How to use this compendium of crowdsourcing techniques

How this compendium is organized

The crowdsourcing techniques described in this compendium are organized in three fundamental groups:

- *Program* crowdsourcing techniques that uncover participants' needs, wants, and expertise for the purpose of structuring the *event program.*
- *Session* crowdsourcing techniques that uncover participants' needs, wants, and expertise available to benefit a *single session.*
- Crowdsourcing techniques that *consolidate learning and move to outcomes.*

Broadly speaking, these groupings correspond to the times they are most likely to be used during an event. Some techniques, however, are appropriate outside these categories. The following sections in this chapter provide a useful way to quickly discover appropriate techniques based on your *goals*, *conference phase*, and *group size*.

Let's look at each category in more detail.

Program crowdsourcing techniques

I've included one simple crowdsourcing technique, *badgesourcing*, that increases awareness of the topics and issues of interest and expertise/experience of each participant throughout the event. Badgesourcing operates whenever participants' attention is not captured by the normal activities at the meeting.

All the other program crowdsourcing techniques will typically be used as early as possible, as they perform the essential tasks of:

- Helping participants usefully learn about who else is present.
- Uncovering truly pertinent topics and issues.
- Identifying participants who can lead sessions.
- Creating a crowdsourced conference program that meets the wants and needs of those present.
- Providing opportunities for specific participant challenges to be addressed.

Note that though I recommend running *The Solution Room* as an opening session, it can be profitably used at any point during an event.

Session crowdsourcing techniques

Session crowdsourcing helps you make sessions you are presenting or leading maximally useful to attendees by:

- Ensuring that the session addresses attendees' actual wants and needs.
- Helping attendees learn about each other in useful ways.
- Supplying a participative environment that keeps attendees engaged and actively learning.
- Discovering attendees who can contribute to the session.
- Allowing participants to explore problems and develop solutions collectively.

Crowdsourcing techniques that consolidate learning and move to outcomes

Crowdsourcing techniques that consolidate learning and move to outcomes can be run at the end of events or sessions. These techniques provide effective closure for participants and—a big plus—build community.

Choosing appropriate crowdsourcing techniques

Start with your goals for the event or session.

- What are the desired outcomes?
- What important information do you want to convey effectively?
- Do you want to build connections between participants who don't know each other well?
- Do you want to uncover useful expertise and experience in the room?
- Do you want to build a community or a movement—or both? Are there action outcomes that the group needs to decide on?

Being clear about your goals allows you to zero in on techniques that will support them. You'd never use every technique in this book in a single event or session, so you need to pick what will work best for you.

Once you've established your goals, use the tables in the next four sections to review the techniques available to you by *goals*, *conference phase (portion of the conference you intend to use the techniques in)*, *group size*, and *time needed*. Then review the associated chapters for the techniques you find that fit your needs.

Read the whole chapter before making a decision to use the technique. Pay close attention to the *resources* section (see below) to ensure that your meeting environment and available resources can support the time, space, materials, and staff needed.

Preparing to use a technique

Whenever possible, give yourself plenty of time to prepare. While some techniques require little or no preparation, others will need extensive pre-work to use them successfully. If you have never used a technique before, comprehensive review and, ideally, one or more practice run-throughs are especially important, both for your confidence and the quality of your participants' resulting experience.

Arrange for all resources to be available when and where they will be needed.

As you review the *how* section of a technique (see below), note any options given and make appropriate choices so you'll know exactly what to do to successfully implement the technique.

How each technique chapter is structured

Each of the technique chapters in this compendium is divided into four sections:

Description

This section provides an overview of the technique, helping you decide whether it's appropriate for the circumstances you have in mind.

When

Some techniques are appropriate throughout an event or session; others are clearly associated with openings, middles, or endings. This section covers when a technique is appropriate and most effective.

Resources needed

Many of the techniques require low-tech materials such as pens, markers, flip chart paper, sticky notes, colored dots, and so on. Others need environmental resources, such as sufficient room space, specific chair arrangements, walls on which materials can be posted, etc.

How

Here's where you'll learn the details of implementing each technique. Many of these sections include sample narratives that further illustrate how to guide participants through the process.