

SAFE FOR THE OFFICE™



FACILITATOR GUIDE

CHOOSING THE RIGHT PLAYBOOK

How to match the workshop to the moment — every time

Overview

Choosing the wrong playbook for a group is one of the most common mistakes first-time facilitators make — and one of the most avoidable. The good news: there's a clear, repeatable process for getting it right every time. This guide walks you through how to start with the outcome you need, work backwards to the right format, account for group size and composition, and avoid the traps that lead to a mismatched session. Along the way, you'll find a full reference table of all 21 Safe For The Office™ playbooks, a branching decision tree, scenario-based recommendations, and a one-page quick reference you can keep on hand. Written specifically for facilitators using the Safe For The Office™ platform. Practical. Direct. No guesswork.

NAVIGATION

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Why the Playbook Choice Matters

Here's the scenario. You've just been asked to run a workshop — maybe it's for a leadership team, maybe it's an onboarding cohort, maybe it's a cross-functional group trying to get aligned on a big project. You open the Safe For The Office™ platform. You see 21 playbooks. And you think: *Where do I even start?*

First, take a breath. This is a learnable skill, not a guessing game. Experienced facilitators don't pick playbooks because they feel right in the moment — they ask a short series of questions, match the answers to the available formats, and commit to a choice with confidence. You can do exactly the same thing, and this guide will show you how.

Here's why the choice matters: the right playbook does a significant portion of the facilitation work for you. It structures the conversation, paces the energy, builds in the right kind of reflection or collaboration, and brings people to a meaningful outcome. When the playbook fits the group and the moment, facilitation feels almost effortless. When it doesn't, you'll feel it — and so will the room.

The wrong playbook isn't just a missed opportunity. It can drain energy, frustrate participants, leave people feeling unheard, or produce outputs that no one actually uses. A planning workshop run with a group that first needs to reconnect emotionally will fall flat. A light, icebreaker-style session run with a team that needed to make a real decision will feel like a waste of time. These mismatches are common, but they're almost entirely preventable.

This guide gives you a repeatable framework for making the right call, every time. By the end, you'll know how to identify the outcome you need, read the room for group size and composition, navigate sensitive topics, and use the full SFTO playbook catalogue as a practical reference tool — not a menu you scroll through hoping something jumps out.

Use this guide before you plan. Use the Quick Reference Sheet on the last page the morning of your session. And remember: a well-chosen playbook is your best co-facilitator.

Start With the Outcome

The Most Important Question You Can Ask

Before you think about which playbook to run, you need to answer one question: *What do I need this group to walk away with?* Not what activities sound engaging. Not what you've run before. Not what fits neatly into the time slot. The outcome. Everything else — format, structure, energy level, timing — flows from there.

This is the step that most first-time facilitators skip, because it feels obvious. It rarely is. People often conflate the activity with the outcome ("I need to run a planning workshop") when what they actually mean is the result ("I need this team to leave with three agreed priorities"). Those are different things, and they may or may not point to the same playbook.

Three Outcome Categories: Learning, Decision, and Connection

Almost every workshop outcome falls into one of three broad categories. Understanding these categories is the fastest way to narrow down your playbook options.

Learning outcomes are about building knowledge, awareness, or capability. Participants need to understand something they didn't before — a concept, a skill, a new process, a shift in context. The emphasis is on insight and comprehension. Examples include: introducing a team to AI tools and how they might be adopted; helping new employees understand how the company works; training customer service reps in best practices.

Decision (also called Planning) outcomes are about producing something actionable — a plan, a set of priorities, a shared direction, a concrete next step. Participants may already have the knowledge they need; what's missing is alignment or commitment. Examples include: aligning a leadership team on strategic priorities; running a project kickoff; designing a quarterly roadmap.

Connection outcomes **are** about building or repairing relationships — between people, between teams, or between individuals and the organization. These sessions focus on energy, trust, belonging, and shared experience. Examples include: onboarding new employees into a team culture; reconnecting a remote team that's been working in silos; creating psychological safety before a difficult conversation.

How Outcome Type Narrows Your Playbook Choice

Once you know your primary outcome type, a large portion of the 21 playbooks become irrelevant — not because they're bad, but because they're designed for something else. A playbook optimized for Connection won't produce a strategic plan. A playbook built around Planning won't rebuild team trust.

- If your primary outcome is **Learning**, look at: AI Readiness Workshop, New Manager Foundations, Customer Service Excellence, HR Workshop.
- If your primary outcome is **Decision / Planning**, look at: Team Planning Session, Strategic Planning Workshop, Project Kickoff and Alignment, Process Improvement, Innovation Sprint.
- If your primary outcome is **Connection**, look at: New Employee Onboarding, Conference Networking Session, Belonging at Work, Remote Team Reset, Sustainable Team Performance.
- If your outcome is **mixed**, look at: Executive Retreat, Quarterly Retrospective, Leadership Development, Change Readiness.

Outcome Mapping Exercise

Outcome Mapping — 3-Question Self-Assessment

Before selecting any playbook, answer these three questions in writing. Your answers will tell you everything you need to know about the right format.

1. What do I need people to KNOW by the end of this session?

(New concepts, context, data, skills — anything they need to understand that they don't now.)

2. What do I need people to DECIDE by the end of this session?

(Priorities, plans, commitments, next steps — anything that requires agreement or action.)

3. What do I need people to FEEL by the end of this session?

(Connected, heard, energized, trusting, aligned — the emotional tone that makes the outcome stick.)

How to use your answers: The category with the most content is your primary outcome type. If all three have significant content, you likely need a hybrid playbook — or two separate sessions.

When the Outcome Isn't Clear Yet

Sometimes you've been asked to "run something" without a clear brief. This is more common than it should be, and it puts facilitators in a difficult position. Don't guess — ask. A 10-minute conversation with the sponsor or manager before you plan anything is worth more than an hour of platform browsing.

Ask them: "What would a successful session look like to you?" and "What's the one thing you'd want participants to walk away with?" Their answers, even if vague, will tell you whether they need Learning, Decision, or Connection. If they can't answer either question, that itself is useful information — it often means the session needs to start with alignment before it can accomplish anything else.

Matching the Playbook to the Situation

The Safe For The Office™ Playbook Catalogue

The table below lists all 21 Safe For The Office™ playbooks with their duration, best-fit audience, and primary outcome type. Use this as your first reference point after completing the Outcome Mapping Exercise. Don't try to read the whole table — go straight to the outcome type you identified and scan from there.

Playbook Name	Duration	Best For	Primary Outcome Type
AI Readiness Workshop	60 min	Any team exploring AI adoption	Learning + Planning
Leadership Development Workshop	75 min	Managers, team leads, leadership programs	Reflection + Insight
New Employee Onboarding	45 min	New employees, onboarding cohorts	Connection + Energy
Team Planning Session	60 min	Any team	Planning + Insight
Quarterly Retrospective	75 min	Any team	Reflection + Planning
Strategic Planning Workshop	75 min	Leadership teams, cross-functional groups	Planning + Insight
Innovation Sprint	60 min	Product teams, innovation labs, hackathons	Planning + Energy
Executive Retreat	90 min	C-suite, senior leadership	Planning + Reflection + Insight
Conference Networking Session	30 min	Conference attendees, large groups	Connection + Energy
HR Workshop	60 min	HR professionals, people leaders	Insight + Learning + Planning
Sales Kickoff	60 min	Sales teams, revenue teams	Energy + Planning + Learning
Remote Team Reset	60 min	Remote and hybrid teams	Reflection + Connection + Planning
Conference Networking Experience	30 min	Conference attendees, association events	Connection + Energy

Playbook Name	Duration	Best For	Primary Outcome Type
Customer Service Excellence Workshop	60 min	Customer service teams, front-line staff	Learning + Insight + Planning
Belonging at Work Workshop	60 min	Any team, ERGs, culture teams	Connection + Insight + Reflection
New Manager Foundations Workshop	60 min	First-time managers, new supervisors	Learning + Planning + Reflection
Process Improvement Workshop	60 min	Operations teams, process owners	Planning + Insight + Reflection
Brand and Marketing Workshop	60 min	Marketing teams, brand teams, agencies	Planning + Insight + Energy
Sustainable Team Performance Workshop	60 min	Any team, people leaders	Reflection + Insight + Connection
Change Readiness Workshop	60 min	Teams in transition, change leaders	Insight + Planning + Reflection
Project Kickoff and Alignment Workshop	60 min	Project managers, delivery teams, PMOs	Planning + Learning + Insight

Reading the Table: How to Use It

The table is a filter, not a menu. Start with your **Primary Outcome Type** from Section 1 and scan the rightmost column first. Then check **Best For** to see if your audience matches. Duration is a secondary consideration — use it to confirm fit, not to make the initial choice.

Notice that most playbooks carry more than one outcome type. The first listed is the dominant one — the thing the playbook was primarily designed to produce. The others are secondary benefits that emerge naturally when the session runs well. If your situation matches the dominant type, you're in good shape. If you're relying on a secondary outcome type to carry the session, reconsider your choice.

When Two Playbooks Both Seem Right

This happens regularly, especially for versatile teams or mixed-outcome situations. When you're deciding between two strong options, use these tiebreakers in order:

1. **Which playbook's dominant outcome type is closer to your primary need?** Even if both seem relevant, one will be better aligned with what you're actually trying to achieve.
2. **Which one fits the audience more precisely?** Check the "Best For" column. A playbook designed for leadership teams will land differently with front-line staff.
3. **Which one fits the time available without being rushed?** A 75-minute playbook run in 45 minutes is worse than a 60-minute playbook run well.
4. **Which one fits your facilitation confidence level right now?** It's legitimate to choose the playbook you can run with more certainty, provided it still meets the group's core need.

✓ Facilitator Tip

When in doubt, choose the playbook that produces something *concrete*. Groups almost always leave feeling better about a session when they have a tangible output — a list, a plan, a set of commitments — even if the emotional work was the real purpose. Visible outputs signal that the time was well spent.

Group Size Considerations

Size Changes Everything

Group size is one of the most underestimated variables in workshop planning. The same playbook can run beautifully with eight people and fall apart with thirty — not because the playbook is flawed, but because the dynamics of conversation, participation, and energy shift dramatically as headcount changes. Before you lock in your playbook choice, know how many people will be in the room.

Small Groups (4–10): What Works and What Doesn't

Small groups are where the most honest, high-quality conversation happens. With fewer than ten people, everyone can speak in plenary without losing the thread, and you have the ability to read every person in the room. Depth is your advantage here — lean into it. Playbooks with strong reflection components, peer sharing, and output-building tend to work especially well at this size.

What doesn't work: high-energy competitive formats, large-table networking activities, and anything that requires subgroups of more than four. With very small groups (four to six), activities designed for pairs or triads tend to create more honest conversation than full-group discussion. Watch for dominant voices — they're harder to manage when there are fewer people to balance them out.

Medium Groups (11–25): The Sweet Spot for Most Playbooks

Most Safe For The Office™ playbooks are designed with groups of 11–25 in mind. This size gives you enough diversity of perspective to generate rich discussion while remaining small enough to maintain coherence and psychological safety. Breakout pairs or triads work well here, as does plenary debrief. This is also the size range where a good playbook does the most facilitation work for you.

At this size, energy management becomes important. Mid-session momentum can drop in a medium group if activities run too long or if the format becomes repetitive. Use transitions deliberately, and plan for at least one energy shift (physical movement, pair conversation, or a change in activity type) every 20–25 minutes.

Large Groups (26–50+): What to Do Differently

Large groups require a different facilitation mindset. You are no longer managing conversation — you are managing experience. Depth of discussion gives way to breadth of participation. Individual voices matter less than collective patterns. The facilitator's role shifts toward hosting, directing traffic, and synthesizing themes rather than drawing out individual reflection.

For groups over 25, choose playbooks with strong structured formats, clear timing cues, and activities that can run in parallel small groups. Conference-style playbooks are explicitly designed for this. If you're running a content-heavy playbook (like Strategic Planning or Leadership Development) with a large group, consider breaking the group into pods of 6–8 with a designated discussion lead in each.

Group Size Decision Guide

Group Size	Key Considerations	Adjustments to Make
Small 4–10 people	High depth; dominant voices a risk; intimacy enables honesty; subgroups limited	Use pairs/triads for sensitive activities; plan for fuller plenary discussion; watch pacing carefully
Medium 11–25 people	Sweet spot for most playbooks; balance of diversity and safety; subgroups work well	Build in at least one energy shift every 20–25 min; use breakout pairs for reflection; debrief in plenary
Large 26–50+ people	Breadth over depth; experience management; harder to read individual energy; logistics matter	Use structured small-group pods; choose conference-style or high-energy playbooks; assign group leads; simplify debrief

A Note on Mixed-Level Groups

One of the trickiest group dynamics isn't size — it's hierarchy. When executives and front-line employees are in the same room, the power differential can suppress honest participation regardless of the playbook you choose. People will self-censor. They'll agree with the most senior person in the room. They'll wait to see which way the wind blows before sharing their real view.

If you're facilitating a mixed-level group, choose playbooks with strong anonymous or pair-based participation structures — formats where contributions are separated from titles. The Belonging at Work Workshop and Sustainable Team Performance Workshop are designed with built-in psychological safety mechanisms that handle this well. If you're running a Planning session with a mixed-level group, consider opening with a Connection activity first to level the playing field before moving into strategic work.

Topic and Sensitivity Considerations

Not Every Topic Is Ready for a Workshop

A workshop is a shared space. That means the topic you bring into the room becomes everyone's experience — and some topics are simply not ready to be handled in a group format, at least not yet. Before you choose a playbook, take an honest look at the topic itself. Is the group ready to engage with it? Is the organization ready? Is the timing right? Answering these questions honestly will save you — and the group — from a session that does more harm than good.

Sensitive Topics: When to Facilitate With Extra Care

Sensitive topics are those that carry emotional weight, touch on identity or belonging, involve conflict or mistrust, or relate to organizational change that people haven't fully processed. They include: team dysfunction, layoffs or restructuring, DEI and belonging, performance issues, leadership trust deficits, and anything where participants may have had negative prior experiences.

Sensitive topics don't mean you shouldn't facilitate — they mean you need to choose the right playbook and prepare with extra care. The wrong playbook on a sensitive topic can feel dismissive, tone-deaf, or even damaging. The right one, run well, can be genuinely transformative.

Three Topic Readiness Questions

Topic Readiness Check — Ask These Before You Plan

1. Has this topic been surfaced in a safe way before?

If people have never had a structured opportunity to talk about this issue, a workshop may not be the right first container. Consider a listening session, manager 1:1s, or an anonymous survey first.

2. Is there psychological safety in this group right now?

If trust is low — between team members, or between the team and leadership — a reflective or sharing-heavy playbook will produce guarded, surface-level responses. You may need to build safety before you can build content.

3. Is leadership ready to act on what comes up?

Running a session that surfaces real concerns, only to have those concerns ignored, is worse than not running the session at all. Confirm with sponsors that there is genuine openness to acting on the group's output before you facilitate.

Matching Topic Sensitivity to Playbook Design

Not all playbooks carry the same level of built-in psychological safety. Some are designed specifically to handle sensitive material — they include structured vulnerability prompts, explicit norms-setting, and activities that create emotional distance before asking for personal disclosure. Others are lower-stakes by design and work best when the topic is relatively safe.

- **Higher built-in safety:** Belonging at Work Workshop, Remote Team Reset, Sustainable Team Performance Workshop, Leadership Development Workshop. These playbooks include explicit trust-building elements and are suitable for emotionally complex topics.
- **Medium built-in safety:** Quarterly Retrospective, Change Readiness Workshop, HR Workshop. These work well for organizational challenges and honest reflection, but benefit from a skilled facilitator who can hold space for discomfort.
- **Lower stakes by design:** Team Planning Session, Brand and Marketing Workshop, Innovation Sprint, Conference Networking Session. These are optimized for productivity and connection in lower-risk contexts. Using them for sensitive topics can feel jarring or dismissive.

When to Recommend a Different Approach

Sometimes the most important thing a facilitator can do is recommend that a workshop is not the right format. If the topic involves unresolved conflict between specific individuals, a recent traumatic organizational event, or a situation where HR or legal involvement is warranted, a group workshop is not appropriate. Be willing to say so. It protects the group, protects you, and protects the organization. Redirect toward mediation, individual coaching, or a structured listening process instead.

Recommended Scenarios

Real Situations, Specific Recommendations

The following scenario blocks translate common facilitation requests into specific playbook recommendations, with brief reasoning for each choice. Use these as reference points when you recognize a situation that matches one you've been asked to facilitate.

Situation: "My team needs to get aligned on priorities."

Recommended Playbook(s): Team Planning Session (60 min) or Strategic Planning Workshop (75 min) for leadership teams.

Why They Fit: Both playbooks are built around the Planning + Insight outcome type, which is exactly what priority alignment requires. The Team Planning Session works for any team; the Strategic Planning Workshop is better when the group is making decisions with organization-wide implications. Choose based on who's in the room.

Situation: "We have new people joining the team."

Recommended Playbook: New Employee Onboarding (45 min).

Why It Fits: This playbook is purpose-built for Connection + Energy — exactly what new joiners need in their first days. It's shorter than most playbooks by design, which respects the cognitive load of new employees while still creating a meaningful shared experience that accelerates belonging.

Situation: "Leadership wants to understand employee sentiment."

Recommended Playbook(s): Sustainable Team Performance Workshop (60 min) or Remote Team Reset (60 min) if the team is distributed.

Why It Fits: Both playbooks create structured space for honest reflection on how the team is really doing — without requiring participants to put themselves on the spot. They surface collective patterns rather than individual complaints, which makes it safer for people to be honest and easier for leadership to hear.

Situation: "We're kicking off a big project."

Recommended Playbook: Project Kickoff and Alignment Workshop (60 min).

Why It Fits: This is the most targeted match in the catalogue. It's built specifically for Planning + Learning + Insight at the start of a project, helping teams clarify scope, surface assumptions, align on roles, and build shared commitment before the work begins. Don't substitute a general Team Planning Session when this one exists.

Situation: "The team has been remote for a year and feels disconnected."

Recommended Playbook: Remote Team Reset (60 min).

Why It Fits: Remote Team Reset is the only playbook in the catalogue explicitly designed for distributed teams experiencing the specific kind of relational drift that comes from sustained remote work. It combines Reflection + Connection + Planning, which maps perfectly to a team that needs to acknowledge how they've been operating before they can agree on how to move forward.

Situation: "We want to improve a broken process."

Recommended Playbook: Process Improvement Workshop (60 min).

Why It Fits: This playbook combines Planning + Insight + Reflection — the three elements you need when fixing something that isn't working. The Reflection component is critical here: groups often jump straight to solutions without honestly examining what's causing the problem. This playbook builds that diagnostic step into the structure, so you don't have to force it.

Common Mistakes

Choosing the Workshop You're Most Comfortable With

This is the most common mistake, and the hardest to admit. When you've run a particular playbook successfully before, it's tempting to default to it — because you know what to expect, you know the tricky moments, and you know it can work. The problem is that familiarity with a format is not the same as fit for a group. Run the right playbook even if it's new to you. That's what preparation is for.

Picking by Duration Alone

Duration is the wrong starting point. "We only have 60 minutes" tells you almost nothing about which playbook to choose — 17 of the 21 playbooks run at 60 minutes. Duration is a constraint to confirm at the end of your selection process, not a filter to use at the beginning. Start with outcome, then audience, then use duration to confirm the fit.

Ignoring the Audience

A playbook that's perfect for a sales team will land differently with a group of HR professionals. A format designed for individual contributors will feel abstract to a C-suite audience. Always check the "Best For" column and think honestly about whether your specific group matches. When in doubt, ask someone who knows the group well before you commit to a format.

Running a Planning Workshop When People Need Connection First

This is a timing mistake, and it's more common than it sounds. Teams that have been through recent disruption — restructuring, leadership changes, a difficult quarter, extended remote work — often need to reconnect emotionally before they can plan effectively. Running a strategic planning session with a team that hasn't processed recent difficulty will produce shallow outputs and quiet resentment. Read the room before you read the catalogue.

Skipping the Outcome Question Entirely

Some facilitators open the platform and choose a playbook based on the title or the time slot without ever asking what the session needs to produce. This is the single fastest path to a mismatched session. The Outcome Mapping Exercise in Section 1 takes five minutes. Do it every time — even when you think you already know the answer. Especially when you think you already know the answer.

What to Do If You Chose the Wrong One

It happens. Even experienced facilitators occasionally start a session and realize within the first 15 minutes that the format isn't serving the group. When this happens, don't barrel through. Pause, acknowledge the moment honestly ("I want to adjust our direction slightly based on what I'm hearing from you"), and use the remaining time to pursue the actual outcome the group needs — even if it means departing from the playbook. A session that serves the group imperfectly but honestly is always better than one that follows the script to no one's benefit.

Which Playbook Is Right For This Group?

LEARNING (Build knowledge or capability)

- Who is in the room?
 - New employees or onboarding cohort
 - *How much time?* 45 min: **New Employee Onboarding**
 - First-time or new managers
 - *How much time?* 60 min: **New Manager Foundations Workshop**
 - Customer-facing or front-line teams
 - *How much time?* 60 min: **Customer Service Excellence Workshop**
 - Any team exploring AI or technology change
 - *How much time?* 60 min: **AI Readiness Workshop**
 - HR professionals or people leaders
 - *How much time?* 60 min: **HR Workshop**

DECISION / PLANNING (Produce action, alignment, or commitment)

- Who is in the room?
 - Leadership team or cross-functional group
 - *How much time?* 75 min: **Strategic Planning Workshop** | 90 min: **Executive Retreat**
 - Project team at start of a new initiative
 - *How much time?* 60 min: **Project Kickoff and Alignment Workshop**
 - Operations or process-owning teams
 - *How much time?* 60 min: **Process Improvement Workshop**
 - Any team needing quarterly alignment
 - *How much time?* 60 min: **Team Planning Session** | 75 min: **Quarterly Retrospective**
 - Sales or revenue teams
 - *How much time?* 60 min: **Sales Kickoff**
 - Product or innovation teams
 - *How much time?* 60 min: **Innovation Sprint**

CONNECTION (Build relationships, belonging, or trust)

- Who is in the room?
- Remote or hybrid team that feels disconnected
- *How much time? 60 min: **Remote Team Reset***
- Any team needing culture or belonging work
- *How much time? 60 min: **Belonging at Work Workshop***
- Conference or large-group networking
- *How much time? 30 min: **Conference Networking Session / Experience***
- Any team needing a wellbeing or performance pulse check
- *How much time? 60 min: **Sustainable Team Performance Workshop***

MIXED (Learning + Decision + Connection all matter)

- Who is in the room?
- Managers or leaders seeking personal development
- *How much time? 75 min: **Leadership Development Workshop***
- Teams navigating organizational change
- *How much time? 60 min: **Change Readiness Workshop***
- Marketing or brand teams needing creative alignment
- *How much time? 60 min: **Brand and Marketing Workshop***

Key Takeaways

5. **Start with the outcome, not the playbook.** Every good facilitation decision begins with the question: What does this group need to walk away with?
6. **Map your outcome to one of three types: Learning, Decision, or Connection.** Your answer immediately filters the catalogue from 21 options to a manageable shortlist.
7. **Use the Outcome Mapping Exercise every time.** Even when you think you know the outcome, writing it down clarifies priorities and surfaces assumptions.
8. **Read the "Best For" column carefully.** A technically relevant playbook that doesn't fit your specific audience will underdeliver. Match both the outcome and the audience.
9. **Account for group size before you finalize your choice.** Size changes dynamics, energy, and participation. Adjust your facilitation approach accordingly, especially for groups over 25.
10. **Take topic sensitivity seriously.** Before facilitating anything emotionally complex, run the Three Topic Readiness Questions. Confirm that psychological safety and organizational readiness are in place.
11. **Don't default to familiarity.** Choose the right playbook for the group, not the one you're most comfortable with. Prepare thoroughly and trust the platform's design.
12. **When two playbooks both seem right, use the tiebreaker criteria in order:** dominant outcome type, audience fit, available time, and facilitation confidence.
13. **Know when a workshop isn't the right format.** Some topics — active conflict, trauma, HR matters — belong in other containers. Recommending against a workshop when it's not appropriate is a mark of facilitation maturity.
14. **If you chose the wrong playbook, pivot honestly.** Skilled facilitators adjust in real time. The group's needs always take priority over the original plan.

Quick Reference

Choosing the Right Playbook

The 3 Outcome Questions.

Ask these before every session:

1. **KNOW:** What do I need people to know by the end? → *Learning outcome*
2. **DECIDE:** What do I need people to decide or commit to? → *Planning / Decision outcome*
3. **FEEL:** What do I need people to feel by the end? → *Connection outcome*

The category with the most content is your **primary outcome type**. Use it to start your playbook search.

Playbooks by Primary Use Case

Scenario and Recommended Playbook

- Team needs to align on priorities = Team Planning Session
- New people joining the team = New Employee Onboarding
- Kicking off a major project = Project Kickoff and Alignment Workshop
- Remote team feels disconnected = Remote Team Reset
- Broken process needs fixing = Process Improvement Workshop
- Leadership team setting strategy = Strategic Planning Workshop
- Culture or belonging concerns = Belonging at Work Workshop
- Teams navigating change = Change Readiness Workshop

Group Size Considerations

Size and Key Consideration

Small (4–10)

High depth; watch for dominant voices; use pairs for sensitive activities

Medium (11–25)

Sweet spot for most playbooks; plan energy shifts every 20–25 min

Large (26–50+)

Manage experience not conversation; use small-group pods; simplify debrief

Mixed-level groups (executives + front-line): always choose playbooks with built-in psychological safety structures.

Common Mistakes to Avoid

- Choosing the playbook you're most comfortable with instead of the right one
- Picking by duration alone — outcome and audience come first
- Running a Planning session when the group needs Connection first
- Skipping the Outcome Mapping Exercise because you think you already know
- Ignoring topic sensitivity — confirm psychological safety before you begin

***The right playbook doesn't just run the session,
it does half the facilitation work for you.***