



The 3 best workshops you  
can facilitate and how  
they will change your  
business results NOW!

# LEADERSHIP DRIVEN WORKSHOPS

 THE GUINEA GROUP

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# INTRODUCTION

## This Book

**“Becoming a facilitative leader means changing how you think in order to change the consequences you help create.”**

**Roger Schwarz: *The Skilled Facilitator***

I was inspired to write this book, by one of the people in a workshop that I was facilitating. That person told me how much they would love to be able to do what I do, but they just didn't have the confidence, or the skills, to run a great workshop.

Of course, I encouraged them to get started. Even if you just get a big enough topic that you can discuss at a business meeting, you can start to practice your facilitation skills, and develop them that way. It doesn't need to be a full blown workshop, although it can be, but what is important is that you get an outcome that serves the tea and that serves the business!

So, regardless of whether you are a team member or a team leader, you can learn facilitation skills, and run great workshops. Like anything in life, workshops facilitation is a process that anyone can learn and implement.

As a leader, though, of the most powerful things you can do with, and for, your teams and your business, is to run engaging workshops with them. Note that if you are not a team leader already, running workshops will help you develop many, many leadership skills. Engaging people in a workshop environment is an amazing skill, and one that teaches you about yourself, about others and about the business!

Actually, workshop facilitation is a key leadership skill that once learnt; it is like riding a bike, you just get back on and start pedaling again.

The very distinct process for running workshops, which includes:

1. Defining the workshop *purpose*
2. Defining the workshop *process*
3. Deciding on the *people* that should attend the workshop
4. *Performing* the workshop facilitation
5. *Polishing* the workshop by closing it out

This book is going to take you through the three most important workshops that you can run in your business, and how much your business will benefit from each workshop. The strategy for each of the three types of workshop will be provided, as will the expected outcomes from each session.



It is not an exaggeration to say that the sooner you implement each of these workshops in your business, the sooner you will benefit from the results.

The reasons for this will become clearer as we work through each of the three workshop types, which include:

1. Goal setting (or strategy) workshop
2. Idea generation (or growth) workshop
3. Problems solving (or solutions) workshop

You can see from each of the above types of workshop types, the outcomes that you are going to achieve.

But, don't take my word for it, take this book, make it your facilitation guide and plan to run one of each type of workshop and see how good the results that you get really are.

I would love to hear from you, and to hear your success stories, as it is my expectation that you will see immediate results, if you implement the process that is outline in this book.

Remember, too, that the workshop is so much more than goal setting, idea generation or problem solving. The mere fact that the ran the workshop will demonstrate to your team that you are committed to engaging them in the process of running the business, that you are interested in their input and that you value their contribution.

Running a successful workshop will do so much for your business, and for your employees, that you will be thankful you made the decision to embracing workshopping as a key business process.

# CHAPTER 1

## Goal Setting Workshops

### About Goal Setting Workshops

Goal setting workshops are simply that. They are a workshop that engages employees in the future direction of the business. These workshops can be used to develop the strategy for the next month, quarter or year, and by engaging employees in the process, the likelihood that they will 'buy in' and own the workshop outcomes, is significantly increased.

These workshops can also be used as 'alignment sessions', in that they can be used to pull different groups together and get them on the same page, in relation to the direction of the project, the team or the product launch, for example.

### Purpose

Before commencing any workshop, it is important to be very clear on the purpose of the workshop. Generally, you should define the purpose in advance of the workshop, though sometimes it is more beneficial to develop the purpose at the start of the workshop, in conjunction with the attendees. Then, they have even more ownership of the workshop outcomes.

The purpose statement for a goal setting workshop could be as simple as:

- To develop the business goals for the next financial year, including our sales targets, our revenue targets and our overall business growth goals

*Note though that if you are running a team goal setting workshop, your focus might be on how many widget you will produce, or how many sales calls you will make, in what time frames, for example. Your purpose statement might be as broad as to develop the business strategy for the next 12 months.*

What is important about the purpose statement is that it is clear and concise enough to provide direction throughout the workshop, and that, at the end of the workshop it is measurable and easy to determine whether or not it has been achieved.

For the purpose of this book, let's work with the purpose statement, above.

## Process

The workshop process relates to all of the tools, systems and agenda items that you are going to use to run the workshop. This is most important to determine well in advance of the workshop, as you should let people know well in advance what to expect, how to prepare and what time they are expected to start and finish.

For a goal setting workshop, the process for running this workshop might be using butcher's paper and starting the workshop with at least three pieces of butcher's paper on the wall. The headings on each of piece of butcher's paper would be:

- Sales targets
- Revenue targets
- Business growth goals

During the workshop, as the facilitator, you would lead the discussion to address each of the above elements and the overall workshop purpose.

*Note that instead of butcher's paper you could use whiteboards, though you will need to take photos of the whiteboards during the day, if you need to rub them off.* Depending on the size of the workshop, and how many people will be in attendance (to be determined in section 1.3); as the facilitator, you will need to estimate how long you think each section of the workshop should run for.

A sample agenda for a goal setting workshop could be:

Agenda Item	Time	Who	Process
1. <i>Introduction</i> (icebreaker and outline of the workshop purpose)	08:00 – 08:30	Workshop Owner (or Facilitator)	Presentation
2. What are our sales targets going to be?	08:30 – 10:30	All	Facilitated discussion
<i>Break</i>	<i>10:30 – 11:00</i>	All	NA
3. What are our revenue targets going to be?	11:00 – 13:00	All	Facilitated discussion
<i>Lunch</i>	<i>13:00 – 13:30</i>	All	NA
4. What are our overall business growth targets?	13:30 – 15:30	All	Facilitated discussion



5. Workshop Close (review of what was discussed, including agreement on any actions)	15:30 – 16:00	Workshop Owner (or Facilitator)	Facilitated discussion
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*Note that the discussion time for each item could be reduced, or expanded, depending on how many different products your business is selling, or how difficult it is to determine possible business growth. The above is a guide, so feel free to modify as required, and as you see fit. Remember to modify the questions that you ask the group, too, to make sure they are completely aligned to your workshop purpose statement.*

When it comes to a workshop agenda, I would recommend that you don't go more than 2.5 hours without taking a break. Depending on the group, a break might be required sooner than that, depending on how the discussion is progressing. As a great facilitator, you will be able to judge this by the energy in the room, during the workshop.

In relation to preparation for the workshop, it is important to make sure that:

- You develop a PowerPoint presentation that contains the introduction slides, as well as the agenda
- The workshop owner is aware of their role in the workshop and what is expected in their introduction and closing
- As the facilitator, you should also be active during the introduction and closing of the workshop, to either lead it, or to support the workshop owner
- An effective ice breaker should be organised in advance of the workshop, and this doesn't need to be too elaborate (it will depend on if the people in the workshop know each other already)
- The logistics need to be organised, including morning tea, lunch, and even afternoon tea, if the workshop is likely to run over time
- The butcher's paper, the data projector, the markers, name tags and all of the little things that will make the workshop successful, need to be organised in advance of the workshop, and any technology tested to ensure that it works

## People

It is important to ensure that all of the relevant people are in attendance at the workshop. For this workshop, the type of people that you might invite includes:

- The sales team (for sales and product information)
- The finance team (for revenue information)
- The product support or development team (for business information)

You might even consider engaging with some of the key personnel that are going to be in attendance, to let them know what you will be trying to achieve during the workshop.

If any team leaders are going to be in attendance, it is also worth engaging with them, to understand what they expect to achieve during the workshop. You may even ask them to take a lead during the workshop and do a presentation, or the workshop introduction.

*Note that if you are not completely confident to take notes, and facilitate the discussion, you might consider engaging support, and getting someone to perform the scribing for you.*

## Performance

Now it is time to take the stage and do your thing!

Before you step up in front of your attendees:

- Get to the room early, set it up (generally in a u shape layout), and ensure that your technology works
- Be very aware of your agenda, and understand when you need to be finished each section by
- Get the butcher's paper on the walls ready to write on
- Think about any challenging questions that you might get asked during the workshop, and how you might ask them
- Consider some of the questions that you might like to ask, to stimulate discussion (consider open questions, closed questions, Socratic questions or leading questions)
- Get a copy of the agenda printed out for everyone
- Put paper on each desk, for people to fold in half and write their name on (if you don't know the people in the workshop)

Once the workshop starts, the main points to consider are:

- Stick to the agenda
- Set ground rules for the workshop (mobile phones off, for example)
- Keep the discussion going
- Ask great questions
- Scribe the discussion correctly
- Keep a whiteboard or an extra piece of butcher's paper for actions that might come out during the discussion
- Assign responsibility to any actions
- Get agreement at every stage of the workshop
- Close the workshop out by referring back to the purpose statement, and ensure that you have achieved it



*Note that some of the challenges that you might encounter during the workshop include conflict during the discussion, disagreements, questions that you may not have the answer to, technology failure, or even just interruptions.*

It is difficult to prepare every facilitator for every challenge that they might face during the workshop. The best advice that I give facilitators is to follow the three P's. That is to prepare, prepare and prepare. The more time and effort you put into the preparation for the workshop, the better off you will be. Some of the preparation that you might do for this workshop could include understanding the current business performance, understand the current revenue situation and even just thoroughly understand the roles and responsibilities of the people that will be in attendance.

Also, be very, very clear on the workshop purpose statement, and refer to it at every stage of the workshop. Finally, do not leave the workshop without letting the attendees know exactly how you will be following up with them after the workshop, and what the next stages of the process will be.

## Polish

So, the workshop comes to a close, and it is time to do a close out report.

The type of close out report required for this workshop will be a report detailing the workshop outcomes, the discussion and any actions agreed on.

For this workshop, I would send the close out report to the people that were in attendance, so that they also have a record of it, and can action any items that they are responsible for.

Then as the facilitator, I would be included to schedule a follow up workshop, to ensure that the goals are being achieved.

*"On a personal note, these are my favorite type of workshops. They are generally very positive. They are full of hope for the future, and they are full of purpose and passion. Team goal setting can be the best way to start a year, or to start a process, or to understand what the vision of the team or business is. Yes, they can be very challenging, when some people want to aim for the stars, whilst others are more conservative. The most important thing to do here is to just get agreement on what is realistic and what everyone in the workshop agrees should be the goals."*

*"In relation to case studies, I recently facilitated over 15 Safety Alignment Workshops for a major project company. The workshops were designed to allow the contractor and the project owner to build a relationship that was focused on delivering the projects safely. The workshops were amazing, the two groups got really well aligned on what they wanted to achieve, and for the most part, the projects have been completed extremely safely!"*



## CHAPTER 2

### Idea Generation Workshops

#### About Idea Generation Workshops

Idea generation workshops are a totally different type of workshop. They are a type of workshop that challenges people to be creative.

These workshops demand innovative thinking; they demand new ways of doing things. These workshops take a significant amount of facilitation, because there is more thinking time required during these workshops. This is not designed to frighten you, as a facilitator, it is about preparing you for pauses for thinking time, and letting you know that some people will be very introspective during the workshop. Not a bad thing, just a fact.

#### Purpose

Again, it is important to understand the purpose statement for the workshop, well in advance of the workshop.

The purpose statement for an idea setting workshop could be:

- Develop ideas and options for the development of a new product, including how it could be marketed and how it will be sold

*Note though that if you are running an idea generation workshop, your focus needs to be about generating options. You might start the workshop with a rule about no sacred cows (no ideas are bad ideas). You might decide to analyse (or not) ideas during the workshop, or you might just decide to generate a list and analyse them separately at a later stage. For the sake of this book, I am going to make the call that we are going to do a quick analysis of each idea during the workshop (a challenge for you as facilitator).*

For the purpose of this book, let's work with the purpose statement, above.

#### Process

Again, the workshop process relates to all of the tools, systems and agenda items that you are going to use to run the workshop.

For an idea generation workshop, you might consider using a MS Word document (or similar), so that you can type the idea, analyse the idea list what the next stage of the idea will be. For example, you might like to use tables (for each section of the workshop) like:

New Product Idea	From	Brief Analysis (Challenges)	Next stages
1.			
2.			
3.			
4.			
5.			

Marketing Idea	From	Brief Analysis (Challenges)	Next stages
1.			
2.			
3.			
4.			
5.			

Selling Idea	From	Brief Analysis (Challenges)	Next stages
1.			
2.			
3.			
4.			
5.			

During the workshop, as the facilitator, you would lead the discussion to address each of the above elements, and the overall workshop purpose.

*Note that you might like to group each of the above tables into one. You might also like to set up a whiteboard to capture any left field discussion that might come up during the workshop, including action items.*

A sample agenda for an idea generation workshop could be:

Agenda Item	Time	Who	Process
1. <i>Introduction</i> (icebreaker and outline of the workshop purpose)	08:00 – 08:30	Workshop Owner (or Facilitator)	Presentation
2. What are some new product ideas?	08:30 – 10:30	All	Facilitated discussion
<i>Break</i>	<i>10:30 – 11:00</i>	All	NA
3. What are some new product marketing ideas?	11:00 – 13:00	All	Facilitated discussion
<i>Lunch</i>	<i>13:00 – 13:30</i>	All	NA
4. What are some new product selling ideas?	13:30 – 15:30	All	Facilitated discussion
5. Workshop Close (review of what was discussed, including agreement on any actions)	15:30 – 16:00	Workshop Owner (or Facilitator)	Facilitated discussion

*Again, note that the discussion time for each item could be reduced, or expanded, depending on how many different ideas are identified during each section. The above is a guide, so feel free to modify as required, and as you see fit. Remember to prepare some prompting questions to ask for when the workshop stalls, and be ready to identify when the ideas have completely dried up, so that you can move onto the next section.*

Also, 2.5 hours is about the right time to go in between breaks.

In relation to preparation for the workshop, the general preparation process is the same as for a goal setting workshop. The difference is that you won't need butcher's paper; you will need a MS Word document, or similar.

## People

Again, it is important to ensure that all of the relevant people are in attendance at the workshop. For this workshop, the type of people that you might invite includes:

- The Research and Development Team (new product ideas)
- The Marketing Team (marketing ideas)



- The Sales Team (sales ideas)

You might even consider engaging with some of the key personnel that are going to be in attendance, to let them know what you will be trying to achieve during the workshop.

*Note that if you are not completely confident to type and facilitate, you might consider engaging support, and getting someone to perform the typing for you.*

## Performance

Now it is time to take the stage and do your thing!

Before you step up in front of your attendees, prepare for the workshop using the process that you would for a goal setting workshop.

*Note that some of the challenges that you might encounter during an idea generation workshop include pauses in discussion. Don't feel like you need to talk through these pauses. You will need to stimulate conversation at times, though be particular with the times that you interject and encourage participation. These workshops are generally the most rewarding as a facilitator, as it is likely that there will be fantastic ideas and energy in the room during the workshop.*

Remember the three P's. That is to prepare, prepare and prepare. You might prepare by reviewing the current product offerings of the business, you might consider what ideas might come up, and you might prepare to do brief analysis of each idea. You might also prepare to cut off discussion that is counterproductive, if the ideas or analysis is getting too in depth.

Keep focused on the workshop purpose statement, and refer to it at every stage of the workshop. Remember to not leave the workshop without letting the attendees know exactly how you will be following up with them after the workshop, and what the next stages of the process will be.

## Polish

So, the workshop comes to a close, and it is time to do a close out report.

The good news is that your close out report is nearly done. You have got a MS Word document with the ideas from each section of the workshop ready to distribute to the people in the workshop. You might need to polish what you typed, though this should not take you a significant amount of time.

*"On a personal note, each time I needed to grow my business, it was time to pull the team together and generate some ideas for growth and opportunity. The best thing about the people in your business is that they have all of the ideas for what we need to do to move forward and grow.*

*I know the power of these workshops, and the ability that they have to get people to think, to create and to innovate in your business.”*

*“In relation to case studies, I recently facilitated a range of idea generation sessions, that were designed to capture the lessons learnt from recent projects, and what ideas or options could be considered to make the next projects even more successful. The workshop results were amazing, and if the client follows through and implements them (which they have done in the past), it is likely that they will get better and better at achieving their goals and running their projects!”*

## CHAPTER 3

### Problem Solving Workshops

#### About Problem Solving Workshops

Problem solving workshops are a different type of workshop completely. They are a type of workshop that challenges people to focus on what failed and what needs to change, moving forward.

These workshops require a real honesty, and a real determination to get to the root cause of what went wrong, or what could go wrong. Depending on the type of problem being solved, these workshops could be called defect elimination workshops, root cause analysis workshops or waste elimination workshops. The difference that you will experience with this type of workshop is that they are very serious. They are quite focused, and your biggest challenge as a facilitator (potentially) will be to ensure that people don't try to assign blame or to point fingers at specific people. That type of discussion may be required, but it must be done professionally and with only the very highest of intent, and that intent is to understand and address the problem at hand.

#### Purpose

Develop the purpose statement for the workshop, well in advance of the workshop.

The purpose statement for a problem solving workshop could be:

- To review what went wrong with the piece of production equipment, to analyse what the impact of the failure, and to understand what can be done to prevent it re-occurring

*Instead of equipment failure, you might like to use business process as part of the workshop purpose statement, if that is the problem that you are solving.*

*Note though that if you are running a problem solving workshop, your focus needs to be about asking very pointed questions. Direct questioning techniques are the big ticket item with these types of workshop. You are going to need to probe, to challenge and to keep challenging until you get to the point where everyone agrees on what the cause of the failure was, what the impact of the failure was and what the re-occurrence prevention strategies will be. Remember too, that there might be more than one causal factor that contributed to the failure of this piece of equipment.*

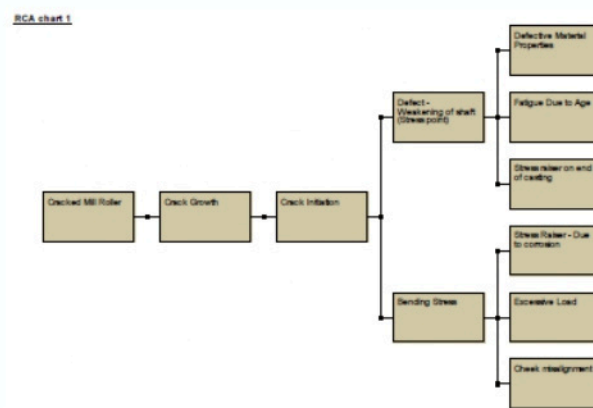


For the purpose of this book, let's work with the purpose statement, above.

## Process

Given that the workshop process is about tools and systems to be utilised during the workshop, the system that works best during these workshops is a fish bone diagram, or a root cause tree. Either of these types of processes will allow you to start with the problem, and work back along each branch of the tree, to identify all of the causal factors that contributed to the problem.

An example of a root cause tree is shown below:



When I am facilitating problem solving workshops, I am proficient enough using this software that I can develop the root cause tree during the workshop, in the software program. Unless you are very proficient with the software, I recommend that you use Post-it note to develop the root cause tree. That way, you can use a Post-it note for each causal factor, and you can move them around as necessary. The Post-it note process is a winner for engaging everyone, as you can get people out of their chairs and working on the board. You will need a big wall, if you are going to use Post-it note, though I would highly recommend you consider this, or a similar process, for your problem solving workshops.

A sample agenda for an idea generation workshop could be:

Agenda Item	Time	Who	Process
1. <i>Introduction</i> (icebreaker and outline of the workshop purpose)	08:00 – 08:30	Workshop Owner (or Facilitator)	Presentation
2. What was the equipment failure and what caused it?	08:30 – 10:30	All	Facilitated discussion
<i>Break</i>	<i>10:30 – 11:00</i>	All	NA
3. What were the impacts of the failure – what are we trying to prevent in the future?	11:00 – 13:00	All	Facilitated discussion
<i>Lunch</i>	<i>13:00 – 13:30</i>	All	NA
4. How will we prevent re-occurrence?	13:30 – 15:30	All	Facilitated discussion
5. Workshop Close (review of what was discussed, including agreement on any actions)	15:30 – 16:00	Workshop Owner (or Facilitator)	Facilitated discussion

*You will need to manage time very carefully during a problem-solving workshop. It is very easy for discussion to turn into a debate, which is fine if it is productive, though debates can become very time consuming. Be aware of your time restraints and do what you can to cover as much ground as you can during the workshop.*

Yes, 2.5 hours is still the right time to go in between breaks.

## People

For this workshop, the type of people that you might invite includes:

- The equipment operators
- The equipment maintainers
- The equipment designers

For problem solving workshops, it is imperative that you engage with the workshop attendees, to ensure that they are also very prepared to share their equipment knowledge.

*If you use the Post-it note process, your role as a facilitator can be simplified. You just need to ask people to build the root cause tree with you, and it is unlikely that you will need support. If you choose the software process, and you are not proficient in its use, just ask someone that is, to assist you for the day.*

## Performance

Now it is time to take the stage and do your thing!

Remember the three P's. That is to prepare, prepare and prepare. In relation to preparation for the workshop, this is the type of workshop that will (potentially) take you the longest to prepare for. Some of the research that you might like to do includes asking yourself some key questions:

- What is the function or application of the equipment that failed?
- How important is it to the business?
- What training is required for people to operate it?
- How many times has it failed like this in the past?
- What drawings or diagrams might be useful during the workshop?
- What photos were taken at the time of the failure, and would they be useful?
- What software programs should I become proficient in prior to the workshop?

*Note that some of the challenges that you might encounter during problem solving workshops include keeping people focused on the workshop purpose statement. It is easy to digress during these workshops, so a laser focus is required.*

Keep focused on the workshop purpose statement and refer to it at every stage of the workshop.

The most common question that you will ask during a problem-solving workshop is about causal factors. What caused this or what caused that? Are there any other factors that could have caused it? What was the impact?

Remember to not leave the workshop without letting the attendees know exactly how you will be following up with them after the workshop, and what the next stages of the process will be.

## Polish

So, the workshop comes to a close, and it is time to do a close out report.

The close out report for these workshops can be quite time consuming, as you need to work through the root cause tree, you need to tabulate causal factors, impacts



and possible solutions. Put the time in that it takes to do an exceptional job of the close out process.

Don't rush it, make sure it is of high quality, and make sure that you don't forget anything. Put as much information as you can into the close out report, including any drawings, any equipment information, and business information or photos that were used during the workshop.

Problem solving workshops are usually the first step in a much larger remediation program, to address some major business failure. It is important to keep understand this, as you are developing the close out report, as it is likely that the information you document will be used widely as part of a major business improvement process.

*"On a personal note, I always get excited when I get the opportunity to run a problem-solving workshop. I have facilitated workshops to review safety incidents, business process failures and equipment failures, amongst others. These workshops are generally seen by Managers, Leaders or business owners as the most able to change their business results, and quickly. By preventing re-occurrence of their failures, you can expect businesses to save a significant amount of time, money or other resources. Their investment in a facilitator will be returned many times over if the workshop is successful."*

*"In relation to case studies, I ran over 20 Root Cause Analysis workshops for a company that owned four factories, and that were struggling with equipment breakdown, that was costing the business many hundreds of thousands of dollars in repair and lost production costs each year. Using the approach outlined above, we agreed with the business General Manager, that the rectification strategies were likely to save the business in excess of \$300k. A great result for 20 workshops!"*

## RESOURCES

To take your leadership to the next level, go to [www.theguineagroup.com.au](http://www.theguineagroup.com.au), and take the 'Leaders with Influence Survey' to see where you rate against each of the key leadership skills (as shown below):



## CONTACT US

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Can't wait to talk to you about your employee engagement strategy!

Let's get started!