

CONGRATULATIONS

ON COMPLETING FACILITATING MASTERFUL MEETINGS

KEEP IT FRESH

1. **Get proficient one area at a time.** Choose a section. Read it from beginning to end once a week or so. Practice the techniques until you feel proficient. Then, move on to another section.
2. **Lead every opportunity you get!** When asked to lead a meeting, do it if at all possible. Real improvement can't come without opportunities to practice.
3. **Seek quality feedback.** Periodically hold a review session after a meeting. Consider using the class feedback form as a guide, especially if there are others in the meeting who have taken the class.
4. **Use the techniques informally.** In conversations, use the starting question and checkpoints. In meetings, make sure the purpose and process are clear. Use consensus building strategies to address disagreements.
5. **Sharpen your skills through our advanced class, Advanced Facilitation Skills.** This three-day course builds on the principles and helps you identify and address your specific areas for improvement.
6. **Complement your skills with The Facilitative Consultant.** Key topics include: defining your client's need, building winning proposals, managing expectations, assessing risk, and developing recommendations.

WHAT'S NEXT?

FACILITATION SERVICES

Avoid wasting valuable time! Our professional facilitators provide the expertise and techniques for focused retreats and planning sessions.

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Conference Facilitation

Meetings Transformation

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FACILITATING MASTERFUL MEETINGS

MINI MANUAL ONE-DAY VERSION

A masterful meeting is a well-prepared, skillfully-executed, and results-oriented meeting with a timely start, a decisive close, and a clear follow-up plan.

MASTERFUL PREPARATION

THE 5 Ps OF PREPARATION

Decide the meeting **purpose**.

- Why are we holding this meeting?

Define the meeting **products**.

- What do we want to have when we are done?
 - In our hands (outputs)
 - In our heads (knowledge)
 - In our hearts (beliefs)

Select the **participants**.

- Who needs to be present to achieve the purpose and create the product?
 - Who will be affected?
 - Who should be included?

Identify **probable issues**.

- What are the topics that will need to be addressed?

Develop the **process**.

- What are the steps needed?

IS THE MEETING NECESSARY?

- Is it possible to achieve the purpose and products without a meeting?
- Are the purpose and products worth the time and resources that the meeting will consume?

MASTERFUL START

INFORM - *Purpose & Product*

Start meetings with:
“The purpose of this meeting is... When we are done, we will have...”

EXCITE - *Benefits to Them*

Get them excited about the process by giving them a clear vision of the overall result to be achieved and the benefits.

EMPOWER - *Their Role*

Empower them by discussing the important role they play in the process and the authority that has been given to them.

INVOLVE - *Their Objectives*

Get them involved in the process by having them speak as early as possible (e.g., key topics, one-minute check-in).

- Confirm the Agenda
- Establish Ground Rules
 - Everyone speaks
 - One conversation
 - Start and end on time
 - Discuss the undiscussable
- Review the Parking Boards
 - Issues, Decisions, Actions
- Do Introductions

MASTERFUL EXECUTION

CHECKPOINT

Take a checkpoint at the beginning of each major activity.

REVIEW what has been done.

PREVIEW what is happening next.

BIG VIEW - Explain how the activity fits into the purpose.

PeDeQs DIRECTIONS

- **Purpose** for the activity
- **Example:** you start it, they finish it.
- General **Directions**
- Specific **Exceptions**
- Ask for **Questions**
- Ask your **Starting question**

REDIRECT SIDE ISSUES

“That’s an interesting point. Can we put it on the issues list?”

RECORDING

- Write 1st - discuss 2nd
- Write what they said - not what you heard
- Document decisions made, actions to be taken, issues, relevant analysis

MASTERFUL INFO GATHERING

STARTING QUESTION

- Start with an image-building phrase (“If, think about, imagine, consider”).
- Expand the image, so they can see the answers (two sentences).
- Ask the “Type A” question.

OTHER TECHNIQUES

LISTING: to gather detail

BRAINSTORMING: to generate ideas

GROUPING: to categorize

PRIORITIZE: to identify importance

LOBBYING: to gain buy-in

MASTERFUL CLOSE

- **Review agenda items** covered in the meeting.
- **Confirm decisions.**
- **Address issues** that are still outstanding.
 - Have we covered it?
 - Do we need to?
 - Do we need to now?
- **Assign actions** to names and dates.
- **Evaluate the meeting.**
- **Thank participants** and end the meeting.
- Document and **distribute meeting notes.**
- **Follow up** to hold people accountable to assigned actions.

WHAT IF

...THE LEADER IS NOT LEADING?

The key to guerilla facilitation is to ask questions.

NO PURPOSE

“Excuse me. I may have missed it. But, could you take a second to go over the overall purpose of this meeting and what we need to have when we are done?”

OVER/LOW PARTICIPATION

“I would love to hear everyone’s opinion on this. Can we go around the room and have everyone say what they like about this or how to make it better?”

LACK OF FOCUS

“Can we have someone record these points for later discussion and then get back to our main topic?”

NO DOCUMENTATION

“Can we have someone repeat and record this point, so we can all be sure what has been decided?”

NO CLOSURE

“Can we take a minute to review the decisions, issues and actions?”

...THERE IS DYSFUNCTION?

Dysfunctional behavior is **any activity** by a participant that is **consciously or unconsciously a substitution** for expressing displeasure with the meeting content, the meeting process or an outside factor.

Separate the **symptom** from the **root cause**.

PREVENTION STRATEGIES

Based on issues identified in preparation, consider:

- Assigning seats
- Adding ground rules
- Making sure you interact with particular people
- Paying close attention to particular reactions
- Holding informal meetings during breaks

DETECTION STRATEGIES

- Actively look for signs of dysfunction.

RESOLUTION STRATEGIES

- Approach **privately** or **generally**.
- Empathize with the **symptom**.
- Address the **root cause**.
- Get agreement on the **solution**.

...THERE IS A DISAGREEMENT?

WHY PEOPLE DISAGREE

- Haven’t **heard** one another
- Different **values**
- Past **history**

WHEN TO JUMP IN

- Taking too much **time**
- Discussion loses **focus**
- Only two or three are **involved**
- Discussion is becoming **emotionally charged**

CONSENSUS STRATEGIES

- Delineation
- Strengths and Weaknesses
- Merging Alternatives
- Converging Solution

5-FINGER CONSENSUS

- 5 - Strongly agree
- 4 - Agree
- 3 - Will go with group
- 2 - Disagree
- 1 - Strongly disagree
- **First vote:** If all 5s, 4s, and 3s, move ahead.
- **Second vote:** If all 5s, 4s, 3s and 2s, move ahead.
- **Final vote:** Majority rules.

HOW TO USE THIS MINI MANUAL

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PREPARING/CLOSING THE MEETING

These techniques are applied once for every meeting and involve preparing for a meeting, starting it, and closing it.

DURING THE MEETING

These techniques are applied/repeated for every agenda item throughout a meeting.

WHAT IFs

These techniques and strategies can be used to address or prevent common scenarios that occur during a meeting - even if you are not leading it.

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FOR MORE INFORMATION
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