

# *Business901* Podcast Transcription

*Implementing Lean Marketing Systems*



## Facilitation Guidelines

Guest was Russ Unger

*Business901*

### **Related Podcast:**

[Voices Matter: Are you helping the situation?](#)



[Voices Matter: Are you helping the situation?](#)  
[Copyright Business901](#)

# Business901

Podcast Transcription

Implementing Lean Marketing Systems



## Transcription of Podcast

**Joe Dager:** Welcome everyone. This is Joe Dager, the host of the Business901 podcast. With me, today is Russ Unger. He is an Experience Design Director for GE Capital Americas where he leads teams and projects in design and research. He is co-author of the book "A Project Guide to UX Design" and his latest "Designing the Conversation." Russ, I would like to thank you for joining me. Let's start out and tell us how you've become such a prolific author. Did you have an "aha" moment or did it just happen?

**Russ Unger:** Well, thanks for having me and thank you for that kind word prolific. I am humbled to hear that for sure. Back in 2008, I attended a conference. My first real conference in the User's Experience Community called the "Information Architecture Summit." I just found a little bit of opening where it felt like there wasn't a lot of content at that time for people who were just starting to do UX and getting their feet wet and trying to get started. I pulled together some outlines and start talking to publishers and asked a friend of mine Caroline Chandler if she would review my outline to see if there were any gaps. I eventually invited her to write the book with me. The next thing, you know, the book is on the shelves, and it is doing pretty decent. It's kind of like Stockholm Syndrome for me in writing books. It's a lot of fun when the book is done, and there are a lot of highs and a lot of lows and you've kind of get into the middle of writing it and stuff. At the end of it all, when you get your time back, you've kind of wonder what you should do next and so for me, I guess it's been keeping my eyes open, watching what's happening in the space.

[Voices Matter: Are you helping the situation?](#)

[Copyright Business901](#)

# Business901

Podcast Transcription

## Implementing Lean Marketing Systems



*Designing the Conversation* came from, realizing that, from my perspective, we are all kind of event planners now. We are all trying to do these kick off meetings or just general working sessions meetings, and we could probably all do them better. It was an opportunity, I think that kind of presented itself, and I had two great co-authors Brad Nunnally and Dan Willis who are both experts by their own rights, and we all sat down and put together a plan. So, I guess, the "aha moment" might have been in 2008 or 2009, when somebody said, "Yes, we'll let you write a book" and it went from there.

**Joe:** *I'll jump back to *A Project Guide for UX Design*; I think you hit a nice chord there with that book because there's a lot of granularity in that book. You always get that twenty thousand foot level on projects, but when you start doing a project and following a book, there are a lot of holes typically, and you didn't have a lot of holes; I didn't think?*

**Russ:** Well, thanks. We tried to take the approach of what's a good starting point. Especially, if you are kind of new to this and you're working on a real project in the real world outside of a college scenario where it is kind of safe. What is a great starting point? A good place to start and learn as a foundation, and tried to give you articles or at least information to help grow yourself. For example, we provide basic personas and then linked out to Todd ZaKi Warfel's persona, which are really, really super detailed. Todd has probably done some of the best personas in the business. So, he was generous in showing us some of his expertise, and it gives people direction to reach out and learn on their own.

[Voices Matter: Are you helping the situation?](#)  
[Copyright Business901](#)

# Business901

Podcast Transcription

*Implementing Lean Marketing Systems*



**Joe:** *I saw that, and there is a real art to building personas?*

**Russ:** There's a lot of art, but I would say there's a heck of a lot more science. When you start to do the research, and you start to collect a lot of data about people's scenarios, various demographics, those data points are important. They are part of what keeps it from being a myth. You start to make it real when you draw in the data from any of the research that you've done.

**Joe:** *With your latest book, which you mentioned *Designing the Conversations*, I thought the title could be somewhat misleading or even somewhat narrowing. Once you looked at the content, you get it. At first glance, I'm not sure everybody does. Can you give us an overview of the book and whom it is intended for?*

**Russ:** Facilitation is what the book is about, and I don't know how familiar folks are with titling processes, but it's a back and forth process. In fact, we've just been doing it, sub-title on the next book. This is generally targeted for designers who need to run meeting or facilitate meetings or help gather some requirements or do some research, talk to stakeholders, even just project teams or interviews, be that a job interview or an interview with the stakeholders, whomever. We tried to take a look at all of those different facilitation activities. In fact, we kind of group it into sections because, the more we looked at the different parts of facilitation, the more that saw there were kinds of facilitation. I think in the book you'll see we do a lot on facilitation preparation because we've seen other books out there that talk about

# Business901

Podcast Transcription

## Implementing Lean Marketing Systems



how to facilitate, but they don't kind of give you a hint as to what goes into planning for it. We went into group facilitation, which is a group of people. When you think of workshops or focus groups or brainstorming, one-on-one facilitation, you are the facilitator here or usability testing things like that. Whether you get into a situation of a conference presentation where you're one person presenting, there's a whole lot of people out there or even virtual seminars; we talk a little bit about things to do when you are done with facilitation because it seems like you reached that end point, and you should be done and able to take a breath, but there is still a little more work to do.

**Joe:** *I think at first it written for it is written for designers, but it's more than that. Anyone who will pick up the book will recognize. There are a lot of people who could use this. But there are two types of designers, the extroverts with all the flair and this introvert that is in the closet writing code, who's the book for?*

**Russ:** The book is for anybody. I appreciate your denomination of the two types of designers, but I think there are so many different kinds, depending on where you sit. In advertising, you say a designer and I think they will probably think a visual designer or print designers. In the web, it could be an interaction designer or a visual designer or even UI designers. So, they get different. Introverts or extroverts are a good place to start. I think for introverts; they are the ones who want to dive right in and try the stuff out. They are the ones who could pick up like *Gamestorming* and go "Uh, this activity, I can figure it all out and go" and they are going to run with those and try to do it with their friends in a hurry. Well, I think

# Business901

Podcast Transcription

## Implementing Lean Marketing Systems



and extrovert probably going to need a little bit of cajoling or at least a lot of planning and preparation to feel a little bit more comfortable with what they are doing. So, I think it's meant for both really. We put a lot of devil in the details in terms of what you have to think of to do these events. I say events, pardon me; I do that because I put on events in Chicago and so that tends to be on my mind a lot when I talk about facilitation. Putting on a facilitation activity, there is just so much more into it. All of those different planning details, so that, by the time, you get up and start facilitating the only thing you have to worry about is the facilitation activity. I think we tried to prepare for both of those types of personality.

**Joe:** *I take that from what you said that good preparation may be meant more for the extrovert, then the introvert?*

**Russ:** That's a fair kind of comment. I think especially on how I said it. I think it's probably for both. I think an extrovert will rush right in and then, granted this is a broad stroke. I don't think all extroverts would actually do that, and I am not classifying any of you extroverts out there. I think an extrovert is probably a little more likely to rush right in or somebody who is like me who never looked at the manual for a VCR back in the days and have that blinking 12 that you can figure out on its own. There are so many details. I think it helps and extrovert and an introvert. In terms of an introvert, I think it will help them kind of through preparation and planning. Making sure everything is there and feeling comfortable with themselves. For an extrovert, I think it helps them because probably the

[Voices Matter: Are you helping the situation?](#)

[Copyright Business901](#)

# Business901

## Podcast Transcription

### Implementing Lean Marketing Systems



activity in general, being an extrovert makes it lot easier to stand up in front of people and kind of just go with it. I think there is still, again, that same sort of planning and preparation and having that kind of guideline; Brad wrote a great chapter on agendas. So, have your timing and what's next and where you need to go. I think it will fit probably both of those.

**Joe:** *Looking at all the different things that you talk about in the book can we think of each one as a project? It's that the way we need to do it, to get better, in control and feel comfortable with it?*

**Russ:** I think it could be in terms in how you used the word projects here. I look at them as a whole bunch of different activities that you could do within the realms of the project or even outside of a project. Had we had more pages I think we would have essentially talked about things that are closer to Toastmaster or how do you speak at a wedding or things like that. So, to some degree, some of these could be projects, especially when you get into something like running a focus group or even getting into brainstorming activities. Those are kind of mini-projects within themselves. So, absolutely, I think to some degree, there is a lot of that in there. Usability testing, for example, depending on how you plan, that can be several weeks' activity.

**Joe:** *You cover a wide spectrum in the book from mentoring to lectures. What was your favorite chapter?*

# Business901

Podcast Transcription

## Implementing Lean Marketing Systems



**Russ:** There are a couple chapters that I favor. I think my most favorite one is what I pulled together about conference presentations. I have been fortunate enough to speak at a bunch of conferences, and that's a blessing to be able to do that. It's kind of a gift that people ask you to come up and talk in front of an audience. But to be able to do that and give a little bit of guidance to folks that are partially into the method that is my madness, but also into standing up on the stage and doing it themselves. I love to see new speakers. I love to see people getting started. So, to me, I think that was probably my favorite chapter because it allows me to share how things work. Pardon the plug here, but I'm just now starting to write a book called "Speaker Camp" with Samantha Starmer. We just did a full day workshop in Chicago a couple of weeks ago where he had about 30 people come in, and we talked about how to write your bio and your abstract, how to brainstorm your idea, get things ready to submit to a conference and then put people up and have them presenting for five minutes time slots. We recorded those sessions and sent them back their videos. It was nice because, for me; it's a foundation to that next sort of book project that I'm doing that's why it is continuing.

**Joe:** *Well, it sounds like "Speaker Camp" is somewhat a Toastmasters on steroids?*

**Russ:** Possibly with less formality. I think we tried to help people at least, go and get themselves on stage for whatever their favorite conferences or the one they want to get to.

**Joe:** *My favorite part was the mentoring part. I think that's an area that's just extremely*



# Business901

Podcast Transcription

## Implementing Lean Marketing Systems



*neglected. What makes mentoring different than coaching or instructing or is it different?*

**Russ:** I think that's a good question. Dan Willis wrote that chapter and Dan also developed the illustration. If you're considering buying the book, I'll tell you the illustrations alone are gorgeous enough to make it worth purchasing. Mentoring, I think in our view is helping somebody with less experience come into their own. Helping them by providing guidance or insights or even responding to the questions of the day or about the field. I think when you look at coaching I have different views on how that is. I understand things like a sales coach where somebody comes in and says you should diversify your business. When it comes to life coach, etcetera, that's not something that's necessarily for me, and if it makes sense for other people, I understand if they're talking to somebody in that sort of fashion. I think coaches tend to get paid more than mentors. I think mentors by, and large don't and from where I sit; there are groups like the Information Architecture Institute and Interaction Design Association that do a lot to try to help mentor and guide folks that are coming into the field. In fact, in Chicago, there's a place called Starter League that frequently has mentors helping students who are going through courses so they can ask them to help. I even think that it's different in instructing because an instructor provides you with assignments and tends to give you a little bit of question and answers throughout the course or even at office hours, but a mentor is going to be somebody who helps you check your work a little bit differently along the way. Dan is such a fantastic job of talking about the finer points of mentoring, and I'm glad to hear that that's one of your favorite chapters

*[Voices Matter: Are you helping the situation?](#)  
[Copyright Business901](#)*

# Business901

Podcast Transcription

## Implementing Lean Marketing Systems



and I'll be sure to let him know.

**Joe:** *The other part about it is your book is very dangerous. It gave me enough information that I'm willing to dive into a lot of areas that I probably shouldn't. Was that done purposely to give you that broad stroke and get you that feeling of learning by doing?*

**Russ:** Yes, absolutely. I mean that's also the premise behind *Project Guide to UX Design*. It's to get you enough to get you up there and get going. I think that if you follow the basics of everything in *Designing the Conversation*, you can likely do any of these activities, pretty decently for your first time out. At least you won't get up there and feel like Tommy Boy. There were some incidents in that movie that "Oh, I think that we kind of prepare you for that" and then if you're bitten by the bug, dive in and do more and start to see what else you can do. There are so many different books about activities that you can take on, and I know I talked about Gamestorming by Dave Grey, James Macanufo and Sunni Brown such a great book with a bunch of activities. This kind of foundation allows you to pick up those and just run with them. So, to me that's a good type of danger to be in. I think being a good facilitator makes us better designers, and that's what's exciting to me.

**Joe:** *I had a feeling that this is somewhat, not necessarily the whole resume or the whole job description, of someone that manages the design group. These were actual things that a person had to have in his bag to be able to do his job.*

# Business901

Podcast Transcription

*Implementing Lean Marketing Systems*



**Russ:** I think that's very fair. I kind of jokingly said, "We're all event planners now". I mean from anything like getting your team together to defining a team charter or communicating rules or any rules of engagement. I think Kevin Hoffman talks a lot about meetings, and I think a lot of meetings aren't run well and when you take a look at *Designing the Conversation* and you couple it with Kevin's information about his meetings and stuff. That's a good thing to put in your back pocket. I'm one of those rare breeds to tighten the meeting invitation to somebody it's got an agenda or probably have the bullet points on what we're going to do. I'm the one who is asking about next steps and making sure that we've spent our time well. I don't like to waste other people's time. I consider it to be very valuable. I want to make sure that we're doing all the things we can and if that means putting in a few extra hours planning to get something right so that the hour that everyone's together is more beneficial. That's what I'm going to do. It's funny people think of a one hour meeting as a one hour meeting, but you got 8 people in there and they are all making a hundred and twenty bucks an hour, you are suddenly wasting away potentially a thousand bucks just by having people not do something and over the course of time that adds up quick if you start not planning well. So, that's the way I look at things at least.

**Joe:** *Well, you also entered something else in just about each chapter, I didn't check to see if every chapter had one, but the Meeting the Expert section. What was your thinking and what did you want to accomplish with that?*

# Business901

Podcast Transcription

## Implementing Lean Marketing Systems



**Russ:** That is something that we tried to do with *A Project Guide to UX Design* too. We interviewed a lot of people in the field, and we wanted to make sure that people get perspective and it's not just a Russ, Brad and Dan thing, but it's also, here's some other smart people who can give you their perspective and their view and if lines up with ours great, or if gives you an opportunity to find someplace else to explore, even better and if it's a little contrary to what we've said, that's okay too because there's no real one right way to set every one of these things up. We're just kind of basing it upon our experience and how we've refined ourselves over time. So, those experts, a lot of those are friends or referrals and people who became friends; they really rounded it out all out in the book and make sure that people understand; it's not just Russ, Brad and Dan, kind of preaching their way.

**Joe:** *I want to switch gear here a second and mention a few things you do in the Chicago area which we touched upon, such as Speaking Camp. But you do something that's called Chicago Camps. Can you tell me about that?*

**Russ:** Chicago Camps, a guy by the name of Shay Howe and I put on an event called Prototype Camp. It's was just a one day event in Chicago. We figured it would be kind of cool it is a hot topic for a lot of people. Shay and I put on this event, and we learned quite a bit. We reached out to another friend, Brad Simpson and the three of us formed a small business, and now we are doing four different one-day events. We use the camp sort of label because there's a lot of things like Bar Camper, different camps that are kind of unconference that's the difference between those and us is that we charge a nominal fee. I think for us it's \$50 for a

# Business901

Podcast Transcription

## Implementing Lean Marketing Systems



full day of a couple of smart keynotes and probably 10 to 12 smart presentations. Through sponsorships and few other things that we can add in, we've generally tried to give people several times their money back. We did some math and found out that for Mobile Camper, earlier this year; we probably gave people around \$350 in value back for their \$50 ticket. We kind of chuckle amongst ourselves that we're one of the best Groupons for an event in Chicago which you know it's all so fitting. So, we really try to focus on single day events giving people high value for a little bit of money adding some good structure and have a nice location and just bring a single team who does the same event, not the same event, but the events in the same place, time and again. So, you get that sort of consistency across all of the events that we put on.

**Joe:** *With all the different things you're doing is there one consolidated place to get a hold of you or what's the best way to learn about these different things?*

**Russ:** Yes and no, I have a personal website [userglue.com](http://userglue.com) that will get you to me in general it will highlight either speaking events or my bio and point you in general directions. We also have [chicagocamp.org](http://chicagocamp.org) that highlights the events that we are doing, and we're just getting right to start planning 2014. It looks like we're going to do a couple more camps and may be something a little bit bigger. Those are probably the best places to track me down on the web.

**Joe:** *Your book, [Designing the Conversations](#), came out just several months ago, I believe and your next book is due when?*

[Voices Matter: Are you helping the situation?](#)  
[Copyright Business901](#)

# Business901

Podcast Transcription

*Implementing Lean Marketing Systems*



**Russ:** Yes, March and the next book we have an all in date of I believe October 2nd. That when we are supposed to have everything to the publisher, and I've just put down a schedule and actually starting to write. I think, depending on the way the publishing schedules go that mean we may be out before the end of the year.

**Joe:** *What's the best way for someone to contact you through that original website or is there a better one?*

**Russ:** Yes, there's a contact form in the website, and you know with all the things that's going on. I tried to get back to people in about 24 hours.

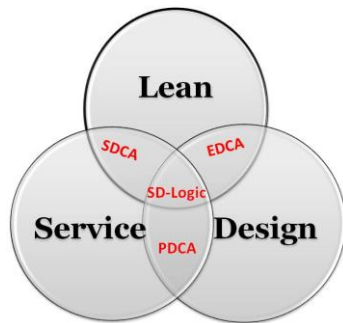
**Joe:** *Okay. Well, I would like to thank you very much Russ, I enjoyed both of your books now that I've read. This podcast will be available in the Business901 iTunes store and on the Business901 blog site. So, thanks again Russ.*

**Russ:** No problem. Thank you very much. Thanks for having me, Joe.

# Business901

Podcast Transcription

Implementing Lean Marketing Systems



Joseph T. Dager

Business901

Phone: 260-918-0438

Skype: Biz901

Fax: 260-818-2022

Email: [jtdager@business901.com](mailto:jtdager@business901.com)

Website: <http://www.business901.com>

Twitter: [@business901](https://twitter.com/business901)

Joe Dager is president of Business901, a firm specializing in bringing the continuous improvement process to the sales and marketing arena. He takes his process thinking of over thirty years in marketing within a wide variety of industries and applies it through Lean Marketing and Lean Service Design.

[Visit the Lean Marketing Lab:](#) Being part of this community will allow you to interact with like-minded individuals and organizations, purchase related tools, use some free ones and receive feedback from your peers.

*[Voices Matter: Are you helping the situation?](#)*  
*[Copyright Business901](#)*