



Facilitate Like a Pro: Skills to Run Effective Meetings and Guide Discussions

Facilitating meetings effectively, even without full Agile or Scrum knowledge, adds value to teams. Building rapport through meeting facilitation is crucial for coaching Agile principles.

Productive meetings are essential for idea generation and decision-making. Learning facilitation skills helps keep conversations on track, fostering group efficiency and validating the role of a Coach or servant leader as a change agent.

FACILITATING AND GUIDING THE TEAM



EFFECTIVE FACILITATION:

GUIDING SUCCESSFUL MEETINGS AND DISCUSSIONS



The term "facilitation" suggests the act of directing a meeting, it includes much more.

An Agile manager or coach is comparable to a conductor in charge of an orchestra.

Their role is to ensure that the team harmonizes effectively, that rhythm and coordination are maintained, and that outstanding results are produced.



WHAT IS FACILITATION?

The process of guiding and managing a group session in a manner that encourages effective participation, optimizes group dynamics, and helps the group achieve its goals.

A good facilitator helps facilitate the creation of an environment in which all participants feel they have a voice and can contribute to the discussion or decision-making process.



MOST IMPORTANT ASPECTS OF MEETING FACILITATION:

- ✓ Setting the Stage
- ✓ Guiding the Process
- ✓ Encouraging Participation
- ✓ Managing Group Dynamics
- ✓ Clarifying and Summarizing
- ✓ Decision Making
- ✓ Closure
- ✓ Neutrality



The principles and skills of facilitation can be applied in a wide range of group settings, from workshops and training sessions to team-building exercises and strategic planning sessions.



MOST COMMON AGILE MEETINGS

- Sprint Planning Meeting
- Daily Scrum or Daily Stand-up
- Sprint Review
- Sprint Retrospective
- Backlog Refinement (or Grooming)
- Release Planning

FACILITATION ACTIVITIES BEFORE THE MEETING



Make sure there is a clear purpose—**why** the meeting was organized.

Make it **SMART** (**S**pecific, **M**easurable, **AR**ealistic, **T**imed)



What deliverables the meeting should produce in order to make it successful?

- **Heads**—anything you can learn, such as skills, ideas, status updates
- **Hearts**—to get buy-in, belief, engagement, or excitement
- **Hands**—to create some tangible output, such as action plans, timelines, or lists



Finally, think about **who** needs to be involved, **when** and **where** the meeting will take place, and **how** you will facilitate it.

So in summary:

- **Purpose,**
- **Deliverables,**
- **Who, When, Where and How**

FACILITATION ACTIVITIES DURING THE MEETING





FIRST 5 MINUTES

Open with a strong start.

Think about the energy level and the engagement.

Always share the meeting's purpose, expected deliverables, and agenda

Let them think about what's in it for them.



DURING THE MEETING

the facilitator uses several tools, like:

brainstorming, mind mapping, problem-solving, voting, grouping, prioritization, working in pairs or groups, and closing the meeting with the expected outcome.



END OF THE MEETING

Summarize the meeting, review how the group addressed the purpose, and summarize the action items.

EXAMPLE: TEAM ALIGNMENT MEETING

Purpose: Align team members on current goals, priorities, and challenges.

Deliverables:

- Clear understanding of current team objectives.
- Identification of obstacles or blockers.
- Defined roles and responsibilities for ongoing tasks.

Who: All team members, Team Lead or Manager.

When: Midway through a project phase or work cycle.

Duration: 1 hour.

EXAMPLE: DURING THE MEETING

- 1) **Set the Mood:** Begin the alignment meeting with an engaging activity
- 2) **Provide Structure:** Briefly describe the flow of the meeting and go over the main objectives and deliverables.
Introduce a "Parking Lot" to park additional topics that are not part of the meeting and/or may need a separate discussion later.
- 3) **State Current Goals:** Present the current team objectives and major tasks. Highlight any changes or updates since the last alignment.

- 4) **Open Forum:** Let team members share their progress, highlighting successes and blockers. Allow for clarifications and questions.

- 5) **Group Discussion:** Foster a discussion around shared challenges and identify themes or patterns. This can be done using sticky notes or virtual boards. (*Mind mapping, grouping*)

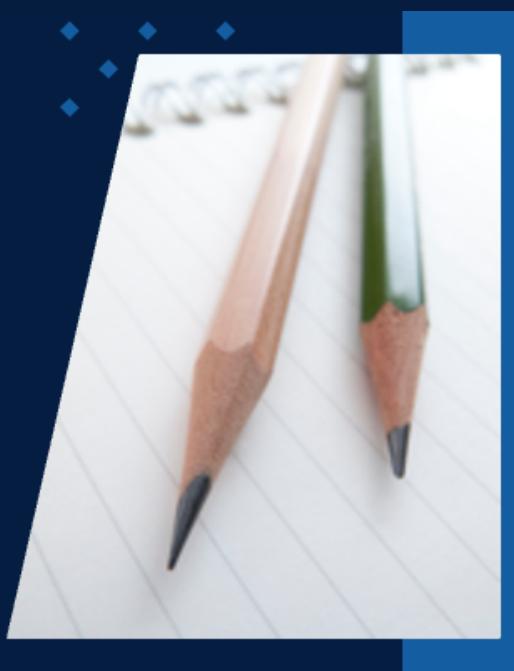
- 6) **Vote on Priorities:** Use dot voting to determine which challenges or topics need immediate attention and deeper discussion. (*Decision making*)

- 7) **Deep Dive:** Dive deeper into the highest priority topics. Encourage solution brainstorming, drawing from the team's collective knowledge.
(Problem-solving, Root Cause analysis)
- 8) **Assign Action Items:** Based on the discussion, assign action items and responsibilities to specific team members to address the highlighted challenges.
- 9) **Recap and Commit:** Go over the action items and ensure everyone is committed to their responsibilities.

- 10) **Conclude:** Review what was achieved during the meeting and end with a check-out activity, e.g., "In one word, how do you feel about our team's direction after this meeting?"

EXERCISE:

FACILITATION BLUEPRINT





INSTRUCTIONS:

Think about a meeting you want to plan?

Or a meeting you've been part of but wasn't run particularly well.

How would you do it?



1. Planning (Before the Meeting):

- **Purpose:** Draft the reason for the meeting. Ensure it is SMART.
- **Deliverables:**
 - **Heads:** Identify any knowledge or ideas you aim to disseminate.
 - **Hearts:** Pinpoint the emotional outcome (e.g., buy-in, excitement).
 - **Hands:** Determine the tangible outputs expected (e.g., plans, lists).
- **Logistics:** Decide on participants, time, and location. Consider tools and platforms if remote.



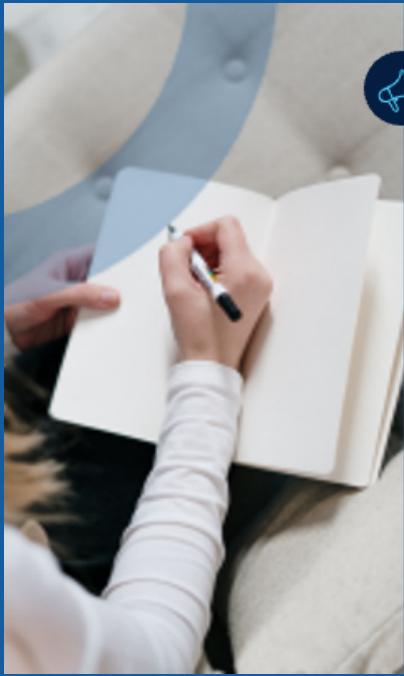
Execution (During the Meeting):

Strong Start: Engage participants from the get-go. Set the mood and energy. Share the purpose, expected deliverables, and agenda.

- How will you do this?

Methodology: Use facilitation tools that fit the meeting's objectives and needs. Whether brainstorming, voting, or grouping, ensure they serve the meeting's purpose.

- Which one are you going to use?



Open & Structured Discussion: Allow space for attendees to share, inquire, and collaborate. Introduce the "Parking Lot" concept for off-topic discussions.

- How will you facilitate the discussion?

Conclude with Clarity: Summarize the meeting, confirm how the purpose was addressed, and recap action items.

- How will you make sure you'll catch the main point?



FACILITATION TOOLS



FACILITATION TOOLS

- Mind-mapping for Ideation
 - Grouping Topics
 - Problem-solving tools (Root Cause Analysis, Fishbone, Five whys, Impact mapping)
 - Decision-making techniques (Roman vote, First of five, Majority voting, Dot voting, Consensus voting)
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EFFECTIVE MIND-MAPPING IN AGILE MEETINGS





Mind-mapping is a technique used to create and articulate a bunch of ideas, very quickly, from a group of people.

A mind map is a graphical way to represent ideas and concepts. It is a visual thinking tool that helps structure information, helping you to better analyze, comprehend, synthesize, recall, and generate new ideas.



- Efficient Ideation
- Stimulates Creativity
- Collaborative Tool



HOW TO FACILITATE A MIND-MAPPING SESSION:

- 1) **Set Clear Objectives:** Define the purpose and desired outcome.
- 2) **Welcome All Ideas:** Encourage the contribution of every thought, no matter how unconventional.
- 3) **Avoid Self-Filtering:** All ideas are valuable at this stage; filtering can happen later.
- 4) **Open Mind Mapping:** Place the topic in the middle of the board using a sticky note, dry-erase whiteboard, or shared virtual board.
- 5) **Organize, Group, and Refine Ideas**



FACILITATOR'S ROLE:

- 1) **Guide, Don't Lead:** The facilitator focuses on the process, not the content.
- 2) **Maintain Flow:** Ensure a continuous flow of ideas without delving too deep into any particular one.
- 3) **Organize and Group:** After brainstorming, help the team group related ideas.

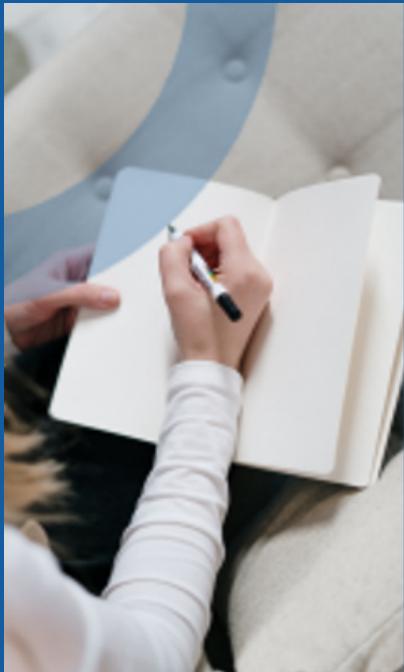
EXERCISE:

SOLO MIND-MAPPING EXPLORATION



INSTRUCTIONS:

- 1) **Choose a Topic:** Pick something personal, like a hobby or a project.
- 2) **Prepare Your Space:** Use paper or a digital tool. Have colored pens or drawing tools ready.
- 3) **Begin Mind-Mapping:**
 - Write your topic in the center.
 - Branch out with related ideas or themes.
 - Freely associate ideas for 10 minutes, avoiding self-filtering.



4) Review & Organize:

- Connect related ideas.
- Group similar thoughts together.

5) Prioritize:

- Highlight or rank important ideas.

6) Reflect:

- Consider your feelings about the solo process.
- Identify areas for potential group input.

MIND-MAPPING:

**FOCUS THE CONVERSATION
BY GROUPING TOPICS**



GROUPING TOPICS

Like-minded ideas can be clustered together.

This technique helps in prioritizing and deciding actionable items swiftly.

THE SIX BOXES TECHNIQUE



Six Boxes is exactly as it seems...you guarantee that ultimately there will only be six boxes from which to choose from.

HOW TO IMPLEMENT THE SIX BOXES TECHNIQUE



- 1) **Layout:** Underneath the main ideation theme, sketch six boxes (2x3 grid). Do not label the boxes
- 2) **Brainstorm:** Grant the group a time-box (10 minutes) to brainstorm.
- 3) **Placement:** Participants take turns reading their ideas and positioning them in a box.
- 4) **Naming:** Once a box accumulates 4–5 ideas, engage the group to label it. This box becomes fixed.



- 5) **Concluding Steps:** With clearly defined boxes, the group can progress to further activities, such as prioritizing or planning.

ROOT-CAUSE ANALYSIS AND IMPACT MAPPING:

PROACTIVE PROBLEM- SOLVING IN AGILE ENVIRONMENTS



The background features a collage of images related to Root-Cause Analysis, including a 3D geometric model, a speedometer-like graphic, and handwritten text 'Root Cause Analysis'.

You can either treat symptoms, and always be too busy, or learn how to identify the cause of a problem.

It's the difference between reactive and proactive approaches.

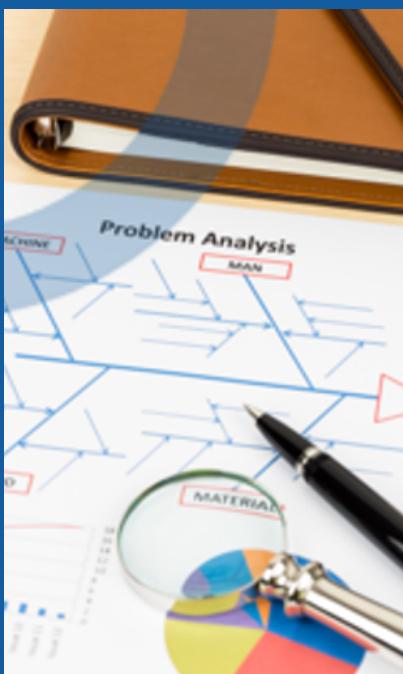
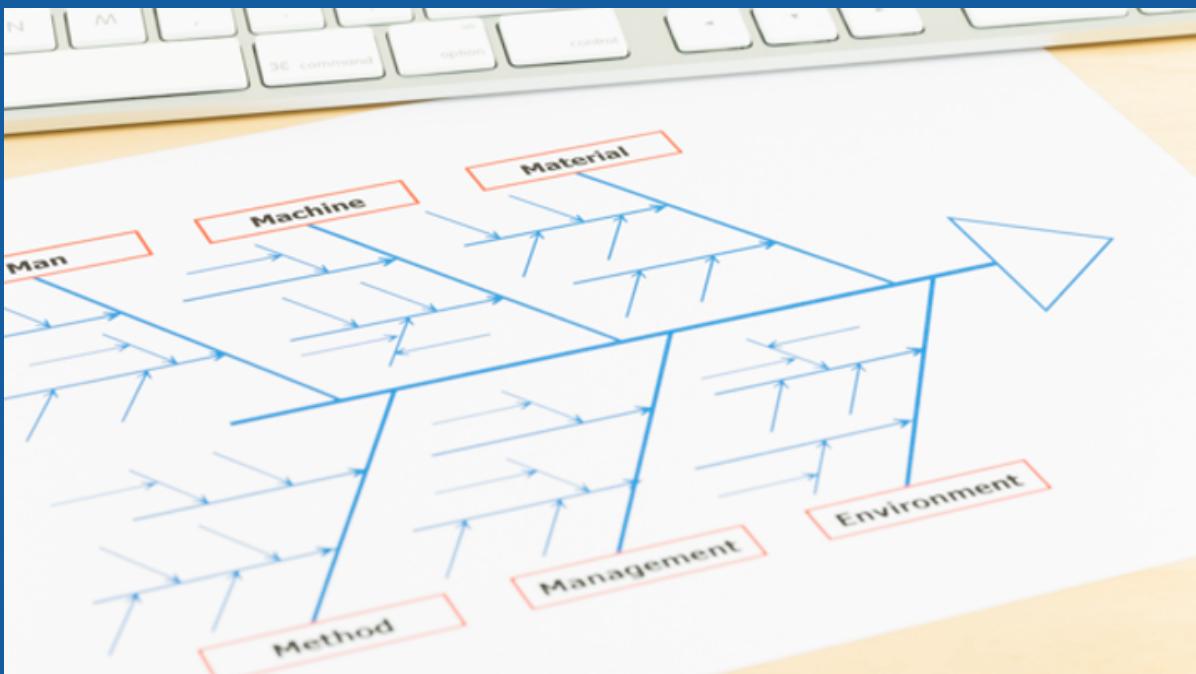
The background features a collage of images related to Root-Cause Analysis, including a 3D geometric model, a speedometer-like graphic, and handwritten text 'Root Cause Analysis'.

- ❖ Fishbone analysis
- ❖ Five Whys
- ❖ Impact Mapping



FISHBONE ANALYSIS

Fishbone Analysis, helps teams visually dissect a problem by examining its potential root causes across multiple categories.



EXAMPLE: FREQUENT APPLICATION CRASHES

Problem: *Users report the application crashes multiple times a day.*

What actions or conditions led to the crash?

- Specific features being accessed simultaneously.
- Running the app for extended periods.

Where do most crashes seem to originate?

- During transitions between different modules.
- In areas where third-party plugins are active.



When do these crashes usually happen?

- After software updates.
- During peak user activity hours.

Who reports these crashes the most?

- Users with older hardware.
- Users who have not updated their OS.

Why is the application not stable despite rigorous testing?

- Testing didn't cover all real-world usage scenarios.
- Incompatibility issues with certain hardware.
- Some bugs might have been introduced during last-minute hotfixes.

EXERCISE:

DIVE DEEP WITH FISHBONE ANALYSIS



INSTRUCTIONS:

1) Pick a Software Problem: Reflect on a recent software issue you've faced or one you've heard about. E.g., a frequently crashing app, slow load times, etc.

2) Sketch the Fishbone Diagram: On a sheet of paper or a digital tool, draw a horizontal arrow pointing to the problem (the "fish's head").

3) Identify Main Categories: These serve as the "bones" branching off the "spine" of the fish. Typical categories might be: What, Where, When, Who, Why.



4) Brainstorm Potential Causes:

- What specific actions or features might cause the problem?
- Where in the software does the problem usually arise?
- When does the problem usually occur?
- Who tends to experience or report the problem the most?
- Why might the problem exist despite precautions?



5) **Review & Analyze:** Examine the causes you've listed. Are there any patterns? Any causes that are easily addressable?

6) **Plan Action Steps:** Based on your analysis, list steps you or a development team could take to mitigate or resolve the issue.

7) Reflect:

- Think about the advantages of visualizing issues this way.

FIVE WHYS TECHNIQUE



A graphic background for the section. It features a blue-to-white gradient with a repeating pattern of the words 'WHY' and 'FIVE WHYS TECHNIQUE' in a stylized font, creating a sense of depth and repetition.

Is a method used to trace the root cause of an issue by repeatedly asking the question "Why?"

EXAMPLE: SOFTWARE PERFORMANCE ISSUE

The software application is running slow.

"Why is the software application running slow?"

"Because there's a memory leak in the system."

"Why is there a memory leak in the system?"

"Because some parts of the code do not release memory after use."

"Why do parts of the code not release memory?"

"Because they were coded without best practices for memory management."

"Why were they coded without best practices?"

"The development team wasn't trained on efficient memory management techniques."

"Why wasn't the development team trained on those techniques?"

"Because it wasn't included in our training program, assuming that developers would have prior knowledge about it."

From this analysis, the solution is clear:

The organization should invest in training their developers on memory management best practices to prevent future software performance issues.

EXERCISE:

DISCOVER WITH THE FIVE WHYS





INSTRUCTIONS:

1) **Identify a Problem:** Reflect on a recent challenge or issue you've faced, whether in software or another context.

2) **Start with Your First "Why":** Ask yourself, "Why did this problem occur?" and jot down the answer.



3) Continue the Chain:

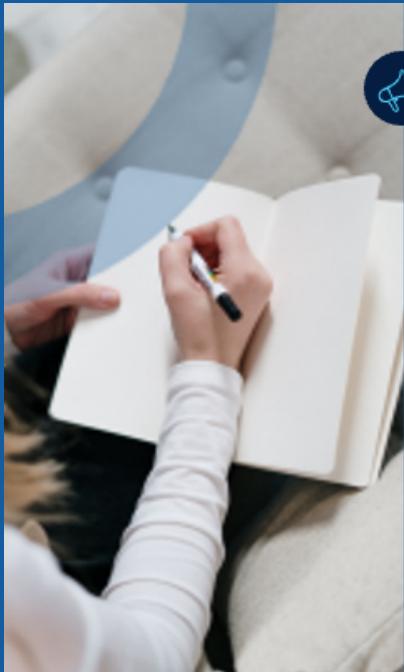
- Based on the answer from step 2, ask "Why?" again.
- Continue asking "Why?" and recording the answers until you feel you've identified the root cause.
- While it's called the "Five Whys," you might need fewer or more iterations depending on your problem.



4) Analyze Your Whys:

- Examine the chain of answers. Can you identify any patterns or systemic issues?
- Think about potential solutions or preventative measures based on the root cause you've identified.

5) **Plan Next Steps:** Based on the root cause and your analysis, list actionable steps that can help address or mitigate the issue in the future.



6) Reflect:

- Ponder on the power of this seemingly simple technique. How did it help you see the larger picture?

IMPACT MAPPING



is an effective technique often associated with product development.

However, it can also be applied in other contexts, such as organizational change, Agile adoption, and Scrum implementation.



1) Why are we doing this?

Start with a goal that is SMART

2) Who can produce the desired effect?

Focus on actors—who can support you and who can obstruct the desired effect? Who will be impacted by it?

3) How should our actors' behavior change?

Investigate the actors' impact—how the actors from the previous step can help you to achieve the goal or prevent you from achieving success.

4) What can we do to support the impact?

Think about the desired outcome and deliverables.
What can you do to make them happen?

SOFTWARE DEVELOPMENT SCENARIO

Imagine you're managing a software product designed to improve user engagement on a platform.

1) Goal: Increase user engagement by 30% in the next quarter.

2) Actors: Existing users, potential new users, marketing team, development team.

3) Desired Behavior Changes:

- Existing users to use the product more frequently.
- New users to sign up and onboard quickly.
- Marketing to create targeted campaigns.
- Developers to ensure stability and add features.

SOFTWARE DEVELOPMENT SCENARIO

4) Actions/Deliverables:

- Introduce a referral program.
- Improve onboarding experience.
- Marketing campaign for user engagement.
- Develop and launch new engagement features.

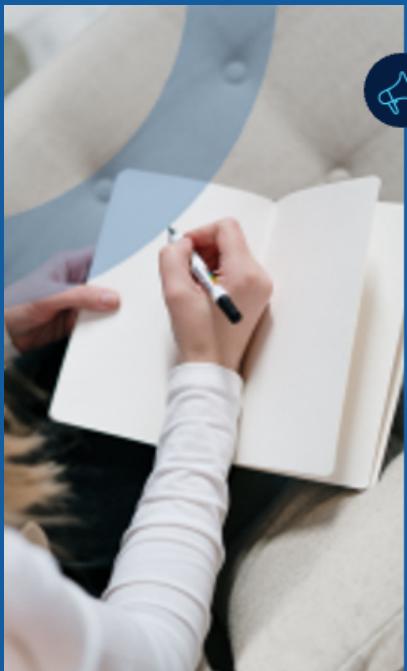
After laying out the map, it's crucial to prioritize tasks.

Star voting is one effective way to do this.

EXERCISE:

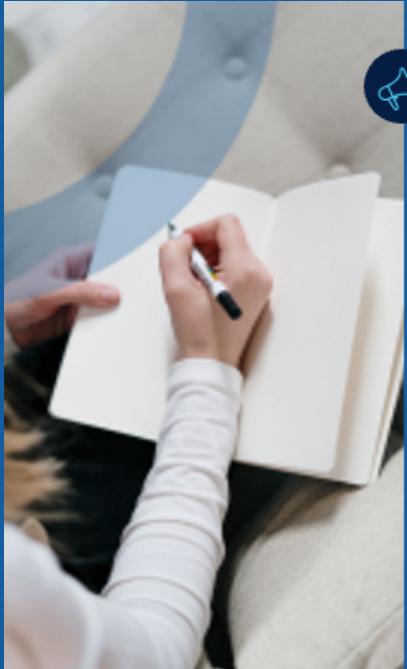
QUICK DIVE INTO IMPACT MAPPING





INSTRUCTIONS:

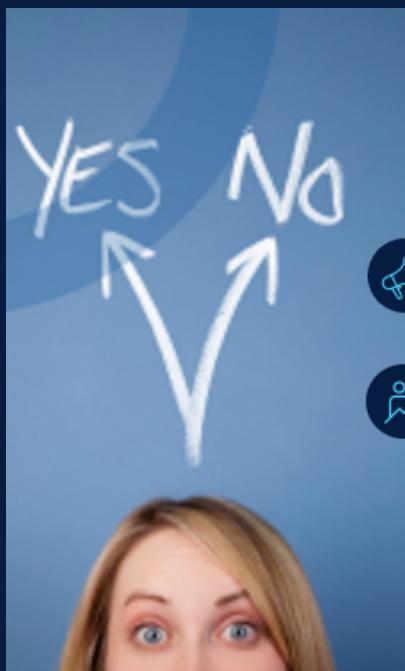
- 1) **Scenario Selection:** Choose a software challenge, e.g., designing an app for efficient remote work.
- 2) **Set a SMART Goal:** E.g., "Boost remote worker productivity by 20% in 6 months."
- 3) **List Actors:** Who influences or is affected by the scenario? E.g., remote workers, HR, IT support.
- 4) **Determine Behavior Changes:** Define desired changes for each actor. E.g., "Remote workers take effective breaks."



INSTRUCTIONS:

- 5) **Brainstorm Actions/Deliverables:** What supports the behavior change? E.g., "Feature for break reminders."
- 6) **Star Voting:** Prioritize actions by allowing participants to vote on the most crucial ones.
- 7) **Discussion & Refinement:** Share findings, get feedback, and adjust the map accordingly.

EFFECTIVE DECISION-MAKING TECHNIQUES IN GROUP SETTINGS



HELP ANY GROUP MAKE A DECISION



It is critical that not only everyone understands what the decision was, but that once made, everyone agrees and supports the decision.



Quickly guide a group to a clear, concise decision that results in takeaways, such as action items.

- ✓ Roman Vote
- ✓ Fist of Five
- ✓ Majority Voting
- ✓ Dot Voting
- ✓ Consensus Voting



ROMAN VOTE



One of the quickest ways to help a group make a decision.



Once you have stated the topic and clarified any remaining questions, count to three. At the end of the count, each person will use one hand to display one of three signs.

Thumbs Up – indicates agreement with the proposal

Thumbs Down – indicates rejection of the proposal

Flat Hand or Sideways Thumb – indicates neutrality



ROMAN VOTE



Useful for

- 1) deciding to continue a time-boxed conversation
- 2) asking if a group is ready for a break, or
- 3) any decision where it is not critical that everyone completely agrees.

FIST OF FIVE



FIST OF FIVE

A quick way of gaining feedback and decisions , extracting more information from participants as it is not a straight "yes" or "no" input.

Once you are ready to call the vote by clearly stating the proposal to be voted on, you count to three.

Each person then holds up the number of fingers on one hand of how strongly they agree with the proposal.



Five fingers indicate enthusiastic approval.

A closed fist, no fingers, indicates strong disagreement.

Three fingers or more the proposal is considered agreed upon.

If anyone has **two fingers or less**, then there needs to be more conversations on the reason that they are not interested in the proposal.



FIST OF FIVE

Use it to ask:

- How they feel about a topic
- Their happiness level
- Choosing where to go for lunch
- A group of people to define standards
- About creating working agreements
- etc.

MAJORITY VOTING



MAJORITY VOTING

Majority Voting is the method most people know from political voting.

There are three different Majority Voting standards:

- Simple Majority
- Lesser Majority
- Greater Majority



Simple Majority is simply the option with the most votes.

Lesser Majority requires greater than fifty percent of the vote in order for the proposal to pass.

Greater Majority is typically seventy-five percent of the votes for the proposal.

Voting can be conducted as closed or open voting structures.



How you facilitate voting depends on whether you are conducting closed or open voting.

Closed vote: have everyone write their vote on a small sticky note. Collect all the votes. Pull one sticky note at a time and read the vote. Then record the tally of each voting option.

Open voting: give each option and ask people to raise their hand if that is the option they chose. You simply count the number of hands to tally votes.

If the majority has not been reached, then the group might need more conversation and then additional votes until a majority is reached.

DOT VOTING



DOT VOTING

Dot Voting is a very quick way of getting a lot of information from a group, especially helpful when there are a lot of options from which to choose.

The **setup for Dot Voting:** Once you know how many items there are to be voted upon, divide that number by four and round up, to determine the number of votes each person will have.

For example: Ten ideas, then divide ten by four this is two and a half, which rounds up to three.



Explain that they can assign some or all of their votes on any given option

Votes can be given in a variety of ways: Checkmarks, tally marks, and even poker chips if in person.

After everyone has voted, you will tally the votes for each option.

CONSENSUS VOTING



CONSENSUS VOTING

The toughest of the voting styles because everyone needs to agree with the decision for it to be accepted.

Consensus Voting is conducted just like Majority Voting and can be done both closed and open.

However, if all the votes are not given toward one single option, the group needs to continue their discussion until they think they can attempt a successful voting outcome.

There is often a great deal of compromise done in order to make each of the options more appealing.