**Tactic: 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.*

**When to Use It:**

Use when you want participants to actively engage with a proposal, idea, or challenge and generate feedback, insights, or recommendations. This tactic works best when the goal is to sharpen concepts, surface risks and opportunities, and build shared ownership for next steps.

**How it Works:**

**Step 1 (30 minutes) | Review & Discuss**

Participants are pre-assigned into small groups based on stakeholder type or cross-functional diversity. A pre-briefed **discussion lead** frames the purpose of the session (e.g., critique, ideation, or refinement). Participants are given 5 - 10 minutes to silently review the proposal or concept on the table. Check in with participants to ensure they’ve absorbed the material, before shifting into plenary discussion.

**The discussion lead then guides a focused dialogue using pre-selected prompts, such as:**

* What opportunities does this proposal present?
* What risks or uncertainties are on your mind?
* Why might this not work—and what would it take to address that?
* Who else needs to be involved for success?
* What resources would this require to implement well?

**Step 2 (20 minutes) | Produce & Prepare to Share**

A self-nominated **scribe** captures key takeaways using a provided worksheet or digital template—these may include recommendations, questions, tensions, or insights. With 10 minutes remaining, a **reporter** prepares 2–3 headlines that summarize the group’s most important contributions or questions.

**Step 3 (20–30 minutes) | Whole-Group Synthesis**

Groups return to plenary and each **reporter** shares their headlines. The facilitator synthesizes areas of convergence, divergence, and open questions using language like:

* “Across the groups, we heard alignment around \_\_\_ and \_\_\_.”
* “We surfaced two different perspectives on \_\_\_ that we may need to reconcile.”
* “Here are the open questions that remain unresolved: \_\_\_.”

Invite participants to clarify, expand, or challenge the synthesis to ensure shared understanding.

### **Helpful Tips:**

* **Prep your discussion leads.** Brief them in advance and give them a facilitation cheat sheet to help manage time and guide the conversation.
* **Be specific about group roles.** Ensure groups have assigned a lead, scribe, time-keeper, and reporter before the session begins.
* **Use a clear template.** Provide a simple, structured tool for capturing insights—this ensures consistent reporting and helps with synthesis later.
* **Seed strong prompts.** Tailor guiding questions to the phase of the work (e.g., exploration vs. decision-making) to keep groups on task and oriented toward outcomes.

