

Facilitating a session in person

What the room needs, what to do before the day, three timed agendas with the words to use, and an answer for each way a room refuses to cooperate.

What you are putting in front of them

A four-quadrant behavioral model built on two axes: assertiveness, how much a person tends to tell rather than ask, and responsiveness, how much of what they feel is visible to others. Crossing the two gives four styles — Analytical, Driver, Expressive and Amiable. The model is David Merrill and Roger Reid's, and it describes observable behavior rather than character, motive or ability.

Say this in the room, and say it early: the instrument describes interaction habits, for self-awareness and team development only. It does not measure ability, and it must never be used for hiring, promotion, or performance evaluation. A room that suspects otherwise will answer strategically, and then nothing you put on the screen is true.

What the room needs

- **A screen everyone can read from their seat**
A projector or a large display. The shared view is designed for it — the grid sits on a light panel so it survives a washed-out projector, and the roster text is sized for a room rather than a laptop. Check legibility from the furthest chair before anyone arrives, not after.
- **Your own device, on the shared screen and nothing else**
Drive the session from one machine and keep it on the shared view for the whole session. Do not present from a screen that also has your email on it, and do not switch to your own dashboard mid-session — your personal result and any private reading of yours live there.
- **Phones, and a fallback for the phoneless**
Participants take the assessment on their own phones by scanning the join code. Assume two people in any room of twelve cannot — dead battery, no camera, a work phone that blocks the scan. Bring one spare laptop or tablet, already signed out, and have the join link ready to type.
- **The room arranged so people can see each other**
Rounds or a horseshoe, not theatre rows. Two thirds of this session is people responding to each other; a layout where everyone faces the screen and nobody faces a colleague quietly suppresses the part that matters.
- **Somewhere the commitments stay visible**
A whiteboard or flip chart. The closing commitments need to be written where the room can see them accumulate — a list on your laptop that you promise to send round afterwards is a list nobody reads again.

Before the day

A WEEK AHEAD

Create the team and send the join link. Everyone who completes it beforehand is ten minutes you get back on the day. Check the size you need: a free team holds six people. Twelve people in the room means the team needs the size the Team plan gives it, and finding that out on the morning is a bad way to find it out.

TWO DAYS AHEAD

Check who has completed it and chase by name rather than by broadcast. Decide your pairs from the actual map — this is the single highest-leverage thing you do in preparation, and you cannot do it from a list of names.

THE DAY BEFORE

Open the shared view on the actual room's equipment if you can get in. Confirm the join code scans from a phone held at the back. Decide which agenda you are running and write the step times on a card; do not run a timed agenda off a screen you also need for the grid.

FIFTEEN MINUTES BEFORE

Shared view up and the join code showing as people walk in. Early arrivals will scan it unprompted, which starts the session before the session and gives the room something to do that is not checking email.

The short session

45 min

A staff meeting slot. Everyone has already taken the assessment.

5 min 1. Frame it before anything is on screen

Stay off the projector. Say what this is and, more importantly, what it is not. The room is deciding in these five minutes whether to take it seriously or perform agreement, and nothing you do later recovers a room that decided wrong here.

"This describes how we come across to each other. It is not a measure of ability, and it is not going anywhere near a performance review."

"There is no good quadrant. If there were, we would have hired only that one and we would be much worse at our jobs."

"Everyone uses all four. What you will see is your default on an ordinary Tuesday."

5 min 2. Put the map up

Open the shared screen and leave it up. Say nothing for the first thirty seconds — let people find themselves and look around. The silence is doing work.

"Find your dot. Then look at who is next to you and who is furthest away."

Needs the facilitator screen, which is on the Team plan and is switched on per team. If your team does not have it, this step still works: Use presentation mode instead — it is on every plan including the free one, and it gives you the same live grid and the same join code. You lose the structural commentary beside the grid, not the grid.

12 min 3. Go around

One or two lines each: your style, and whether it feels right. Go last yourself. Keep the pace up — if it slows, you will lose the back half of the agenda.

"Your style, and does it match how you would have described yourself? One line."

"If it is wrong, say it is wrong. That is more interesting than agreeing."

10 min 4. Read the room's shape

Move from individuals to the group. Point at the crowded corner and the empty one and ask the room what that costs them. Do not supply the answer before they try.

"Which corner is crowded? Which one has nobody in it?"

"What does this mix make easy for us — and what does it make us slow to notice?"

"Who tends to get talked over in our meetings? Does the map explain it?"

Needs Team X-ray, which needs a plan with insight generations and is switched on per team. If your team does not have it, this step still works: Read it off the grid by eye instead. The empty quadrant and the crowded one are visible without any commentary; the questions in this step work perfectly well unassisted, and a room that works it out itself argues about it less.

10 min 5. One pairing each

Everyone picks one person on the team they find a bit of work, and looks up that specific direction — you working with them, not the pair in general. Read the "what to do differently" lines together for two or three of them out loud.

"Pick one working relationship that takes effort. Not a difficult person — a pairing that costs you energy."

"Read the one for you working with them. It is written to you, because the adapting is your job."

Needs Flex Brief, which needs a plan with insight generations and is switched on per team. If your team does not have it, this step still works: Use the public interaction guides instead. All sixteen directions are free, need no account, and are the same material the brief is built on — open them on a phone at /resources/guides.

- 3 min** **6. One commitment each, out loud**
Go around once more. Each person names one specific thing they will do differently with one specific person. Write them down where the team can see them. Vague commitments are the failure mode; push for a name and a behavior.
- “One thing, one person, this week.”
- “‘I will send Priya the agenda the day before’ counts. ‘I will communicate better’ does not.”

The standard session

1 hr 30 min

The default. Room for people to take the assessment on the spot.

- 8 min** **1. Frame it, and say where the data goes**
As in the short session, plus the part people are actually wondering about: who sees this. Say it unprompted. A room that has to ask has already decided you were not going to volunteer it.
- “This describes how we come across. It is not ability, and it is not for hiring, promotion or performance review.”
- “Your full result is yours. What lands on the shared screen is your name and your style — nothing else, and nothing from anyone's private reading.”
- “Everyone uses all four. This is your default on an ordinary day.”
- 10 min** **2. Everyone takes it, here, now**
Put the join code up and let the room take it together. Five minutes is the real number; ten absorbs the two people who need help. Walk the room rather than watching the screen — you are looking for anyone stuck, not for the count to rise.
- “Scan the code. If you do not have an account you do not need one — continue as a guest and the result is yours immediately.”
- “First instinct, not best answer. Trying to score well on this only makes it less useful to you.”
- 7 min** **3. Reveal the map**
Switch to the shared screen and let the dots land. If two or three are still finishing, say so and carry on — the grid updates live and their dot will appear mid-conversation, which is a nice moment rather than an interruption.
- “Find yourself. Then find the person you work with most.”
- “Two axes: how much you tend to tell versus ask, and how much you show what you feel. Everything else on this screen comes from those two.”
- Needs the facilitator screen, which is on the Team plan and is switched on per team. If your team does not have it, this step still works: Use presentation mode instead — it is on every plan including the free one, and it gives you the same live grid and the same join code. You lose the structural commentary beside the grid, not the grid.
- 20 min** **4. Go around properly**
Longer than the short version: each person names their style, whether it fits, and one situation where they behave like a different quadrant entirely. That last part is what stops the room hearing this as a box.
- “Your style, whether it fits, and one situation where you are somebody else entirely.”
- “When does the deadline turn you into a different quadrant?”
- 15 min** **5. Read the patterns**
Now the team as a whole. Name the tilt, the empty corner, and anyone sitting alone out on their own — that last one carefully and kindly, because it is usually the person who already knows.
- “Where are we crowded, and what does that make us good at?”
- “What is the cost of the corner nobody is standing in?”
- “Is there a decision we keep failing to make? Look at the map and tell me why.”
- Needs Team X-ray, which needs a plan with insight generations and is switched on per team. If your team does not have it, this step still works: Work from the grid directly. Crowding, the empty quadrant, and who sits alone are all visible on the projected map; the three questions in this step are the ones the read would have prompted anyway.

20 min 6. Work the frictions in pairs

Split into real working pairs — pick them yourself, in advance, and pick the ones with actual friction. Each pair reads both directions of their guide and talks. Then bring two or three back to the room.

“Read the one for you working with them, and let them read theirs. Then compare what surprised you.”

“You are not looking for who is right. You are looking for what you each do that lands differently than you meant it.”

Needs Flex Brief, which needs a plan with insight generations and is switched on per team. If your team does not have it, this step still works: The sixteen public interaction guides cover every direction, free and without an account. Pull them up on phones at /resources/guides — this step was built on that material before the brief existed.

10 min 7. Commitments, written down and owned

One specific commitment each, named person and named behavior, captured where the team will see it again. Then say when you will revisit it — and mean it, because an unrevisited commitment teaches the room that these sessions do not count.

“One person, one behavior, starting this week.”

“We will read this list out at the retro in six weeks. That is the whole enforcement mechanism.”

The half day

3 hr 30 min

An offsite or a new-team formation. Two breaks, and time to rehearse.

15 min 1. Frame it, and let them push back

The long version. Say what it is, what it is not, where the data goes — then deliberately invite the objection. In a half day the skeptic will surface regardless; far better at minute four with you holding the floor than at minute ninety.

“Before we start — who here has done a personality thing at work that was a waste of a morning? Good. What made it a waste?”

“Two axes, both observable: how much you assert yourself and how much you show what you feel. The model is Merrill and Reid’s, from behavioral research, and it describes behavior rather than character.”

“Nothing from today goes into an evaluation of anyone. If it ever did, you would all start answering strategically and the instrument would stop working.”

15 min 2. Warm up on the mnemonic

Run the bird exercise before anyone has taken the assessment or seen a grid. It gets the four patterns into the room as an argument rather than a lecture, and a team that has argued about the edges reads its own map far better an hour later.

“Four names, four birds, scrambled. Work out together which goes where.”

“There is a right answer, but the arguing is the point.”

15 min 3. Everyone takes it

Join code up, room takes it together. With this much time, let people go slowly and answer questions as you walk around. Anyone who finishes early has a fifteen-minute break starting early, which is a good incentive.

“Five minutes, first instinct. Come back when you have your result — do not read the whole thing yet, we will do that together.”

15 min 4. Break

A real one. People have just read something about themselves and they need ten minutes to talk about it in twos before they will say anything useful in front of twelve.

“Fifteen minutes. Compare results with someone if you want — that conversation is half the value of the day.”

10 min 5. Reveal the map

Shared screen, full attention, no commentary for the first minute. Then walk the axes once, slowly, so the room understands what the position means before they start interpreting each other's.

"Left to right: asking versus telling. Bottom to top: how much of what you feel is visible."

"Near a line means near a line. If you are close to the border you flex across it constantly, and you probably already knew that."

Needs the facilitator screen, which is on the Team plan and is switched on per team. If your team does not have it, this step still works: Use presentation mode instead — it is on every plan including the free one, and it gives you the same live grid and the same join code. You lose the structural commentary beside the grid, not the grid.

30 min 6. Go around, with a story each

Each person: their style, whether it fits, and one concrete moment at work where it helped or cost them. The story is the part the team remembers in six weeks — the label is not.

"Your style, whether it fits, and one time this week it either helped you or got in your way."

"Tell us the moment, not the trait."

25 min 7. Read the patterns together

The structural conversation, with enough time to actually land it. Crowding, the empty quadrant, isolation, and the decisions the shape predicts will stall. Let the room do the diagnosing.

"What does our shape make us fast at? What does it make us blind to?"

"Name a decision we have failed to make three times. Now look at the map."

"Who is furthest from everyone else, and what have we been asking them to do all year?"

Needs Team X-ray, which needs a plan with insight generations and is switched on per team. If your team does not have it, this step still works: Read the structure off the grid. Everything this step asks about — the crowded corner, the vacant one, who sits alone — is legible on the projected map to a room that has been looking at it for an hour.

15 min 8. Break

The second break matters more than the first. The pattern conversation is the heaviest part of the day and people need to put it down before the pairs work.

"Fifteen. Then we get practical."

35 min 9. Pairs, both directions, out loud

Assign pairs deliberately — real working relationships with real friction, not friends. Each reads their own direction, then they trade what surprised them. Rotate once if the group is small enough. Bring three back to the whole room.

"Read the guide for you working with them. Not the one about them."

"Then tell each other the one line that stung slightly. That is the one worth acting on."

Needs Flex Brief, which needs a plan with insight generations and is switched on per team. If your team does not have it, this step still works: Use the public interaction guides — all sixteen directions, free, no account, readable on a phone at </resources/guides>. The brief personalises the same material; the material is what this step needs.

20 min 10. Rehearse a real meeting

Pick a meeting the team genuinely has next week — a decision, a review, a planning session — and walk through who will drive it, who will go quiet, and what you will do about it. This is the step that converts a good morning into a changed Tuesday.

"Thursday's planning meeting. Who talks most? Who has the thing nobody else knows and will not say it unasked?"

"Name the one person you are going to deliberately bring in, and how."

Needs Read the room, which forecasts a meeting you describe against the team's own map, which needs a plan with insight generations and is switched on per team. If your team does not have it, this step still works: Run it as a conversation instead. Describe the meeting aloud and have the team predict itself from the grid — who drives, who contributes, who goes quiet. A team that has spent three hours on this map is genuinely good at this by now.

15 min **11. Commitments, and what happens next**

One commitment each, named and written. Then tell them exactly when this gets revisited and by whom. Close by handing back the responsibility: the map was today's work, the adapting is theirs.

"One person, one behavior, this week."

"Six weeks from now we read this list out. Nothing else about today is mandatory; that is."

"You will all forget which quadrant everyone is in. That is fine. What I want you to keep is the habit of asking why someone landed differently than you expected."

When the room does not cooperate

None of these is unusual. Each has one good answer and several bad ones, and the bad ones mostly involve improvising in front of the group.

Someone has no usable phone.

Hand them the spare device you brought, or pair them with a neighbour and have them answer on that person's device after it — the assessment takes five minutes, so two people sharing one phone costs you ten and nothing else. Failing both, they sit the round out and take it afterwards: the team map works fine with one dot missing, and adding them later updates the grid without redoing anything. What you must not do is read the questions aloud and have them answer in front of the group.

The room has no usable network.

This is why you check the day before. If it happens anyway, switch agendas: run the bird warm-up, which needs no devices at all, then do the go-around on how people think they come across, and have everyone take the assessment on the way out. You lose the live reveal and keep most of the value. Do not tether twelve people to your hotspot and hope.

Someone arrives after the map is already up.

Do not restart the framing for them, and do not skip it either — both cost you the room. Say the two sentences that matter ("observable behavior, not ability; nothing here goes into a review"), point at the join code, and carry on. They can take it while the go-around happens and their dot will appear live. Catch them properly at the break.

Someone does not want their result on the screen.

Take it at face value and do not negotiate in public. They can take the assessment without joining the team, keep the result entirely to themselves, and participate in every discussion in the room — the go-around works perfectly well with someone saying "I came out Analytical and I would rather not be a dot today". A person who was made to display a result they did not want to display has learned something about the organisation that will outlast anything else in the session.

The room decides it is a horoscope.

Agree with the fair half of it, out loud and early — plenty of workplace typing is exactly that. Then move to ground the room can stand on: the two axes are observable, the value is the behavior change rather than the label, and nothing here predicts anyone's future. Then ask the skeptic to test it: does the map explain a friction the room already knows about? It usually does, and that is more persuasive than any defence you can mount.

Someone says their result is plainly wrong.

Believe them and move on quickly. Ask which part is off, let them place themselves on the grid by hand, and use it: a result the person argued with and corrected is more useful than one they nodded at. Near a border, this happens often and is usually right — people who sit close to a line genuinely do flex across it. Retaking is free and draws different questions, but do it after the session, not during.

One person dominates the go-around.

Likely a high-assertiveness quadrant, and the room is watching how you handle it — including whether you let the map become an excuse. Use the structure rather than a confrontation: "one line each, and I am going to be strict about it because I want to hear everyone." If it keeps happening, name the pattern without naming the person: "notice that this room fills its silences fast. Who has not spoken?"

The session goes quiet and nothing is landing.

Stop asking the group and ask the map. A question about a specific visible feature — the empty corner, the two people furthest apart — is far easier to answer than an open invitation to reflect. Failing that, go to pairs early: a room that will not talk to twelve people will almost always talk to one.

Team Dynamic Labs · teamdynamiclabs.com/resources/teams/in-person-session — where this guide lives, alongside the sixteen interaction guides and the short 60-minute agenda. Free to read and free to run with your own team.

This instrument describes preferred interaction habits. It is for self-awareness and team development only; it does not measure ability or personality disorders and must not be used for hiring, promotion, or clinical decisions.