding is in the eating. The fundamental question is: ‘Did we gather valuable insights in a new and compelling way through our large groups?’ The answer is yes – and because the clients were present at the dawning of the awareness that informed the insights - many of them have been put into action much more effectively and rapidly than had they simply arrived in a report. A list of innovations based on insights from large group work is included in the Appendix.

In summary, there are a number of features of large groups that make them different from small groups and invaluable as a tool in the search for insights:

1. First and most important, they have never been done before, much as focus groups and in-depth interviews were unknown until the 1960’s. They are fresh and new.

There are a number of other special features of large groups which make them particularly likely to take us where we have not been before – and thus into insight-rich territory – these are:

2. The volatile emotions of the large group, driven by conflicting feelings of invincibility and vulnerability leading to the fears both of exposure and invisibility, mean that passions are near the surface and require only the right facilitation to reveal them.
3. The tension between the desire to speak in the large group and the wish to remain invisible builds a sense of not knowing what to expect but that something ‘big’ might happen at any moment. This produces an atmosphere pregnant with possibility and full of participants with something at stake. Everyone wants to make a contribution; all are afraid of saying something silly. Any silence quickly becomes unendurable and people feel they must speak.
4. The size and space allocated can allow for lots of activity rather than discussion based explorations. Things can get built or prototyped, processes may be role-played, objects or observations may be brought in from outside.
5. The clarity and the role of the leader/facilitator. This, in our experience is more visible and clearly distinguished than in the focus group.
6. The ability for sub-groups to work independently on parts of a project and bring their discoveries back to the main group.

7. The opportunity to witness sub-groups and diverse communities interacting in the same space and noticing the effect of these differences.
8. The ability for clients and their agencies to participate directly in the consumers' elicitation of their deepest issues and how these might be resolved.
9. The existence of a 'theatre' of reactions and performance which allows people to venture into sides of themselves not present in a conventional discussion.

Having set the scene, we are conscious of the need to make our points succinctly if they are to be of practical use to the reader. This forces us to make some choices about the way we will present the topic. Like society itself, the large group may be approached from countless perspectives. We have chosen to outline the main steps or considerations in constructing a large group exercise for anyone who might wish to experiment with the method. These main steps are:

Step One: A description of problems or issues suitable for work with large groups.

Step Two: Considerations in designing and rescourcing a large group study.

Step Three: Leading and facilitating large groups. A model for effective facilitation and the role of the leader.

Step Four: Process design: what to do with a large group.

Step Five: Capturing results and generating insights.

Step Six: Implementing Results and enrolling the organisation.

Step One: Problems or issues suitable for work with large groups

To save space we have opted to describe these operationally. This is a list of the issues that have been brought to us over the past few years. These are all concerns which we have approached using large groups:

1. The problem of working on a brand or in a company that has become a shadow of what it once was. How do you re-energise the brand and/or the team?
2. Clients with a gut feeling that something is missing or gone but they didn't know what it was.
3. Clients whose customers were leaving the brand in considerable numbers.
4. Instances where there was a lot of 'churn' or switching in the market. There was evidence of low levels of loyalty and people were talking internally about churn and switching as if they were facts of life.
5. Clients who had noticed that increasing efforts in terms of marketing and promotion were yielding diminishing returns.
6. Companies who had become obsessed with product rather than brand development. This might have led to numerous line extensions that were confusing and giving rise to cannibalisation in the market.
7. Research managers who felt that their customer information and data seem very predictable, one-dimensional and repetitive. They were looking for fresh thinking.
8. Companies who feared being sidelined or outmanoeuvred by new technology, distribution channels, business models or brand positionings.

9. Companies where in spite of all the talk about change and new horizons, it was proving very difficult to get things done differently in their organisation.
10. Companies who were obsessed with the moves of major competitors and needed to reconnect with their actual customers. (Coke and Pepsi, Nike and Reebok, Lever and Procter, Internet Explorer and Netscape).

Most people came to us either because they wanted to try something different or because the conventional approaches had not delivered a solution to their problem. Often both these reasons were evident. It should not be underestimated how difficult and risky it felt for many of those who reached out to an untried technique. There are particular reasons why this is so hard in the area of consumer contact. Hirschhorn (1988) has argued that individuals operating at or near to an organisation’s boundaries (i.e. close to customers, suppliers, competitors) experience acute anxiety from two sources: that derived from uncertainty about the nature of ‘outsider’s and their responses, together with fear of attack from within their own organisation. This attack may come from colleagues who ridicule or criticise or from the inner dialogue of the risk-taker himself as he struggles to grasp the breakthrough or insight they might need. Much impatience and frustration must be negotiated. This leads to a tendency to retreat to the centre of the organisation or to tried and trusted methods, away from the hurly-burly of the boundary. It takes rare courage and commitment to explore at the margins.

Even though your client may have an appropriate issue, he or she might not have a groundswell of interest or commitment within the organisation. Mobilising this and explaining the large group approach – and at the same time enrolling his colleagues in the project - might be part of the essential preparation process. The client may need your help to demonstrate the possibilities to his colleagues.

Step Two: Designing, Resourcing and Preparing for a Large Group Project.

There are two key questions to ask at the beginning of the design stage. These are

- What is the highest expression of what we are trying to achieve?
- Whom do we need to invite to contribute to this and to deliver it?

It might seem strange to start out with a question that is rather grand, that reaches for the largest goal for the project, but it pays to remember that you are asking people to give up a lot of time, one day, perhaps two, and that at some point the leader or facilitator will stand in front of all these strangers charged with the issue of setting the goals and ambition for the session. With perhaps as many as 80 people in the room it helps to have a great topic, something that will mobilise all of the interest in the room and give people a sense that this size of gathering is warranted and that the outcome will be worth the sweat. World Peace might be a bit ambitious but two examples from our recent history might help:

"We'd like your help to invent the future of flying."

"Help us build the perfect healthcare company."

It is our experience that people will not hesitate to drill down into the detail if the result is worth it. To help them work through the difficulties they need a bigger vision, a bigger cause to measure their more finely focused work against. When groups get stuck in detail it is often a ruse to avoid conflict or lack of confidence in their output. This may arise as a facilitation issue from time to time and we will discuss this in the section on process but giving people a big enough game to play in the first place will save much effort.

From these deliberations an invitation to consumers who might attend the large group session can be constructed. Once again, this should emphasise the size and importance of the project as well as details of dates, times and venue. Here is one we used for an airline.

An Invitation

"We need your help.

Please come and help us design the future of flying. We will work for a weekend in a creative group alongside airline staff who have been asked to take the things we invent forward.

There will be about seventy-five of us altogether, made up of 50 passengers and 25 airline staff from different departments. We will also be an international community with members from every continent on earth. What we do together could make a difference for every passenger.

You don't need to know anything technical or even have any special opinions about flying or travel. You will be enough just the way you are. We will work both as a large group and in smaller groups so that everyone can give of their best and have ample opportunity to make a contribution.

We will feed you, refresh and look after you during our two days together. The event will take place at----------, and will run from 9.15am to 5.30pm on each day. We will be pleased to pay you £.... to thank you for your participation. The whole event will be *filmed so that people from the airline who are unable to be there for the weekend can share in our results.*

The event will be facilitated and managed by a team from Transformations."

Who Should Attend?

We balance the numbers in the large group so that customers always equal or outnumber clients. The customer sample is usually designed in a similar way to a qualitative study, representatives of different ages, usership, gender, regions or nations are invited in accordance with the objectives of the project and the client's consumer profiles. We use recruiters experienced in inviting people to this kind of event and so far we have always filled our quota. One of the reasons, apart from the exciting nature of the topic is that we pay good incentives. At the moment we are paying £300 a head for attending a two-day session. Although this might seem a great deal, it works out at about £21 per working hour per respondent, which if considered in these terms is rather less than we pay for standard groups.

Duration of the group is very important. Obviously it takes longer for 80 people to make a contribution to a topic than for 8, but there are several other important considerations that we have discovered over the years. The first is the importance of an integration period during the actual inquiry itself. Normally this never happens in a focus group and the study is condemned to keep restarting with a new set of customers. In the large group we have found it beneficial to run the sessions over two consecutive days, often at the weekend. There is something about the opportunity to 'sleep on it' that brings people back on the second day ready to share realisations based on impacts from the first day. Here is an example:

> *"What I thought was that I hadn't had an easy time of it yesterday. Suddenly I thought of Chad Varah. I don't know of people know him, he's the man who started the Samaritans. And the reason he started the Samaritan's Helpline was because he went to his parish church one day and a man was digging a grave for a young girl, and he asked, "What did she die of?" The gravedigger said, "She committed suicide," and he said, "Well, why?" because she was only fourteen.*
>
> *The man said "Well, she started her periods and was so ignorant and uninformed and terrified that she killed herself."*
>
> *And I thought yesterday about our vision for the future of Tambrands ten years on and I was quite disappointed how timid we all were. My son will be a grown man by then and really I would like a world where the whole thing has stopped being a problem, where women can actually be women and enjoy it, where people are in tune with their body and celebrate it."*
>
> *Female Participant 35: Tambrands Project on Menstruation 1993.*

There is much to be gleaned from this quote both about the advantages of leaving people with their experiences overnight and about the nature of insight. We can tell from the speaker that she had experienced some feelings of difficulty during the first day and suddenly a thought came to her about a story she had once heard which demonstrated to her the terrible consequences of remaining silent on this topic. Her passion on behalf of future generations led her to speak out, on the verge of tears.

We don’t know at what point she had the sudden realisation that if people didn’t discuss it the problem would continue. There is much difficulty in opening out this particular topic; the slang term, ‘the curse’ is an example of the taboos inhibiting a mature discussion of this normal feature of adult life, but obviously the impact was at work in her on the first day. This led us to postulate a model for the Insight Experience that we will describe in more detail in Step Five, but we may note here that on many occasions there is a delay between what we call *the moment of impact* and the *moment of realisation.*

It has been our experience that the second day is very rich in insights in the large group while the first day was spent getting into the process and the topic. We suspect that many respondents are sent away far too early from focus groups, before they have had a chance to notice shifts in their feelings and awareness. Returning after a night’s rest allows us to press people about what made an impact on them and why. Since we have become aware that even two days might not be enough, we ask the client group to participate in an insight generation session with us a few days after the main workshop. We will describe this in detail in Step Five, focussing on how we work to bring insights to the surface.

The whole question of duration is interesting. Why do we resist spending more time with individuals? Are our interests in consumers limited to an hour and a half for eight people (nine with the moderator), which gives each person ten minutes at most. We would not expect a new acquaintance to reveal himself to us in an hour. Yet he might over a weekend. Moreover, when you think about it, if we spend two whole days with people that’s a total of 16 hours which is just about the same total length of time we might spend with respondents in an 8 group study. Only we keep all of our respondents all the way through rather than dismissing them just as we are getting to know them. Thus each person has sixteen hours to ease into the process and make a contribution.

Another key consideration is the participation of the client. Clients are often anxious about meeting their public in open forums, fearing either ridicule or attack or that they might not know the answers to questions and look silly in front of consumers and colleagues alike. We believe it is key to avoid the humiliation of clients or consumers and so give clients coaching on how to handle themselves in these sessions. The first tip is to spend the session in the customer side of their personality: how do they feel when they meet organisations, goods and services in the world? How would they feel if what they hear from customers happened to them? We let the whole community know that we have asked the clients to behave as customers at the start of the session. This gets them off the hook from the beginning. We also ask the clients to monitor whether they or their customers are contributing more. If the clients are dominating proceedings it's probably time for them to keep quiet for a while. It is vital to remember that every client has more experience as a customer than as a provider of goods or services – if not of his own products then of others. We are all qualified consumers.

Finally, the issue of venue or location. Think about how your community will get there and get home. It needs to be accessible. Remember that we use the power of the large group to do a lot of physical expression both to loosen the community up and to enact or prototype things so that we may experience their desires-in-action. This takes space. You need to allow around three square metres per person which is about three times the space that an hotel will normally allow for people seated 'theatre-style'. The space will also be important to ensure a degree of autonomy and freedom from interruption in the small group work. To accommodate people who must have privacy while they create we usually look for a venue where there are extensive and comfortable public spaces like lounges, lobbies, restaurants, and anterooms. We do not usually hire breakout rooms unless there is a need to work extensively in small groups or when each group must build its own project or artefact. We tend to encourage an improvisational use of space, facilities and resources.

Step Three: Facilitating and Leading the Large Group

There is so much to say on this topic that we can only hope to make a start here. We will attempt a brief introduction in two sections:

I. A General Theory of Large Group Dynamics

II. How to facilitate large groups: Leadership Style

We have selected this format because these two subjects have proved very influential in forming our approach. We had no theory to speak of when we started and so these principles have been derived from our large group events and from careful study in a field that is still very much in its infancy as far as recognised research is concerned. Although these theoretical discoveries came last in our development of this work we present them first here because they influence everything you might consider in the process and leadership areas and are a vital resource for tactics and guidance when something goes wrong. They might save you some time and errors that cost us disappointment and embarrassments.

<u>I. Towards a General Theory of Large Group Dynamics</u>

i. The Nature of Membership

Every study and common experience shows that people are both excited and anxious in a large group. The task for the facilitator is how best to mobilise that excitement into creative and spontaneous expression while providing structure and support that will allow group members to manage their anxiety. The excitement arises from the feelings of power and invincibility generated in the large group:

> *“Surely a group of this size with this many resources could accomplish anything we set our minds to?”*

represents a typical thought for a group member on joining a large group. This excitement and potential alone acts to stimulate the imagination, which may continue along a constructive and optimistic line for a while until a thought, something like the one below intrudes:

> *“Wait a minute, I don’t know all these people, there might be crackpots and whatever else among all these strangers. Some of them look hostile. Can I trust them? Is it safe to show myself to them? Perhaps I’d better keep quiet until I see how the land lies?”*

At some time near the beginning every group member will have some experience of oscillating between enthusiasm to be included and fear of being overwhelmed or attacked. We call the nature of membership status at this time ‘Singleton’; the group is made up of a collection of single people in a space together. If you can imagine yourself in such a gathering, one of the most disconcerting things might be that everyone looks so calm and quiet while your inner world may be sounding alarm bells, an inner voice calling you crazy for coming, identifying possible attackers or any of the myriad expressions of anxiety that overtake us in uncertain situations. Here we have one of the core paradoxes of group work, while you, personally, may be experiencing all sorts of chaotic thoughts and emotions, those around you look as though they are calm, collected and in control. This, of course, heightens your concerns about your unruly mind and makes secrecy and withholding even more likely. It is also a potent source and motivation for much of the pretending and posturing that occurs in groups.

It is the role of the leader/facilitator to introduce Singletons to the group and its process in a fashion that helps people to overcome their estrangement and start to make connections. It is also usually good to mention the difficulties of being in a large group and not knowing the routine or the other members and how this will be overcome. Leadership style, which we tackle in the next section, will be very instrumental here. We have noticed that once Singletons have spoken, especially if they have managed to speak in front of the whole group, their membership status seems to change. They become what Turquet (1974) has called Individual Members. They retain their individuality yet through their contribution have become members of the larger body. They are able both to recognise their individual opinion and notice the climate of opinion in the group and where they stand with respect to that. This is an ideal state for participants to contribute from.

However, as with many elements in group dynamics this is a difficult balance to maintain. There is quickly a temptation to move forward to a third state which Turquet calls Membership Individual. Here the membership of the group or ‘herd’ effect has overtaken the individual and he has moved to a ‘compliant followership’ where doing what seems to be the will of the mass has the dominant call on his behaviour. In this condition of membership the individual is very inclined to take cues from the apparent will of the majority, even though perception of this will is often based on a mixture of instinctual interpretations and contagion – a kind of ‘sniffing’ of the group scent or atmosphere. This state of mind, driven by unthinking compliance, is that which permits normally orderly citizens to commit acts of destruction when in the centre of a large protest or demonstration.

It is also worth remembering that since this is a dynamic situation, there is the possibility of reverting to ‘Singleton’ at any moment too, should a participant feel threatened, unappreciated, ignored or distracted by her inner reality. All this sets a challenge for the process design and leadership to keep as many members in the Individual Member status as possible throughout the process. We have found that the invitation to play short, intensive and physical games of the type called ‘icebreakers’ in team building work is a very good antidote to the separation (Singleton) and aggregation (Membership Individual) drives that flow through the group during its time together. Both separation and aggregation are responses to anxiety and so can be ameliorated by any work that engages people outside of their fear.

ii. The Key Activity of the Work Group (W)

When the group is not dominated by an anxiety that leads to avoiding the task, it is able to work utilising and combining perspectives from both inner and outer realities. This means that peoples’ thoughts and feelings and their perceptions of others and the world may be included in the work. The group can achieve a fine balance in integrating these different sources of experience. The main activity that we encourage for the W group is what we call ‘Free Talking’. This is as near as free association as we feel able to aim for in the large group. Remember we are often aiming to get beneath rational responses and allow people to bring their more hidden aspects, including desires and secret wishes into the open. Free Talking is the name we give to the process of circumventing the effects of resistance and inhibition. We thought at first that the size of the group would massively inhibit the potential for Free Talking. But after many surprisingly candid revelations in these sessions we have formulated a simple equation to explain these occurrences of extraordinary outspokenness in the large group:

‘The size of the speaking is created by the size of the listening.’

In other words, although they may be experiencing fear, inhibition and resistance, at some level people know that they will not often get an opportunity to speak out in front of such a large group on a point that could make a big difference to their lives were they to express and resolve it. Furthermore, in front of the large group people will only say the things they are really committed to, that are really worth hearing. Much small talk is thus cut out. The size of the audience actually promotes a level of candour and passion often absent from the small group. This was an extraordinarily powerful commendation of the possibilities of large groups for us and a great encouragement in the early days. Suddenly people would speak from the heart and bring themselves forth in what had seemed unlikely circumstances.

Obviously these phenomena, Free Talking and overcoming inhibition are linked and we must describe the best conditions we have found for facilitating and supporting them.

iii. Conditions and Rules established by the Leader.

There are many needs of the group that must be attended to by the Leaders. The art of dealing with these needs creates a sense of structure in the group that reassures participants that it is safe to be a member and to make a contribution. Here are just two of the key elements of structure:

a) Security Needs

These include a space to call my own (my chair, my desk), somewhere to escape to, knowing where the toilets are, somewhere to keep my valuables safe, ways to keep warm enough, a place and time for food and drinks, knowing how to get out of the room if a fire should occur. But there are more subtle and less objective needs included under this heading. People must know that they are safe from abuse; that if they venture something spontaneous or odd, they will not be mocked or ridiculed. Thus we discourage criticism and the giving of good advice in the large open forums. It’s fine to disagree but make your own case, don’t rely upon demolishing others. So in the large group sessions where anyone may speak we always have them feed back to a leader who is located in front of the room. This discourages attacks on other group members and encourages speakers to find a mode of expression that conveys their point without attacking others. The leader is also quick to acknowledge anyone who takes a risk and brings a taboo or contrary opinion into the room.

So, for security needs, here is a checklist.

i. Make people aware of the surroundings and where they can deal with their physical needs i.e. toilets and fresh air etc.

ii. Ensure that there is refreshment available, and they know when they can eat and drink.
iii. Explain the fire drill and point out exits.
iv. Facilitate them claiming a place that can be theirs – territory is a vital dependency need to all members of the animal kingdom.
v. Let them know how safe their personal belongings are – if they are at risk ask them to keep them with them.
vi. Let people know what they can rely on ethically from you, and what your ethical expectations are of them.
vii. Share your own fears about not being taken care of when you are a participant in a group, and use these as a context for explaining how such ethical boundaries are important.
viii. Deal with ethical breaches without condemnation. So if someone is abusive about another person's remarks, remind them of our rule about acknowledging and respecting all contributions and say how you – personally - would feel if someone followed up on one of your remarks in a dismissive fashion. Point out how we will all become timid if we fear that anything we say will be ridiculed. But do this in a manner that normalises ethical breaches in the context of everyday life by demonstrating how common they are from the playground to the workplace and at the same time explain how the breach of ethics affects the process adversely. By reassuring people of their normality, you relieve them from the burden of having to either defend themselves or feel ashamed. In this way both the original speaker and the dismissive follower can be protected.

ix. If the ethical breach happens to you, be honest about the impact it has had on you without blame. Let them know that you are sure they did not intend to have the adverse effect. Enrol them into taking care of you and others.

x. Get training and experience in the handling of group process work. Small group discussions are different, they already contain a whole bunch of unwritten rules and assumptions which tend to keep them tame and orderly. If you are to do open process work you will need new skills.

b) Relational Needs

To be able to work meaningfully and in depth the group needs to establish strong personal relationships: not professional, not private but personal. Here is a checklist for relational needs:

i. Create personal relationship. This requires that you see people as they are as apart from your judgements about whom they are.

ii. Play games that allow them to see the people they are with in a more open and spontaneous mode. Use icebreakers and warm-ups of the types described in the section on Group Process to help in this.

iii. Entrust something about you that is important within the context of your agenda. To create trust you have to entrust something to people. Give them the opportunity to do the same with each other.

iv. Acknowledge what works about people. Be the messenger for the qualities you see in them that enhance the process and encourage them to do the same by your example. Thank them for being courageous, funny, wise, honest, authentic. As they believe what you tell them they can start to use these qualities more and more. If you find this distasteful then we leave you with a question: how does it protect you to deny people knowledge of what works about them - and how can it possibly benefit them? And, by the way, praise is never patronising when it is honestly and sincerely given.

v. Let people have all the information they need in order that they know all of the agendas. If a game requires that you need to keep some information back, let them know that you are doing this and ask them to trust you. They will be delighted. If you have a hidden agenda they will smell it, however good a liar you may be. Deal with all doubts.

vi. If you want them to do something unusual, then tell them how your own fear gets in the way and what it tells you. Show them how to do it by doing it first. Play games that put them in touch with the internal resources that they will need to use to deliver on your requests.

vii. Acknowledge them individually at every opportunity, especially anyone that you have decided that you do not like! Let them all be ‘better’ than you at anything and everything.

viii. If someone hogs the limelight at the expense of others stay on their side, thank them for being so willing to take the initiative, and then enrol them into encouraging others to do the same, ask them for their help.

ix. Walk in their shoes whenever you change the game, or they complain, express their needs, get upset etc. By this we mean put yourself in their place and allow yourself to feel as they might in the face of a new challenge, change of pace, direction or intensity. When necessary offer a short explanation to satisfy people's rational needs before asking them to do something unconventional. For example: "What would you say to trying something really different. Just as a game to see what happens? What about if we set up the situation at your bank or post-office and in doing so tried to capture some of the atmosphere, style and tone there? Do you think you could choose three or four key characters and brief them on how to behave to give your group a feel for what goes on in your bank? If we want better service and responses in these sorts of places it might help to develop our picture of what they are like now."

x. Stay present with them come what may. And stay on their side. And always remember - a good friend does not leave until the agreed time has arrived!

c) The Interplay of Activities in the Large Group

We have found that a good mixture of activities works best. These include:

Large group forums where anyone may speak, one at a time, on their feet with a microphone in front of the whole group. These work particularly well after games, small group activities or after a reflective process (e.g. visualisation) or a break.

Small group discussions. The large group may be subdivided in many different ways and people can work on topics according to their interest, for instance group one works on product design while another works on customer service. Feedback is always given to the large group from each small group so that everyone is appraised of the results in all exercises. In this way you can get the combined benefits of small group and large group work and offer the whole community a chance to build on its various discoveries.

Reflective Inner work. This includes things like short walks to reflect on an issue or problem, visualisations, Art From Within – a creative drawing process. Again the results of these reflections are built and shared with the whole group.

Play and Games. These include all manner of role-plays, enactments, prototyping, imagi-building, and wherever possible we aim to stimulate the physical energy by warming up the group with a relevant exercise. We will describe more of these exercises when we deal with group process. Usually a particular exercise does not take more than an hour. There are exceptions, however.

II. How to Facilitate a Large Group: Leadership Style

There is no doubt that the large group calls out for leadership, much more so than the small one. The dilemma is what style and characteristics of leadership should you employ and how many leaders should you have? To take the second question first, we have no doubt that two leader/facilitators are an advantage in the large group. At any time one may be working with the group while the other is keeping an eye on process, timing, group atmosphere and climate and the transference and counter-transference effects between the group and the active leader. Transference and counter-transference are phenomena that were distinguished by psychoanalysts from their experiences with patients. It rapidly became apparent on occasion that patients were treating the analyst as if he were some other person from their past. The analyst would be expected by the patient, for example, to judge him in the same way as parents or teachers had. There was a reciprocal tendency for the analyst to project onto the patient feelings and motives that derived from significant people in the analyst's earlier experience. He might impute a new patient with a similar pattern as a former one, for example. These phenomena are particularly strong in the presence of anxiety as our survival mechanism tries to alert us to signals that formerly have resulted in danger of either a physical or psychological nature to us. Thus in the large group transference and counter-transference effects are very strong and occur as a background of emotions and interpretations that can easily come to dominate and influence the actual verbal and physical events. The general effect is that participants or facilitators might start to act as if they are dealing with circumstances other than those actually transpiring in the session. Usually they are reacting to a person or from an earlier time in their life that they have been reminded of by something in the room. This then results in the production of a feeling or climate that occurred in that earlier time and that feeling is transferred onto the present situation.

The observing facilitator can keep a look-out for these emotional entanglements, unexpected reactions and consequences and for things that need to be cleared up or returned too. A good example here is when a facilitator reminds a participant of someone else in his life with whom he has some incomplete business. There is a temptation, driven by unconscious wishes, to try to complete that business here and now in the group, even though the facilitator is not the appropriate person. This can also happen to the facilitator where he starts to treat an actual participant in a manner charged by left-over tensions from an earlier encounter with someone else. Here the observing facilitator may point out to his colleague in a pause or break that he has, in our terminology, got ‘hooked’ by some unseen (transference) undercurrent. If necessary the observing facilitator can intervene to stop things going too far. On many occasions we have used three facilitators in a two-day process where one has special technical expertise in a particular type of exercise or process. This can also work to give other facilitators a much-needed break.

There has been a great deal of focus on the style and effect of group leaders in recent years, particularly since the need to lead organisations through change has become such a normal feature of our commercial world. Many writers in this field have adopted an autobiographical approach (e.g. Harvey-Jones (1994), Bennis (1997)), telling us how they did it and these texts are worthy of review, particularly for their guidance on how to deal with mistakes and misunderstandings.

However, our problem is of a slightly different nature. Our large group is met for a once-only encounter and we must start as complete strangers quickly to develop enough trust and intimacy to become aware of and share our deeper feelings on issues from our daily lives. From these realisations we must then work together to produce quite complex "What if?" type answers that will allow a more appropriate satisfaction of our wishes. There are obviously going to be as many opportunities for disagreement, misunderstanding, offence and inhibition in this type of meeting as for cohesion, alignment and inspired creativity. Then, in a matter of hours, the group will end and the job will be done. How best can a leader help?

To answer this question we have turned our eyes inward to our own experiences and combined these reflections with feedback from participants on what worked for them and what did not. Earlier we have discussed in some detail the needs that are likely to be present in the large group. What style or combination of styles is best suited to accommodate these? There are two distinct elements that contribute to our answer. They interact with each other within the person of the leader to produce a performance made up of what is said and the way it is said - content and tone if you like.

i. Content Components

This again neatly subdivides into two main competencies:

a) Technical expertise

b) Model-setting for participants

In each of these roles the leader helps to shape the norms of the group. These norms will be established fairly early in the group's life and will tend to persist throughout its duration.

'**Technical Expert'** is essentially the aspect of leadership that lets the group know that the leader has visited this unusual, perhaps strange, process before. He will ensure safety, set and maintain rules and fairness and distribute resources, guidance and acknowledgement in line with open and just principles. He will settle disputes and help to remove obstacles to progress without promoting one member over another. The underlying skill of the leader in this role is that of social reinforcement. Group behaviour is continuously influenced by a series of environmental events that have a positive or negative effect. This is a bit like the model from behaviourism where Stimuli and Responses create a chain of subsequent strengthening (reinforcement) or weakening (punishment) of links between people and events. The leaders job is to support recognition and acknowledgement of these events and to provide help in integrating them and moving on to greater accomplishments.

‘Model-setting for participants’ describes the element of leadership in which the leader’s personal behaviour is used to set an example of the type of interactions that will be permissible in the group. In other words the leader may use personal self-disclosure to set an example of the level of candour and self-revelation that may be required to complete the task. He may demonstrate ways in which the group can be freed from social convention by raising his own energy, pace or tone to shout, sing, dance, be impetuous. Alternatively, he may be quiet and reflective and demonstrate ‘not-knowing’ yet be willing to stay in contact with the whole group while he ponders this ignorance and how he feels in its presence. The leader may also, by offering a model of non-judgemental acceptance and appreciation of other’s strengths, help to shape a group that feels healthy, vital and able to grow and learn from each other.

ii. Tone Components

Once again, there are two main elements in the make-up of the tone or emotional range of leadership.

a) Affect

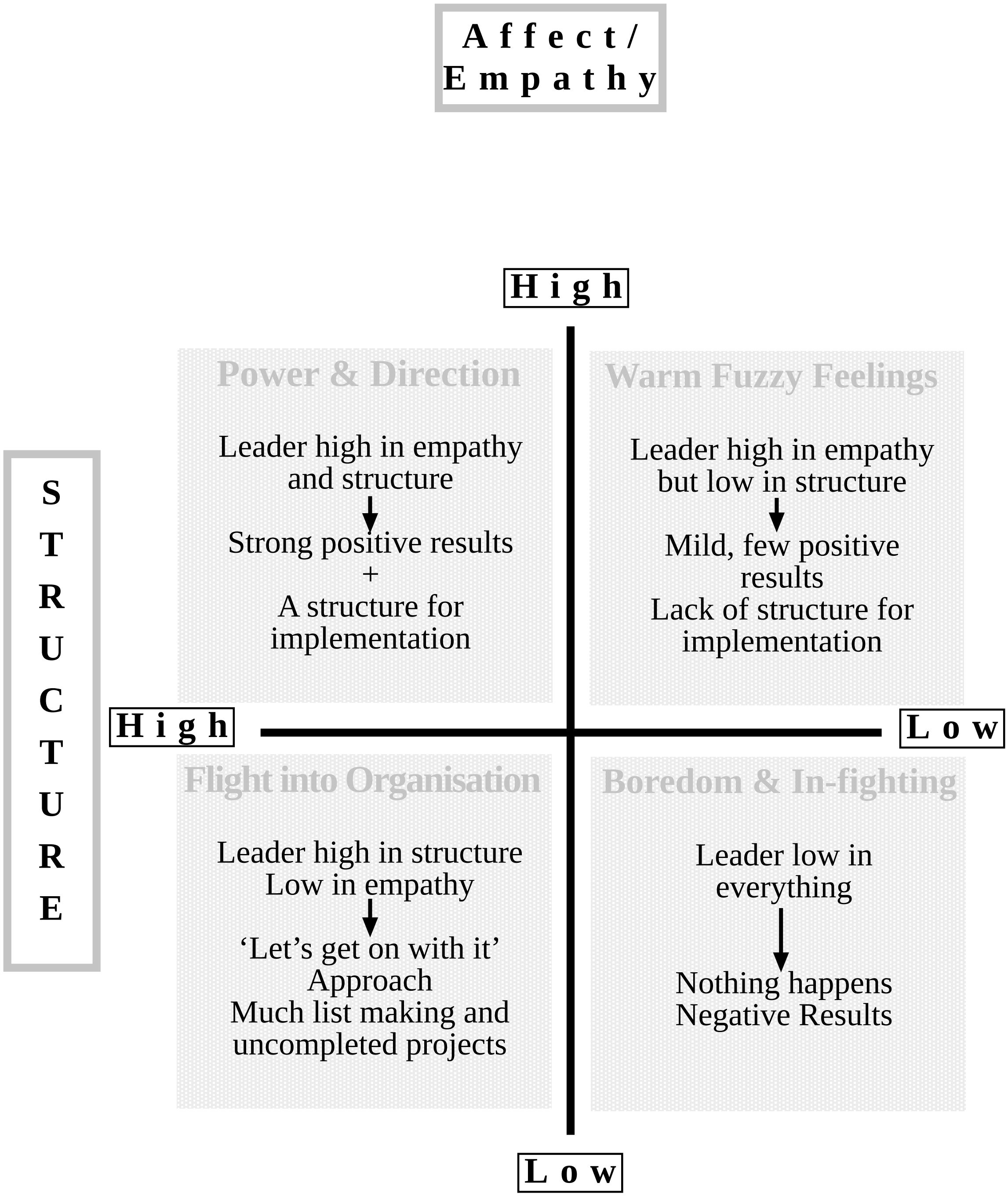
b) Empathy

Affect simply refers to the leader’s willingness to show how events and contributions have affected him emotionally: to acknowledge when he is touched by something, upset by something, confused by something. This helps participants both to identify and describe their own emotional responses and in so doing makes feelings part of the common currency of the group. Once this is so, they may be combined with facts to produce a richer understanding of what is significant and what is not.

Empathy describes the leader's ability to stand in others' shoes, to experience things from another's point of view. This has the effect of people feeling that they have been heard, that their contribution is acknowledged in essence as well as content. A leader is also able to be empathetic without either endorsing or criticising a contribution. It does not depend on his opinion. It is just part of his positive regard for another person's contribution.

When we have asked groups what type of leadership they prefer the result has been that they most appreciate a fairly even balance between Affect and Structure (Music 2002). For anyone unfamiliar with the term affect, it can quite easily be interchanged with descriptors like feeling or emotion. We are talking about the emotional climate here and the balance between that and the structured activities of the group. For example, a group that has been working hard for hours on structured activities will be longing for some 'down time', a chance to relax, joke, engage in gossip and small talk, let their feelings show. The leader must balance the time spent in work with time for relaxation and refreshment. We have summarised this balance and what happens when you tip over into too much of one or the other in the following diagram.

LEADERSHIP STYLE
The Affect - Structure Model



The best leadership style is generally to be found in the top left quadrant, although to be honest you will find yourself visiting all of the quadrants from time to time. Use your co-facilitator to help spot when you drift off into an unhelpful style.

Next comes the question of what to do with the group – the process – and we will now explore that and how to gather results, generate insights and use them.

Step Four: Process or What to Do in a Large Group

In the first three steps we introduced the idea of the large group as a method for qualitative inquiries and made some suggestions about setting up a large group study, inviting people, working with the group dynamics and leadership. Now it is time to turn our attention to process, to look at what to do with the large group and how to reconcile the manifest events, the things that actually happen, with the latent or hidden dynamics in such groups.

There are three key phases of the large group:

Beginning/Getting started

The Work Group (W)

Endings

There is also a further section, which includes advice on how to deal with problems and breakdowns in group performance, which may occur in any or all of the phases.

i. **Getting Started**

It might help anyone thinking of trying to run large groups for us to share some of our naivety and anxiety when first we set out on these projects. Here are some notes made by Roy Langmaid about his first large group for a client in 1991:

"When I first stood in front of the group of 60 people I was petrified. I was reminded of how I had felt at my first focus group 25 years before. It was difficult to stay conscious; I felt I might faint. Even though I managed to remain on my feet by breathing deeply and repeating a personal mantra to myself, ("yes, this is really happening and it's up to you to make the next move!"), I could hardly stay present to the group. At this moment it seemed like an audience, not a group at all. It was hard not to 'become' a performer, put on a show. I found myself wishing I knew a good joke and fantasising about how I could hand over to the next act - except there wasn't one.

The topic for the group was "Women and Alcohol" and the client who had been brave enough to commission this untried technique was Janet French, then of Guinness in Dublin. The group was to be two full days in duration, on a Saturday and Sunday, and took place in a city centre hotel. Moreover, not only were there 50 consumers in the room, there were Guinness executives and advertising agency staff too. My anxiety was so great that I hadn't really prepared an agenda for the session at all. I hadn't known how.

Suddenly, there in front of this crowd, I realised that if I was feeling this nervous I probably wasn't the only one - yet everyone was sitting there looking so calm and expectant - I couldn't assume that everyone was as scared as I was, could I? Suddenly, an opening came to me. I blurted it out before I could think:

"I wonder what's on your minds as you sit there?"

For a moment silence, then like floodwater breaking through a dam there was a rush of people wanting to speak. I had anticipated that we might need to control this *dynamic of everyone wanting to speak at once and also to record what got said, so I was able to ask people to take it in turns, one at a time, and to use a microphone so that everyone else in the room could hear them. With great fear of replicating the classroom situation and regressing the whole group into dependence and compliance I asked them to raise their hands if they wanted to say something. That slowed things down momentarily but soon the flow resumed. People seemed thankful that there was some sense of order, of taking turns and not a free-for-all.*

To my surprise they didn't at first talk about the topic at all (I was fixated on it, you see!). They talked about wanting to know the reason why they had been asked, why we had picked this particular hotel, how difficult the journey in and getting the kids cared for had been, their curiosity about who everyone else was and so on."

In essence they were trying to discover something about the structure and nature of the situation. Like many people they had probably said 'yes' to attending the session without giving it much thought at the time and now that they found themselves here they wanted to know what it was all about. At first questions came in quick succession and gave me the opportunity to explain the brief and the set-up to them. In his masterpiece 'Civilisation & Its Discontents' Freud (1913) points out that the level of uncertainty is so great in a large group that people preoccupy themselves with structure; who is in charge, what is the agenda, how will it work, where are the facilities? This was my first real experience of the intensity of the emotional climate in a large group. The members, of course, know that they outnumber you and that if you cannot provide a structure that satisfies them they can rise up and replace you or simply walk out. Although at this point people are not really known to each other, there is a basic assumption of 'oneness' among the group, as if to say, “Now, you got us here. What’s this all about?” As the leader stands there in front of the room she may just see a sea of faces, all turned towards her as one, seeking for direction. For the leader this atmosphere can feel like hostility or dependency and either may provoke a flight into justification, over-detailed explanation, or confusion of one kind or another.

Today we anticipate this opening uncertainty by making a short introduction in the form of a Welcome, followed by a brief description of the topic and why such a large group is a good way of tackling it. We assure people that we have done this kind of thing many times before and that people usually have a good, if not remarkable, experience in sharing their views and developing new ideas with others. We also talk about the presence of a ‘client’ community, (see below), but stress that they are there as their customer selves, as people who also use services and buy products and who have many of the same concerns as the rest of the group. We also tell people about the kinds of activities we will be doing and the timing of breaks, the availability of refreshments and the position of the loos. It is amazing what a magical calming effect this has on that tense opening atmosphere. All through this opening we are concerned to provide enough detail to help people to feel safe, though not as much as to create dependency (i.e. the feeling that there is a fully worked out agenda and all the participants have to do is show up and sit there with their arms folded ready to answer questions.)

Here is a checklist for those who wish to get started in leading a large group. These are the things we recommend you attend to in the opening session:

- Stand for quite a few seconds in front of the group before you speak. Let them become aware of your presence. Much of the noise will quieten as they become aware of you.
- Make sure you can be heard and that whatever method you are using to take customer input they can be heard too. Many will speak quietly or at varying volumes. This is also important for collecting your output. How will you record them if you don't have microphones present? We usually have the facilitators equipped with lapel mikes and 3 or 4 hand-held mikes for participants. Mike runners distribute these in accordance with the facilitator's directions. If you are wearing a lapel mike make sure it is switched off if you are not leading the room. Any casual remarks you might make to colleagues may get played back over the loudspeaker system.
- Introduce yourself, tell them your name and your role and that you have experience in this kind of session if you do. (Don't lie: if it is your first time tell them so, they will try to help you.)
- Tell them some details about the environment, for example, where the exits and fire escapes are.
- When and where you will take breaks and something about the meals and refreshments.
- The starting and ending times for each day
- When they will get paid.
- The purpose of the facilitation group, and the reason for the film or sound crew being there.
- Introduce the topic and the purpose of the gathering.

- Tell them how you will work – sometimes as a large group, in small groups, as pairs, as individuals, in discussions and spontaneous exercises a bit like games - always bringing your discoveries back to the large group.
- Introduce the group and let them know something about its make-up.
- Introduce the client community and ask them to stand up.
- After you have done this it is time to give them their first experience of speaking in the large open forum. We usually start out with a general question, something like:
- “Have you any questions or concerns?”
- Then after taking as many of these as there are (but not more than about 6 – you have a job to do too,) start out with a new question like:
- “I wonder what’s on your mind about ……….?” (Put the topic in where the dots
- are).
- Point to people when it’s their turn to speak and ask them to stand and wait for the microphone. It is best to have two mike-runners with a group of fifty or more. As a rule we don’t usually return to the same speaker more than twice in a single session. We still have the potential problem of the dominant respondent!

Do let this first session run so that people can build confidence in the large group. We usually take somewhere in the region of 45-60 minutes with it. Have a couple of back up questions, again of general import to the topic, ready in case the first dries up. The main **‘don’t’** at this stage is – don’t comment on or evaluate these early contributions, don’t show prejudice or preference. Thank everyone who contributes and institute the practice of applauding every contribution, it helps to build an acknowledging community and encourages the shy to come forward and the brave to take risks if they know they will be applauded. Don’t underestimate the importance of this just because you might feel a bit embarrassed to ask people to clap. Lead the applause yourself, they will surely follow and it will quickly become a group norm. Remember whether you like it or not, group norms will be quickly established and, once they are there, will be hard to change. You must build an acknowledging and supportive community quickly.

One of the earliest realisations from our first session was that the client community needed a level of support and coaching to be able to enter and participate in the large group with confidence. This began to inform us about how wide the split between customer and client communities actually is. Clients don’t spend time with their customers as people engaged in enquiries about the events of daily life that effect decisions and choices which in their turn effect purchasing. From these realisations we developed a preparation session to help clients get the most out of their participation in the large group.

After this first session in 1991, for the next couple of years we continued working and developing this large group methodology. We are indebted to two visionary clients who recognised its potential and sponsored it in their organisations, Pat Stafford of British Airways and Linda Miller of Tambrands. One thing that we noticed from the first ten or so sessions was the importance of having two facilitators as well as a support person who handled logistics and interactions with the venue so that things happened as and when they should and the facilitators were not distracted or pulled out from the group to handle logistical matters. The interplay between the two facilitators is crucial, particularly in this large forum where there are many opportunities for fantasies and fixations about ‘others’ to gain hold.

Any struggle or competition between the facilitators will show up in the room. If there is an ego battle going on as the facilitators strive to ‘prove’ themselves, the group will watch with amusement, at least until they become bored. It is also likely that the struggle between the facilitators will be mirrored in one way or another among the larger group. Moreover such a contest means that the facilitators’ attention is more likely to be on each other than the group. This theatre of competition and in-fighting has often formed a key component of the humour in duos like Morecambe and Wise or French and Saunders, who affect partnership while continually seeking to advance their individual agendas often at the expense of the other. While we love these humorous portrayals of the fragile ego, it is not what we are being paid for in running an inquiry with a large group. We can speak candidly from real-life experiences here; with some of our early co-facilitators, in our anxiety and confusion, we allowed ourselves to get embroiled in struggles for supremacy that everyone else could see but we could not. It left us very open to manipulation both by the large group or individuals within it but particularly by our own support teams and clients. We were nervous and wanted approval and our competitiveness was designed to ensure that each of us personally might get any praise that was going. It left both of us feeling undernourished and our partnership could not hold. It is extremely important that you are up-to-date in your relationship with your co-facilitator and support team, that you are not withholding important information or harbouring resentments with each other and that personal differences are ironed out before the group arrives, not during it. Once your beginning is completed, taking usually about an hour, it is time to move on to the work group.

ii. The Work Group (W)

The first thing that must be handled in process terms is the transition from introductions to work. There will be many transitions during the large group and it is worth noting that each one will be accompanied, at least momentarily, by a sense of disorganisation and vulnerability in the group. At one moment they were doing OK and now there is a new challenge, perhaps a new facilitator, a new task or group format. We usually use the first transition to introduce the second facilitator and at the same time to shift both the energy of the group and the nature of the task. We have, so far, been in an adult rational discussion mode; there is danger in getting too accustomed to this mode of working. Once again it pays to remind yourself that norms for the group will be established very firmly in these early stages. This is a good opportunity for something more unstructured, more fun, more mobile and improvisational. If you don’t do this early in the process it will become increasingly difficult to shift people out of the rational discussion routine.

The second facilitator needs to make a short introduction of him or herself and then get the group out of their chairs and mingling with each other. There needs to be more relatedness in the group for trust and self-disclosure. We have noticed that this shift between physical spontaneous play and more sedentary adult discussion is a very powerful pattern for creating resources and energy in the group as it moves between subjects and topics. We did not fully understand the reason for this until one of us happened to be studying the work of the influential psychoanalyst, Melanie Klein. She too, as it happens came across the power of play in releasing and conveying elements of individual’s unconscious desires and deepest wishes.

> “As is often the case in scientific development, new discoveries follow the use of a new tool, whilst they in turn can lead to refinement of the tool. In the case of child analysis the new tool was the play technique. Taking her cue from Freud’s (1920) observations of the child’s play with the reel, Melanie Klein saw that the child’s play could represent symbolically his anxieties and phantasies. Since small children cannot be asked to free-associate, she treated their play in the playroom in the same way as she treated their verbal expressions, i.e. as symbolic expression of their unconscious conflicts.
>
> This approach gave her a road into the child’s unconscious, following the transference and the anxieties as in the analysis of adults she was able to discover the rich world of the child’s unconscious...” (Segal 1973)

We had similarly discovered a new tool for use in inquiries featuring a mixed community of consumers and corporate executives and over the past few years we have been refining and developing the play techniques in our work. It is as true for customers and corporate executives as for children that they cannot easily free-associate among a group of strangers and so other means must be found to help them articulate their wishes and dreams in a fashion that feels safe and appropriate. We would like now to introduce you to some of our play techniques.

Getting Ready to Play

There is a different kind of energy and permission needed to allow people to play when they are in an unfamiliar setting with unfamiliar people. You may have noticed that your own children will stay close by, holding on to you in such settings. They do not run off to play freely as they might at home or in a well-known environment. So the group leader must create this permission and energy by his own example. When we do this we raise our voices in tone and speed and often shout in a good-natured way to the group:

> *"OK, we're going use play to bring our most creative and uninhibited side to the project. Have you ever noticed that when children play they don't do so in a half hearted manner? If they're being Superman, that's who they become. We'll do some things together to get warmed up and a bit more familiar with each other. Most of them don't have any meaning at all. They're just for fun. Will you join me?"*
>
> *"The first thing we need to do is get up out of our chairs and move them to the side."*
>
> *"Now return to the middle of the room and spread out to fill the space." (The group inevitably bunches together in a huddle at first!)*
>
> *"Next move around the room and greet five or more people that you haven't yet met."*
>
> *"Ok, well done. Now I'd like you to greet some more people, but this time as if you're really suspicious of them!"*
>
> *"Well done, lots of high class paranoia there!"*
>
> *"Now I want you to greet them as if you're madly in love with them but they don't know it."*
>
> *"Great! Let's do one more. Now will you greet people as if there's an awful body odour in the room and you think it might be them!"*

This is an actual sequence used in a large group a few weeks ago. By the time it was done in just five minutes the room had gone from sitting silently to high levels of laughter and spontaneity. We have evolved over the years a set of games that help to prepare, or ‘shape’ if you like, the energy for the inquiry ahead. For example we have one game called Tantrum which is designed to help people overcome their internal censor which we think is an important influence in group behaviour. Tantrum requires group members to have a ‘rant’ or tantrum about a product or service much as a four-year old would. To start the game we get people into groups of five or six and each member is to have a one-minute tantrum in their turn. Another group member will record the main features of each tantrum so that any ideas, no matter how crazy about the product or service will get noted and commonalties between different tantrums may be observed. However, before we play the tantrum proper we warm up a bit. Let’s imagine we were following on from the warm-up session above:

> *“OK, we’re a bit warmer now. Let’s do something else. Have you ever seen a four-year old have a tantrum? Good, I want you now to generate a tantrum of your own but this time I want you to do it about a plane journey you’re about to take.”*
>
> *“Let’s practice some useful bits first. One of the interesting things about a tantrum is that you ‘lose’ conscious control of what you’re saying, so let’s start with a common one. You’ve lost your car keys and you’re mad about it. I’ll show you my version and you can follow me if you like. I start tapping my feet and then move up a beat, tap a bit faster, I might get to stamping them. Now I’ll bring my inner dialogue out into the open: “I put those keys over*

there, I know I did. You can never leave anything in this house. Someone moves it. And my things no one cares about, they just stuff them away without telling me. Don't they realise I have things to do. I'm important. I can't be spending all my time looking for bloody car keys!"

"Let's see you have a go. We'll take just 15 seconds each at first."

"One tip that might be useful is that sometimes the dialogue just dries up on you. If that happens, pause and then shout '....And another thing...' That will often get you going again!"

Within ten minutes of starting the warm-up we have a room of 70 or so people taking it in turn to practice losing their inhibitions about the product and/or service while their colleagues note down what comes to the surface. Such a game often has valuable content as people's inhibitions are released but also a wonderful effect on the group process, for once people have let themselves go a bit crazy in front of each other and their contribution has been accepted and recorded by others, they will quickly free themselves up for another creative game if and when needed. It is quite important in a game like Tantrum to free people from anxiety about the use of curse or swear words in public. We usually check out that the group feels OK to suspend normal censorship rules and allow swear words, but if that offends any member in a small group then that must be negotiated with his group. He could sit out or request that certain swear words are allowed while others are not. Usually it is not an issue but it does occasionally merit discussion and the setting of appropriate norms and safeguards.

In the next few paragraphs we will give a short and by no means exhaustive list of the main types of games that we might play with a large group.

Deconstruction Techniques

There are many subjects to which people bring a lot of history or ‘baggage’. This is particularly the case in an over-researched topic or a subject that has been a concern in an organisation for a long time. Deconstruction techniques help us to let go of these. Here are two examples:

2. Have people work in pairs. Imagine they are neighbours meeting to talk over the fence in the garden. Only they are Chinese. Invent a two-minute conversation in Chinese about the woman across the street.
3. Ask the group to go around the room they are working in for 2 minutes and to rename everything they can see in the room. Just give it a different name from the one it has and speak the new name out loud. Ask them when they’ve finished about how the size of the room appears to them. It will almost certainly seem large.

The purpose here is to model alternative realities and in so doing start to loosen the ties of association and familiarity which bind perception and attitudes. After doing something like this you might have people reinvent a shopping experience noticing things they don’t usually notice. Or say, “Here is a pack of detergent; find me six things about it that you’ve never noticed before and make them into a new proposition to customers.”

Boundary Busting

Is another means of deconstruction that is particularly useful if you have a topic that contains taboos or suppressed material.

Here are three examples of boundary busting exercises:

i. Ask the group to gather in a circle. Then demonstrate yourself what everybody is to do in turn. You go into the centre of the circle and as you do so, you say, “Hello, my name is Roy and I never pick my nose in public.” As you do this you deliberately pick your nose. The whole group must then repeat and mimic exactly your actions and tone of voice. Then it passes to the next person and he must think of a taboo action and go into the centre speaking and performing it. Here are some examples, scratching my arse, farting, scratching my crotch, chewing a bogey, wiping snot with my sleeve. You get the picture! Anything non-violent is allowed. Ask people to be sure not to do anything dangerous!

ii. Ask a group of four to support themselves with only three points of contact with the ground. Give them two minutes to accomplish this.

iii. Arrange the group in two equal sized teams facing each other. They should be in a line, facing the line of the other group about 10 feet away. They have to take it in turn to shout as loudly as they can at each other. One group shouts “Oh Yes you will.” The other, “Oh No I won’t.” The moderator will pick the winner.

Subjects like menstruation, smoking, drinking, sexual relationships, illness are all areas in which we have used this kind of exercise. Please note that it must be handled sensitively, with goodwill and humour where necessary!

Creative (construction) Techniques

a) Visualisation

Visualisation has some of the qualities of dreaming. The normal rules of life don't apply, almost anything can happen. Once you have established a quiet, safe and gentle atmosphere people will allow themselves to float off into a creative and reflective state. Some of our best group creativity has emerged from what we have called 'Group Dreams'. In some way, helping people into this mild, trance-like state seems to make unthinkable things readily available. It may be that you will find an explanation that helps to appreciate why this is so, but the truth of the matter is that no one really knows why or how these altered states of consciousness work. Here are some of the ideas and instructions we use to accomplish this.

Time-travel is easy in visualisations. Provided your pacing is appropriate and you give people suggestions and help that frees them from present considerations, it is possible to take people five or ten years forward and bring them into an everyday world up there in the future. What is amazing is that if you construct it carefully with an acceptable balance between guidance and freedom, you can get ideas on all manner of things from the appearance of a living room to an imaginary meal, a trip to the bank, a visit to the shops or the latest bunch of commercials on TV. You can ask people to picture the future logo of, say McDonalds, or Barclays Bank.

You can invite people to 'receive' clear messages or prompts from the outside world while they are in a visualisation. You could for example say, "Turn your attention to the TV, suddenly you see a user of Microsoft's Windows 2010 being interviewed. What is she saying? How does she seem while talking about the product?" In this way we can get round people’s resistance to owning the sales messages that they themselves may be expected to respond to. They can put them in the mouths of others.

People can be allowed to use whichever aspect of their sensory system they prefer in a ‘visualised’ journey. Some people will hear words rather than see pictures; others will experience bodily sensations and emotions. Contrary events will often appear side-by-side as in real life and provide interesting scenarios for discussion after the event.

As soon as a visualisation is completed and people have been ‘brought back’ into the room and re-connected with present time, ask people to write a fulsome account of their journey in fifteen minutes. Invite them to invent or fill in parts that were not clear (after all, the whole thing is an invention anyway!), and ask them to record five or six specific phenomena that you will have included in the journey. For example, “What did the product look like up there in the future?”

The next step is to get people into small groups of, say, 4 to share their journeys. There will be both convergences and divergences between their impressions and experiences. Ask them to build a ‘group movie’ from the best or most exciting of their revelations and encounters. Feed these back to the large group and recognise the output as a resource for further work on a new positioning, proposition or product feature.

b) Art-From-Within

Automatic drawing can be used as a powerful way of tapping creative resources we literally ‘never knew we had’. We have used this both as a way of bringing complex feelings and processes to the surface and also to help clients and other members of their organisation both to get a glimpse of the customer’s associations with a brand and their own. Often there is considerable ‘corporate denial’ of, say, a darker aspect of a product or service. Cigarettes were a prime example of this denial in recent times but there are many others, even among our most popular products.

This is the way that Nicky Forsythe, our expert on this and other forms of projective work introduces the exercise:

> *“The process is simple: you start off by assuming that a part of yourself that you do not know and are not in control of is going to do the drawing. Then draw! Start by picking up any colour or colours that feel right to you; make marks or divide the page in the first way that occurs to you. Then relax in the knowledge that the process is already under way: what you have done is already meaningful: it is the beginning of something which ‘wants’ to be drawn or expressed. You don’t yet know what this ‘something’ looks like: you just watch the process of creating it unfold; you are a passive observer of your own process.*
>
> *You might want to focus on a specific issue on which you’d like some insights. However, do not try to draw anything relating to this issue: simply note that you want some insights in this area and leave an unknown part of you to do the work.*
>
> *Check any tendency to try to recognise or name what you are drawing, or to rush in with rational interpretations of your work while you are doing it. Equally, do not try to make your work meaningful or beautiful: in fact, if you find yourself getting stuck on the notion that you need to do something ‘good’, the best thing to do is to give yourself full permission - or even to set*

out purposefully - to do something bad and meaningless! (This can yield some astonishing results).

Your rational mind may well be busy making judgements like:

"I don't believe this works"

"This is meaningless"

"Maybe this works for artistic people, but not for me"

"I can see something is taking shape here, but I don't believe that it has any deep inner meaning: it's just scribbles!"

This is a sign that everything is going as it should: the left brain or rational mind likes to believe that it is in control and knows what's really going on. In fact, this side of you will often deny or flatly refuse to believe that there is any other part of you at work here.

Just accept these thoughts, if they come up; carry on with the process and see what happens. Eventually, you may well find you reach a point where your mind-talk subsides or stops completely: you become unaware of the passage of time; totally absorbed in what you are doing and oblivious to what is going on around you.

When you feel complete with your work, sit with it for a while and allow it to communicate to you: what comes to mind when you look at it? What thought processes does it set off? Do you see any shapes or forms that have meaning to you? (Don't be afraid to acknowledge and to see things that you never overtly intended to draw). Also, notice what you were paying attention to when doing your drawing: was it a particular feeling? Were you drawn to *certain colours or combinations of colours? Were you preoccupied with outlines and boundaries or with forms? With harmony or with contrast? What do these things mean to you?*

Finally, after giving yourself enough time really to explore your work receptively, acknowledge three insights that have come to you as a result of doing this, and write them down."

When we use Art-From-Within in a large group we always organise a Go-Round, much as in the Visualisation process so that members of the group share and get acknowledged for their insights. And another benefit of the go-rounds is that the whole participant group is brought up-to-date with the good ideas that are emerging.

c) Dramatic Techniques

There are almost as many possibilities for dramatic techniques as there are styles and types of drama. The main ones we use are role-play, sculpting, re-enactment and improvisation. The very first one we did back in 1989, featured a re-enactment of Blind Date in which we had three people ‘playing’ brands of lager who had 5 minutes each to be interviewed by the same thirsty drinker. The drinker then had to make a choice between the three.

There have been too many playlets over the years for me to easily pick one. Some have been better than TV! But I am reminded of the brilliance of a British Airways group who invented ‘Transformations, the New Age Airline.’ It was in essence a spoof on us - the facilitators - back in 1993 when we were going through a New Age period, but it also provided the seeds of insights about new ways of ‘holding’ or supporting travellers which are evident in the more personal style of contact made by cabin crew today.

Sculpting provides a means for modelling or representing in a physical tableau the relative pressures and factors that contribute to a decision or behaviour. It is especially useful for depicting things that might be going on between people - like family group members - that for one reason or another are unspoken. So we might sculpt “Washing Day at home” or “A visit to the bank”. Groups then create a physical tableau which illustrates by use of arranging distances, postures, expressions and gestures a ‘frozen moment’ which sums up the interaction from the perspective of the sculptor. It is also interesting to have clients sculpt alongside consumers so that things may be viewed from different sides of the equation.

In improvisations we often ask people to generate dialogues or tableaux which feature ways of talking, appearances or actions that seem representative of a brand. How would Nike walk, for example? What tone of voice would Nescafé use to speak? Are there different tones for different users or usage occasions? Build a ‘Nescafé style’ of speaking and find out what you can about the brand by doing this. You can see from just this brief description of the types of play and improvisation we engage the group in what a wide variety of activities and approaches to a topic this kind of work makes possible. Here are just some of the advantages:

The Advantages of Improvisations

i. Because of the physical component of this work the emotional intelligence of participants is made much more readily available. This in turn drives perception and realisation in a different way than does rational intelligence. After a play session we can return to a more objective, reflective style of discussion with which to review the outputs. This is handled with more sensitivity and elegance by the group than, say, a session where creative inputs from other people who are not part of the group are assessed.

ii. Participating in these kinds of ‘childlike’ activities refreshes and re-connects the group to its energy, just as a session in the gym or jogging can refresh and renew your vitality. It helps overcome inhibition based in convention and unfamiliarity and shines a light on non-verbal outputs of many kinds. Just in the list above we have feelings, dreams, visions, and impressionistic drawing.

iii. Such processes provide client participants with an ideal opportunity to study their own and their customers’ process at first hand. What is noticed? What is missed? Do customers’ central concerns match the organisation’s preoccupations? Is the language an organisation uses to talk to its customers for their benefit or its own? Can you actually listen to and empathise with their concerns, needs or desires?

iv. This form of work provides an ideal way to support that oscillation between an emotionally engaged group and a more reflective, rational one. This fluctuation between states is typical of daily life as we have observed. This is how we go about forming opinions and ideas and shaping our responses to the world. We do it partly through action, partly through reflection. The action part is missing from most qualitative processes.

v. The play sessions allow us to use the numbers in the group to great effect. For example we have created two gangs of 30 members each, one a Coca-Cola gang, the other a Pepsi gang. Each gang had to produce a style of dress, a series of favourite activities, a clubhouse, a chant, a motto and an explanation of why their gang was best.

vi. In another session involving a thousand people we had participants literally build the High Street of the Future. It took place in an exhibition hall at the NEC in Birmingham and we supplied a set of basic construction resources. Teams of 25 each built their own outlet or element of the street. Later this High Street was visited by 300 customers who each had a certain amount of ‘money’ to spend. We were able directly to see which outlets attracted the money in the future!

vii. The play techniques also help further to explain the need for cameras to record the highlights and insights that come forward in the large group sessions. As always in a commercial context the facilitators must take care not to include in a film for general display any material which will embarrass or otherwise expose participants who are working within a contract of confidentiality. Sometimes we make an edit of the uninhibited and amusing highlights as a memento for the participating group of clients and consumers and a separate film in more rational style for the remainder of the client organisation!

General Principles of Large Group Processes

It is important not to forget the eight key needs of the group. At any time one or more of these may be missing and need the facilitator’s attention:

i. **Relationship needs:** (is the level of relatedness in the group sufficient for people to work at the level you are asking for?)

ii. **Leadership needs:** have you provided enough examples by your leadership that you think this is a valid and feasible undertaking which you have asked them to do? Have you given examples of your own willingness to undertake such a course of action?

iii. **Security needs:** is the safety factor in the group substantial or have things happened which have created an unsafe atmosphere? If the latter, you may need to rebuild the group's feeling of freedom from fear. A typical example is when participants themselves start to worry if their work is useful or not. They might imagine that the client community is bored or dismissive and need reassurance that they are doing well.

iv. **Permission needs:** have you demonstrated your own willingness to have a go at something unusual or difficult? Do they need some warm-up steps to help them get more permission to behave spontaneously?

v. **Stimulatory needs:** have the group enough stimulation and resources to carry out the activity you are requesting. Do they need more input or inspiration that you could provide?

vi. **Information needs:** do they have a clear brief and enough information to accomplish the task? Are you ready to reassure them that if they invent things when they don't know the answer that this will be a useful contribution to the group?

vii. **Reward and Acknowledgement needs:** have you constructed the task so that people will be rewarded and acknowledged for their contribution to it, no matter what the actual outcome of their endeavours? Have you let them know up front that whatever they produce will be OK?

viii. **Ending needs:** have you let them know what you expect their activities to lead to? How will each session be ended, what will they do with their output and how will it be shown among the group? How will the whole group end? Do not forget that a large group experience of this intensity and duration will have a profound impact on many members. In some cases people will never have experienced such a productive and exciting working climate. They may wish to keep in touch with other group members, or to hear from the commissioning organisation about progress on the project. Leave lines of communication as possibilities and do not undertake any personal contracts to meet people outside of the group. Ask your client if he wishes in a winding-up thank you to his customers to mention a possible line of communication or feedback mechanism. Sometimes we make a four-minute film of some of the best moments in the session and send this out to customers. But there is no need to do this. A proper good-bye and thank you will suffice.

You must always work to balance the dynamic between structure and freedom. Remember that people will not talk freely if it does not feel safe, or if they are not resourced to do so. Try to optimise this possibility by interspersing sessions involving spontaneous play and creativity with more reflective, analytical work. One tip for newcomers to this work is ***'beware the flip-chart'***. Given the opportunity, groups will gather around the flip charts and indulge in orgies of list making. We have found 90% of these lists to be of little or no use. Get them instead to use a creative process to generate some insights about a product or service and then to agree the top three 'realisations' that they had as a result of the exercise. Make it tougher by saying that at least two of the realisations must be things they had not known before.

Try to start and/or finish each major segment of work with an open forum and an opportunity to feed back to the large group. This ensures several important things:

i. That important learning is shared
ii. That things may be happening in other groups even if your own group was struggling with a topic or exercise – you are not in this on your own!
iii. That everyone has a contribution to make and is worth listening to
iv. That time and space will be found to hear from everyone about matters which interest or concern them.

Keep an eye on the energy level and quality of output from the group and be ready to vary tasks and activities to refresh and revitalise people. Vary group sizes, too. With this many people you can build groups from 2’s-> 4’s-> 8’s-> to 16’s. Get the groups to build and align their discoveries with others as the group size increases. Ask them to notice differences and similarities and work through them to produce a coherent result. In this way much that is unimportant will be discarded as things progress. This again is an issue that is often unattended to in small group work where every utterance may be given the same weight as every other, leaving it to the moderator to impose her structure on the text. Get the group to do it for you!

Force them to limit the data in their structuring process e.g. ask for the top five points that they noticed about the subject or their interaction while they worked. In our experience if something important happens to be suppressed by such limitations it will re-appear at another point. In general don’t worry about losing data. You will inevitably generate too much and suffer from anxieties that the all-important gem will get lost among the rubble of words. We will return to this topic in the next section. For now, the insight session (see Page 68) gives you the perfect opportunity to mine for gems of both the obvious and hidden kinds.

Getting Stuck - and What to Do About It

The first thing to say is that even after many large group experiences involving more than 20,000 customers over the years, we still get stuck somewhere in every process that we do. You must come to recognise getting stuck as part of the job and as a resource for evaluation and redirection if needs be.

Here are the common forms of getting stuck that we experience:

1. **Freezing –** either because someone said or did something that rocked you or because you lose contact with your thread or theme. Your mind may simply go blank from time to time.
2. Becoming **overwhelmed** by an emotion or persistent thought about some person or people in the room.
3. Realising that **the design that you had in mind is no longer relevant** to the group and that a new process or route must be found.
4. Feeling that you have **not made yourself clear.**
5. **Having a sense or feeling that you are not doing well** or that the client is annoyed with you.
6. **Experiencing stage fright** or the fear taking control of the large group.
7. **Worrying that your discoveries or processes are too commonplace** and/or feeling that you are wasting everyone’s time and money.

Here in the same sequence are our tips/recommendations for dealing with these problems. All of these are also applicable to small group work too. In every instance our approach has been: “How can we resolve what appears to be a problem and use it as a resource to expand the group’s capabilities?”

When you **freeze**, you can employ a winning formula to get by, a smile, a joke, some form of distraction or re-organisation. This is much as we do in everyday life and is one of the principle structures of politeness – we do not show our discomfort or unease, we have a set of practiced resources for covering these feelings. We recommend that you do the opposite when working with the large group. The reason for this is that as a leader you want to make as many demonstrations as possible of the kind of things that you wish the participants to do. This is a prime example: what to do when your mind goes blank or you lose your train of thought? Here’s an example of what you might say and where it can lead:

> *“All of a sudden my mind has gone blank. I’ve lost my way. Does that ever happen to you? What do you do when it does? Give me a hand! I’m looking for some tips here.”*

Take some feedback from the large group – as usual allowing only one person to speak at a time. This will take the attention away from your inner world out into the group and while they offer what may be very useful suggestions, you can re-connect with your flow, have a quick chat with your co-facilitator or simply wait for the answer to present itself. Whatever happens you will be starting from a different place within a few moments and you can take if from there. You may want to pick up on one of the suggestions. Be sure to acknowledge people for their help.

If you are **overwhelmed** by something someone says or does, say so. Something like:

> *"I was really rocked/touched/surprised/taken aback when X said (whatever he said). I wonder if it had an effect on anybody else? Did anyone else have a reaction to that? /Has anyone else had a similar experience?"*

Again the idea is to open up your inner process to the group and ask for their input. You are almost certainly not alone in your reaction – and there will be other interesting perspectives in the room too. Keep to the single speaker at a time discipline and watch out for time passing.

If you are **bothered by a persistent thought or feeling about an individual or a group of people** within the room you are probably in the grip of a transference or counter-transference effect. In a transference effect the group member or members may be projecting some emotion or feeling onto you. You may feel that their expression or attention towards you is charged in some way. They may, for example, be looking at you with what seems to be an expression of adoration or consternation or irritation. Discuss it at the earliest opportunity with your co-facilitator. If you are working alone, discuss it with a member of the support or logistics team. Don't buy into the transference and don't get into defensive or evasive manoeuvres to try to placate, punish or avoid this member or sub-group. All groups have a set of transference responses to leaders depending on other similar situations they have experienced in the past. Examples might be things like school assemblies, attending a talk, lecture or performance, going to watch almost any type of public show or activity and so on. Unresolved feelings from those experiences will pop up in this forum. It is normal and you must not allow the pressure of these emotional climates to distort your process.

More serious from the point of view of the leader is the phenomenon of counter-transference that may arise either independently of or as a result of transference. In this phenomenon unresolved feelings about a person or experience from your past will attach themselves and appear to be emanating from the person or persons in the room. You will be sure that they are a certain way, are feeling certain feelings or planning certain things. You will almost certainly be tempted to try using whatever escape tactic you used back in the original situation, including avoiding them, courting them, getting emotional when addressing them, looking at or away from them in a pronounced fashion to mention but a few. This is what we call ‘Getting hooked’ and you must notice these feelings and discuss them as soon as possible with your colleagues. Otherwise an emotional climate arising from your feelings from another time in your life will descend upon you like a veil and soon everything that happens in the room will seem to be an effect of it. The key insight is to deal with unexpected emotions and projections separately from the large group and to deal with them quickly. If you do not they will unbalance you in front of the group and quickly people will notice that there is something unspoken which has gripped you. They will then start wondering if it is something about them, personally, and start engaging in defensive strategies.

Another strategy for ‘breaking the spell’ of counter-transference is to seek out and spend time finding out about the person or group that you have become hooked by. This helps to separate what is really happening here and now from your past-based projections and assumptions. It is interesting how reluctant we sometimes find ourselves to actually do this. Our defence mechanisms rise to support the counter-transference and we find excuses for not seeking out the people who could release the 'hooks'.

If you realise that **your planned programme is inappropriate** there are a couple of basic techniques, either of which can work out well. The first is to trust your intuition that will almost certainly be giving you internal messages about what is happening. It may be saying 'slow down' or 'speed up' or that things are not clear, or that new information has overtaken your plan. It may indeed have suggestions to offer you about what is need instead of what you had planned. Check these out with your colleagues and revise your plan accordingly.

Alternatively, let the room know that new things are emerging which call for a revision of plans. Create a 5-minute break and during this discuss alternatives with your colleagues. It is a good idea in your original planning sessions to have a couple of alternative themes or processes available that can be used if a change in direction is called for.

If you have the impression that **you have not made yourself clear**, check it out with the group. Ask them. It is also a good idea to check in with them from time to time as you go. Ask them if it is making sense to them, if they understand what is happening or do they need more information?

All of next three worries are common for group leaders, **you are wasting people's time, your process is dull, the client is disappointed.** Any or all of these may lead to a reluctance to go to the front of the room and address the group. If you are worried about the client you may be tempted to ask him if he is OK with the way it is going. In our experience this is not usually a good idea. It is important to remember that he is managing his own anxieties in front of his colleagues and peers and part of your job is to hold and manage those for him. He will probably not know as much about this sort of event as you, and it may increase his sense of concern if you express your worries – even if they are perfectly legitimate. Again this is one to resolve with your co-facilitator and support team. Ask them how they think its going, if there's anything they would do more of, or less of, if they have any suggestions. Ask them if they think you're doing OK. Expect to experience these anxieties at regular intervals during the process. Part of what you are paid for is to keep going even though you have doubts.

Keeping Going

We are often asked how to do this in the face of these large and complex audiences, so here are some suggestions. It will often be the task of the leader to press on even though conflict, evasion or confusion may be manifest in the group. These things may be evident from expressions, body language or remarks. They may also be a result of counter-transference by the leader who may be himself confused or doubtful or insecure and imagining that he sees these things in the group (see above). It is not always easy to know the source of these feelings as some of the illusions and impressions can be very powerful and convincing in the large group. Freud (1913) has demonstrated that unconscious influences will make it very difficult for group members and leaders to maintain an unclouded view of reality. Bion (1961) too, has emphasised that in the face of anxieties about its competence or cohesion the group is likely to adopt primitive defence tactics in the form of emotional climates and assumptions that shape perceptions. Just try it for yourself one day. Sit silently among a large group and say nothing. It will not be long before your mind becomes agitated and your inner dialogue is making crazy or irrational assumptions. This is one of the reasons for the massive piles of magazines in waiting rooms – to provide distraction from anxiety. You may have noticed how hard it is really to read in such situations.

Given that complex states and underlying anxieties may exist in the large group what is the leader to do? The best antidote we have found to group anxiety in these situations is the presence of hope and reassurance. Group members may be prepared to suspend their worries and move on to a new focus in the presence of hope. Here is an example of the kind of remark we might make in such circumstances:

> *"I realise that we have not covered all of the issues arising out of our conversations so far. There are many things we have touched on that warrant further discussion. It is also possible that many of these issues will be resolved or lose significance as we proceed. We are doing so well that I'd like to move on to a new topic and I promise that there will be an opportunity to deal with unfinished conversations later?"*

Allow 20 seconds for the group to respond and then if permission is given either overtly or covertly (by silence), move on. Be patient, the group will notice if they are not actually given time to respond in which case your question – and future questions – are likely to be viewed as rhetorical and the group will assume that you don't need their input. In other words they will assume that you already know the answer, or at least the answer you want, and this will increase both your own feeling of omnipotence at the front of the room, and the group's dependency. It may also generate an undercurrent of rebellion as a nascent resistance to your manipulative efforts.

Interventions by the facilitator are an important feature of the process. An intervention may be anything from a question to a joke, from an aside to a direct remark. Common ones include requests for more detail, asking someone to elaborate on their reasons or perceptions or simply offering something up for comment by the group. The facilitator may make an intervention at any time, but it is worth thinking carefully before you do so. With a large group any intervention will have some impact on quite a large number of people and may then require further work to handle the effect of the intervention – misunderstandings, confusion, offence or simply the need to repeat and explain things for those who were not paying attention. Every intervention takes time so use them sparingly.

If you feel the need to intervene, ask yourself: for whose benefit? Interventions can easily stray into interpretations and give the group a sense of being judged or watched with a discriminating eye. To avoid this use 'I' based statements and refer things to yourself and your own experience rather than 'you' based statements which always sound as if the thing affecting you was something about another person. So, for example, if someone says something that shocks the room and there is a sense of surprise or discomfort in the air, you might say:

> *"I noticed my feeling of shock when Gerald told us about X. Then I felt worried and as though I must do something to ease my tension. Now that I've had a few moments to think it through, I realise that I might have felt just like him if that had happened to me. I wonder how other people felt?"*

Instead of intervening, try to let your attention stay evenly suspended, observing both what is happening outside and inside. Notice what things, no matter how seemingly trivial, make an impact on you, or thoughts that keep recurring.

Step Five: Capturing Results and Generating Insights

One of the key, usually unrecognised, problems with qualitative techniques is the amount of data they generate. An eight-group discussion project will produce more words than an average book. Which are important? Which may be ignored? Which are a product of the inquiry – the brand, product or service under investigation – and which are products of group dynamics. Do the dynamic effects in their turn mirror circumstances out in the wider world and therefore reflect how people buy and use? Or are they just manifestations of unresolved inter-personal struggles, complicated by transference effects and unexpressed emotions?

For the researcher, what will he make of all this? Are there ‘unspoken’ climates or exchanges in the group that must be contextualised or explained to make sense of the data? For example, an antagonism or hostility which arises between group members and affects their responses in some way, may or may not be related to the subject of the discussions but may affect how people perceive and evaluate materials, ideas and suggestions from others. All of these levels and subsidiary effects of human interaction can quickly become overwhelming in their complexity. If this is so in a one-and-a-half hour session involving eight people, how much more will it be so in a two-day encounter between seventy?

From the outset – in group work small and large - researchers, respondents and clients need to be liberated from the idea that they must remember and record everything that happens. How much do you remember of the detail of what happened yesterday? Whatever you recall, you almost certainly remember anything important or out of the ordinary that occurred. You probably also recall some things that had an impact on you, although you may not yet know their full meaning or implication. It is just the same in the large group. We always say to clients and customers alike:

“Don’t worry. If anything important happens you’ll probably remember it.”

Nevertheless, we must make provision for capturing the important exchanges and information that emerges from the group. To do this we usually use film and/or sound.

The things we film or record are particularly the large group forums when everyone is present and the feedback sessions when smaller groups report back to the large community what they discovered in their inquiry. We also use a roving camera to capture snippets of activity, conversation, discussion or play. This film then forms the raw material for our analysis of the outcomes and also acts as a resource for the client to inform other members of her organisation about what went on. It is not uncommon to make 4 or 5 edits of the film to address different audiences who must be appraised of the outcomes.

There will also be a large quantity of outputs in the form of ‘art’ or written records of exercises or key points of interest as described above. Inevitably some flip chart lists will emerge too, just don’t rely on them for inspiration!

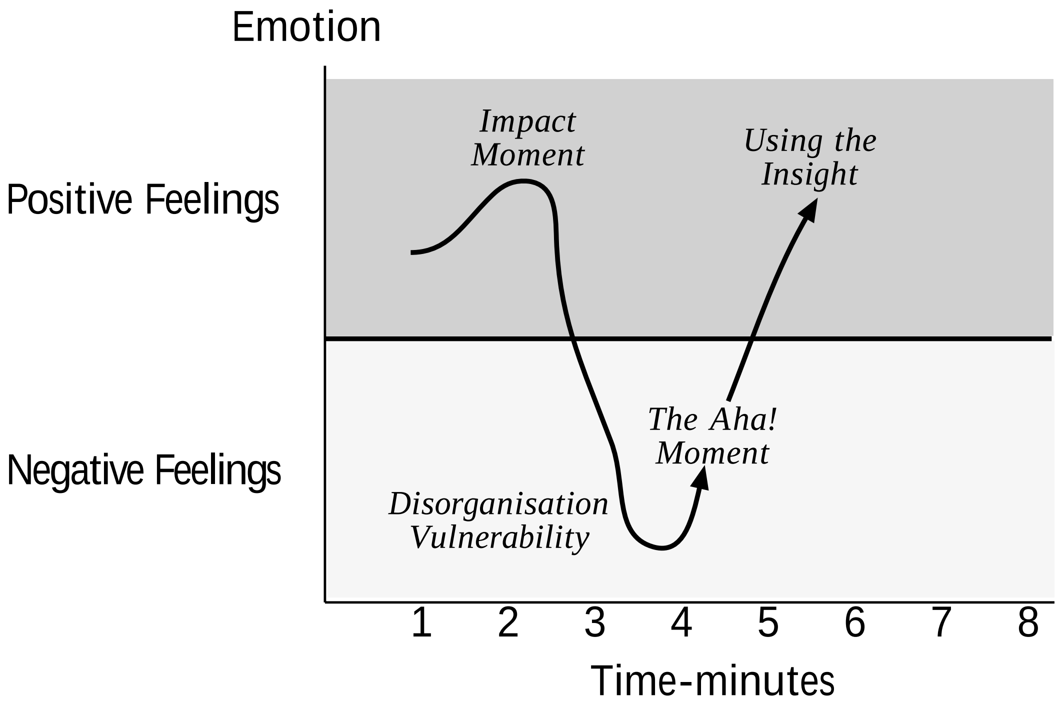
It is not our intention to go into a more general review of the recording and managing of qualitative data at this point. Since the client is participating in full in the session she will, in any event, have been present at all of the significant moments, if not in person then in the shape of one of her colleagues. We want to turn to that most intangible of topics, the generation and analysis of insights.

Generating Insight & the Insight Session

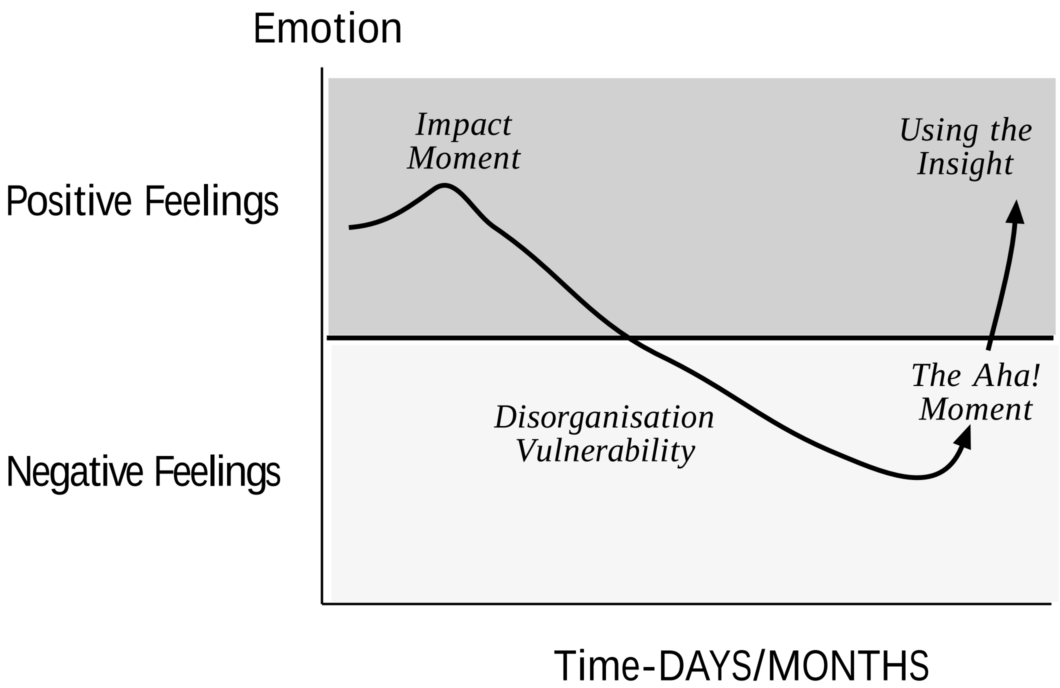
It is seldom realised that insightfulness is a creative act. It requires intentionality and willingness to put yourself in the presence of insightful realisation. Much of the time we are defended against such impacts because they upset the carefully built and rehearsed sense of normality that we use to keep ourselves free from the fear of the unexpected. Mostly, we prefer things to be where they should be and events to go as planned. Insights destroy all that. They change reality and are unsettling in their effect. At the very least they will leave us feeling disorganised and, when among other people, we may easily suppress the feeling of vulnerability that accompanies this and, in order to do so, may suppress the impact or insight as well. Thus it is a matter of providing people with a safe environment where they may allow unsettling realisations to surface and emerge into the light of day.

As you can see from the diagram overleaf we believe that insight is a process; it is in fact an awareness phenomenon in which something has an effect, usually at the emotional or visceral level that surprises the person experiencing it. Next this leads to feelings of vulnerability and disorganisation which is the time in which the subject will be inclined to suppress the disturbance, put it away, carry on with something else. During the preparation sessions when clients are getting accustomed to the effects of a large group we demonstrate how to capture this moment and hold onto the all-important impact information. After this moment of impact, followed by vulnerability and disorientation, in our experience the next sequence can be divided into two forms, a long and a short version. In the short version the time between the impact and realisation is short, a few moments. In the long form the realisation may take much longer to surface after the impact has affected the recipient. Here is a diagram that reflects these two forms and shows the moment of impact and its consequences.

The Insight Wave: Short Form



The Insight Wave: Extended Form



As you can see in the longer form it may take days, even months for a realisation to dawn. Whether instantaneous or extended in form it is likely that the recipient of the insight will have some experience of feeling disorganised and vulnerable as her awareness shifts.

Another factor here is that, as we showed in our Insight Wave earlier, we cannot be sure of the time delay between impact and realisation. People may feel a ‘hit’ of recognition but not be sure what it was. Our answer to this is to encourage the noticing of new awareness both within the large group process and to have a separate session after the large group where the client team may work specifically on the impacts and insights that they experienced. It is important to create this dedicated time for insightfulness for several reasons:

It is not usually acknowledged that insights can be created in a devoted and specific environment of insightfulness where the job of the group is to notice things they might have passed over or be unsure about. This in itself recognises, acknowledges and provides a structure for a creative endeavour. It also requires the building and facilitation of a sensitive and supportive environment for this group work.

There may be insights in the client community that are not easy to share in the presence of customers. These may involve confidential information or sensitivities that are better surfaced once customers have departed.

Insight work needs a process that helps people to return to the moment of impact and then to talk freely about what flows from that. This can be quite difficult in the presence of others who were also there at the moment of impact, since the impact may have been prompted by something that one of them said or did. This is quite time consuming and involves the shaping of raw experience that is premature for the data gathering phase in the large group.

Like any generative process, the uncovering of insight benefits from practice and in a dedicated event all of the resources may be devoted to insightful discovery rather than to more general inquiries. We use a structure for this practice that teaches a three-stage technique for working with insight.

Insights, if they are to be valuable will continue their effect of reshaping reality long after the initial realisation. So that these developments may be worked through and incorporated into the final picture, whether it is a new understanding or a product innovation, it is important that the client team have successive opportunities to meet and reconfigure things in the light of their growing understanding.

A Three Stage Process for Insight Generation

There are in our experience three clear steps or operations involved in the successful uncovering of insights. These may, on occasion, occur automatically but as we have suggested there may be many reasons, particularly the onset of anxiety usually as a sense of vulnerability or disorganisation, that can lead to suppression of the insight. Below we outline the steps and their purpose but before we do so it might help to recall that we usually conduct this process with the client and facilitation team some day or days after the large group event. During this insight process it is normal for us to work in basic groups with 4 or 5 members in each group. It is the support of the group and the willingness of other members to take part in the capturing and building of the insight that helps overcome feelings of vulnerability and lends strength to the integrity and possible validity of the newborn realisation. In addition, the feedback from up to five or six small groups working on insights starts to build what we call insight banks or platforms which may themselves be reviewed for synergy and direction.

Step One – Reproduce

The first step is to reproduce the circumstances in which the impact occurred. To do this, the recipient of the original impact describes the situation in which she experienced the impact, bringing in information from perceptions and emotions, and from inner as well as outer dialogue. She might also include diagrams or drawings that accompanied the incident if there were any. Here is an example:

> "*We were talking about getting older and I was the youngest in the group and going on about my desire to drive one of the new minis before I die! Then Bill, who is in his seventies and was sitting on my left suddenly said in a jokey manner: "I hope I can stay in my little flat until the end."*
>
> *"For several moments I sat in stunned silence. Many thoughts rushed through my head, I imagined this block of flats with elderly people struggling to get up the stairs – I even visualised an old lady falling down a flight of steps. Then I smelt the smell of cabbage cooking, like school dinners and my thoughts jumped to Meals on Wheels. Then I felt sad and tearful and my mind jerked itself away to think about something more pleasant. But I couldn' t take my eyes off Bill. I just stared at him and stumbled to try to rejoin the conversation in an appropriate way. He was so, well, quiet and…brave."*

This is a very good example of completing Step One. The moment of impact is reproduced, although as we can see from the text, the speaker is not yet sure what she have become aware of, other than a new awareness and set of feelings about her neighbour. The next thing to do is to offer this story to the small group and ask them to reproduce it **as if it had happened to them.** In this way we can build the chain of associations and possibilities that arise from the impact and this leads us into Step Two.

Step Two – Generate From

We have asked each of the small group members to imagine that the impact had happened to them. So, the next group member said:

> *"If that had been my experience, I would have thought guiltily about all the times I had wished old people weren't in my way. Like in the supermarket when they are dithering about at the shelf and blocking up the aisle. I would have wanted to speak with Bill."*
>
> *(Facilitator prompts: What might you have said to him?)*
>
> *"Oh, I dunno. I might have said, you know, I've never thought about older people in that way before, What I mean is, they've got so much to put up with. Their bodies don't work as well, they only get pocket money to live on and their nearest and dearest might be gone. Makes you think whether you could handle it or not?"*
>
> *(Facilitator: OK, let's hear from the other two group members. What if this experience had happened to you?)*
>
> *"I'm afraid I would have changed the subject. (says group member No, 3) I can't bear morbid thoughts and I think that you make your own luck I think you have to make the best of things. It doesn't do to dwell on problems."*
>
> *(Group member 4) "Don't you think that might have been a bit odd, to try to ignore something like that or put a 'good spin' on it? I don't think I would*

have known what to do. It wouldn't have been something light-hearted though. To be honest my mind's gone a bit blank now. That's probably what would have happened to me, I would have blanked it out, it's too painful."

We have now accomplished the task of reproducing the impact and building around it. We can already see a range of tactics for handling the impact, including ignoring it. Now it is time to start to generate from the impact and build new possibilities.

From this point we could take several different directions and it is up to the group to decide how to use its material to produce further ideas. We are starting to create a reality in which our impact and insight have influence. Returning to our working example, we could generate from Bill's position. For example we could have two group members work on "what could Bill do to ensure he stays in his flat as long as he wants?" Or we could move to a more general societal view, and have two members work on "what can the community do to help Bill?" Or from a client's position, say a health or insurance company, "what can we do to support Bill's wishes?"

Give the group these options and 10 minutes to generate a new set of possibilities from these perspectives and feed back to the foursome. Now we are in the position of having built the impact, used it as a resource to generate from and perhaps some interesting new ideas have emerged. It is time to move to Step Three.

Step Three – Generate

There are two main elements to this step. The first is to generate the key insight or realisation itself. What is it that we have become aware of that formerly we did not realise? The second element is to ask: 'if that realisation were true, what difference would it make given our brief?’ And to follow this discussion up with a series of focusing sub-questions:

ix. What would we say or do differently?

x. What would we start doing that we’re not doing now?

xi. What would we stop doing?

viii. How might any of these help us to reach our goals? (A first test for feasibility)

To follow through on our example and see this process in action, let us return for a moment to the impact and the conversation at Step One. What have we become aware of that formerly we were unaware of? It seems that we have noticed the bravery or courage of an older person and also that this courage operates at the level of small everyday things, the desire to remain autonomous, to stay in your own place – something that we can all relate to. This is a very different perception of older people than the idea that they are in the way, a bit of a nuisance. What difference would it make if we changed our view of the elderly? How would we interact with them differently? How would manufacturers of goods and services play their part in this new conversation?

It is not within the scope of this paper to explore those findings. We would like you to notice that this three-step process for generating and building insights is very much like the process that anyone goes through when acquiring a new skill or creating something from scratch. If you were learning to play the guitar, you would start by trying to reproduce melodies that you liked. You might get some help in the form of a teacher who would probably have you reproduce notes and scales. Then, you would generate from the tune you had learned, playing it in your way. Next you would become able to rearrange the notes and patterns you had learned into a new tune, perhaps with a different sense of rhythm or timing. What we are describing here is a set of steps and operations that underlies many a creative process. Adapt it to your own needs and style.

Step Six: Implementation and Enrolling the Organisation

The truth is that by doing this kind of work you may end up with a whole raft of insights that could change a great many things about an organisation and its relationship with customers. But will your client organisation be willing or ready to listen? More fundamentally for your own project, how can you best ensure that your results get a listening? The standard way is to create a presentation and then to deliver it in the form of a debrief and report. You probably already know how to do that if you are reading this paper. So to finish our paper let us share with you a way that we have found which helps insight work to gain a foothold in an organisation.

The first thing to do is to review what we are trying to accomplish and the resources we have available to us. If our client has approached us for this novel approach (the large group) he is almost certainly looking for something out of the ordinary, or to solve a problem that has not been resolved by standard procedures. During the process itself quite a number of his colleagues have become involved in one way or another with the customer workshop and its findings. So these people are qualified to make a choice about whether the quality of the insights deserve a wider audience within their organisation. This is usually a choice that we offer and work through with our client team in the last session of the insight day. Put in summary form we say:

> *"We have discovered X, Y and Z. We have noticed that if we acted on X, Y and Z it could make quite a difference to the way we do business. Is it worth taking this forward and recommending it to the organisation?"*

If the answer is yes, we then recommend a process for taking this work forward into the organisation. This process can vary depending on the type of insights, the type of organisation and the business needs that are driving the inquiry. But two key steps of the implementation plan involve:

d) Rather than presenting findings to the organisation, we design a listening programme in which members of the client team will arrange sessions with their colleagues to gather their views on the topics of the inquiry. These will then be reviewed at a further meeting for synergy and discord with the study's findings. Appropriate actions can then be taken to align a wide set of perspectives. The alternative, as we mentioned, is often to deliver the newborn insights in a PowerPoint presentation and hope they survive. In our experience most don't. The more powerful they are the more they will upset the status quo. Many people in the organisation will automatically defend the status quo.

e) The second key step is to institute a process of building and enrolling sponsorship for the initiative and the implementation process arising from the insights. Is someone up there willing to get behind what you are doing? Is the desire for a solution still alive? Can it be formalised by asking your sponsor to sign off a series of steps – or even just one step – to further development? These discoveries, if they are to make a difference, need to become part of a normal business development programme as soon as possible, with specified goals, a time-phased plan and relevant resources, finance and personnel as soon as possible.

<u>Conclusions</u>

We have taken you on a long journey around our discoveries in the arena of large group work. Since we pioneered this approach, back in 1991, we are aware that many of our peers and colleagues have developed their own approach to all kinds of experimental workshops, many involving large groups. Yet to our knowledge, no attempts to describe methods and theories that inform this new style of work have appeared until now.

To summarise, here are six things that we would draw to your attention:

iv. Contrary to what you might expect, large groups of more than 15 in number increase the depth and insightfulness of market research inquiries provided that high levels of safety and permission coupled with appropriate leadership support the process.

v. The inclusion of client members in the group makes a big difference both to consumers and clients alike. Both sides feel honoured by the other's presence and motivated to give of their best.

vi. Two consecutive days of large group work provide a very rich addition to the considerable gains that can be made in a one-day session. The process of 'sleeping on it' allows for integration and review of the relative importance of things that have been learned.

vii. Throughout the process the programme of varying the size of the sub-groups and the nature of the activities undertaken allows for a realistic representation of the changing pressures, affiliations and centres of interest that occur in real life.

viii. We have worked with up to 1,000 people at a time which makes this kind of process ideal for tackling issues like corporate culture, large scale brainstorming and envisioning the future.

ix. The issue of insight generation and receiving a supportive listening for your findings needs to be inbuilt into the process. The more radical your discoveries, the more likely the organisation – with the best will in the world – will resist them. You need to plan for this and be ready for it. Your client may need your support and ideas on how best to do this.

It is inevitable in an attempt to describe a new form or method of inquiry that some themes are insufficiently clear to you either in terms of process or relevance. It has been a bit like that for us too. If we were readers we might be thinking something like, “this is all very interesting and innovative I’m sure, but is it worth it? There must be a simpler way. Why can’t I just ask people using a good moderator that I trust?”

The answer is, of course, that you can if that is your preference. But if you as a moderator or client want new or better insights at some time you are going to need to get closer to your customer or to view her in different aspects of her person. We do not show ourselves to strangers, nor do we always show our deeper selves even to those that we love. It requires something special, something unique to help us open the gateway to the place where our dreams live and then to bring these forward to share with our peers. Especially if we feel, as many of us do, that the commercial world is likely to exploit or manipulate us by attaching its wares to our deepest longings. We need to be invited to something special to give of our best and to share ourselves, much as we would for friends or family members. And we need to feel that receptive people are listening and that our work has value to them.

The customer is a complex, sometimes messy and difficult to understand creature, just as we are. Refusing to join them in their messy process because it appears subjective or irrational is just a measure of our fear of the unknown. Groups can be difficult, dangerous and unpredictable, but can also be safe, rational and predictable. If you split off and eliminate the danger and make your groups all like each other, then they too will become safe and predictable. You may even find yourself complaining about this on your way to conduct them or listen to them.

If you are prepared to experiment with large groups, not only will you get new and better insights, but you will also have a vehicle for introducing your customer in a fresh way (just as group discussions once did) to your organisation or client. It has been our experience that people in organisations pay more attention to each other or competitors in other organisations than to their customers. This tends to result in companies producing endless variations based on minor differences in a sea of products which consumers can hardly tell from each other. This is exactly what Freud meant when he referred to the 'narcissism of small differences' and is a sure sign of a company's obsession with its own world, rather than its customers. It is also an indication that a company or sector has lost faith in the value of customer insight, or has just not developed any new ways of getting in touch. The history of human progress is the history of new communications, new language and new forms of relationships, of new experiments and new journeys. We hope our work with large groups can play its part.

Appendix

Innovations that have been inspired by large group work and subsequently implemented:

The Arrivals Lounge at London's Heathrow Airport

Up until this time airlines had taken no responsibility whatsoever for arriving passengers. It was a passenger's insight in a large group that he felt 'dumped' in a concrete building in a tired and somewhat dishevelled state, with nowhere to refresh himself, shower or change crumpled clothing. From this insight the Arrivals Lounge was born.

The Fast Track – now at most major airports

The Well Being in the Air Programme

Beds in Business for BA

The converter seat for Club Europe

The New World Traveller Plus cabin

Creative development of the Good to Talk campaign for BT

Personal development for staff at BA, BT, BUPA, Lifetime, Quest, Holiday Inn

The Welcome Home programme for Holiday Inn, Europe, Middle East and Africa

Good Karma toiletries and relaxation products at Crowne Plaza Heathrow

Some of the early inspiration for BT Talkworks

Living Cover from Lifetime/Bank of Ireland

A unified set of communication tools for Dell Europe

BUPA Heartbeat, winner of two prizes for marketing and innovation in financial products.

New childcare and screening products from BUPA

A contribution to the new worldwide positioning for Visa

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