



# Awareness and inclusion

## Facilitator guide

### Activities and worksheets:

#### Persona swap

60-90 min

Understand, respect, and embody  
different points of view.

#### Casting call

30-45 min

Identify the ideal personas that will make  
your next project successful.

# What are awareness and inclusion?

An understanding of self and others that enables teams to navigate interpersonal dynamics and foster inclusion.

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**Awareness and inclusion are about respecting differences, not resolving them.**

Awareness and inclusion are about respecting everyone on your team and the viewpoints they bring.

**More like:**

Being aware of different needs and preferences.

**Less like:**

Mandating a certain way of working.

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**Awareness and inclusion are about understanding your own needs.**

**More like:**

"These are the conditions that make me able to best contribute to the team."

**Less like:**

"This is how you need to work with me."

Awareness and inclusion

Activity 1 of 2

# Persona swap

Creating opportunities for your team to assess a situation from multiple points of view makes the work stronger. In this activity, the team will take on new “personas”—like the “Dreamer”—to provide fresh perspectives on the work.



## Facilitator instructions

The persona swap activity has three steps:

01 — Set the stage

02 — Guide a discussion

03 — Keep it going

## Context

When the team needs new perspectives and points of view on the work.

## Goal

Empower team members to understand, respect, and embody different points of view.

## Time

60-90 minutes



## Worksheet

Persona swap — pg. 7-8



## Materials needed

Markers

Sticky notes

White board



## Persona swap Facilitator instructions

# 01 Set the stage

## Activate

This activity is about empowering team members to embody new perspectives, particularly in group work. To help set the stage, make sure everyone feels invited to the discussion.

To get the team thinking, try these talking points:

- This activity will help us think through the different perspectives we want to consider in our meetings or group work.
- We all wear many hats, but sometimes we default to a particular viewpoint. This will enable us to lead in new ways.
- It will also help us take advantage of the individual strengths we all bring to the team or challenge ourselves to take on roles or personas we may normally shy away from.
- In this activity, you'll be invited to take on a new "persona"—like the "Dreamer" or the "Decider." It may be hard at first, but if we have fun with it, it will help us achieve a new understanding of our work.
- At the end of this activity, we'll have a better idea of what our team composition looks like—do we have all Dreamers and no Doers? Based on this, we can discuss how we can take on the personas we may be lacking.

## Print worksheet

Print out the worksheet for each of your team members for this activity and cut out the cards (pg. 8):

Persona swap — pg. 7-8



## Prepare

Get ready to facilitate the persona swap activity with your team.

Here is a checklist:

- ☐ Review the persona cards. Print off enough copies for your team.
- ☐ Ask the team to complete the first page of the worksheet. You can do this as prework before the meeting or during the first couple minutes of the meeting.
- ☐ Let the team know the plan is for everyone to share their profiles with the group.
- ☐ Invite team members to a 60- to 90- minute meeting.
- ☐ If you have a remote team member, help them feel included by starting a Microsoft Teams meeting and sharing your whiteboard or camera.



# 02

## Guide a discussion

### Reflect

Ask the team to share page 1 of 2 of the persona swap worksheet with the group. It's important that everyone feels comfortable sharing with the group, so invite them to opt-in for sharing.

After everyone has shared their profile, open up the discussion.

Start with a few open-ended questions:

- What experiences shaped your answers? Were most of them based on professional situations? What about moments at home? With friends?
- What are you curious to learn more about? (It may be a particular response, an unknown talent).

### Synthesize

Now it's time to pause and invite the team to notice trends on the existing team composition. Share the stack of persona cards with the team. Read off the titles and the descriptions to the group.

Ask the team to self-select one persona that resembles who they are when they get to work. If they are stuck, you might prompt them to see what most matches to the "Things you can count on me for" section of the worksheet.

Invite them to also select one persona they would like to adopt (this may match the "Things I sometimes need help with" section of the worksheet).

Take a tally of how many people identify with each persona. Do you have a lot of Dreamers and no Examiners? Point out these gaps and engage the team in a discussion on these trends. What does that say about the group?

What conditions may need to change to alter this composition? What conditions enable the current composition?

### Draft

Now that the group has had a chance to understand each other's contribution, invite the team to add additional persona cards to the deck.

Are there any personas you would add? Remove? Change?

Use the blank persona cards to add new profiles based on the team discussion.



# 03

## Keep it going

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### Revisit

The next time a critical meeting or a team review takes place, ask the team to take stock of the roles and perspective they identified in the activity. Invite them to consider a new perspective. If you typically show up as an Examiner, is it your turn to play the role of the Dreamer? Remind the team that there are always opportunities to embody new lenses on the work.

Keep the persona cards on hand and use them in different meetings. These cards are great to use in brainstorming, group discussions, or other generative activities where you want to encourage different perspectives.

Identify types of team activities where having different perspectives could be helpful. In these activities, let everyone select one card during a meeting and ask them to take on that persona.

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### Repeat

Teams are dynamic—always moving and changing. You may choose to reignite this conversation as new members are added to your team. Let the personas be living and changing.



# Persona swap

Page 1 of 2

Understand, respect, and embody different points of view.

Imagine you joined a new team today. What are the top things you'd want your teammates to know before they begin working with you? Be sure to include things you've learned about yourself from other experiences, friends, colleagues, and beyond.

Things you can count on me for...

Things I may need help with...

My preferred way of receiving feedback is...

Ways I'm looking to grow...

I'm most successful when...

I can get stressed if...



## Worksheet



Cut and distribute persona swap cards to your team



## Examiner

The Examiner encourages the team to think critically and go deeper on topics.

**Ask yourself:**  
What are we missing?



## Doer

The Doer encourages the team to be practical, and find an actionable way forward.

**Ask yourself:**  
What actions do we need to take?



## Mediator

The Mediator helps the team understand their common objectives and navigate tension.

**Ask yourself:**  
What are our common objectives?



## Dreamer

The Dreamer encourages the team to think big and bring imaginative approaches to the conversation.

**Ask yourself:**  
What can we explore to make this magical?



## Decider

The Decider takes in information and makes a decision.

**Ask yourself:**  
Is this a priority?  
Do I have what I need to make a decision?



## Leader

The Leader is accountable for setting and upholding the objectives driving the conversation.

**Ask yourself:**  
What do we need to achieve, and how do we get there?



## Coach

The Coach provides guidance, empathy, and champions the value of ideas.

**Ask yourself:**  
How do we best support voices in the conversation?



## Operator

The Operator provides structure and logistical support for team activities.

**Ask yourself:**  
What does the team need to be successful?



## Critic

The Critic assesses the topics at hand and looks for potential issues that should be addressed.

**Ask yourself:**  
How can we improve this?



Create your own persona.





Awareness and inclusion

Activity 2 of 2

# Casting call

Examining a project from the viewpoints it needs can lead to stronger outcomes. This activity allows you to build the right team composition based on the goals you want to accomplish.



## Facilitator instructions

The casting call activity has three steps:

01 — Set the stage

02 — Guide a discussion

03 — Keep it going

## Context

When the team needs to ensure the work is covered by multiple points of view.

## Goal

Identify new points of view/personas to achieve certain goals.

## Time

30-45 minutes



## Worksheet

Casting call — pg. 13



## Materials needed

Markers

Sticky notes



## Casting call Facilitator instructions

# 01 Set the stage

## Activate

Invite the team to help plan your next project by identifying which personas will make the project successful. Casting call is an activity that will enable the team to take on new roles and consider blind spots to achieve common goals.

To get the team thinking, try these talking points:

- We all play different roles on the team. Let's take some time to consider the roles we most consistently play.
- The goal of casting call is to understand who we are as a team and the personas we may need based on our desired outcomes.
- This will help ensure we are creating space for new and different ways of working.

## Print worksheet

Print out the worksheet for each team member for this activity:

[Casting call — pg. 13](#)



## Prepare

Get ready to facilitate the casting call activity with your team.

[Here is a checklist:](#)

- ☐ Review the casting call worksheet and choose a specific project you want to examine with your team.
- ☐ Take time to review the persona swap cards from the previous activity. You may choose to share the personas with the team.
- ☐ Set aside 30 to 45 minutes for the team to develop its own casting call for your next project.
- ☐ If you have a remote team member, help them feel included by starting a Microsoft Teams meeting and sharing your whiteboard or camera.



# 02

## Guide a discussion

### Reflect

Describe your chosen project in preparation for the meeting. Invite the team to consider its goal.

Start with a few open-ended questions:

- What are we trying to accomplish?
- What does success look like?
- What personas do we need to achieve our goals?

### Synthesize

Now it's time to identify personas that are required to make this project successful.

Ask the team to review the outcomes and personas identified. What are the key themes?

Invite the team to discuss who could play each persona. Are there any natural fits? Any personas that would stretch the team?

### Draft

Now that the team has had a chance to discuss the goals of the project and the personas required, complete the casting call worksheet.

End the discussion with this question:

- Are there any personas you would add? Remove? Change?
- Who will play each persona?



Casting call  
Facilitator instructions

# 03

## Keep it going

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### Revisit

It may take a few more discussions to get the goals and personas just right. As a team, identify check-ins (maybe monthly meetings or at natural breaks in the project) to revisit the casting call worksheet. Make sure you're still focused on the right goal and have identified the right personas to get you there.

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### Repeat

Establish consistency by making this an ongoing ritual the team completes at the start of every project. This will reinforce the importance of inviting diverse perspectives and allow team members to feel like they have the permission to show up in new and different ways.

As new projects arise, repeat this process so that you are considering blind spots.



# Casting call

Identify the ideal personas that will make your next project successful.

Identify a project. Start with the goals you want to achieve, then the personas needed to make that project most successful. Finally, match the people on your team who can fill those personas.

Project name:

Project description:

Goals we want to achieve:

Personas required:

<div>Persona type:</div> <div></div>	<div>Persona type:</div> <div></div>	<div>Persona type:</div> <div></div>	<div>Persona type:</div> <div></div>	<div>Persona type:</div> <div></div>
<div>Team member(s):</div> <div></div>	<div>Team member(s):</div> <div></div>	<div>Team member(s):</div> <div></div>	<div>Team member(s):</div> <div></div>	<div>Team member(s):</div> <div></div>