

COMPILED RESOURCE · NOVEMBER 2026

Four workshop tools from the field

A goal-setting exercise, a change framework, a set of interview questions and an executive summary template, gathered in one place and credited to the people who created them.

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Whose work is this?

Not ours. These tools came from outside Artichoke. We've gathered them here so they're easy to find and use, and we've credited each one so it's always clear where it came from.

TOOL	WHAT IT IS	CREATED BY	PAGE
What are our organization's goals?	A 45 to 60 minute group exercise for writing and combining goals	Penn State Extension	3
4 P's: connecting people to success	A one-page framework for connecting people to a project's success	Prosci	4
Starter set of assessment questions	A sample interview protocol for an organization design assessment	Amy Kates	5
Executive summary template	A blank one-page summary for proposing a project: the issue, risks, resources and open questions	Brandy Newman	6

What we changed

Layout, type and color, so the pages match each other. The wording follows each original, with a little punctuation tidied. The 4 P's graphic is redrawn in Artichoke's colors, and the executive summary template is rebuilt as a page. The ideas, structure and words belong to their authors.

BORROWED FROM

Penn State Extension

"Choosing Our Direction, Workbook 3: What Are We Going to Do?"
extension.psu.edu/choosing-our-direction-workbook-3-what-are-we-going-to-do

What are our organization's goals? (45-60 minutes)

This exercise can be altered to gather and create values as well.

To prepare for the larger brainstorming and consensus-building exercises ahead, write down five to ten goals you believe should be pursued by your organization over the next 1–3 years. Think about the big picture: what would be ideal for your organization in the long term? Dream. At this stage, don't worry about whether any of your ideas are realistic or feasible or how they might be achieved.

Goals

Descriptive, open-ended, and often broad statements of desired future conditions that convey a purpose but do not define measurable units.

Objectives

The "how" items implemented to achieve the goals.

Small group activity

Identify one person that will keep the group on time and one person to capture the group output on easel paper.

10 MINUTES	Individually write three to five goals you have for the organization. Remember that goals are descriptive, open-ended, and often broad statements of desired future conditions that convey a purpose but do not define measurable units.
10 MINUTES	Share the goals with the small group in a round-robin fashion (each person shares one goal, then the next person until each person has shared one goal, then repeat the process until each person has shared all the goals they have written). One person in the group will write the statements on easel paper as they are shared. Discussion should be limited to questions that would clarify the goals.
20 MINUTES	**Review the goals.** ◦ Group the goals as appropriate to identify common goals. ◦ Discuss the goals to ensure they are realistic and desirable. ◦ Do the goals reflect the issues raised during the SWOT discussion? (if you've already done a SWOT) ◦ List the common small group goals on a sheet of easel paper. ◦ Identify a person to report the small group results to the full group.
20 MINUTES	Small groups report their discussion results to the full group. After each group has completed their report, the full group should review the goals and combine any duplicate goals that were identified by more than one small group.

And the high-priority goals are…

The previous goal identification exercise most likely resulted in a large number of important goals. The challenge at this point is to strategically prioritize these goals in a manner that effectively utilizes the organization's resources (human and physical) and moves the organization toward its mission and vision.

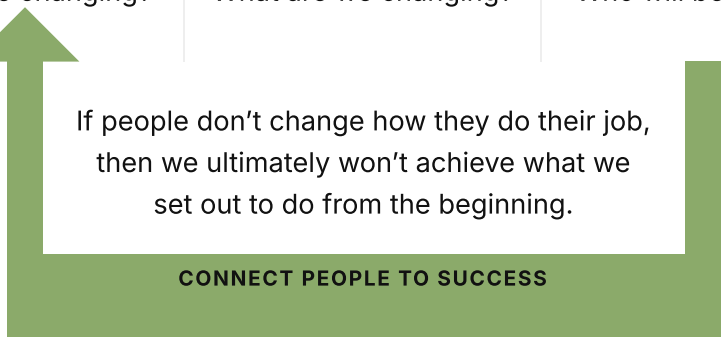
BORROWED FROM

Prosci

"Prosci 4 P's: Connecting People to Success." Original graphic by Prosci, redrawn here in Artichoke's colors.

4 P's: Connecting people to success

Project	Purpose	Particulars	People
What is the project?	Why are we changing?	What are we changing?	Who will be changing?



BORROWED FROM

Amy Kates

"Organization Design with Amy Kates," Starter Set of Assessment Questions

Starter set of assessment questions

Usually, 10 to 12 questions are enough for a one-hour interview. Ask open questions around the Star Model, as well as a few specific questions that allow you to test some design hypotheses.

Below is a sample interview protocol. Where the questions say "function" you can substitute "division" or "geography" or "unit," or another group name as appropriate.

1. What are the most important objectives of the company business strategy that this function (or division, or geography, or unit) must support?
2. What capabilities will be most important for the function to have or to develop in order to support the business in the next three years?
3. What are the strengths of the function? What do you do really well that could be a best practice for other functions?
4. Think about the way that the function is structured today. How does this help or hinder the ability of the function to support the business strategy?
   - What work sits in the regional organizations that could be more effectively managed from the center? Why?
   - To what extent are there unnecessary layers of functional work in regions and countries?
5. What are the most important processes for the function? What works well? Where are the points of friction in getting the work done? Where would better collaboration make a difference?
6. How is success measured? What needs to be realigned, if anything, in terms of metrics and rewards?
7. Given the business direction and the capabilities you identified, are there talent and skill gaps in the organization today, or anticipated in the future?
8. What are the other open issues that you think need to be resolved from an organization point of view going forward?
9. What would make this project a success for you? What would you like to see accomplished as a result of this assessment and design work?

BORROWED FROM

Brandy Newman

Executive summary template, created by Brandy Newman
linkedin.com/in/brandy-newman

Executive summary template

WHAT IS THE ISSUE?

Problem statement

Problem solution
(Project summary)

Benefits

Requestor

Stakeholders

BACKGROUND & SUMMARY

RISKS

Risks of doing	Risks of NOT doing

RISK MITIGATION

Risk	Risk mitigation approach

REQUIRED RESOURCES

OUTSTANDING QUESTIONS

ADDITIONAL COMMUNICATION NOTES FROM PRODUCT TEAM

FINAL REQUIREMENTS

Where each tool came from

Each tool remains the work of its original creator.

Penn State Extension

“What Are Our Organization’s Goals,” an exercise from *Choosing Our Direction, Workbook 3: What Are We Going to Do?*

extension.psu.edu/choosing-our-direction-workbook-3-what-are-we-going-to-do

Prosci

“Prosci 4 P’s: Connecting People to Success.” Graphic redrawn for this document.

Amy Kates

“Organization Design with Amy Kates,” Starter Set of Assessment Questions.

Brandy Newman

Executive summary template.

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