Learning Spaces for Sustainable and Responsible Decision-Making

Workshop Design

for Peer Learning on Sustainable and Responsible Decision-Making

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WIRTSCHAFTS UNIVERSITÄT WIEN VIENNA UNIVERSITY OF ECONOMICS AND BUSINESS

UNIVERSIDADE BEIRA INTERIOR

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Introduction

Total Duration: 20 hours (2 days in-person, 1 half-day online)

Objectives:
Equip potential successors of smaller firms with the skills and knowledge to navigate succession-related business situations, including moral dilemmas, through interactive case studies and peer learning. The focus is on developing improved decision-making skills.
Give the participants the opportunity to experiment with the theories and methods learned in the individual on-demand online course.

Day 1: Introduction and Case Study Exploration

Duration: 8 hours (in-person)

Morning Session:

1. **Welcome and Introduction (30 minutes)**
    - Overview of the workshop
    - Objectives and expected outcomes
2. **Ice-breaking Session (30 minutes)**
    - Interactive activity to build rapport among participants
3. **Introduction to Case Study Methodology (30 minutes)**
    - Explanation of the case study approach
    - How to analyze and discuss the case studies

Mid-Morning Break (15 minutes)

4. **Case Study 1: Navigating the Aftermath of the Pandemic or the fragile Balancing of Stability and continuous Adaptation to new Realities (2 hours and 15 minutes)**
    - Scenario: see handout
    - Activities: See groups start working on the case in accordance with the instructions.

Lunch Break (1 hour)

Afternoon Session: 5. Case Study 1: continued (2,5 hours)

5. **Debrief and Reflection (30 minutes)**
    - Groups' reflection on case and findings
    - Facilitated discussion on moral dilemmas identified

End of Day 1

Day 2: Advanced Case Studies and Strategic Planning

Duration: 8 hours (in-person)

Morning Session:

1. **Recap and Reflections from Day 1 (30 minutes)**
2. **Case Study 2: Navigating Resistance to Leadership Transition (3,5 hours)**
    - Scenario: See handout
    - Activities: See groups start working on the case in accordance with the instructions.

Mid-Morning Break included (15 minutes)

Lunch Break (1 hour)

Afternoon Session:

3. **Case Study 3: Balancing Responsibility and Viability: Navigating Sustainability Amidst Economic Challenges (2,5 hours)**
    - Scenario: See handout
    - Activities: See groups start working on the case in accordance with the instructions.
4. **Debrief and Reflection (30 minutes)**

End of Day 2

Day 3: Online Session involving participants from all three countries

Duration: 4 hours (online)

Online Morning Session:

1. Interactive Session: Presentation of main findings and feedback from participants (2 hours)

Mid-morning break (15 minutes)

2. **Presentation of the Wise Up Game for continued learning beyond the training programme (1 hour)**
3. **Final Debrief and Reflection (40 minutes)**
    - Workshop wrap-up and key takeaways
4. **Closing Remarks (5-10 minutes)**

End of Workshop

Additional Components

- **Facilitators:** Academics specializing in SME business succession.
- **Materials:** e.g., Case study handouts and additional material relevant for the workshop
- **Evaluation:** Pre- and post-workshop surveys to assess learning outcomes.
- **Technology:** Online collaboration tools for the virtual session (e.g., Zoom, Google Meet, Miro).

Interactive activity to build rapport among participants

Activity: "Peer Introduction and Storytelling Circle"

Objective:
To build rapport among participants by fostering personal connections and encouraging open communication.
Duration: 30 minutes
Materials Needed:

- Name tags
- Markers
- Small tokens (like stickers or colored dots) for groups
- A soft ball or talking stick

Setup:

- Arrange chairs in a large circle or multiple smaller circles if the group is large.
- Ensure there is enough space for participants to see each other clearly.

Activity Steps:

1. **Welcome and Name Tags** (5 minutes)
    - As participants enter, provide them with name tags and markers.
    - Ask each participant to write their name and a fun fact about themselves on the name tag.
2. **Forming Groups** (5 minutes)
    - Divide participants into smaller groups of 4-5 people each.
    - Use the small tokens (stickers or colored dots) to assign groups randomly. Place a sticker or dot on each name tag as participants enter.
3. **Group Introductions** (10 minutes)
    - Each group forms a small circle.
    - Within each group, participants take turns introducing themselves.
        - Share their name, role, and the fun fact from their name tag.
        - Additionally, ask them to briefly describe their connection to the business they are succeeding and one challenge they hope to address during the workshop.
4. **Storytelling Circle** (10 minutes)
    - After the introductions, have participants reassemble into the larger circle.
    - Introduce the soft ball or talking stick. Explain that the person holding the ball/stick has the floor to speak.
    - Start with a simple, light-hearted prompt related to business or succession (e.g., "Share a memorable experience from your first job" or "Describe a lesson learned from a mentor").
    - Toss the ball/stick to a participant to share their story.
    - After sharing, that participant tosses the ball/stick to someone else in the circle.
    - Continue until several participants have had a chance to share, ensuring it stays within the time limit.

5. **Wrap-up and Reflection** (5 minutes)
    - Conclude the activity by thanking everyone for their participation.
    - Briefly reflect on common themes or interesting points that emerged from the stories.
    - Highlight the importance of openness and learning from each other's experiences throughout the workshop.

Session: Introduction to Case Study Methodology

Duration: 1 hour

Objective:
To equip participants with an understanding of the case study approach, and provide them with the skills to analyze and discuss the three case studies effectively.

Activity Steps:

1. Introduction (5 minutes)

- Briefly explain the importance of case studies in learning and how they will be used in the workshop.
- Outline the session agenda.

2. Explanation of the Case Study Approach (15 minutes)

- **Definition and Purpose:**
    - Explain that case studies are real-world scenarios used to illustrate complex concepts and decision-making processes.
    - Emphasize their use in bridging theory and practice.
- **Types of Case Studies:**
    - Describe different types (e.g., descriptive, exploratory, explanatory) and their purposes.
- **Components of a Case Study:**
    - Highlight key components such as the background, main issues, stakeholders, and the decision dilemma.

3. How to Analyze Case Studies (15 minutes)

- **Reading and Understanding:**
    - Teach participants to read the case study thoroughly, noting down key facts and figures.
    - Encourage the identification of the main problem or decision to be made.
- **Framework for Analysis:**
    - Make reference to the content discussed in the online learning course.

4. How to Discuss Case Studies (15 minutes) -This is done with reference to the content of the online course.

- **Effective Discussion Techniques:**
    - Encourage active listening, asking questions, and constructive feedback.
    - Stress the importance of considering diverse viewpoints.

- **Group Dynamics:**
    - Explain roles within a discussion group (e.g., facilitator, note-taker, presenter).
    - Discuss how to manage group discussions to ensure everyone participates.
- **Developing Solutions:**
    - Encourage brainstorming multiple solutions and considering their implications.
    - Highlight the importance of backing up solutions with data and logical reasoning.

5. Q&A Session (5 minutes)

- Allow participants to ask questions and clarify doubts.

6. Wrap-up and Reflection (5 minutes)

- Summarize the key points covered.
- Reinforce the importance of thorough analysis and open discussion.

Materials Needed:

- **Handouts:**
    - Brief overview of the case study approach
    - Analytical frameworks (SWOT, PEST, Porter's Five Forces)
    - Case studies to be discussed
- **Presentation Slides:**
    - Key points and visuals to guide the session
- **Whiteboard/Flipchart and Markers:**
    - For illustrating concepts and frameworks
- **Q&A Session Tools:**
    - Microphones or online tools for managing questions (if applicable)

Pre-Workshop Survey

Objective:
To gauge the participants' baseline knowledge, expectations, and specific areas of interest or concern regarding business succession.

Format: Online survey (QuestionPro)

Questions:

1. **Demographics and Background:**
   - Name:
   - Age:
   - Current Role in the Business:
   - Years of Experience in the Business:
2. **Baseline Knowledge:**
   - On a scale of 1-5, how familiar are you with the concept of business succession?
   - Have you ever participated in a business succession process before? (Yes/No)
   - What do you believe are the key challenges in business succession? (Open-ended)
3. **Expectations:**
   - What are your main goals for attending this workshop? (Multiple choice, select all that apply)
     - Understanding succession planning
     - Learning about ethical decision-making
     - Developing strategic planning skills
     - Networking with peers
     - Other (please specify)
   - On a scale of 1-5, how confident do you feel in making succession-related decisions currently?
4. **Specific Interests or Concerns:**
   - Are there any specific topics or areas you are particularly interested in or concerned about? (Open-ended)
   - What do you hope to gain from the peer learning aspect of this workshop? (Open-ended)
5. **Case Study Familiarity:**
   - Have you worked with case studies before in any capacity? (Yes/No)
   - On a scale of 1-5, how confident are you in analyzing and discussing case studies?

Post-Workshop Survey

Objective:
To measure the participants' perceived learning, satisfaction with the workshop, and areas for improvement.

Format: Online survey (QuestionPro)

Questions:

1. **Overall Satisfaction:**
   - How satisfied are you with the workshop overall? (Scale of 1-5)
   - How well did the workshop meet your expectations? (Scale of 1-5)
2. **Learning Outcomes:**
   - On a scale of 1-5, how much has your understanding of business succession improved?
   - On a scale of 1-5, how much has your confidence in making succession-related decisions improved?
   - What were the most valuable aspects of the workshop for you? (Open-ended)
   - Which case study did you find most beneficial and why? (Open-ended)
3. **Skills and Knowledge Gained:**
   - On a scale of 1-5, how much have your skills in analyzing case studies improved?
   - On a scale of 1-5, how much have your skills in discussing and collaborating on case studies improved?
   - How well did the workshop help you understand responsible decision-making in succession? (Scale of 1-5)
4. **Workshop Content and Structure:**
   - Rate the effectiveness of the following components: (Scale of 1-5 for each)
     - Ice-breaking session
     - Introduction to case study methodology
     - Group discussions
     - Group presentations
     - Feedback session
   - What topics or activities did you find most engaging? (Open-ended)
   - Were there any topics or activities you found less useful? (Open-ended)
5. **Peer Learning Experience:**
   - How valuable was the peer learning aspect of the workshop? (Scale of 1-5)
   - Did you feel the group discussions were productive and inclusive? (Yes/No)
   - What did you learn from your peers that you found particularly useful? (Open-ended)
6. **Feedback and Suggestions:**
   - Do you have any suggestions for improving the workshop? (Open-ended)
   - Are there any additional topics or areas you would like to see covered in future workshops? (Open-ended)

7. **Future Application:**
   - How likely are you to apply what you have learned in your business? (Scale of 1-5)
   - What are your next steps in implementing your succession plan or improving the succession process (depending on what applies)? (Open-ended)

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