

Top Convening Agenda Tactics

The tactics below are proven approaches that foster collaboration, facilitate engagement, and improve sustained action post-convening. They help participants navigate complex issues, build trust, and work towards shared goals.

This overview organizes the tactics by the outcomes they're designed to achieve. In the following pages, you can explore each one in more detail, with links to corresponding documents that include context, step-by-step instructions, and—when relevant—worksheet templates.

Top Tactics Worksheets Master List

Open with Intention

[Opening Introduction Prompts](#)

[Start of Day Round](#)

[Step In Circle](#)

[Inspiration Letters](#)

[Toasts](#)

[Ground Rules](#)

Build Trust

[Walk and Talk](#)

[What We Bring With Us Wall](#)

Keep Presentations Fresh

[Hot Seat](#)

[Lightning Talks](#)

Align on a Vision

[The Game of Analogs](#)

[Madlibs Brainstorming](#)

[Future Walks](#)

[Future Wheel](#)

[Aligning on Guiding Elements \(Criteria\)](#)

[This, Not That](#)

[In/Tensions](#)

[Newspaper Headlines](#)

Plan to Take Action

[Workshopping Proposals](#)

[Red, Yellow, Green](#)

[Roadmap & 90-Day Action Planning](#)

[Who We Want to Be](#)

[Assets and Needs Mapping](#)

[What's Emerging](#)

Close with Connection

[Closing Circle](#)

[I Have, I Need](#)

[I Used to Think...Now I Think...](#)

Tactics To: Open with Intention

OPENING INTRODUCTION PROMPTS

Spark connection from the start by making intros personal, engaging, and a cue that **everyone's voice matters**.

[ACCESS WORKSHEET](#)

START OF DAY ROUND

Create space for every voice by inviting individual intentions and questions, setting the tone for **focused, inclusive** engagement.

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STEP IN CIRCLE

Build **connection** and **empathy** by surfacing shared experiences and identities—revealing both **common ground** and the richness of difference—through a **physical, energizing game** that brings the group into movement.

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GROUND RULES

Establish **shared expectations** for how the group will work together—creating a **foundation for inclusion** of all voices, accountability, and respectful participation.

[ACCESS WORKSHEET](#)

INSPIRATION LETTERS

Reflect on the **qualities** of inspiring leadership by participants writing letters to someone who has shaped them, **surfacing shared values**, and committing to how they want to show up in the world.

[ACCESS WORKSHEET](#)

TOASTS

Kick off the convening with a warm, personal welcome that sets the tone for **connection and shared purpose**—offering a brief reflection on why we're here and what we hope to accomplish together.

[ACCESS WORKSHEET](#)

Tactics to: Build Trust

WHAT WE BRING WITH US WALL

Invite participants to name what they're bringing into the room—like **hopes, worries, or goals**—to surface areas of alignment and difference, and begin **building the trust** that meaningful collective action requires.

[ACCESS WORKSHEET](#)

WALK AND TALK

Create space for **reflection and connection** through **paired walks** that help participants process insights, deepen relationships, and spark new thinking.

[ACCESS WORKSHEET](#)

Tactics to: Keep Presentations Fresh

HOT SEAT

Keep energy high and conversations dynamic by **spotlighting individual voices** through **rapid interviews**, followed by collective reflection and participant engagement.

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LIGHTNING TALKS

Spotlight a rapid-fire mix of perspectives that **reveal patterns, possibilities, and the power of brevity** to anchor a group discussion.

[ACCESS WORKSHEET](#)

Tactics to: Align on a Vision

THE GAME OF ANALOGS

Uncover **relevant lessons** from **outside the sector** to surface what success has looked like elsewhere—and identify the core ingredients that can guide this group's approach.

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MADLIBS BRAINSTORMING

Provide structure to **group ideation** by guiding participants to clearly articulate a big idea, who it serves, the challenge it addresses, and what's needed to move it forward.

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FUTURE WALKS

Zoom out through a **paired walk** that uses prompts to envision aspirational futures; **re-energize the group by finding shared clarity** around what's possible and moving past immediate barriers.

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FUTURE WHEEL

Make a proposed change more concrete by mapping its **ripple effects**—surfacing intended and unintended consequences to **inform smarter, more strategic action**.

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ALIGNING ON GUIDING ELEMENTS (CRITERIA)

Surface and align on **guiding principles, criteria**, or other **aligned values**, giving the group a shared framework to navigate decisions ahead.

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THIS, NOT THAT

Invite participants to reflect on the **ideal characteristics and future direction** of an initiative, coalition, or issue area.

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IN/TENSIONS

Visualize **alignment** and a range of **perspectives** by mapping where participants stand—**normalizing nuance, surfacing tensions**, and taking a lively **temperature check** of the room.

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NEWSPAPER HEADLINES

Surface the **long-term vision of success** by inviting participants to imagine and articulate the future impact of their work—captured as a bold, unifying headline.

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Tactics to: Plan to Take Action

WORKSHOPPING PROPOSALS

Engage participants in focused **small-group dialogue** to stress-test ideas, generate recommendations, and build shared ownership of next steps—through structured roles, prompts, and transparent synthesis.

[ACCESS WORKSHEET](#)

RED, YELLOW, GREEN

Surface **actionable ideas and stakeholder commitments** by mapping what's a clear yes, a hard no, and a creative maybe—inviting fresh thinking and uncovering unexpected opportunities for collaboration.

[ACCESS WORKSHEET](#)

ROADMAP & 90-DAY ACTION PLANNING

Build clarity and momentum by **mapping a shared vision**, identifying key stakeholders, and outlining **concrete next steps** to turn ideas into action.

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WHO WE WANT TO BE

Clarify how this group wants to move forward by reflecting on what will make **collaborative leadership** work for this particular initiative—surfacing the **values, structures, and commitments** needed to stay connected and effective beyond the convening

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WHAT'S EMERGING

Create a shared language around **what's been learned, what's unresolved, and what deserves further exploration** to ensure group alignment before identifying what's next.

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ASSETS AND NEEDS MAPPING

Move an idea from concept to action by inviting the group to map **what's needed** and **what's already in place**—closing gaps to success and building momentum for next steps.

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Tactics to: Close with Connection

CLOSING CIRCLE

Invite **reflection and shared commitment** by creating space for participants to name what has shifted for them—and what role they'll play in carrying the work forward beyond the convening.

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I HAVE, I NEED

Build trust and spark **ongoing collaboration** by inviting participants to name real needs and exchange tangible offers of support.

[ACCESS WORKSHEET](#)

I USED TO THINK...NOW I THINK...

Surface **shifts in perspective** and help participants **internalize** what they're learning.

[ACCESS WORKSHEET](#)