



**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.*

- |                         |                      |
|-------------------------|----------------------|
| Strategic Planning      | Team Activation      |
| Team Building           | Issue Resolution     |
| Conference Facilitation | Process Improvement  |
| Meetings Transformation | Systems Requirements |
| Community Engagement    |                      |

*We offer a free, one-hour briefing on "The Level-3 Organization." Call for more information.*

**FACILITATION TRAINING**

*Give your key people the training they need! Our dynamic instructors will provide your people with detailed tools and techniques for success.*

- |   |                                  |
|---|----------------------------------|
| The Effective Facilitator                       | The Facilitative Consultant      |
| Advanced Facilitation Skills                    | Facilitation Skills for Trainers |
| Facilitator Certification Prep                  | Facilitating IT Sessions         |
| The Effective Virtual Facilitator               | Facilitating Virtual Meetings    |
| Leadership Through Facilitation                 | Facilitating Masterful Meetings  |
| The Seven Separators of Facilitation Excellence | Masterful Technical Meetings     |
| Secrets to Facilitating Strategy                |                                  |

*Call about our public class schedule. Ask about classes we can teach at your site!*

# FACILITATING MASTERFUL MEETINGS

## MINI MANUAL

*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.*

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## 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

### 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.