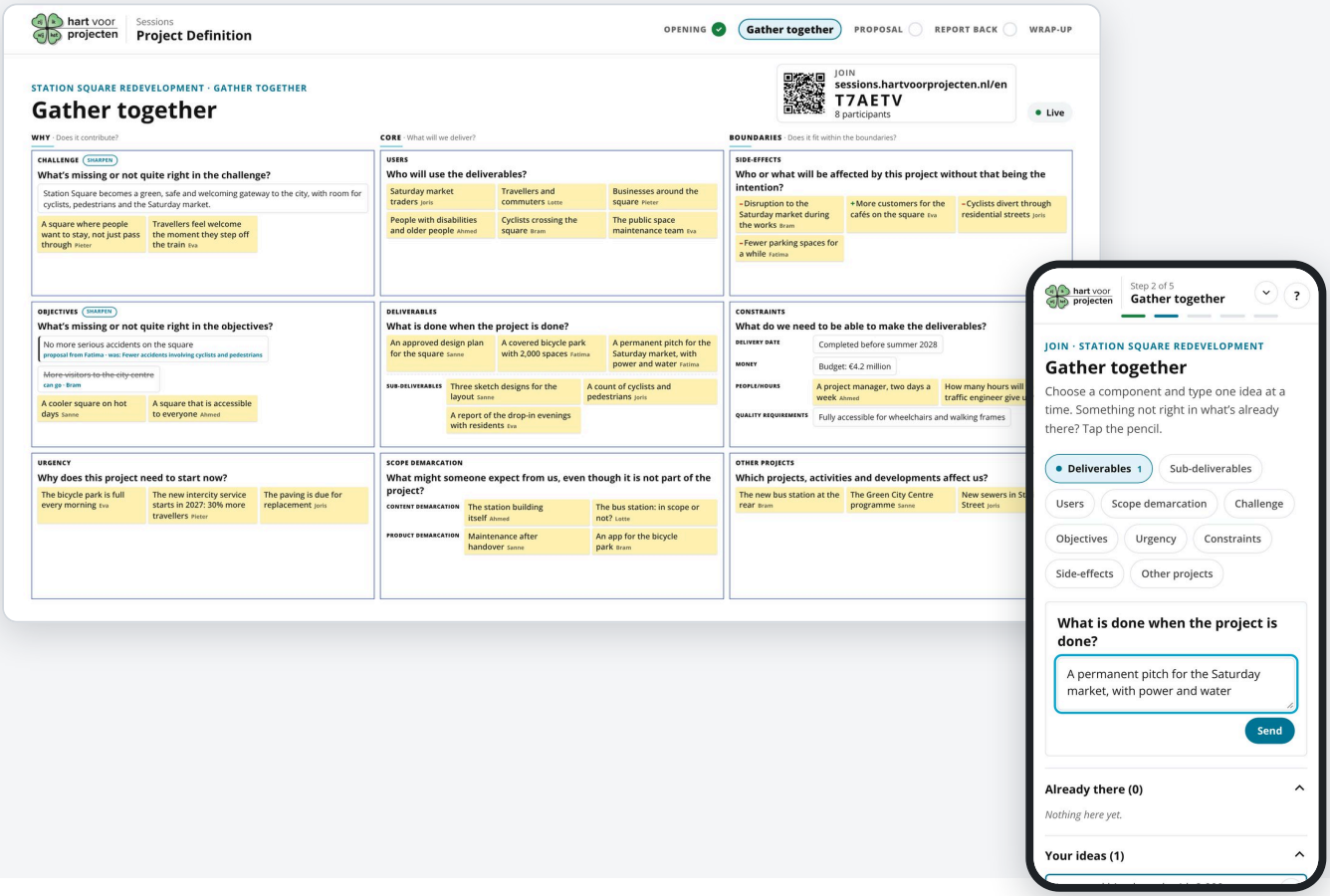
SESSIONS BY HART VOOR PROJECTEN

Facilitator manual

How to prepare a session, let the team take part and wrap up. For the project leader or facilitator who runs the session.

Project Definition | Activity Plan | Risk Management | Project Scan | Goals-Efforts Network | Programme Course



The example project in this manual is fictitious.

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ABOUT THIS MANUAL

This manual is for you as the **facilitator**: the project leader or facilitator who leads the session. You open Sessions with your start code. Team members don't need a manual: they join with a QR code and see on their own screen what they can do.

Chapters 1 to 5 apply to all tools. After that, there is a chapter for each tool on how the session goes. Prefer it short? The **quick start** puts the main steps on two pages.

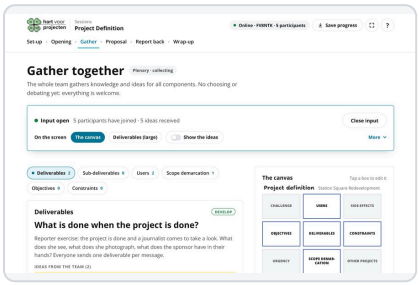
The screenshots are from version 1.8.5, with a fictitious example project. Your own screen may look slightly different, for example because of a different screen size.

> **Help in the tool itself.** Under the question mark at the top right, each step explains what you do and what the team does. There you also find the tool's guide as a PDF, with the why behind the method.

CHAPTER 1

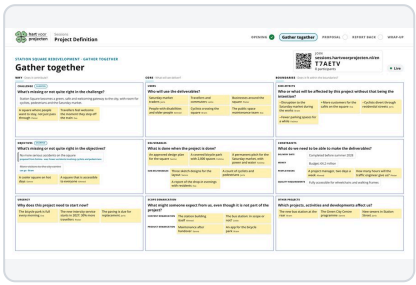
Sessions at a glance

Sessions brings the tools of Hart voor Projecten online. You facilitate the session, the team takes part on their own laptop or phone, and the presentation screen shows what is happening: on a big screen in the room, or shared in the video call. Everyone works on the same thing at the same time, and at the end you have the result straight away as a file.



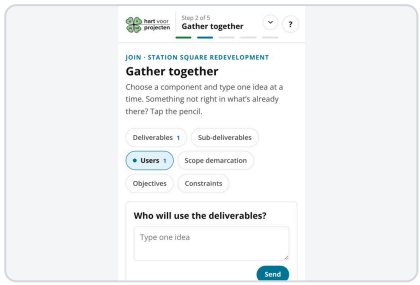
You, the facilitator

On your laptop you prepare the session and set the pace: which step, when the team can send things in and what the presentation screen shows. Only you see the controls.



The presentation screen

On a big screen or a projector in the room, or shared in the video call: it shows the questions, what the team sends in and the QR code to join. It follows your choices automatically.



The team

Team members join with the address and the session code (laptop) or with the QR code (phone). No account, no app: a first name is enough.

The six tools

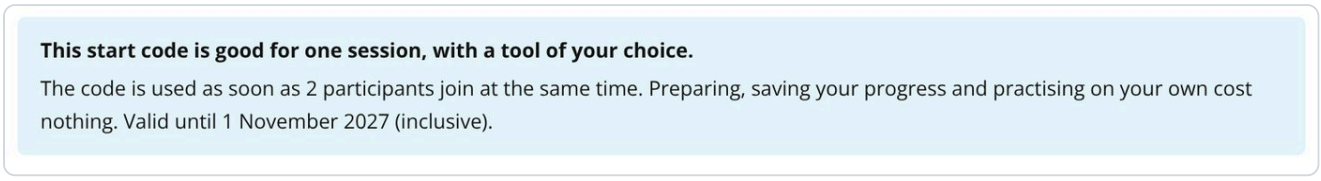
TOOL	WHAT FOR	WHAT YOU END UP WITH
PROJECT DRIVEN CREATION		
Project Definition	Agree together what the project delivers, for whom, and what is explicitly not included.	The project definition (Word) and the canvas (PDF)
Activity Plan	Collect all the activities, cluster them, divide the tasks and plan together.	The activity plan (Excel and PDF)
Risk Management	Map the risks together in the risk matrix (likelihood and impact) and agree measures, each with an owner; optionally schedule them too.	The risk analysis (Excel, PDF, image); with Schedule also the plan
Project Scan free	Where does the team stand on the success factors of Project Driven Creation? With agreements.	The report (PDF and Word)
PROGRAMME DRIVEN CREATION		
Goals-Efforts Network	Go with the programme team from the vision to the goals and the efforts that contribute to them.	The goals-efforts network (Excel, PDF, Word and an image)
Programme Course	Look back on the past period with the programme team, and build a timeline together for the coming period.	The overview with the timeline (PDF and Excel)

The tools build on each other: the project definition goes to Activity Plan, the activity plan to Risk Management, and, with Schedule, the updated plan back again. Goals-Efforts Network and Programme Course are for programmes. You can use the Project Scan at any point. Every session can be in **Dutch** or **English**; the team gets the language of the session.

CHAPTER 2

Your start code

With a start code you open Sessions as the facilitator. A start code is good for **one session**, with a tool of your choice from the tools the code is valid for.



This is what the start screen shows after you have entered your start code.

From new to used up

New
You can prepare, view the example and practise. That costs nothing.

›

Online
You put the session online. The code now belongs to this tool.

›

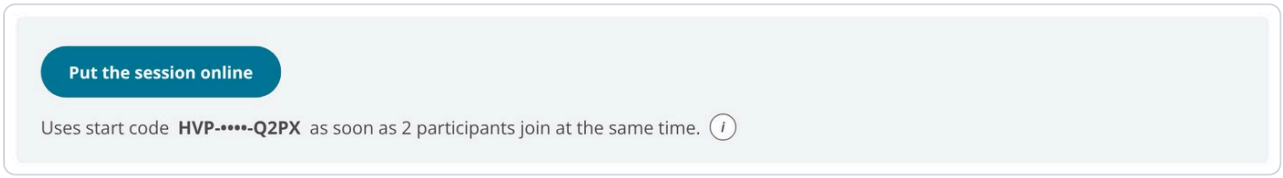
Used
As soon as 2 participants join at the same time. You can reopen it for another 7 days.

›

Used up
7 days after the code was used, or straight away when you then close and delete the session.

Good to know

- **The code is used as soon as 2 participants join at the same time.** Only team members with a name count; you as the facilitator and the presentation screen do not. It is also shown under The session, in the set-up:



- **Practising costs nothing.** Preparing, View an example and a trial on your own do not use the code. Note: if two laptops or phones with a name take part in your trial, even one after the other, the code is used.
- **If you delete a session before the code is used** (Delete online session), the code is new again.
- **The Project Scan is always free** and does not use your code. Even when your code is used up, you can still open the Project Scan, up to and including your code's end date.
- **Sessions deletes the online session 24 hours after you put it online**, with everything the team sent in. So only put it online on the day itself. Want to continue later? Save a progress file (chapter 12). Within 7 days after the code was used, you put it online again with the same code, as often as needed.
- **Your code is valid up to and including the date on the start screen.** Your browser remembers the code for as long as it can be used. Want to enter another code? Choose **Other start code** at the top right of the start screen.
- **Keep your start code to yourself.** Team members only need the session code: the six characters next to the QR code on the screen.

CHAPTER 3

Preparing

A good session starts with the technology in order, so that the attention goes to the conversation.

What you need

- ✓ **A laptop for you**, with an up-to-date browser. That is where the controls are.
- ✓ **A big screen or a projector** if you are together in one room. Connected to your laptop as a second screen, or to a computer of its own: there you open the link for the presentation screen. Online or hybrid: a video call in which you share that window.
- ✓ **Internet for everyone**: Wi-Fi or mobile data.
- ✓ **A laptop or phone for each team member.** By default, a session has room for 40 devices, group laptops included.
- ✓ **For group work, one laptop per group.** In Make a proposal, Make the schedule and Organise, a group of two or three works on one device, in Goals-Efforts Network and in Measures and Schedule three by default (also alone, up to five, or a number of groups); a laptop is wider than a phone.

Practise first

Try out the tool beforehand. There are two ways, and neither costs you your start code:

1. **View an example.** At the bottom of the set-up is **View an example**: you go through the steps with an example project, without anything being online. Do this before you start preparing: the example replaces your set-up and takes an online session off the website (not in the Project Scan). Already prepared something? Save a progress file first. At the top is then **Start your own session**; after a change, the tool first asks whether it may go (also when you choose View an example again).
2. **Do a trial session with your own laptop or phone.** Put the session online, join as a team member and go through a few steps. With one device, the code is not used. Then choose **Delete online session**: your code is new again.

Just before the session

- Open the presentation screen. In the room, put it on the big screen or projector in full screen; online or hybrid, share that window in the video call.
- Put the presentation screen in a window of its own, and keep the tab with the controls in view on your laptop: a tab that stays in the background for a long time falls behind.
- Open the session in one tab at a time.
- Keep the QR code and the session code in view until everyone has joined.
- Agree with the team that phones may stay on: today they are tools.

> **Online or hybrid?** In the video call, share the window with the presentation screen, not your own screen with the controls (it also shows what the team sends in before it goes on the screen). The team joins on their own laptop or phone: with the QR code on the shared screen, or with the link **For team members** (under **Copy a link**) that you post in the chat. Whoever is in the room looks at the presentation screen.

CHAPTER 4

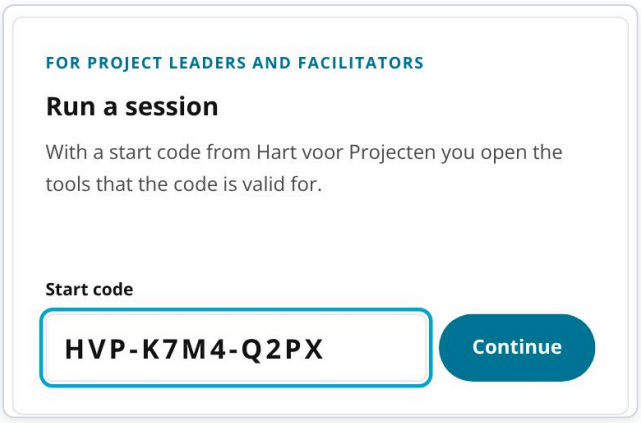
Your first session in six steps

This is how you put a session online and let the team join. The example is Project Definition; the other tools work the same way.

1 Enter your start code

Go to **sessions.hartvoorprojecten.nl**. Under **Run a session**, enter your start code and choose **Continue**.

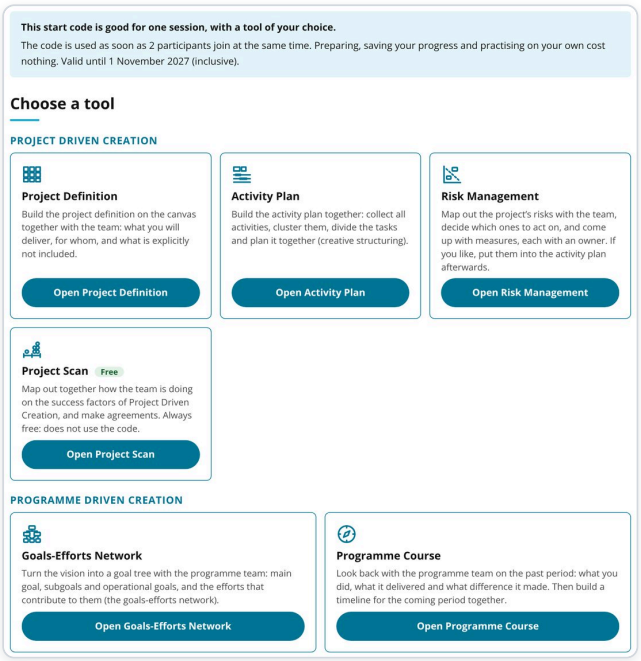
The box on the left, Join a session, is for team members.



2 Choose a tool

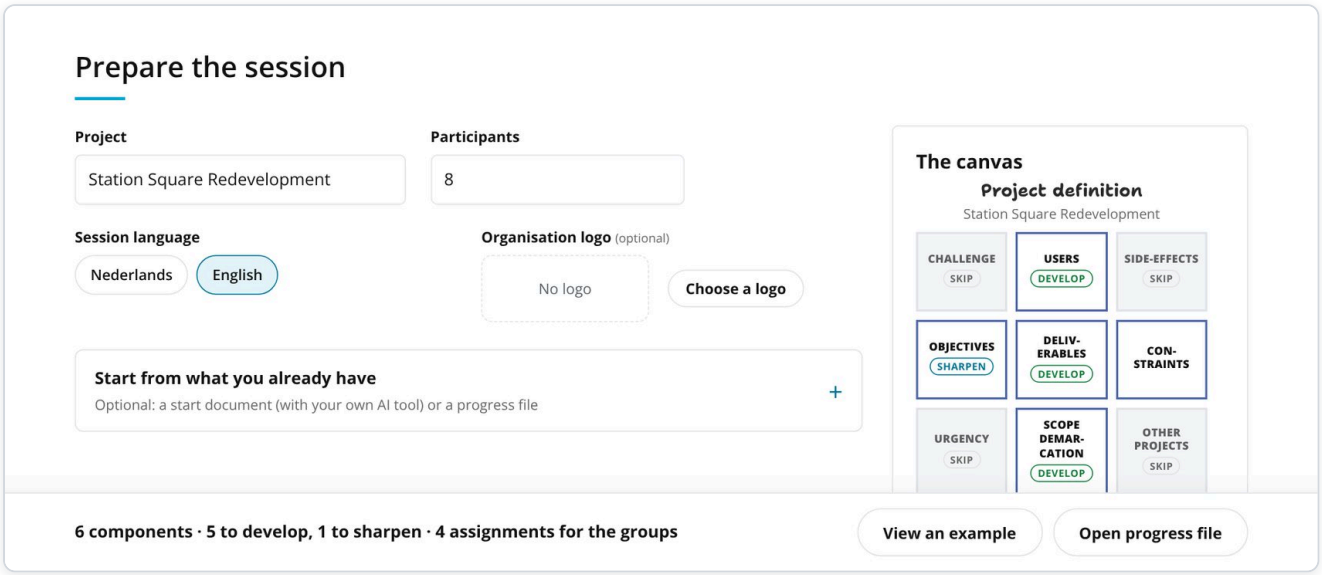
You see the six tools in two groups (Project Driven Creation and Programme Driven Creation), with what the code can still do at the top; the ones your code is not valid for are greyed out. Choose **Open …** for the tool of your session.

Feel free to look around: opening and preparing do not use the code yet.



3 Prepare the session

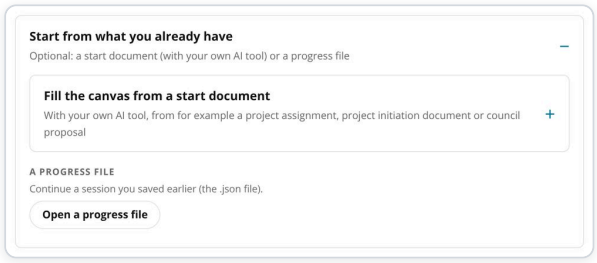
In the set-up you enter the name of the project, the number of participants, the **session language** and, if you like, your organisation's logo (it appears on the presentation screen, at the top right of the first page of the PDF and the Word file, and on the image from Risk Management and the Goals-Efforts Network; not in Excel). Then you choose, for each tool, what gets attention. You can do the set-up at your leisure beforehand: your browser keeps it, and with **Save progress** you also have it as a file.



The set-up of Project Definition. On the right you see the canvas with your choices straight away. At the bottom are View an example and Open progress file.

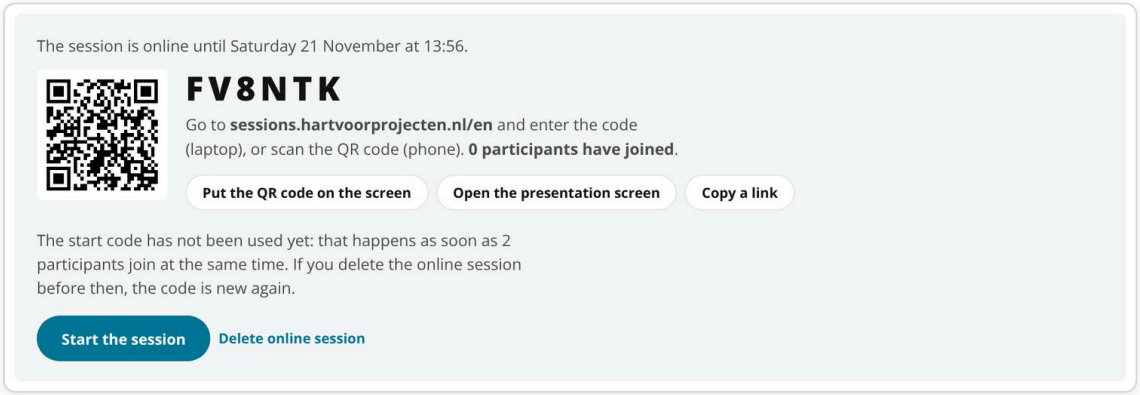
Start from what you already have

Is there something already, such as a project assignment or an earlier session? Then open **Start from what you already have**. There you read in a start document (made by your own AI tool with the instructions Sessions prepares) or a progress file. The Activity Plan reads in the project definition here.



4 Put the session online

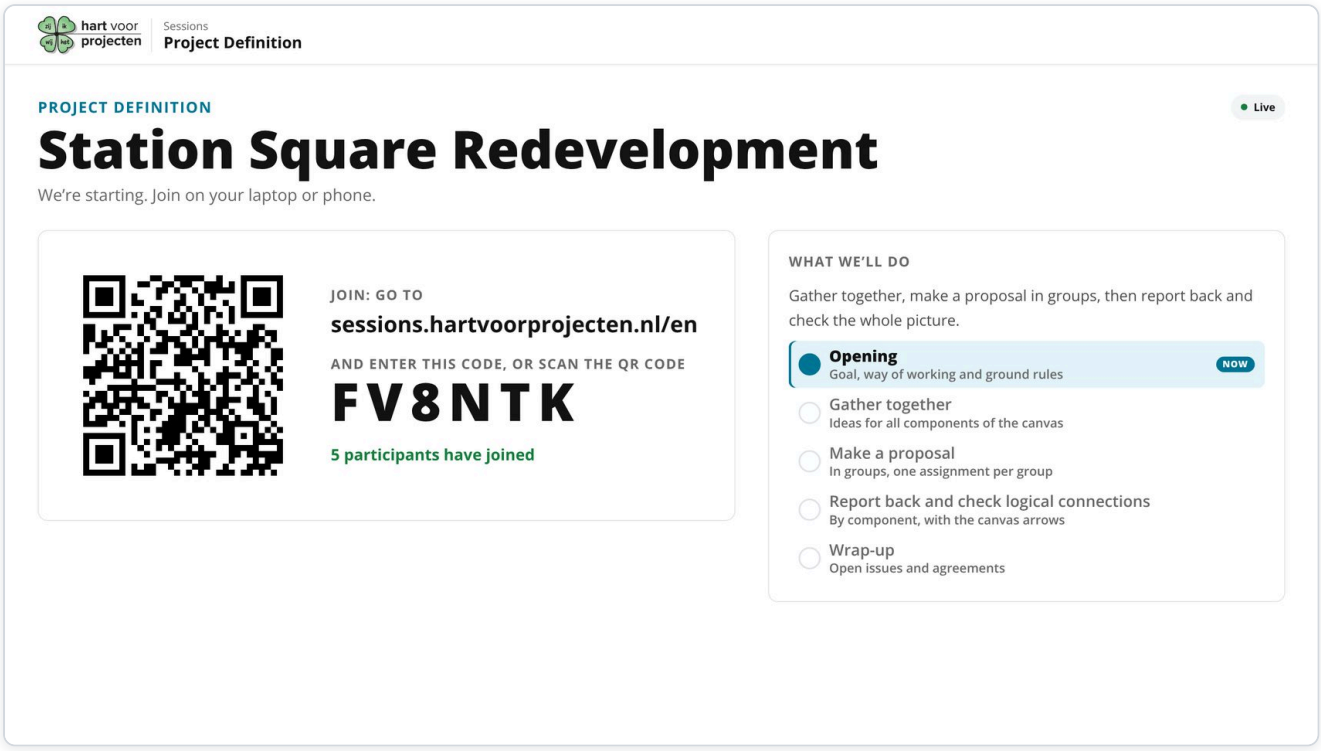
At the bottom of the set-up, under **The session**, choose **Put the session online**. You get a session code and a QR code, and the time until which the session stays online.



The session is online. Use **Copy a link** to get the link for team members or for the presentation screen. If you delete the session now with Delete online session, the code is new again.

5 Open the presentation screen

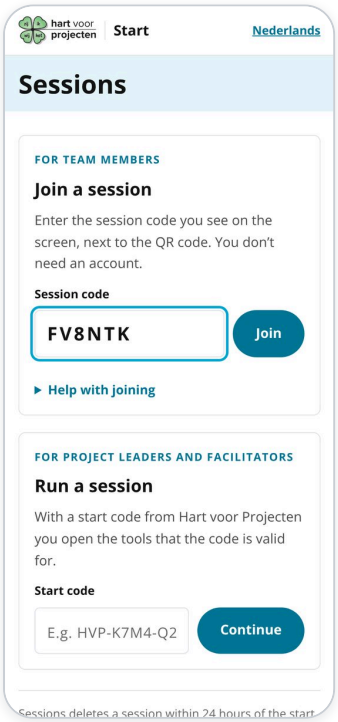
Choose **Open the presentation screen**. Drag the new tab to the big screen or projector and make it full screen (online or hybrid: share that window in the video call). The start screen shows the QR code, the address, the session code and the steps. Is the big screen or projector connected to another computer? Open the link **For the presentation screen** there.



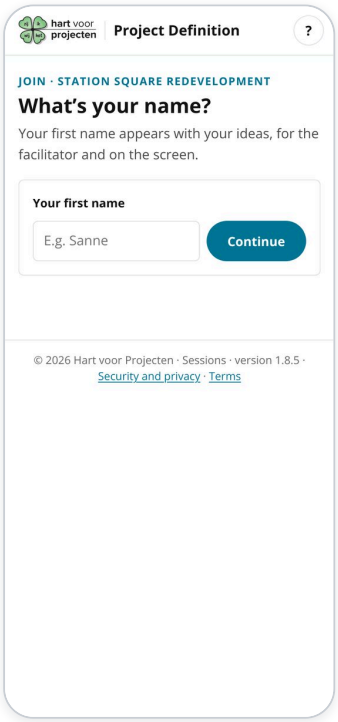
The start screen on the presentation screen. The number of participants goes up as the team joins.

6 Let the team join, and start

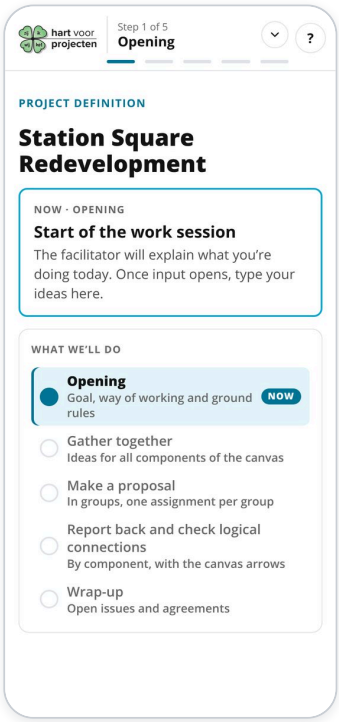
Team members enter the session code at **sessions.hartvoorprojecten.nl/en** (laptop) or scan the QR code (phone), then their first name. Has everyone joined? Choose **Start the session** on your laptop.



Entering the session code



Entering a first name

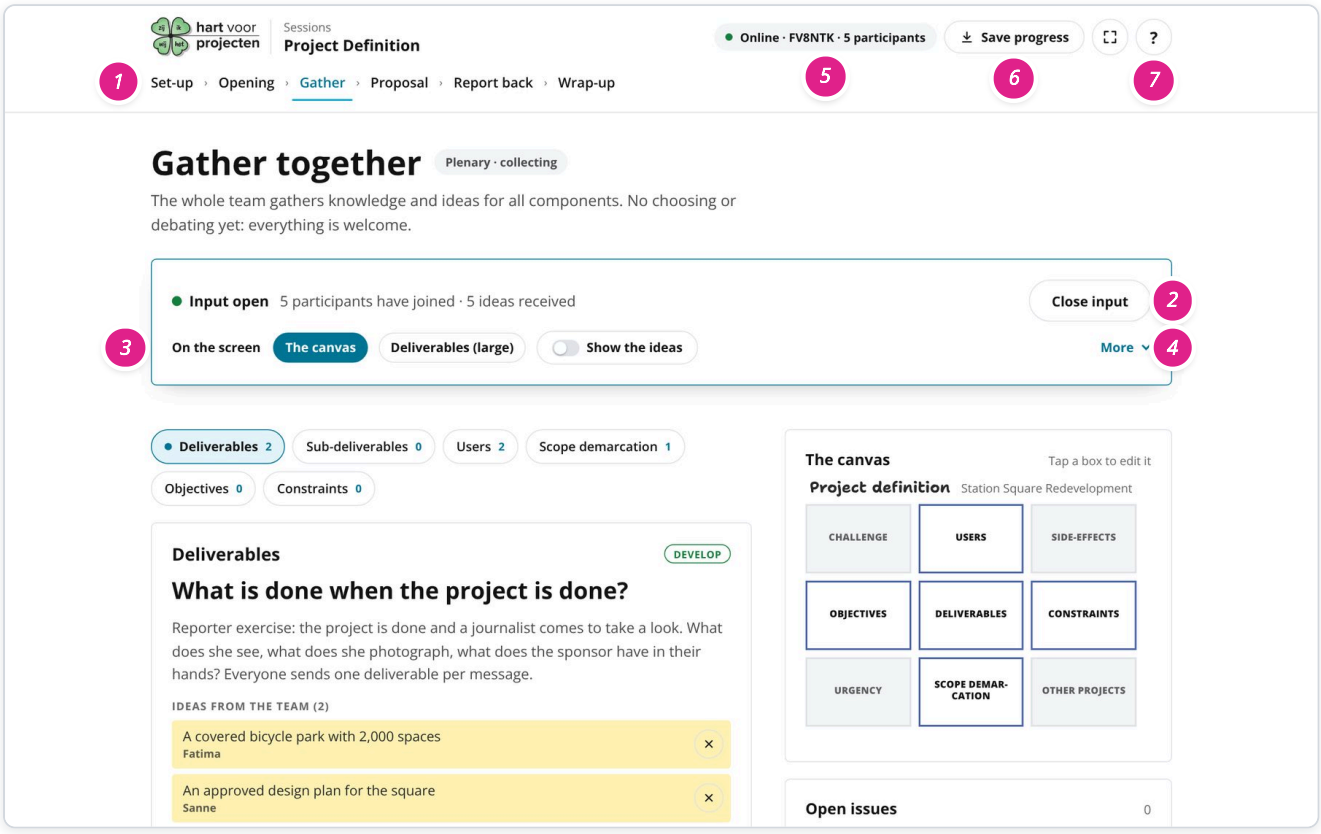


Ready to start

CHAPTER 5

During the session

On your laptop you see the controls. Every step is built the same way: at the top the step bar, then the step heading and one control block.

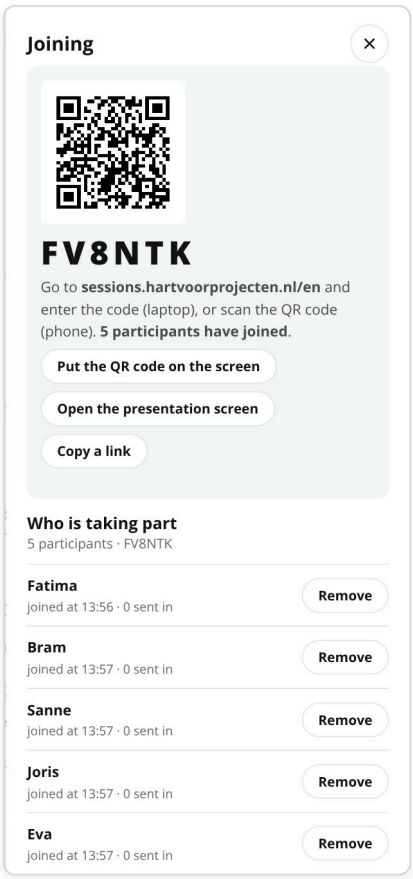


The facilitator during Gather together (Project Definition), with input open.

1. **The step bar.** Where you are and what is coming. Click a step to go there; the screen and the team come along.
2. **The status and the main button.** At the top of the control block: what is happening now (Input open, 5 participants have joined, 5 ideas received) and the button you need now, such as opening or closing input. When the work of the step is done, it becomes **Continue: …**: it takes you, the screen and the team to the next step.
3. **On the screen.** Choose what the presentation screen shows. A switch, such as Show the ideas, turns something on or off. When gathering, what the team sends in reaches you first; you put it on the screen with Show the ideas or Show the changes.
4. **More.** What you need less often, such as opening input for one column of the canvas.
5. **Online, the session code and the number of participants.** Click it for Joining and Who is taking part (next page). If it says No connection, check your laptop's internet connection.
6. **Save progress.** Everything from the session as a file, at any time.
7. **Help.** Explanation for the step you are in, and the tool's guide.

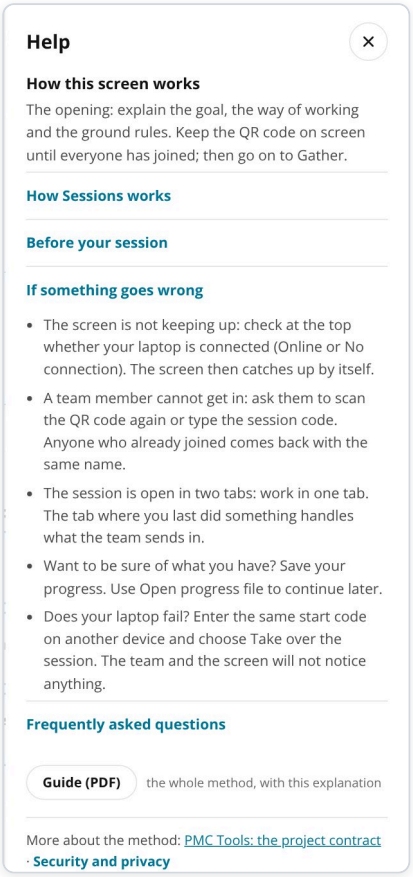
Joining and Who is taking part

Click **Online · …** at the top. You see the QR code (which you can also put large on the screen) and who is taking part. Has someone joined twice by accident, or does someone not belong? Choose **Remove**. What they already sent in stays.

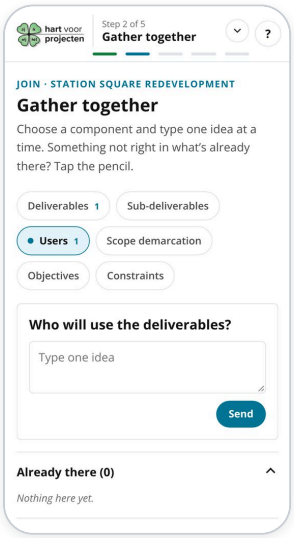


Help

The question mark opens the help for the step you are in: **How this screen works**, tips for your session, what to do if something goes wrong, and the frequently asked questions. With **Guide (PDF)** you download the explanation of the whole tool; this facilitator manual is at sessions.hartvoorprojecten.nl/en/manual.



The team and the screen follow you



- When you go to another step, the presentation screen and the team's devices come along.
- When you open input, team members see on their laptop or phone what they can do, as here: choose a component and send one idea at a time. In between, they look at the presentation screen.
- After a change, the main button cannot be clicked for a second, so a double click never moves anyone on by accident.
- You keep the current state; team members do not need to save anything. If a team member opens the page again on the same device, they rejoin with the same name.
- The team does not see your control block or More.

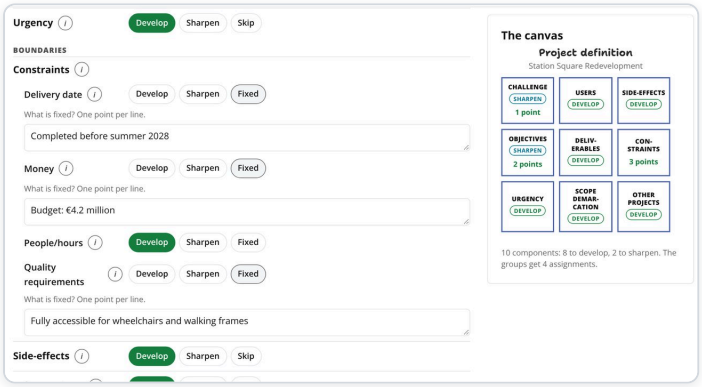
CHAPTER 6 · TOOL

Project Definition

Create the project definition together with the team: what you will deliver, for whom, and what is explicitly not included. It is about the what, not the how. Start with the deliverables: they are the deal with the sponsor or client. Then use the why as a check.

STEP	WAY OF WORKING	WHAT YOU DO
Opening	Plenary	Goal, way of working and ground rules; joining with address and code or QR code.
Gather together	Plenary · collecting	Open input; show the ideas and let people explain them.
Make a proposal	In groups · choosing	Let the groups choose; each group makes a proposal for an assignment.
Report back and check logical connections	Plenary · checking the whole picture	For each component, show the proposal, check it with the canvas arrows and adopt it.
Wrap-up	Plenary	Divide the open issues, download the project definition and close.

The set-up: choose what needs attention

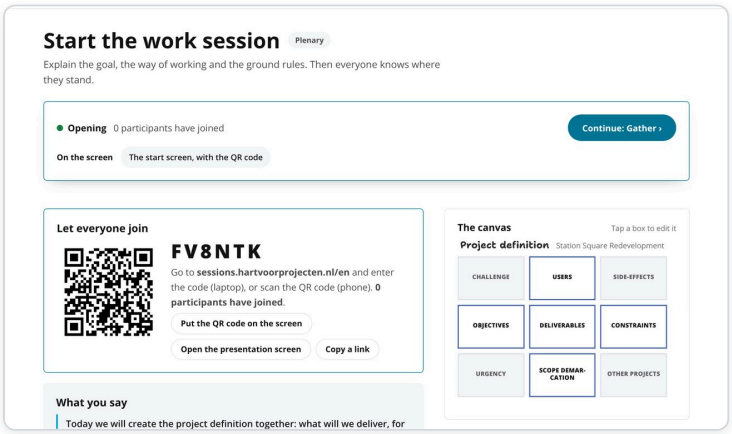


For each canvas component you choose:

- **Develop**: what is still open;
- **Sharpen**: something already exists. Put it under *What is already there?*, one point per line; the team makes proposals on it;
- **Skip**: whatever is already clear, you note with **+ Note what is already clear**. Not for the core; for the constraints it is called **Fixed**.

At the bottom you see how many assignments the groups will get. On the right you see the canvas with your choices.

Opening



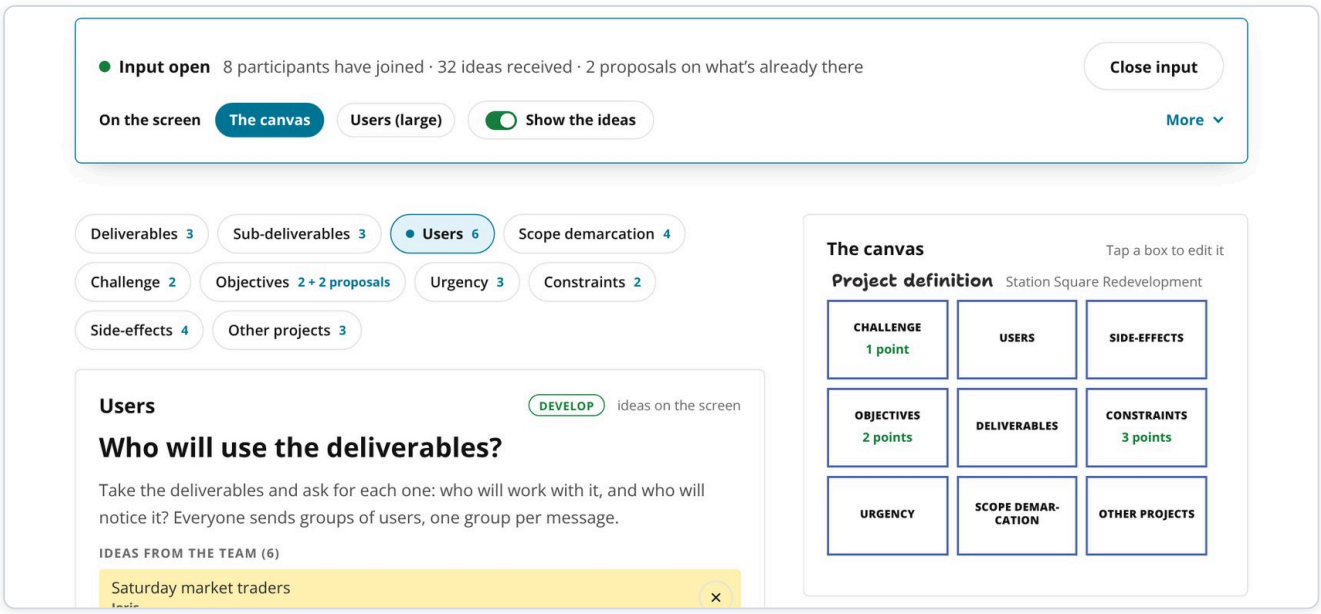
The presentation screen shows the start screen with the QR code. Explain the goal, the way of working and the ground rules (a text you can use is under **What you say**):

- First collect, then choose.
- One idea per message.
- We can go back: if the picture changes, we move or change a point.
- Whatever we cannot decide becomes an open issue with an owner.

Has everyone joined? Choose **Continue: Gather ›**.

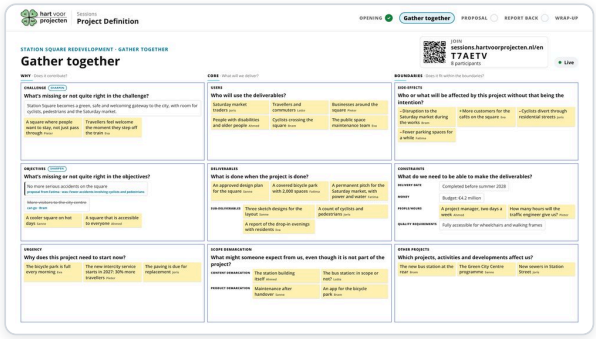
Gather together

Plenary · collecting



Your screen during Gather together. For each component you see the team's ideas; on the right, the canvas.

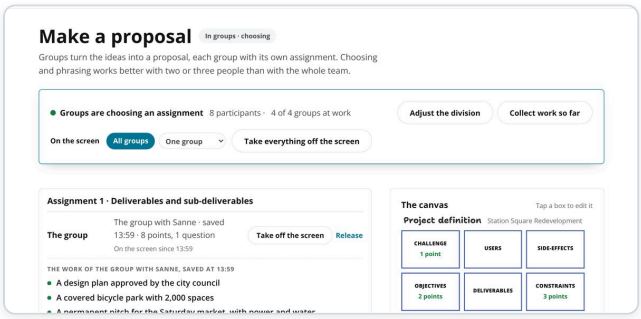
1. Choose **Open input**. The questions are on the presentation screen and on everyone's laptop or phone.
2. Everyone first writes in silence for a few minutes, one idea per message. For Sharpen, the team makes proposals on what already exists.
3. Turn on **Show the ideas** and let everyone explain briefly. Questions are fine, judgements not yet.
4. Probe further on anything vague. Need more focus? Open the input for one column of the canvas (under More).



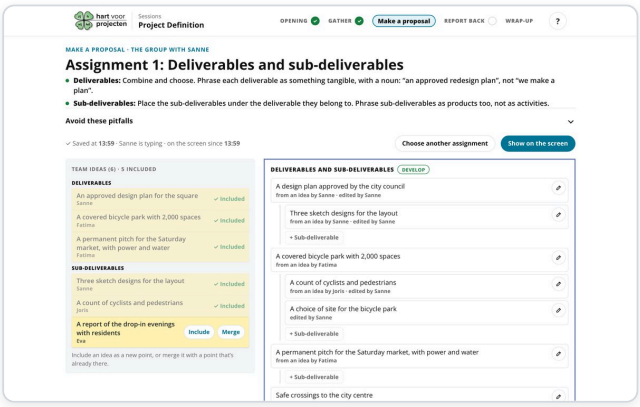
The presentation screen: the canvas with the ideas.

Make a proposal

In groups · choosing



You see for each assignment which group is working on it and what it is making.

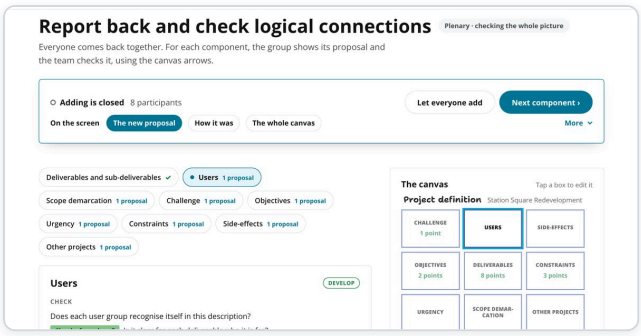


A group adopts ideas, merges them and phrases them sharply.

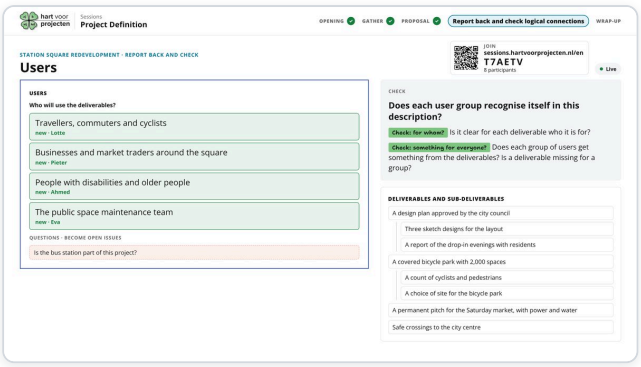
1. Form groups of two or three, each on one device (preferably a laptop). With **Adjust the division** you divide the components among the assignments.
2. Choose **Open up: groups choose**. Each group chooses its assignment and combines, chooses and phrases things sharply: five clear points are better than fifteen vague ones.
3. Whatever a group cannot decide, it adds to the questions: these become open issues. Agree how much time the groups have, and keep an eye on it.

Report back and check logical connections

Plenary · checking the whole picture



You choose the component and see the check on the arrow.



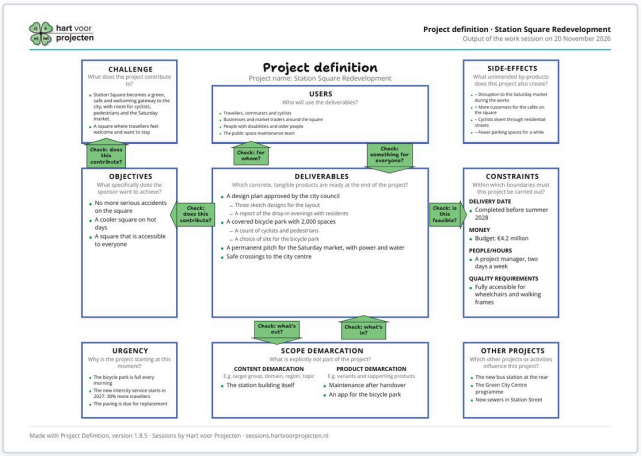
The presentation screen shows the proposal with the check next to it.

1. For each component, put the proposal on the screen. The group explains it briefly; the others first ask only clarifying questions.
2. Check together using the check on the arrow. Put components next to it (under More) or show the whole canvas.
3. Use **Next component ›** to adopt the proposal as it is and move on. Does the team want to change anything? Then first choose **Let everyone add**.
4. Whatever stays open becomes an open issue with an owner.

Wrap-up

Go through the canvas once more and finish with the questions on your screen: what can we not decide yet, and who will find out? Which questions do we put to the sponsor?

1. Download the project definition (Word) and the canvas (PDF), and share them with the team.
2. Work out the project definition in the Hart voor Projecten template.
3. Present it to the sponsor and process their feedback.
4. Then comes the how: the activity plan (chapter 7). The Word file or the canvas is the starting point there.



The canvas as a PDF.

Closing and deleting: see chapter 12.

CHAPTER 7 · TOOL

Activity Plan

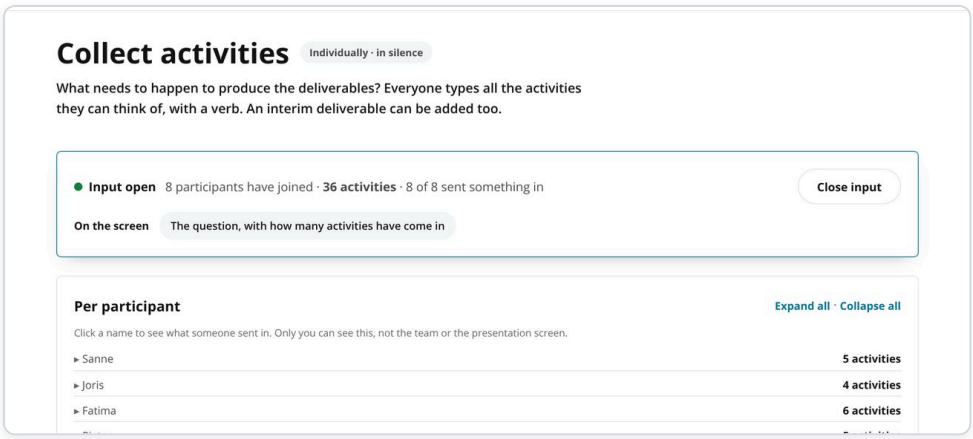
Make the activity plan together with the team: first collect all the activities, then decide together what belongs in it, cluster them, divide the tasks and make the schedule together. The result is a plan the team made itself. The starting point is the project definition.

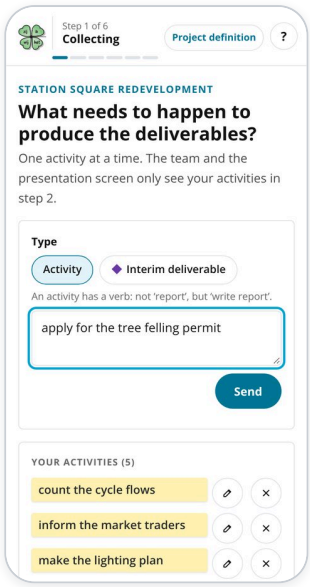
STEP	WAY OF WORKING	WHAT YOU DO
Opening	Plenary	Show the project definition on the screen and go through it briefly.
Collect activities	Individually · in silence	Open input; about ten minutes.
Decide	Plenary · taking turns	Lead the conversation: does it belong, and where?
Cluster	Facilitator or a group on one laptop	Tidy up the board; give each cluster a name.
Divide the tasks	Everyone · on their own screen	Open input; discuss what has no name.
Make the schedule	In groups per cluster	Divide the clusters; demonstrate the controls; open up.
Align the schedule	Plenary · everyone moves cards	Move cards together until it fits; record agreements.
Wrap-up	Plenary	Download the plan (Excel or PDF) and close.

The set-up and the opening

- **Read in the project definition** under Start from what you already have: the Word file, the canvas (PDF) or the progress file of Project Definition. No project definition? Then fill in the deliverables yourself.
- **Is there already a schedule?** Read it in under Start from an existing plan, with your own AI tool. You can also read in the Excel file of an earlier Activity Plan session there, with the name of the project. If the plan comes from Risk Management, the measures have a pink label with the code of their risk (R3).
- **Choose the timeline**: from when to when, and in what steps, for example per month. During the schedule you can still split a period, for example a month into weeks.
- **In the opening** you show the project definition on the presentation screen and go through it briefly: what do we deliver, and what is not included? Does something need to change? Edit it with the group watching (**Edit**); only you can edit. Is the deliverable not yet clear? Then do a Project Definition session first.
- With the **Project definition** button at the top, you and the team can look at it throughout the session.

Collect activities Individually · in silence

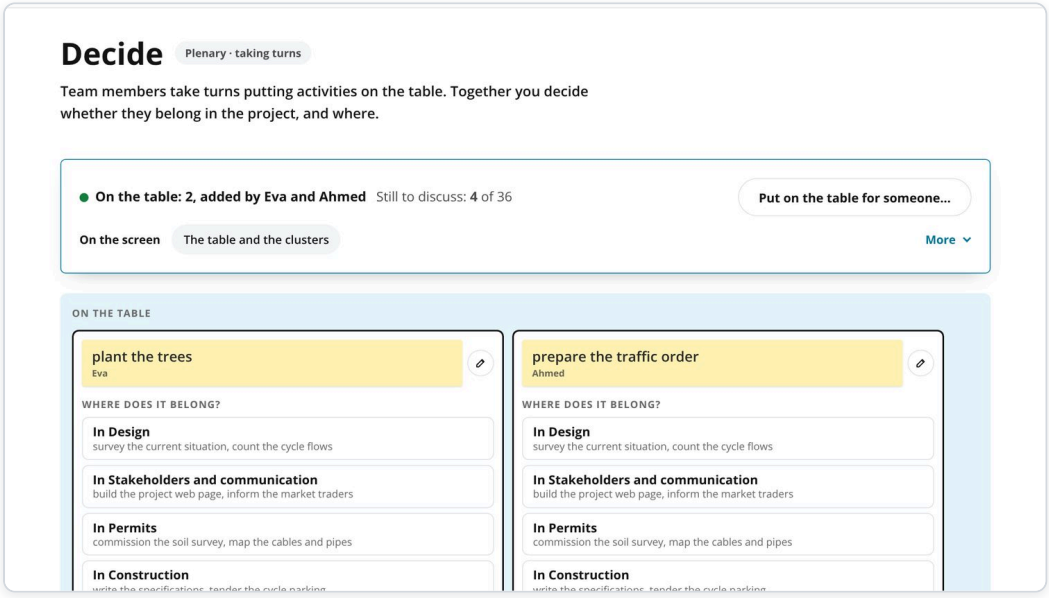




You see for each participant how many activities have come in, and can click a name open. The team and the screen do not see this.

1. Open input. Everyone types in silence, one activity at a time, with a verb: not “report”, but “write report”.
2. Something that has to be ready along the way, such as “sketch design approved”, can go in as an **interim deliverable**: a card in its own colour.
3. Everyone sees only their own activities; the screen shows only a counter. Ten minutes is usually enough.

Decide Plenary · taking turns



Your screen during Decide. On the table are the activities you are discussing now; for each activity you choose where it belongs.

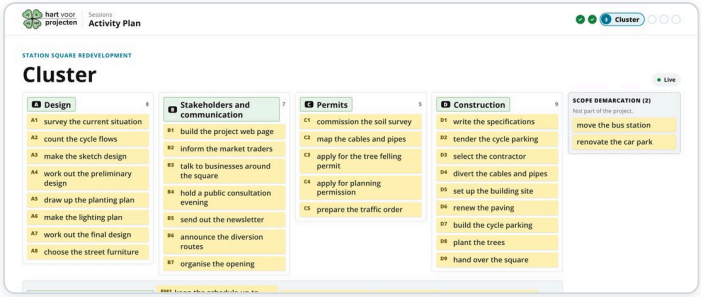
1. Ask someone to put one or two activities on the table. You decide whose turn it is in the conversation.
2. Ask two questions for each activity: is it clear what the person who came up with it means? Do we want to do it in this project, and if so, where does it belong?
3. Not clear? The person who came up with it explains, and you adjust the wording together. Not in this project? Then it goes to the Scope demarcation.
4. What belongs together goes together: that’s how rough clusters emerge. Others add their similar activity to it, and discard literal duplicates themselves. Project management gets its own cluster at the bottom.

The presentation screen shows the table and the clusters; team members put their activities on the table from their own screen.

Cluster

Facilitator or a group on one laptop

1. Arrange the board yourself, or let a group of two or three do it on one laptop. The others watch on the presentation screen.
2. Give each cluster a name: often a sub-deliverable, a phase or a discipline. The deliverables and sub-deliverables from the project definition are ready as suggestions.
3. From now on each cluster has a letter and each activity a code (A1, A2 ...).

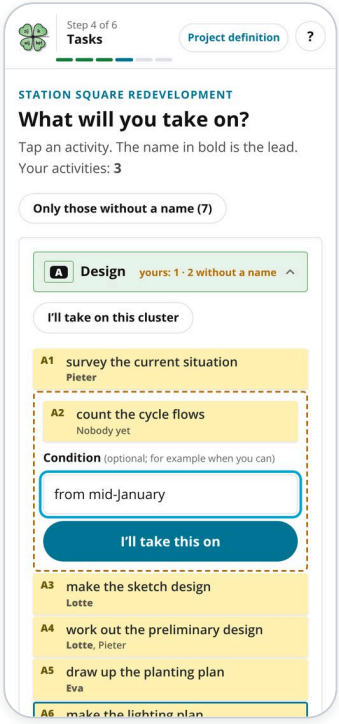


The board with clusters, letters and codes.

Divide the tasks

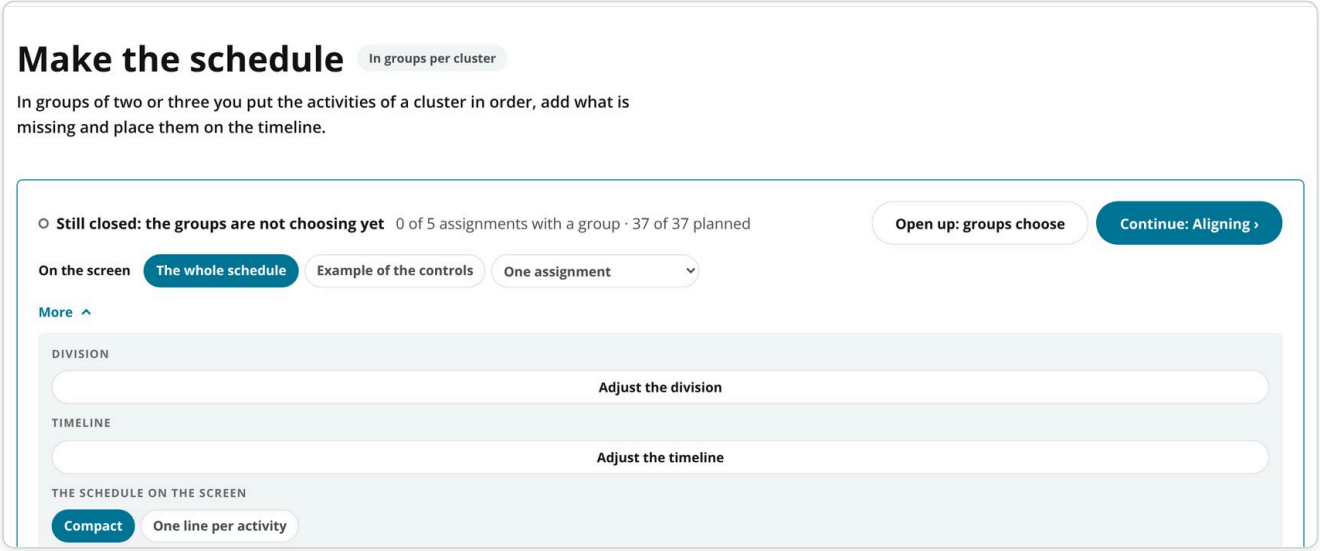
Everyone · on their own screen

1. Open input. Everyone taps an activity and chooses **I'll take this on**. A condition can be added, such as "from mid-January".
2. More names on one activity is fine; the first is the lead.
3. Discuss what doesn't have a name yet. Add a name yourself for anyone who isn't here.



Make the schedule

In groups per cluster

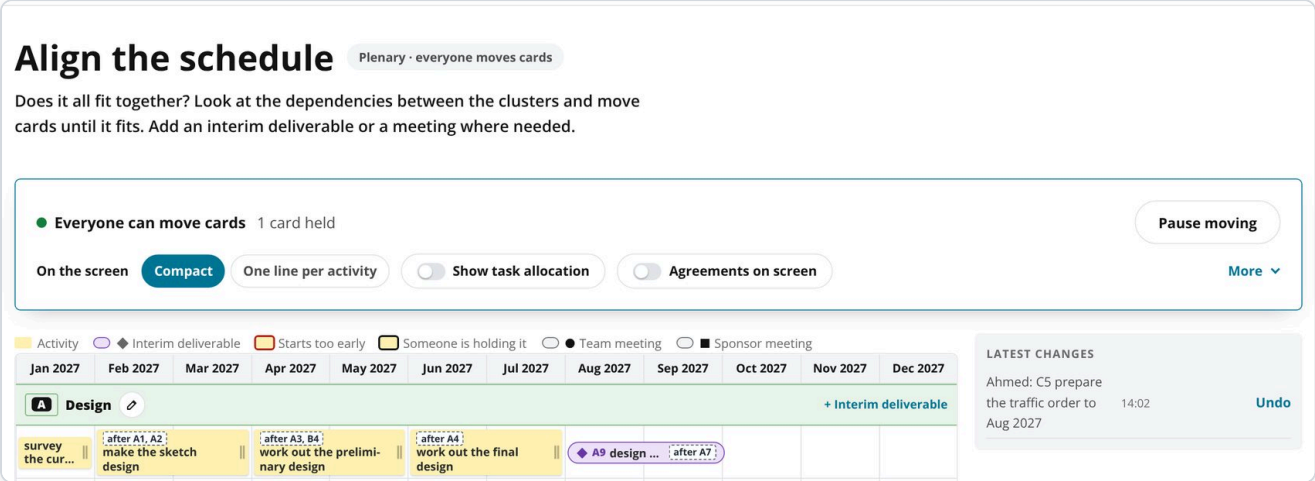


Your screen during Make the schedule, with More open: the division, the timeline and how the schedule appears on the screen.

1. Divide the clusters among groups of two or three: one assignment per group (**Adjust the division**).
2. Explain the controls before you open it up: under On the screen, choose **Example of the controls**, then switch back.
3. Choose **Open up: groups choose**. Each group chooses an assignment on one device, preferably a laptop. First the order, from top to bottom; then exactly on the timeline. What can happen at the same time runs side by side. Everyone takes their own calendar into account.
4. Is an interim deliverable missing? The group adds it with **+ Interim deliverable**.
5. Does a row wait for something in another cluster? The group chooses **Also follows (another cluster)**. The bar then shows, for example, *after B1*.
6. Is a lot in one period? Click the column heading and split it, for example a month into weeks.

Align the schedule

Plenary · everyone moves cards

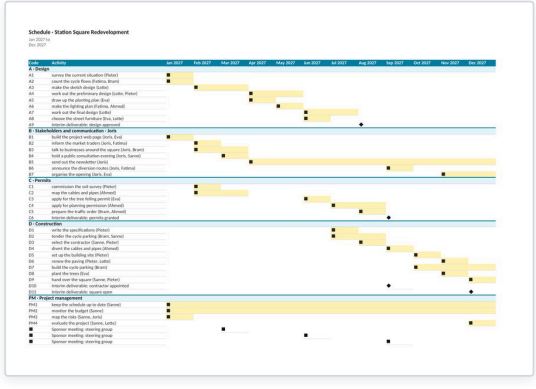


Your screen during Align the schedule. On the right the latest changes, with Undo.

1. Everyone can move cards: whoever picks up a card holds it for a moment. The others see who.
2. Does an activity take longer? Drag the right edge of the bar, or choose Up to and including.
3. A red border: this starts before the activity it waits for is finished.
4. The label on a bar, such as *after A1, B1*, shows what it waits for, also in another cluster. Point at the bar (or tap the label) and the predecessor lights up.
5. Meetings with the team and with the sponsor are under Project management.
6. Record agreements and open issues, such as estimating the hours afterwards. Team members can send one in too; remove what is not right.
7. With **Pause moving** you freeze the schedule for a moment.

Wrap-up

Choose what the screen shows and download the activity plan as **Excel** or **PDF**. In Excel, everyone estimates the hours for their own activities afterwards. Then close the session (chapter 12).



CHAPTER 8 · TOOL

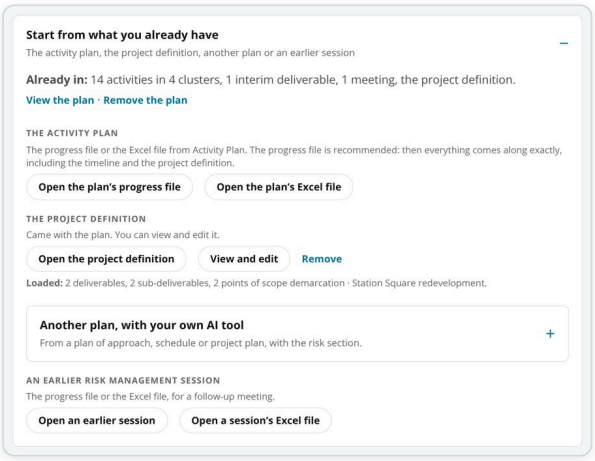
Risk Management

Map out the project's risks with the team: what can go wrong, and what could cause it? Place them in the risk matrix (likelihood and impact) and come up with measures in groups, each with an owner. If you like, you then put them into the schedule together (the Schedule step). The starting point is the activity plan: the team goes through the plan looking for what could go wrong.

STEP	WAY OF WORKING	WHAT YOU DO
Opening	Plenary	The explanation on the screen: why, an example and the risk matrix.
Identify risks	Individually · in silence	Open the input; about ten minutes.
Prioritise	Plenary · taking turns	Lead the conversation: first clarify, then place.
Measures	In groups · then report back	Let the groups work; each group reports back, you adopt.
Schedule (optional)	In groups or plenary	Put the measures on the schedule and into the plan.
Wrap-up	Plenary	Download the risk analysis (and with Schedule the updated plan).

The set-up: start from what you already have

- Do you also want to put the measures into the schedule? Switch on **Schedule measures** (off by default): Schedule then follows Measures, and you choose the timeline. You can also switch it on during the session, under More at Measures.
- Then there is one block, **Start from what you already have**, open.
- **The activity plan**, preferably the **progress file of Activity Plan**: then everything comes along exactly (the clusters, the activities, the timeline, the project definition and the agreements). If the timeline differs, the tool says so. The Excel file of Activity Plan works too. Also: **the project definition**, **another plan** with your own AI tool, and **an earlier session**.
- You can also start **without a plan**. With Schedule, the measures then form a new plan. If a plan already lists risks, they come along via your AI tool; the team sees them under **Already there**.



Start from what you already have, after reading in the plan.

Opening Plenary

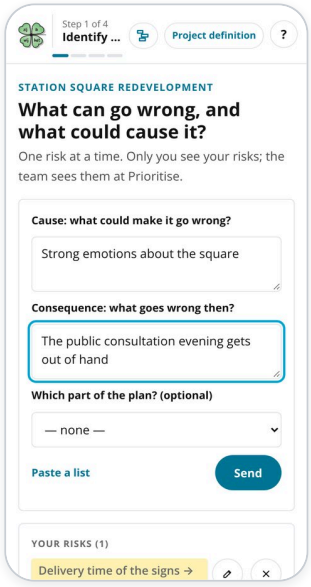
1. Let everyone join with the address and the code (laptop) or the QR code (phone). A laptop is recommended.
2. Choose **Put the explanation on the screen**: one screen with *Why?* (check and strengthen the project contract, manage expectations, be alert as a team), *A risk* (an example card with cause and consequence) and *The risk matrix*.
3. Explain the risk matrix with the example: likelihood to the right, impact upwards. Above the line you act with measures; below it you monitor (for now). Then: **Continue: Identify risks ›**.



The explanation on the presentation screen. In the risk matrix, above the line (orange): act on. Below it (blue): monitor.

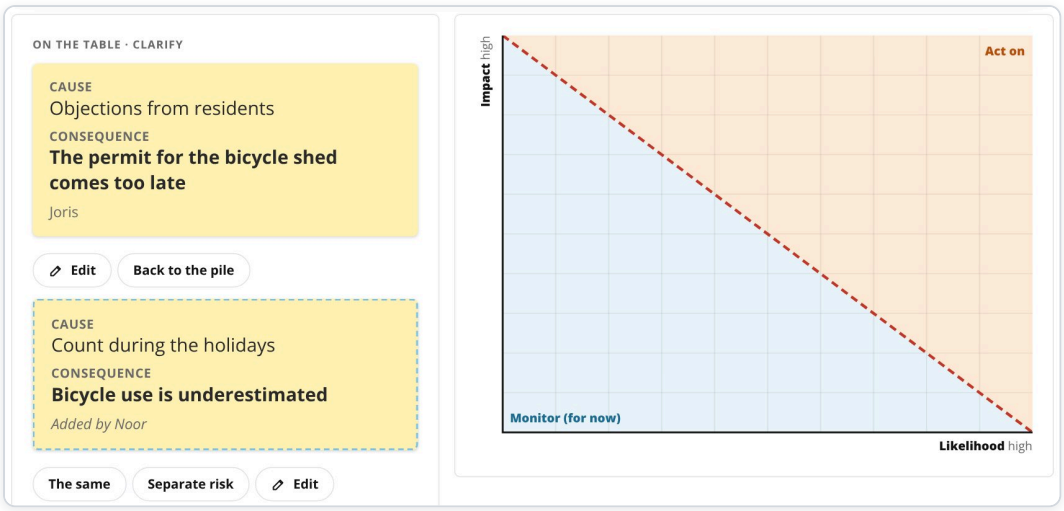
Identify risks Individually · in silence

1. **Open input**. Everyone types in silence, one risk at a time: first the **cause** (what could cause it), then the **consequence** (what goes wrong). For example: “Because residents object, the permit comes too late.”
2. Without a cause the tool asks for one first; the team can still send it in, and add it later with **Why? Fill in the cause**.
3. Is there a list already? **Paste a list**: each line becomes a risk. A team member pastes their own; a list that came in beforehand, you paste under More, with the name.
4. Go through the plan and the project definition looking for what could go wrong (the team views them with **Activity plan** and **Project definition** in the header). Which part of the plan the risk belongs to can be added; it doesn’t have to.
5. Everyone sees only their own risks; you see per participant what has come in. The screen shows the question, an example and a counter, not the risks themselves.



Prioritise

Plenary · taking turns



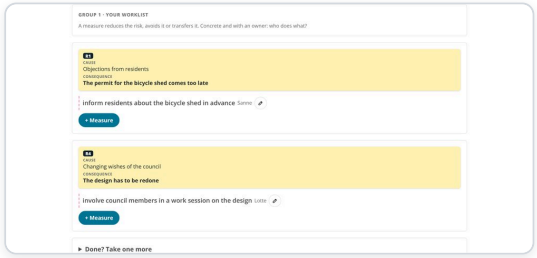
Your screen at Prioritise. On the left the risk on the table with a card added to it, on the right the risk matrix.

1. Ask someone to put a risk on the table. You decide who goes next in the conversation.
2. **First clarify:** is it clear to everyone? Anyone with something similar adds it: it then lies on the table as a second card. Record the outcome per card: **The same** (it goes, the contributor's name moves to the first card), **Separate risk** or **Edit**. A literal duplicate is thrown away by whoever brought it in.
3. Choose **Clear: place it now**. If all cards are separate, choose **Place this one first**; the others come up straight after.
4. **Then place it:** whoever brought it in drags the card or taps the spot. Don't debate for long. In doubt? Ask: do we need to do something about this? Yes means above the line. A card cannot stay on the line. Each placed risk gets a number (R1, R2 ...). Then **Done with this risk** (or **Next risk** if another risk is already waiting).
5. Under **More**: **Put everything in the risk matrix** (you place the rest with the team), **Shift the line** and **Close a risk**.

Measures

In groups · then report back

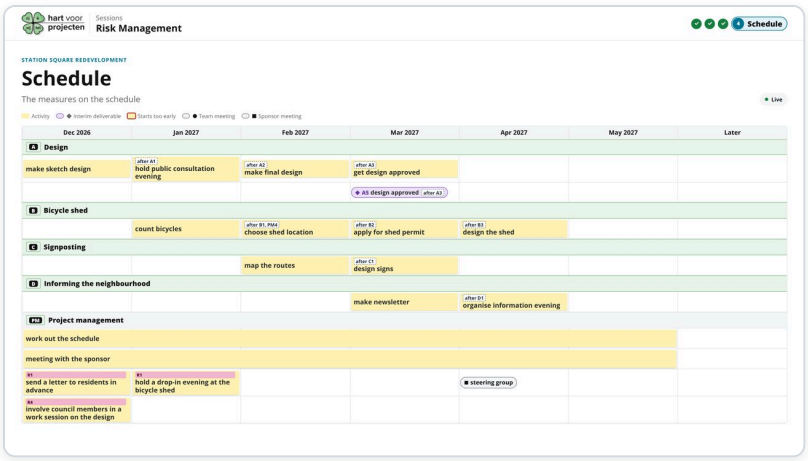
1. Make the groups: the tool divides the participants and the risks above the line. Who is where: **Change the groups**; which group gets a risk, you choose at the risk. Small team? Under More: **With the whole team**.
2. Choose **Let the groups start**. Each group works on one device, preferably a laptop (**Work here**). For each measure: what and who, in concrete terms (reduce, avoid or transfer). The first name is the **owner**; that can be someone from outside the team, for example the sponsor or client. Done? **Take one more**.
3. **Collect work so far**, and **finish the group work** when time is up.
4. **Reporting back:** put a group on the screen; the team adjusts or drops measures. Choose **Adopt**, for the whole group or for a single measure. At the top is *No measure yet*: think of one together (**+ Measure**) or leave it as an open item. Under More: **Adopt all**, **Reopen the groups**, **Review the risks...** and the Schedule measures switch.



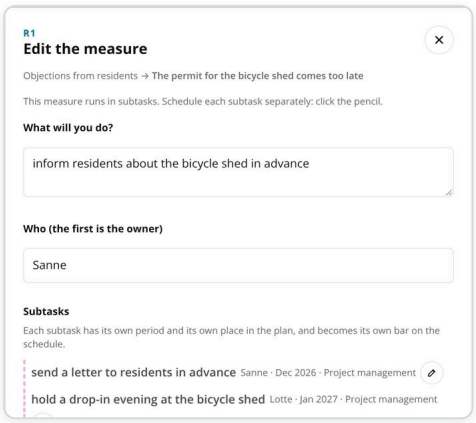
A group on the laptop: the worklist with the measures.

Schedule

In groups or plenary



The presentation screen at Schedule. The measures with the pink label of their risk; a label such as *after A1* shows what a bar waits for.

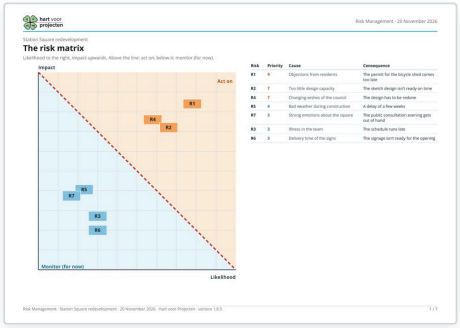


A measure split into subtasks, each with its own period.

1. Schedule only takes part when **Schedule measures** is switched on, and only with the adopted measures and the groups from Measures. Change the groups under More, or use the drop-down to move a risk to another group: its measures go with it.
2. Each group gives its measures a period, a place in the plan and the activity that waits for it: a draft, dashed on the schedule. You add a measure yourself with **+ Measure…** under More, even while the groups are planning. To change or remove one, use the pen, also once it is in the plan. Does a measure run in stages? In its window the group splits it with **+ Subtask**: each subtask gets its own period and its own bar.
3. Finish the group work and choose **Put in the plan** group by group: the measures (or their subtasks) are then activities with the label of their risk. Then **Let everyone move cards** until the schedule works. *after R2* on a bar: it waits for a measure for R2 that is not in the plan yet.
4. Prefer to work with the whole team? Then, before **Let the groups start**, choose **With the whole team** under More: each measure gets a suggested period; drag or edit, and choose **Put everything in the plan**. Put **Review the risks** on the schedule as a meeting. If you switch Schedule measures off later, whatever is already in the plan stays there.

Wrap-up

Download the **risk analysis** as Excel (the tabs Risk matrix, Risks and, if there is one, the plan), as a PDF (the risk matrix with a table next to it, the risk list with the measures and their owner, the agreements and open items, and the plan if there is one) or as an image. A risk above the line without a measure becomes an open item in the agreements. With Schedule you also download the **updated activity plan** as Excel, as a PDF and as a progress file for Activity Plan: there the measures (and subtasks) are ordinary activities with the label of their risk.



A next meeting? Open the progress file (**Open progress file**) and choose **New meeting**: the risks, their place, the adopted measures and the agreements stay; at Measures you let the groups start again. In Prioritise, **Put on the table again** (under Discuss again) puts a risk back on the table so you can adjust it; the previous priority is shown ("was 7, now 4") and in the column Previous. Then close (chapter 12).

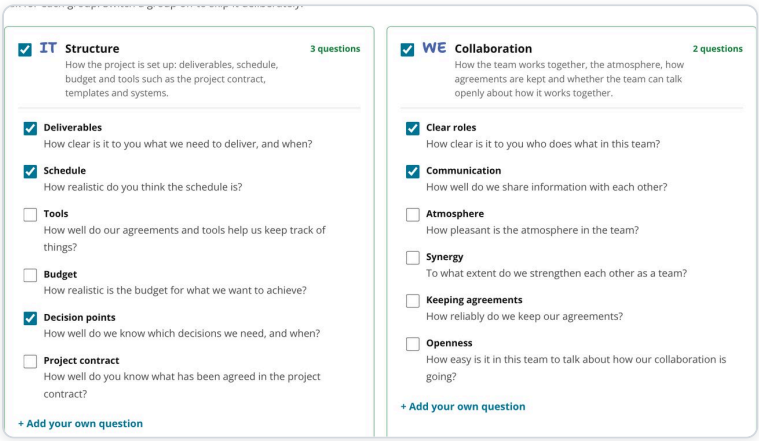
Project Scan free

Map out together where the team stands on the success factors of Project Driven Creation. For each question, everyone chooses a score from 0 to 10 on their own phone, and the picture of the whole team appears on the presentation screen. Together you discuss what it means and what you agree on. The Project Scan is always free and does not use your start code.

How to facilitate the Project Scan

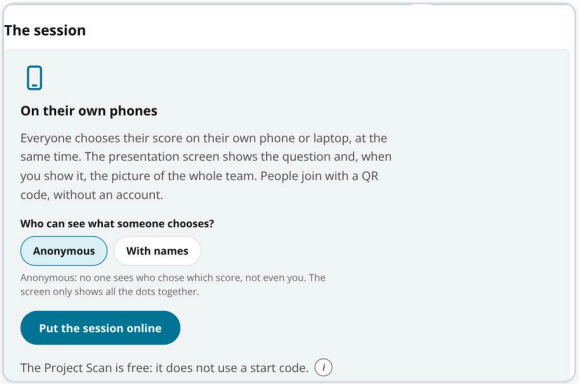
1. **Put the session online** and open the presentation screen.
2. **Let everyone join** with the QR code on the screen, on their own phones.
3. **Ask the scaling question.** Everyone chooses a score from 0 to 10 at the same time. If someone has no phone, you tap in their score.
4. **Show the picture** and discuss it together. Stay neutral: every position is information.
5. **Make an agreement**, and ask who will take extra responsibility for it.

The set-up



For each group of success factors, choose which scaling questions you ask: IT (structure), WE (collaboration), I (commitment) and THEY (environment). Turn a group off to skip it deliberately. You can add a question of your own too.

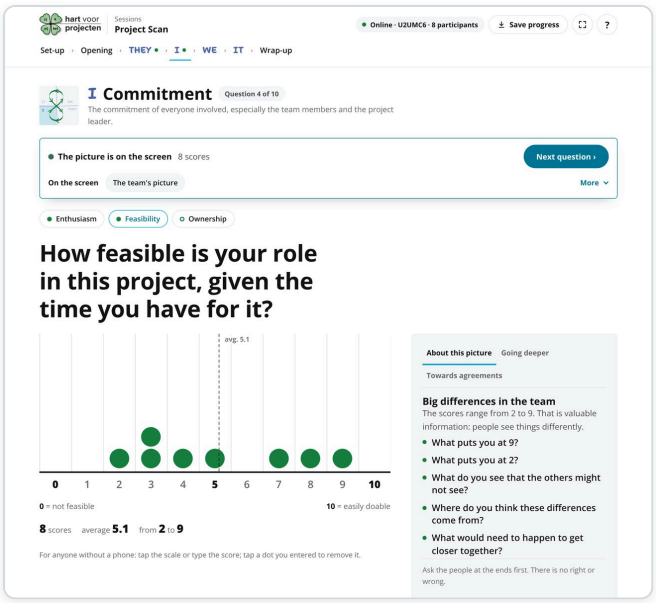
Chosen a lot of questions? Discussing them takes quite some time; then don't include all four groups.



Under **The session** you choose who can see what someone chooses: **Anonymous** (no one sees who chose which score, not even you) or **With names** (you see the names while people are choosing; the screen and the phones only when the picture is shown). After the first question, this choice is fixed.

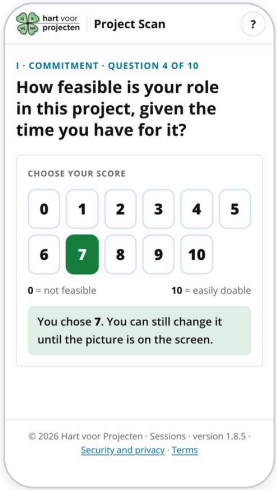
Put the session online and open the presentation screen. If you then view the example, the online session stays; with **Continue with the online session** you carry on with it (then check the name and the questions). **Prefer a line in the room?** Ask everyone to stand along a line from 0 to 10, and tap in the scores.

A question

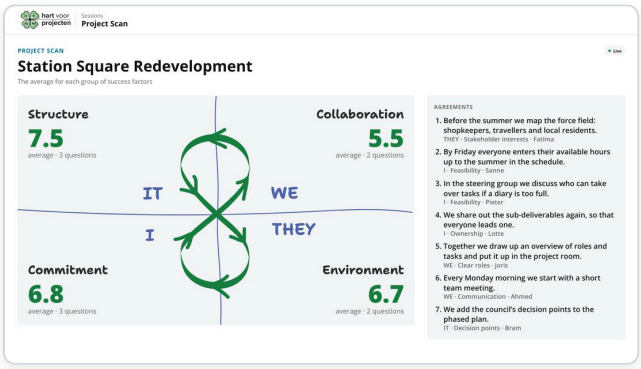


Your screen during a question, with the team's picture and the conversation guide; the agreements are below it.

1. The question opens when you go to it. Everyone chooses a score from 0 to 10 on their own phone, at the same time. For anyone without a phone: tap their score on the scale.
2. Show the picture once everyone has chosen. Until then, you only see how many people have chosen (and who hasn't yet); after that, the screen, the phones and you see all the dots.
3. Discuss the picture. Stay neutral: every position is information. The conversation guide adapts to the picture.
4. Make an agreement and ask who will take extra responsibility for it. The agreements appear on the screen straight away.



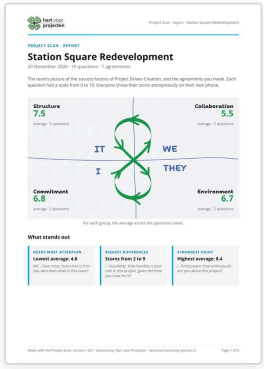
Wrap-up: the overall picture



The overall picture on the presentation screen, with the agreements.

Discuss what stands out and save the **report** as PDF or Word. Choose **Delete online session** when you are done.

Another Project Scan? Choose **New session**: this also deletes the online session. Then put it online again; the team joins with the new code.



CHAPTER 10 · TOOL

Goals-Efforts Network

Together with the programme team, turn the vision into a goal tree: the main goal, the subgoals and the operational goals, and below them the efforts that contribute to them. Together, that is the goals-efforts network.

STEP	WAY OF WORKING	WHAT YOU DO
Opening	Plenary	The vision and the layers of the goal tree on the screen, with Balm if you like; edit the vision if needed.
Goals	In groups · then plenary	Form groups; each group puts the goals in a pyramid. Then you build the shared network together.
Operationalise	In groups per subgoal	Choose and divide the subgoals; report back per subgoal and adopt the operational goals.
Efforts	Individually · in silence	Open input; merge duplicates.
Connect	In groups per subgoal, or plenary	Report back per subgoal, or connect in plenary yourself; discuss the gaps and record agreements.
Wrap-up	Plenary	Show the network, download it and close the session.

The goal tree in brief

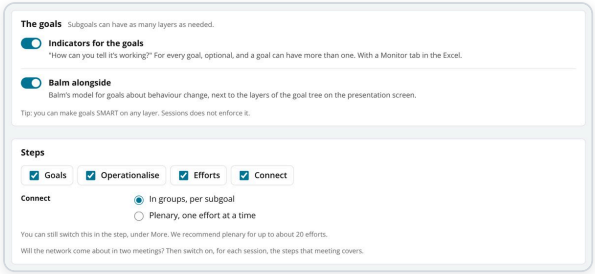
- **Vision**: the inspiring perspective, at the top.
- **Main goal**: the strategic programme goal.
- **Subgoals**: the larger components, often in several layers. A goal is often a means to a higher goal.
- **Operational goals**: specific goals for the shorter term; they make a subgoal concrete.
- **Efforts**: an activity or project (yellow), or a result or product (pink).
- Work on the goals for no more than 2 hours per session (Goals and Operationalise together), preferably early in the day.

It is a **network**, not a tree that only branches downwards: a goal or effort can contribute to several higher goals, and every link is a line. The **gaps** show where efforts are missing or contribute to nothing. Any goal can be SMART, on any layer; Sessions does not enforce it.

Every card has a fixed code: M (main goal), S1 (subgoal, also in a lower layer), O1 (operational goal) and E1 (effort). A code stays; only a main goal that becomes a subgoal gets an S code.

> **Two meetings.** The network often does not come about in one meeting. Then do it in two sessions: first collect the efforts with project leaders and experts, then sharpen the goals and connect them with a smaller group (Programme Management reader, p. 33). For each session, switch on the steps you need and continue with the progress file. Each meeting is a session of its own: within 7 days after the code was used with the same start code, after that with a new one (chapter 2).

The set-up

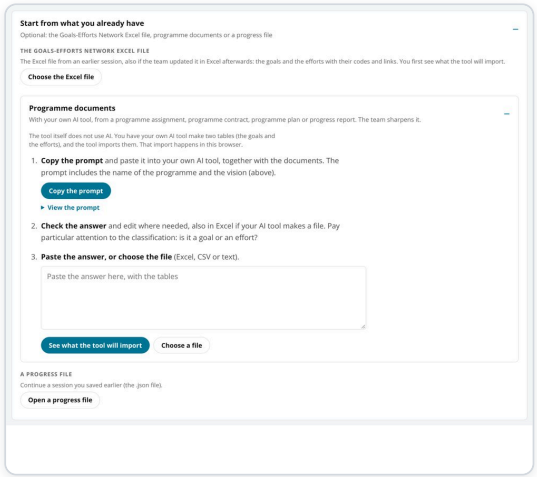


- **The vision** in a block of its own: type or paste it, and choose an image if you like (png, jpg or webp; also later under Edit the vision). The image appears with the vision on the screen, for the team, in the PDF and in Word.
- **Indicators for the goals** (off by default): for every goal the question "How can you tell it's working?", optional, and a goal can have more than one; with a Monitor tab in the Excel file.
- **Balm alongside** (off by default): Balm's model next to the layers on the presentation screen. You can also switch it in the opening.
- **Steps**: Goals, Operationalise, Efforts and Connect can each be switched on or off.
- **Connect** in groups per subgoal (default) or in plenary, one effort at a time. You can also switch in the step, under More.

Subgoals can always have as many layers as needed. The time estimate (collapsed): about 2 hours and 45 minutes with all steps.

Start from what you already have

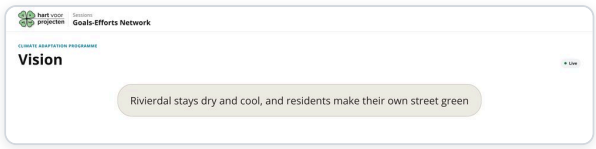
- **The Goals-Efforts Network Excel file** from an earlier session, also if the team updated it in Excel afterwards: the goals and efforts with their codes and links.
- **Programme documents**, with your own AI tool: choose **Copy the prompt**, paste it into your AI tool together with the documents (such as the programme plan or a progress report), check the answer and paste it back, or choose the file. The tool itself does not use AI.
- **A progress file** from an earlier session: everything comes along. Recommended for a next meeting.



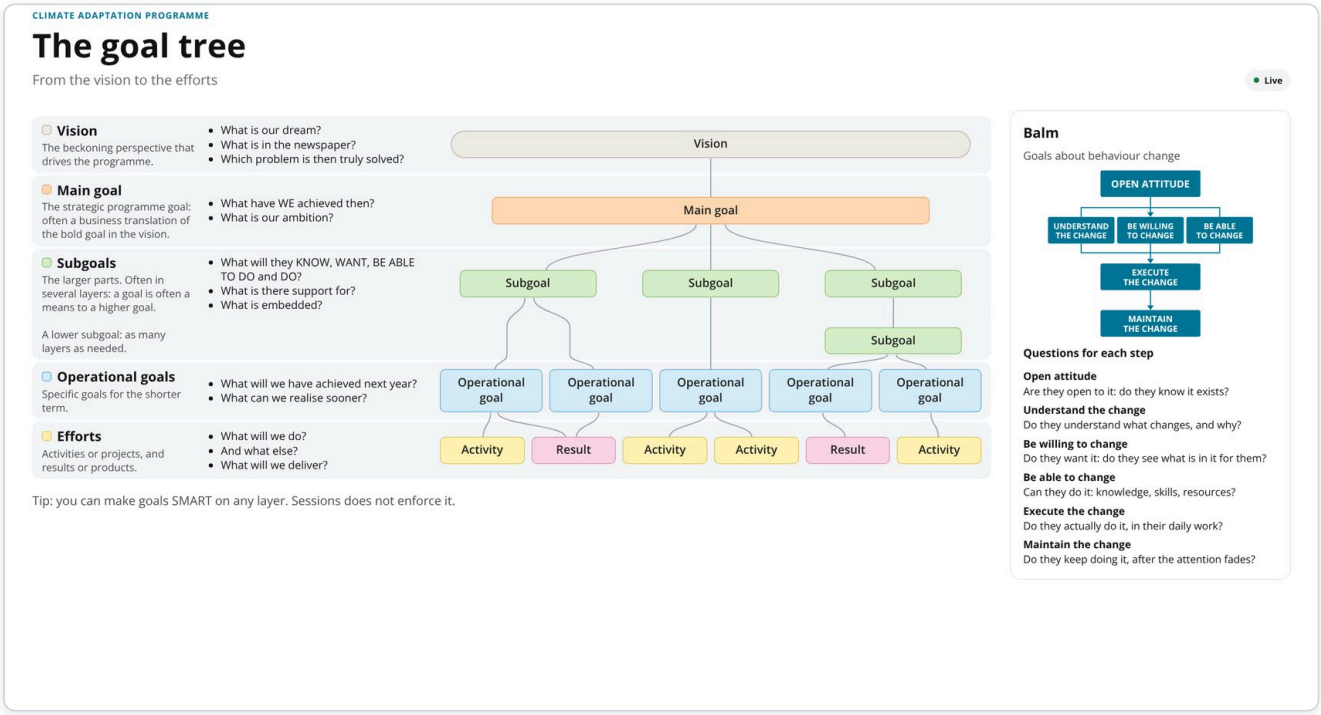
With the Excel file and the programme documents, you first see what the tool reads in, with any messages. If there is already something, choose Add to it or Replace; then choose **Read in** (more main goals: type a new one above them). Goals that were read in get the label *from the plan*; efforts that were read in appear for the team under Already there. The presentation screen does not show source and doubt.

Opening Plenary

1. Have everyone join with the address and code (laptop) or the QR code (phone) on the screen. Joining on a laptop is recommended: it gives more room on screen. Then choose **Put the vision on the screen**: the vision appears large on the presentation screen and, while it is there, on the team's devices too.
2. Does something need to change? Choose **Edit the vision**: what you type appears on the screen straight away. No vision yet? Then the screen shows the guiding questions. Tip: let participants write down their vision beforehand.
3. Choose **Put the layers on the screen**: an empty goal tree with, for each layer, what it is and the guiding questions. With **Balm alongside**, Balm's model appears next to it, for goals about behaviour change. Then the main button offers *The example*: a fictitious, filled network.



The vision on the presentation screen.

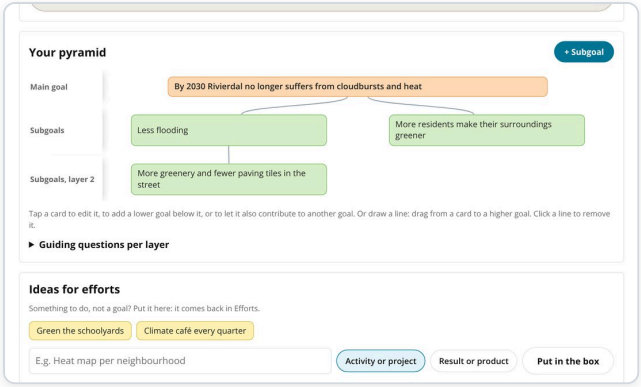


The layers on the presentation screen: an empty goal tree with, for each layer, what it is and the guiding questions, and Balm next to it.

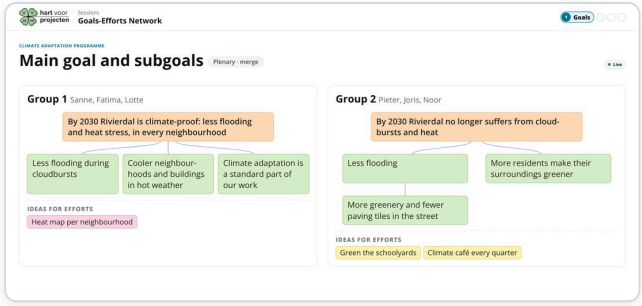
> **Goals about behaviour change?** Then it helps to use Balm's model: open attitude; understand, be willing to and be able to change; execute the change; maintain the change. The model also appears with the group's guiding questions and in How this step works.

Goals

In groups · then plenary



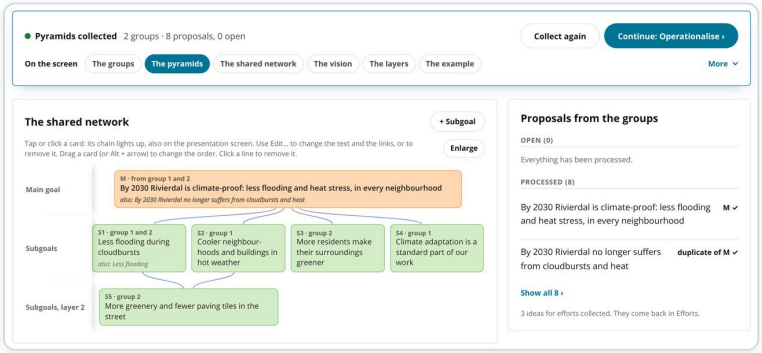
A group puts the main goal and the subgoals in a pyramid. Anything that is clearly something to do goes in the box.



The presentation screen puts the groups' pyramids side by side.

1. The tool proposes small groups from Who is taking part, three by default. With **Change** at the group allocation you choose another size (alone, pairs up to five) or a fixed number of groups. Drag a name to swap someone. Choose **Let the groups start**. Each group works on one device, preferably a laptop.
2. The group puts the goals in a pyramid, with the vision at the top and the guiding questions per layer. If there already is a main goal, it is fixed at the top. Formulate in '-er' terms: better, more, less. Stay out of the discussion whether something is an end or a means: write everything down and put it in relation. In doubt whether something is a goal or an effort? Goals are about change, efforts are things to do: they go in the box *Ideas for efforts*. To remove a link: click the line and choose **Remove** (the same in the network on your screen).
3. Look along with **View the work** at a group; use **Show on the screen** to put that work on the presentation screen. Explain it again? Choose *The layers* or *The example* under On the screen; the groups keep working.
4. Choose **Collect the pyramids**: the screen puts them side by side. What do you recognise, what is a duplicate, what contributes to what?
5. Build the shared network together under *Proposals from the groups*: **Adopt**, **Is a duplicate of…** (both texts stay visible) or **Contributes to…** (the links from the pyramid are already ticked). A goal gets its code when you adopt it.
6. Tap a card in the network and choose **Edit** for the text, the links, Is a duplicate of… (with a goal of the same type) or removing it; with **+ Subgoal** you add what is missing; use **Enlarge** to give the network the full width. Once there is a main goal and a subgoal, choose **Continue: Operationalise ›**.

More than one main goal? On the main goal, choose **Edit** › **Make it a subgoal…** and type a new main goal above it; put the other one next to it. A second main goal from a group: *Side by side*.

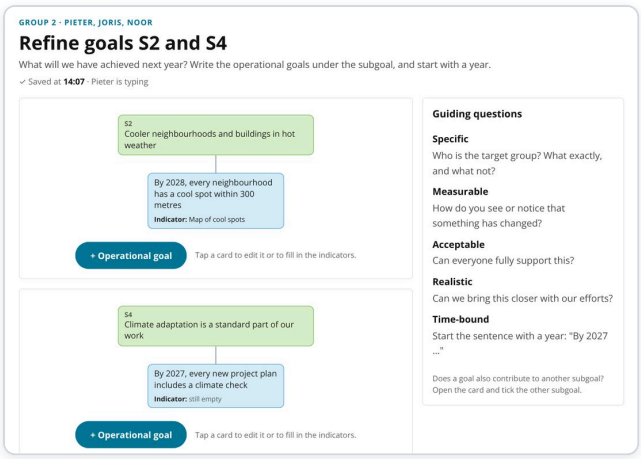


Your screen during Goals: on the left the shared network, on the right the groups' proposals.

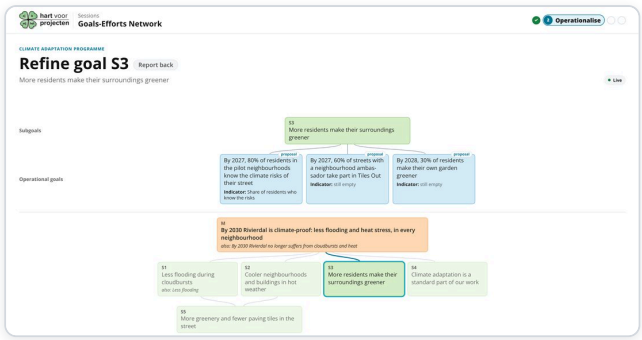
> **A small team?** Choose **Plenary with the whole team** under More and then **Open input**: everyone sends in goals, and on a laptop everyone sees the pyramid grow. You build the network with them.
>
> **Online or hybrid?** Give each group its own room in the video call; one person operates the group's device.

Operationalise

In groups per subgoal



A group makes its subgoals concrete, with the guiding questions on the right. Here the indicator is switched on.



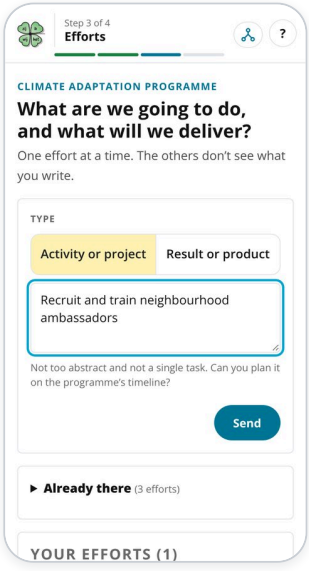
The presentation screen during reporting back, headed "Refine goal S3": the proposals for one subgoal, labelled proposal, with the whole network small below.

1. Choose which subgoals take part: by default the lowest subgoals of each branch; tick more or untick one. The tool divides them among the groups; a group can have more than one subgoal. Adjust the division if needed and choose **Let the groups start**.
2. Each group writes the operational goals under its subgoals (**+ Operational goal**). Start with the year: "By 2027 ...". Make it measurable, specific, acceptable and realistic. If the indicator is on: how can you tell it's working? With **Vision and network** in the header, the team looks back at the vision and the network at the start of the step (also in Efforts and Connect).
3. Want to see how far the groups are in between? Choose **Collect work so far**. When they are done, choose **Finish the group work**: you get the latest version from each group, and then all devices follow the presentation screen. Need more time after all? **Reopen the groups** is under More.
4. Choose **Start reporting back**: the proposals appear on the screen per subgoal. Adopt what is right; use **Next subgoal ›** to adopt the rest (at the last subgoal: **Adopt the proposal**). The team follows the screen on their own laptop or phone; the whole network is small alongside (**With the network alongside**). Choose **Edit...** to adjust a proposal before adopting it (a goal already in the network on the left: click it). With **Let everyone add** the team gets an input box above the network; what they send in arrives as a proposal from the team.
5. Is the team in doubt about support or feasibility? Add one question mark to the goal, with a short note (Edit, Doubt). The presentation screen does not show it.

Efforts

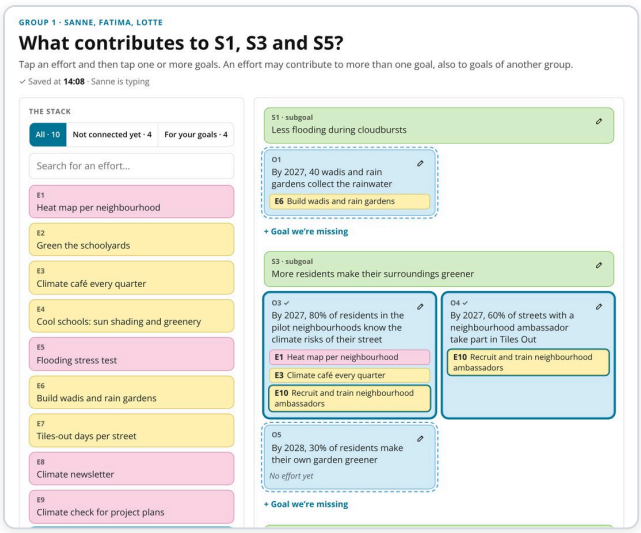
Individually · in silence

1. Choose **Open input**. Everyone writes, without consulting others, one effort at a time, and chooses the type: activity or project, or result or product. Don't connect yet: that comes in the next step.
2. An activity is a noun with a verb; a project can also simply be the project's name. A result or product is tangible: something that can be planned, broken, cancelled or erased. Not too abstract ("implementing a method") and not a single task ("inviting participants").
3. Under Already there, the team sees the ideas from the box, what you read in and what you added yourself. The screen shows the network with a small counter; you see per participant how many have come in. **Vision and network** is in the header here too.
4. Merge duplicates before connecting (*Possible duplicate*, **Merge**). Something missing? Choose **+ Effort** or **Paste a list...**

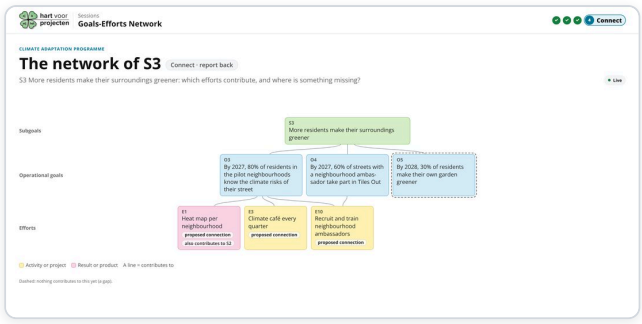


Connect

In groups per subgoal, or plenary



A group: on the left the stack, on the right the goals of its subgoals. Tap an effort, then tap the goals.



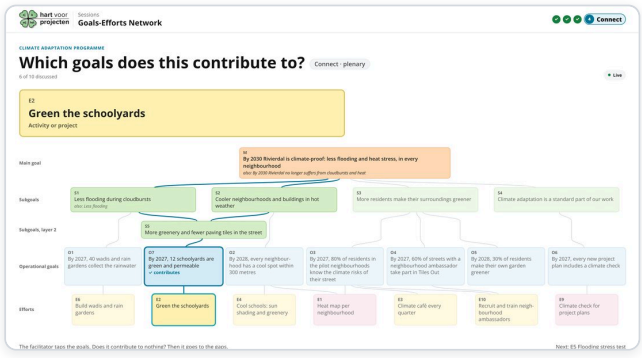
The presentation screen during reporting back: the network of one subgoal, with the gaps dashed.

In groups

1. The Operationalise groups connect efforts to their subgoals (now all subgoals): choose **Let the groups start**. On the group's laptop the whole stack comes first (*All*); *Not connected yet* shows what contributes to nothing yet. If the stack is large, it helps to search.
2. Connect each effort to the goals it contributes to, usually an operational goal. A goal of another group is possible too (**Also contributes to a goal of another group…**): that is a proposal, which comes up when you discuss that subgoal. The group sees what the other groups have already connected. A proposed goal is also a place to connect to; if you adopt it when reporting back, its connections come along.
3. Something missing? **+ Effort we're missing** (labelled proposal), a proposal for a goal with the pencil, or **+ Goal we're missing**.
4. Choose **Finish the group work** (in between: **Collect work so far**): you get the latest version from each group and all devices follow the screen. Then **Start reporting back**: for each subgoal you adopt the connections or leave them out; **Next subgoal ›** adopts all connections to the goals of that subgoal (at the last one: **Adopt the connections**). A proposed goal (labelled proposal): adopt it or leave it; if one is still open, the tool asks first. Merge duplicates. Saving progress with work of the groups still open? The tool asks first: it does not come back in a next meeting.

Plenary

In **plenary** (in the set-up, or under More), one effort is on the screen, with the network of the goals; the goals it contributes to get a ✓. The team thinks out loud; you tap the goals and continue with **Next effort ›**. Switching to plenary adopts the groups' open connections. We recommend plenary for up to about 20 efforts.

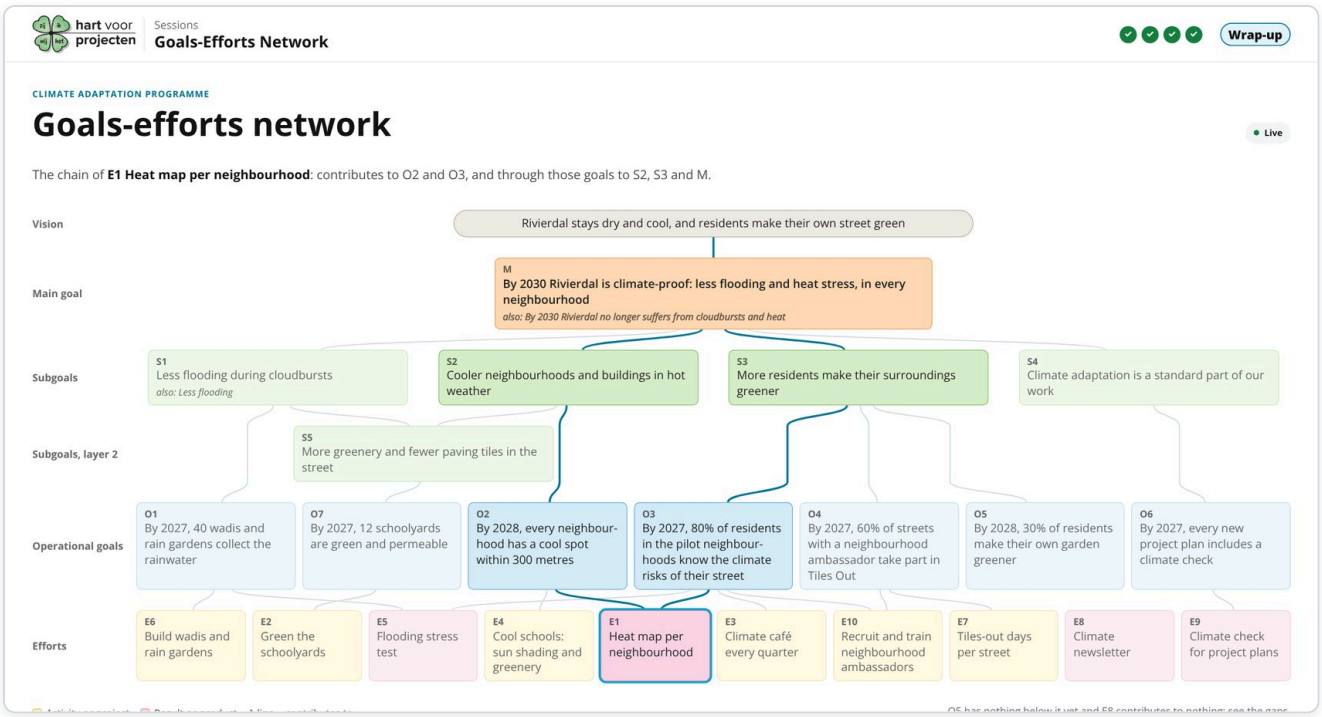


Plenary on the presentation screen: one effort and the network, with a ✓ at the goals you tap.

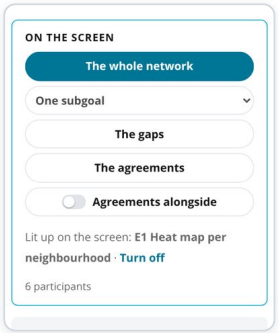
Afterwards

You see the whole network with the gaps dashed, and two lists: goals nothing contributes to yet, and efforts that contribute to nothing. Solve what is wrong, or leave it on purpose. Record agreements, for example who works out the network further; with **Agreements alongside** they appear next to the network, a subgoal or the effort.

Wrap-up: showing the network



The whole network on the presentation screen. The facilitator chose E1 Heat map per neighbourhood: its chain lights up, via O2 and O3 to S2, S3 and M.



- **Views** for you: The network, One subgoal, Gaps and As a list. If it doesn't fit, the cards get smaller; on the screen the efforts then appear as a number per goal.
- **Highlighting:** tap or click a card and its chain lights up (the higher goals it contributes to and what contributes to it); it also lights up on the presentation screen and for the team following the screen. Tap again, **Turn off** or Esc turns it off; so does putting something else on the screen. Want to show a chain in another view? Choose the view first, then tap the card. Drag a card sideways to change the order in a row.
- **On the screen** (the sidebar): the whole network, one subgoal, the gaps or the agreements; with **Agreements alongside** next to the network.
- **The team** sees the network (on a phone as a list per layer) and the agreements; they can still send in an agreement.

DOWNLOAD	WHAT IT CONTAINS	WHAT FOR
Excel	The tabs Goals, Efforts, Network, Network as picture (the network in the cells), Gaps, Agreements and Session; with the indicator also Monitor. With the codes, the links, doubt, source and who added it.	Working on it further; it can be read in again in a next session
PDF	The vision (if it has an image); the whole network; for each branch (a subgoal in the first layer) an enlargement with what contributes to each goal; the gaps and the agreements. Not who added what.	The sponsor and the programme file
Word	The vision and the goals per layer with their codes, what they contribute to and which efforts contribute to them; with images of the whole network (on a landscape page) and of each branch.	The goals in the programme contract
Image	The whole network as a picture.	A presentation or the programme plan

Also save your progress: with it, you continue in a next meeting. Closing and deleting: see chapter 12.

CHAPTER 11 · TOOL

Programme Course

Look back on the past period with the programme team: what you have done, what it has delivered and what effect you notice. Then you build a timeline together for the coming period, building on that overview.

STEP 1 · REVIEW

Gather together	Plenary · collecting
Organise by line	In groups · organising
Report back	Plenary · looking at it together
Actions and agreements	Plenary · recording

STEP 2 · OUTLOOK

Individual input	Individually · on the timeline
Merge and organise	In groups · organising on the timeline
Report back	Plenary · looking at it together
Walk through together	Plenary · the whole timeline

Three colours

Everything the team contributes has a colour. That way you see at a glance the difference between being busy and achieving something.

Efforts
What did we do? Looking ahead: what will we do?

Deliverables
What was delivered? Looking ahead: what will we deliver?

Impact
What difference do we notice? Looking ahead: what do we expect to notice?

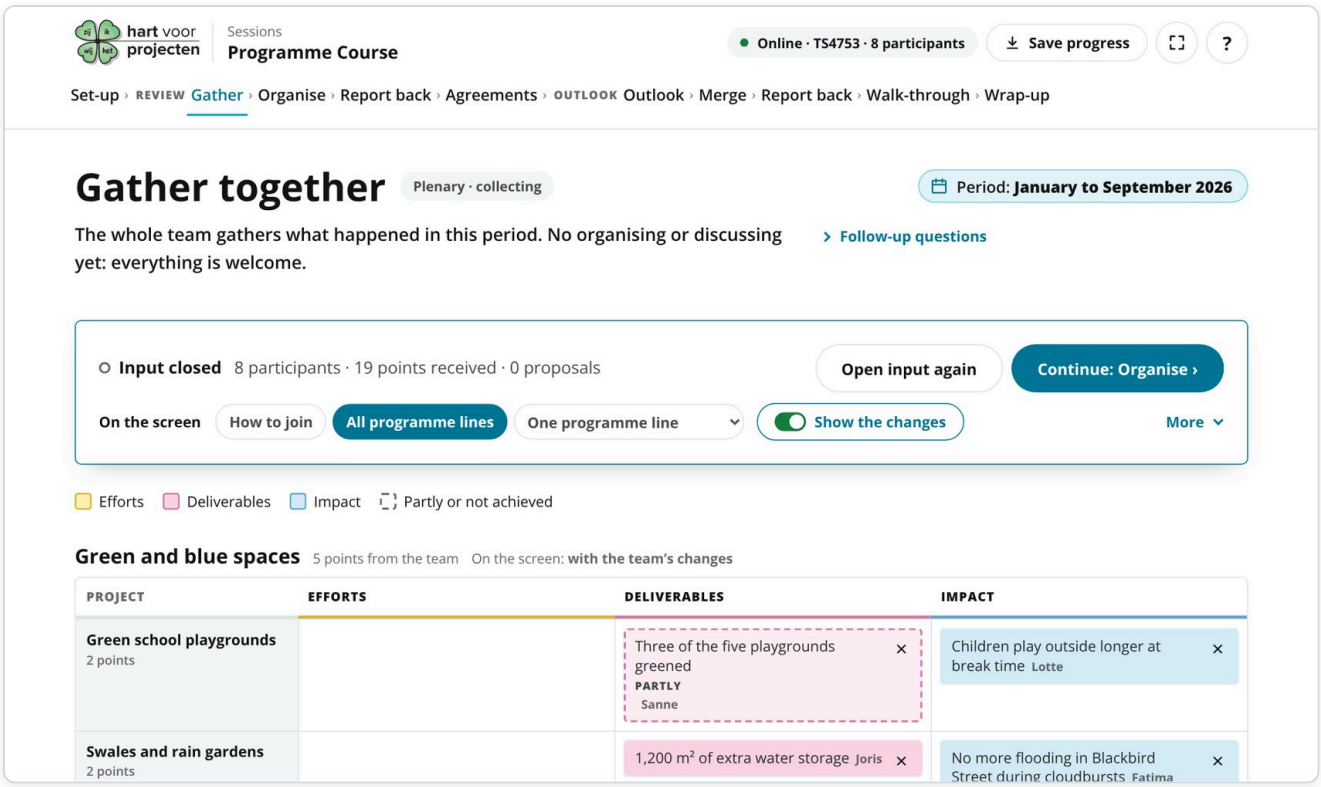
Whatever was not (fully) achieved is shown **dotted**: partly or not achieved. It stays visible, so that it is carried into the outlook.

The set-up

- **The structure of the programme:** for example programme lines with projects. You can fill in beforehand anything that is already known, such as the plan for the coming period.
- **The period** you are looking back on.
- **The timeline** for the outlook: per week, 2 weeks, month, quarter, half year or year, from … up to and including …, then larger steps if you like, and with a Later column. During the outlook you can still split a period and merge it again.

> **Groups per line.** In Organise and Merge, each group works on one programme line on one laptop. If you skip the groups, the proposal is what the team contributed itself, and you adopt that during Report back.

Step 1 · Review

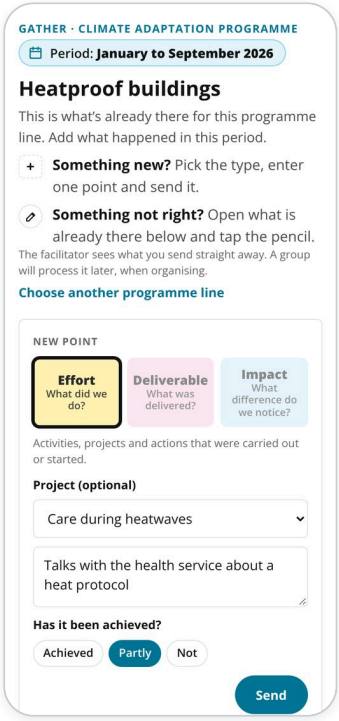


Your screen during Gather together, after input has closed: for each programme line, the team's points in three colours.

Gather together

Plenary · collecting

1. Explain the colours, let everyone join and open input. One point at a time, with the colour and the line.
2. What was not (fully) achieved belongs here too: they choose achieved, partly or not.
3. Show the changes once everyone is done (**Show the changes**) and let people explain briefly. Questions are fine, judgements not yet.



Organise by line

In groups · organising

Form groups, one per line, each on one laptop. Choose **Open up: groups choose**, give the assignment and agree how long they have. Then finish: you get the latest version from each group.

Report back

Plenary · looking at it together

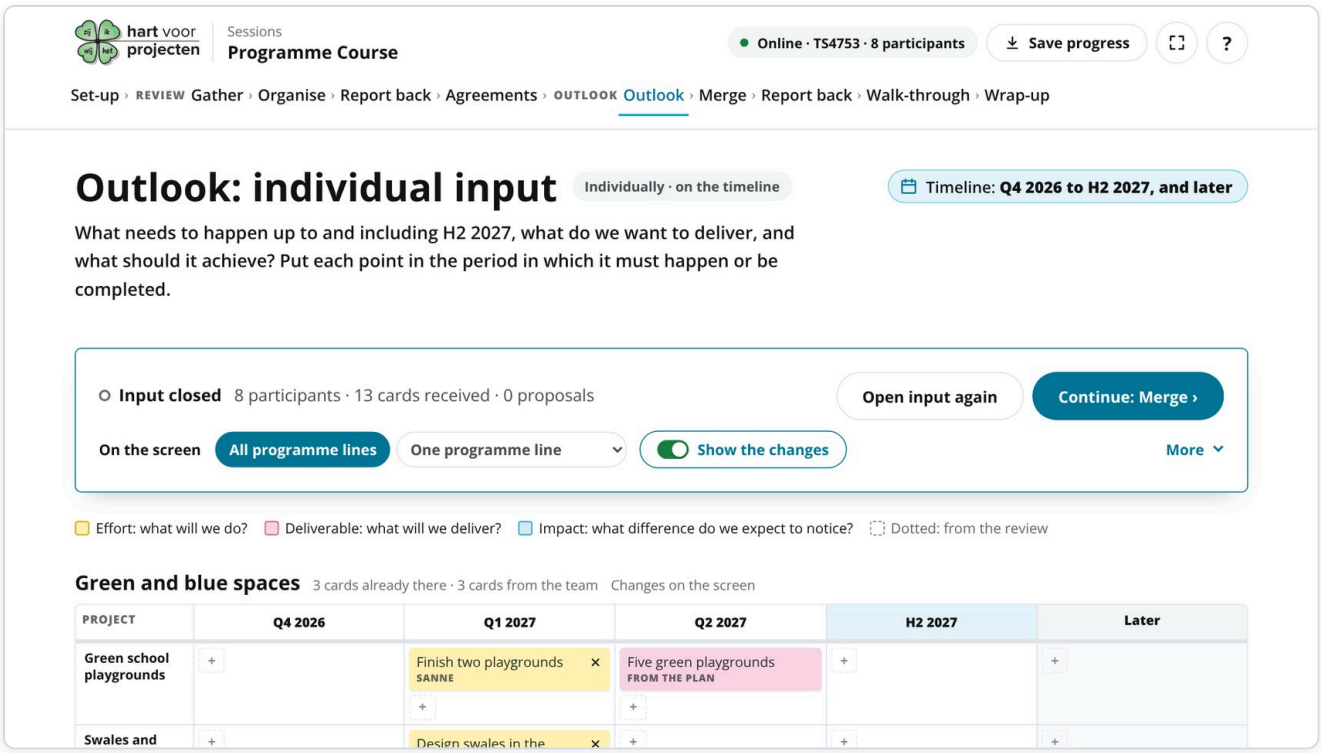
Choose a line: the screen shows the group's work. The group explains it briefly; at first, the others only ask clarifying questions. Adopt it into the overview and together fix what is wrong or missing. With **Let everyone add** the whole team can still add something.

Actions and agreements

Plenary · recording

Type the actions and agreements that come out of the review into the list, with who will pick them up; they appear on the screen straight away. Do team members want to enter items themselves? Open input. Read through the list together: is everything clear, and is nothing listed twice?

Step 2 · Outlook



Your screen during Outlook (individual input): the timeline per programme line, with the team's cards.

Outlook: individual input

Individually · on the timeline

Open input. Everyone puts cards on the timeline and can change what is planned or propose removing it. Whatever was not (fully) achieved in the review, they put on the timeline with one click. Show the changes once everyone is done: you will see duplicates too.

Merge and organise

In groups · organising on the timeline

First show all cards and decide on proposed new lines. Then each group completes the timeline for one line: merging duplicate cards, wording them sharply, putting each card in the right period.

Report back

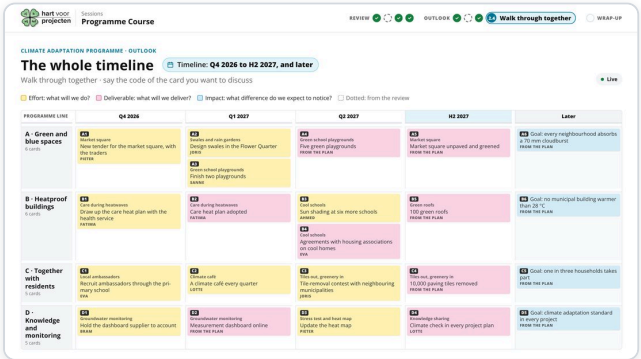
Plenary · looking at it together

For each line, the group's proposal, with the review alongside. Is the planning correct, feasible and complete? Adopt it and adjust it together.

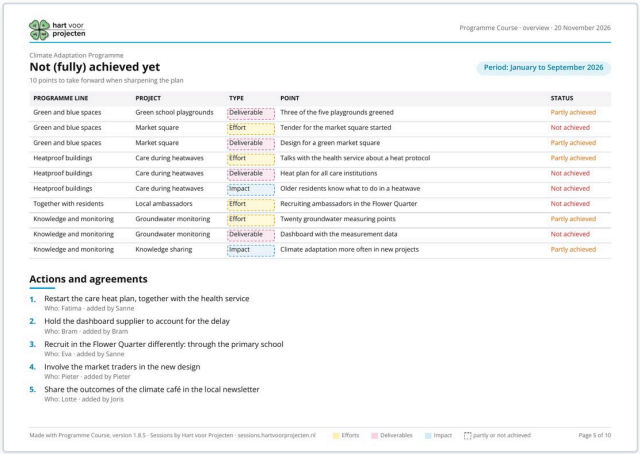
Walk through together

Plenary · the whole timeline

Go through the periods from left to right: where is it too full, where too empty? With **Let everyone edit**, team members make changes themselves; if there are two changes to one card, you choose. Too full? Click the column heading to split it. Under More: **Actions and agreements (...): view or add** and **Show the actions and agreements on the screen** (next to the timeline).



Walk through together on the presentation screen: the whole timeline.



Wrap-up: the overview as a PDF (also as Excel).

CHAPTER 12

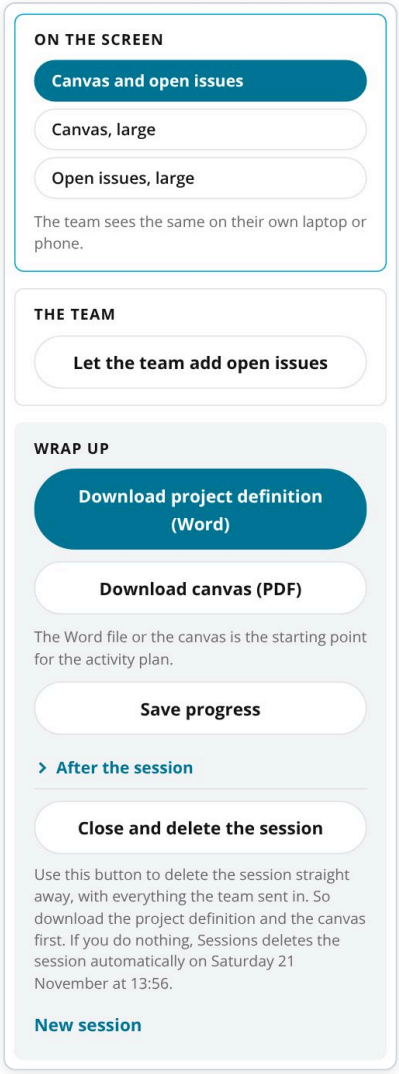
Wrapping up and continuing later

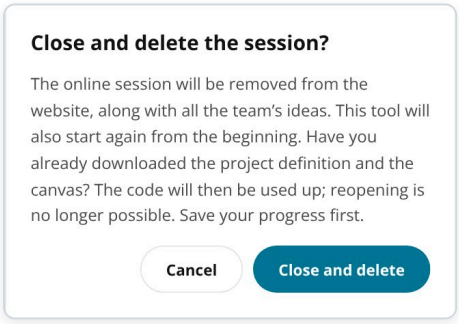
In the last step, **Wrap-up**, you choose what the screen shows, download the result and close the session. The buttons are in the sidebar.

1. **Download the result.** Per tool as PDF, Excel or Word, sometimes also as an image: see the overview in chapter 1 and the chapter of the tool.
2. **Save your progress.** A file (.json) with everything from the session. With it, you continue later or change something.
3. **Choose Close and delete the session.** The online session disappears from the website straight away, with everything the team sent in. If the code was used, it is then used up and you can no longer reopen it. The team sees *This session has ended*.

If you do nothing, Sessions deletes the online session automatically, 24 hours after you put it online. In the Project Scan the button is called **Delete online session**; the Project Scan does not use a code.

Download first. Your own browser makes downloads and progress files; they are not on the website. After deleting, you only have what you downloaded or saved.

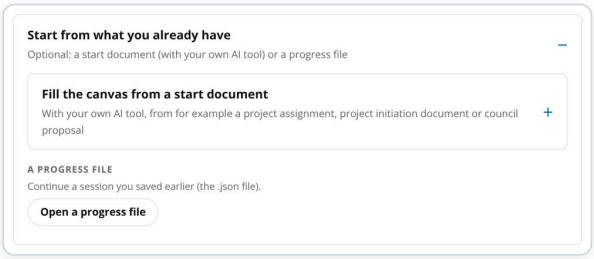




Sessions always asks once more.

Continuing later

Finishing the session on another day? Save a progress file at the end. Open it later in the set-up, under **Start from what you already have** › **Open a progress file**, or with **Open progress file** at the bottom. Within 7 days after the code was used, you put the session online again with the same start code, as often as needed. After that you need a new code. The Project Scan does not use your code: you reopen it until the code's end date.



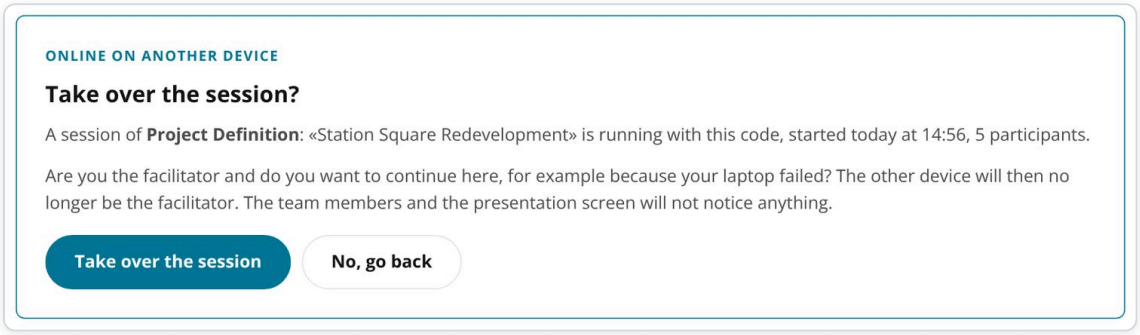
In that case, don't choose Close and delete the session. Let the online session expire, or delete it with **Delete online session** (in the set-up, under The session): then you can reopen it.

CHAPTER 13

If something goes wrong

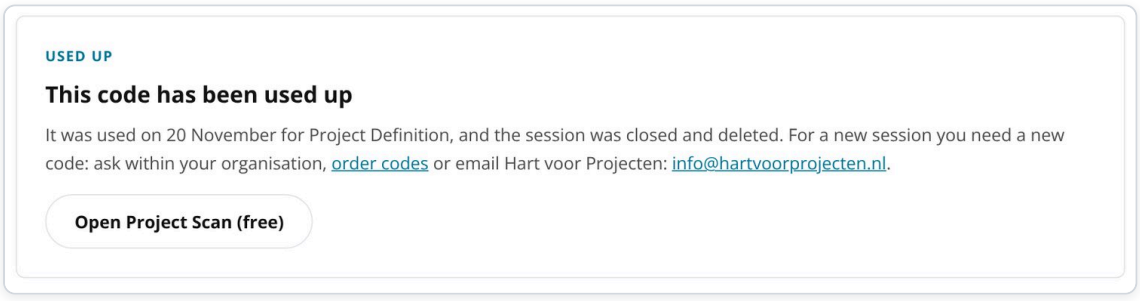
For you

- **The screen is not keeping up.** Check at the top whether your laptop is connected (Online or No connection). The screen then catches up by itself.
- **A team member cannot get in.** Ask them to scan the QR code again or type the session code. Anyone who already joined on the same device comes back with the same name.
- **The session is open in two tabs.** Work in one tab. The tab where you last did something handles what the team sends in.
- **Want to be sure of what you have?** Save your progress. With Open progress file you continue later.
- **Does your laptop fail?** On another device, go to the start screen, enter the same start code and choose **Take over the session**. The team will not notice anything. Was the big screen or projector connected to your laptop? Then open the presentation screen again. Taking over is not possible in the Project Scan: put a new Project Scan online on the other device (with your latest progress file, if you have one); the team joins again with the new QR code.



On another device: taking over the session.

- **This code has been used up.** The code was used and the session was closed, or the 7 days have passed. For a new session you need a new start code. The Project Scan stays open.



For the team

- **Nothing new?** Wait a few seconds: your laptop or phone fetches the latest state by itself. If nothing happens, reload the page.
- **No connection?** Check that your Wi-Fi or mobile data is on.
- **Do you see a different screen or do you have to start again?** Open the address again and enter the session code, or scan the QR code. On the same device, you rejoin with the same name.
- **Open the session in one tab at a time.**

Team members also find this under the question mark on their own screen.

CHAPTER 14

Frequently asked questions

What does the team see?
What is on the presentation screen and what appears on their own laptop or phone. The team does not see your control block or More.

Do team members need an account or an app?
No. The QR code or the session code is enough, plus a first name.

Can someone join on a phone?
Yes, with the QR code. A laptop is recommended: it has more room.

Can the session be in English?
Yes. Choose English under Session language in the set-up. The team gets the language of the session. Once the session is online, the language is fixed.

Can I finish the session later?
Yes. Save your progress and open it later with Open progress file. Within 7 days after the code was used, you put it online again with the same start code; after that you need a new code. The Project Scan does not use your code: you put it online again until the end date of the code.

When is my start code used up?
7 days after the code was used (2 participants at the same time), or straight away when you close and delete the session. If you delete a session before the code is used, the code is new again.

Do I use the code if I'm just practising?
No. Only when 2 participants join at the same time. You and the presentation screen do not count.

My laptop failed. Have I lost everything?
No. The session carries on on the website. Enter the same start code on another device and choose Take over the session. Not in the Project Scan: on the other device, open your latest progress file (if you saved one) and put a new Project Scan online.

Can I change something the team sent in?
Yes. You keep the current state: you edit points or remove them. How exactly is explained for each step under the question mark.

Does Sessions use AI?
No. In some tools you can copy instructions for your own organisation's AI tool, with documents you choose yourself. Sessions reads in the answer in your browser.

What does Sessions store, and for how long?
See chapter 15, and Security and privacy at the bottom of every page.

CHAPTER 15

Privacy, help and contact

What Sessions stores

- During the session, the website stores the content of the session (points, ideas, cards, proposals, actions and agreements), the names participants enter (a first name is enough) and, if you added them, your organisation's logo and, in the Goals-Efforts Network, an image for the vision.
- Not stored: participants' email addresses or accounts. Your own browser makes downloads and progress files; they never reach the website.
- Sessions deletes the online session 24 hours after you put it online, or straight away when you close and delete it. It can remain in the encrypted nightly backup for at most 14 days.
- The connection is always encrypted (https).

Everything is in **Security and privacy**, at the bottom of every Sessions page, also as a PDF. The **Terms** are there too.

Help

- **In the tool:** the question mark at the top right, at every step. With the tool's guide as a PDF.
- **For team members:** Help with joining on the start screen, and the question mark on their own screen.
- **About the method:** the PMC Tools on hartvoorprojecten.nl.
- **This manual and the quick start:** the latest versions are always at sessions.hartvoorprojecten.nl/en/manual and /en/quick-start.

Contact and feedback

Questions, or running into a problem? Email **info@hartvoorprojecten.nl**. Tell us which tool and which step, what you did and what you saw; if you add a screenshot, that helps. We would also love to hear your ideas for making Sessions better.

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