

CHAPTER 7

The Clustering: Bringing Order out of Chaos

Upon this gifted age, in its dark hour
Rains from the sky a meteoric shower
Of facts They lie unquestioned, uncombined.
Wisdom enough to leech us of our ill
Is daily spun, but there exists no loom
To weave it into fabric.
—Edna St. Vincent Millay

The Intent of Clustering

The clustering process weaves the disparate, disconnected items of a brainstorm into a mental fabric that can be worked with for consensus building, planning, or problem-solving. At the end of the brainstorm, the participants will be confronted with forty to sixty cards on the wall. Trying to get a group to make sense of the data from that number of cards is like trying to drink from a gushing fire hydrant. A gradual synthesis has to happen. Process in the form of steps and procedures is needed. Cards that are similar answers to the focus question are placed together. These card clusters need to be named in such a way that a new creation—a gestalt—crawls out of the data and the group has insight instead of random multiplicity to work with.

A consensus workshop is not an analytical process, but a process that belongs to inquiry. The opposite of inquiry is advocacy. The advocate pleads, recommends and pushes a specific perspective. He is convinced that his position is right and seeks others who will support it. The inquirer, on the other hand, comes at a topic with an open mind looking for a creative or viable option, or the facts of a particular matter. Inquiry attempts to open up new ground, or get a new take on “established truth.”

The consensus workshop as inquiry is trying to unleash the powers of intuition and association to see and form connections among ideas, connections that are not immediately obvious. It is looking for a breakthrough of insight that is contained in the data but is also beyond the data. This is why for many years ICA’s name for the clustering and naming process taken together was “gestalting”—a breakthrough insight that comes from many pieces of data. It is a very handy German word, but, since some thought it might seem too academic, we broke the one step into two parts and called them clustering and naming.

Dealing with a big mass of data

What happens when a group is confronted with a large array of ideas on a wall? Here's the process.

Start small and begin where clarity is greatest. Now, the starting point is that participants' ideas are on cards and spread out in front of each team so everyone in the team can see them. Here the context, as usual, is very important. The participants need an image of where they are going.

PROCEDURE 1: GIVE A CONTEXT

So you say:

"We are going to make some clusters of these cards by putting cards together that make a thread. Then we're going to gather some more clusters, and some more and then we're going to name these clusters. Eventually we'll arrange all the cards in clusters.

"We're going to do this in rounds. First we'll get the clearest cards up, then the cards you are most confident about, then the ones that are different from the previous. Teams will be asked first for their clearest card. I'm going to read each card out, show it to you, then fix it to the wall. Next, we're going to ask for the cards you are most confident about. We'll do the same with them. Then we'll ask for cards that don't fit. We'll put those up.

"While the cards are going up, we'll answer questions of clarity only. The group whose idea it was will do the answering. I'm sure you understand that it is not appropriate to argue or disagree with any card. Any judgmental or editorial comments will cut off participation.

"If you see a card go up and you don't understand what's meant by it, don't try to interpret it yourself, but ask, and it's better to ask straightway. Don't look on this as an interruption. It's really clarification—and for everyone.

"When we get enough cards up, we are going to cluster them. We will put cards together that go together.

"We are going to use symbols to identify the clusters— symbols like circle, cross, triangle, square, infinity symbol etc. These symbols have no meaning. They are used to prevent the process of categorization or tagging which gives titles prematurely to the clusters, before all the ideas are in.

"When you see an idea that goes with an existing cluster, say, "That idea goes with the circles." It will make it easy for the facilitator to locate the cluster.

"So that's the process we're going to use. Let's begin."

PROCEDURE 2: FIRST ROUND OF CARDS

You say: "Each team, send me your two clearest cards." Or "Send me two you are most passionate about." Shuffle the cards. Hold up each card to the group. Read it aloud. Place it on the wall. Put other cards up randomly on the wall, as they are shown and read.

After you have read the card, say: "If you are not clear on what this card means, ask and we'll have the group who wrote the card explain it to us."

PROCEDURE 3. THE SECOND ROUND

You say: "Send up one (or two) that are very different." Add these to the random placement.

PROCEDURE 4. PAIRING CARDS

a. The procedure

Pairing is the first stage of forming a cluster. Any items that do not fit the cluster can be left as single cards on the lower part of the wall, but separate from the clusters

b. What you do

After 15-20 cards are on the wall, ask:

“Where do you see pairs of ideas that are pointing to the same—issue, element, problem, characteristic etc.” Use the focus question to clarify the type of similarity.

Put them together and put a symbol next to them.

Tell the group that if they don’t agree with this pairing, to say so and ask for clarity.

Then find another pair similar to each other but different from the first pair. Then others.

Create four to five pairs before adding cards to the pairs. Leave any alone that people are not sure about.

Insist that participants name the groups by one of the symbols, rather than by some preconceived name or title, such as “the economic group” or “ the public relations cluster.” Putting such titles on prematurely prejudices the content of the column. As more cards are grouped in a column, it may appear that it is not about economics or public relations, but something more comprehensive or quite different. It is important to allow the insight emerging in clusters to grow or change.

Hints

You create four to five pairs, so that participants begin to see the different components. It is very easy to see relationships between all the cards and have one big cluster. In pairing, you are teasing out the various components of the response to the focus question.

The pairs are grouped because they are pointing to a similar answer to the focus question—the same issue, the same approach

The leader and the group need to let go of preconceived notions of categories and relationships. Each cluster, when finished, will form part of the final product, which answers the focus question. A symbol is placed at the top of the cluster, so each column can be referred to without any naming.

You also want to avoid referring to a column by one of the cards in the column. This has the same impact as prematurely naming the column. For example, if a card in the “square” says, “Revamp the training curriculum” it is unhelpful to refer to that column as “the training column.”

It is important to be aware that the participants’ principle of clustering may be quite different from the facilitator’s. The facilitator needs to keep mental track of why people are clustering ideas the way they are.

Be careful about:

- Clustering cards with the same word in them. Deal with the whole idea, not just one or two words on the card.

- Clustering cards by cause and effect. (If you do this, then this happens.)
- Clustering cards in a sequence because they seem like a series of actions—you do this first, then that, then that.

If a card fits more than one cluster, ask.

The symbols have no meaning. You put a symbol with the cluster so it can be referred to without naming the idea. Discourage naming the clusters until all cards are up.

PROCEDURE 5. THIRD ROUND

Here you say two things:

First, “Pass up all the cards that don’t fit.”

Second, “Mark the ones that obviously fit with the appropriate symbol.”

Hints

Let the group decide where the cards go. This is the place that the clusters may grow and change. This is also the place where we will reduce some overlap and things will start to get clear.

PROCEDURE 6: FOURTH ROUND

You say, “Give me all the cards that do fit.” Sort the cards by symbol, then put them up quickly into the clusters, respecting the wisdom of the small group.

A caution here: it is dangerous to move cards around after they have been placed in a cluster or column, unless moving creates an “aha” for the group and does not require other cards to move. Too much movement of cards can cause the whole thing to collapse. All the king’s horses and all the king’s men will never get the synthesis together again.

It is very important that the whole group own the decisions being made about the ideas. Some facilitators may tell the group to put symbols on their cards and come up to the front wall and put their cards wherever they fit. This is not best practice, although there are times when the facilitator may deem it necessary.

Hints

If there is disagreement on where cards should go, the workshop facilitator can ask one or two of these questions to the group:

- What did you mean by that card?
 - What were you thinking about when you wrote this card?
 - Is the card more helpful here or here? Do you want this card over here by itself?
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