



# Facilitation: Running Effective Meetings

*If you had to identify, in one word, the reason why the human race has not achieved, and never will achieve its full potential, that word would be "meetings."*

—Dave Barry



## EXERCISE: Kicking Off A Meeting

### The Art of Facilitation

The process of conceiving and executing a successful meeting involves the deliberate act of planning and preparing for the meeting ahead of time.

Facilitation is the act of guiding that meeting process so that the participants all become actively involved and the meeting itself stays on course. Meetings should have a forward flow to them that allow participants to express themselves and have a sense of their own power within the organization.

Meetings should be organized so that people feel their time is not being wasted. Most workers have busy workdays and resent their time being misused by a disorganized or unnecessary meeting. If a meeting is efficient and informative, it can help build morale and positive attitudes within a team or department.

### The three keys to an effective meeting

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



According to the National Statistics Council, during an average meeting, \_\_\_\_\_% of the meeting time is unproductive, spent discussing non-agenda items.

### Ten meeting pitfalls:

- |                                 |                        |
|---------------------------------|------------------------|
| 1. Lack of preparation          | 6. Personality clashes |
| 2. Poor attendance              | 7. Lack of commitment  |
| 3. Side conversations           | 8. Fatigue             |
| 4. Disruptive behaviors         | 9. Lack of involvement |
| 5. Power struggles within group | 10. Inflexibility      |

### Three basic types of meetings:

1. **Problem-Solving.** The objective with this type of meeting is to state an issue, get background and feedback, broaden the range of solutions, narrow down the alternatives and gain consensus as to the best course of action.
2. **Brainstorming.** The objective with this type of meeting is to gather ideas about a specific topic. Cast a wide net, even including the wildest ideas, without judging. Generate as many ideas as possible and build on those already mentioned.
3. **Informative.** The objective with this type of meeting is to provide and receive information about a specific topic or issue. Make sure that all information that needs to be covered in the meeting is indeed covered.



According to the landmark study by Professor Albert Mehrabian, someone's initial perception of another person's communication breaks down three ways:

- **Verbal** (what we say) \_\_\_\_\_%
- **Vocal** (how we sound) \_\_\_\_\_%
- **Visual** (how we appear) \_\_\_\_\_%



## Tips When Co-Facilitating

While most presenters facilitate by themselves, others are frequently required to facilitate meetings or presentations with a partner, such as a peer, team member or co-worker. Co-facilitation can present some exciting advantages for an audience, but also offers some distinct challenges. A good facilitator must be able to both facilitate and co-facilitate, depending on the material and circumstances of the session.

One advantage to co-facilitation is that it introduces audiences to different communication styles, depending on which facilitators have been partnered. Another advantage is the task of delivering information and controlling an audience is shared between two presenters.

Here are some tips when facilitating with a partner:

1. **Prepare together.** Take time to properly prepare with your co-facilitator for the upcoming session. Avoid co-facilitating with a stranger. Decide on codes or signals for time management purposes in order to keep the session on track.
2. **Clarify roles.** Decide ahead of time which person will lead, capture ideas on a flip chart, control the slides, take questions, etc. This will avoid awkward moments of suddenly having to decide these things in front of an audience.
3. **Choose a leader.** Even when two or more people are co-facilitating, it is helpful to choose one person to serve as the leader of the session. The leader can be decided by the person's specific status within the organization, by someone volunteering or simply by choosing randomly.
4. **Take turns.** Try to share the stage as much as possible. Divide the session or presentation into equal sections, but be careful not to switch back and forth between speakers too frequently, as this will make it more difficult for you to connect with your audience.
5. **Assist when not facilitating.** When you are not facilitating, assist your co-facilitator by taking on other responsibilities such as capturing ideas on a whiteboard, distributing handouts or working the projector.
6. **Support your partner.** Avoid publicly disagreeing with your co-facilitator. If you have a concern, wait until a break to address it with them and do it privately. Try not to interrupt, if possible.



7. **Work your transitions.** Transitions from one facilitator to the next should be smooth and seamless so as not to lose the momentum and flow of the session. Practice your cues and transitions (what actors call “tops and tails”) ahead of time.
8. **Decide how to handle questions.** Anticipate questions that might arise during the session and decide which facilitator will handle them. Discuss and agree upon your answers ahead of time. If either facilitator has experience or expertise with a specific topic or area, that is the person who should field those questions.
9. **Stay engaged, even when not speaking.** It is important for co-facilitators to stay connected to each other during a session or meeting. Use active listening and check in often with each other. Focus on your co-facilitator even when you are not speaking so as not to distract your audience or steal focus.
10. **Sync your energy levels.** Try to match the energy level of your co-facilitator with regard to volume, pace and gestures.

## Three Different Types of Behavior Within Groups

1. **Functional behavior** - Maintains or enhances group effectiveness and increases the likelihood the group will achieve its goal or objective.  
*Examples might include:* \_\_\_\_\_
2. **Dysfunctional behavior** - Reduces group effectiveness and decreases the likelihood the group will achieve its goal or objective.  
*Examples might include:* \_\_\_\_\_
3. **Counteractive behavior** - Enhances the group’s effectiveness by negating negative behavior.  
*Examples might include:* \_\_\_\_\_

Group behavior refers to a combination of individual behaviors within a group that have meaning at a group level. When facilitators observe behavior in a group, they must look for levels of meaningful behavior—meaningful in that it either contributes or detracts from group effectiveness.



An \_\_\_\_\_ is any statement, question or nonverbal behavior made by a facilitator that is designed to help the group.

An effective facilitator relies on observable behavior as much as possible and relies on inferences only when absolutely necessary. **Facilitators intervene in the group process to help it become more effective.** Facilitators should intervene when members of the group act inconsistently with the ground rules they have agreed to follow.

The skilled facilitator must be aware of individual behavior and decide whether it contributes to, detracts from or redirects the group toward effectiveness. The facilitator should have a model for effective groups that she uses for diagnosis and intervention, utilizing the diagram and process below.

## CONFLICT/RESOLUTION CHAIN



### EXERCISE: Conflict Resolution



## Communication For Groups

Communication involves the exchanging of information in a way that conveys meaning. Members' comments will generally build upon, compete with or be unrelated to others. Typically, members with higher status in the group are more likely to interrupt those with lower status.

### Conflict management within a group

The way in which a group manages conflict will affect its ability to solve problems, be creative, and move forward to accommodate the different interests and demands placed upon the group.

Researchers have identified five different ways that individuals manage conflict:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Conflict scenarios

Using the information discussed previously, examine the following conflict scenarios. Try to understand the specific conflicts that have arisen within the group and lay out what potential consequences might occur if the conflicts are not resolved. Then decide which of the choices listed above would be most appropriate to effectively manage each.

1. Your interior design company has decided to rebrand, starting with a redesign of the corporate logo. You soon discover that your two graphic designers have passionate and conflicting feelings about how the new logo should look.

*What is the conflict?* \_\_\_\_\_

*What are the consequences if this conflict remains unresolved?* \_\_\_\_\_

*What is the best way to manage this conflict?* \_\_\_\_\_



2. The exasperated head of your party planning committee approaches you with complaints about the consistently rude and unprofessional behavior exhibited by the food vendor the company has hired for the past three years.

*What is the conflict?* \_\_\_\_\_

*What are the consequences if this conflict remains unresolved?* \_\_\_\_\_

*What is the best way to manage this conflict?* \_\_\_\_\_

3. Your sales manager, who is scheduled to speak the following day at the annual sales kick off, suddenly informs you that his son in another state has been rushed to the hospital after suffering back injuries in a car accident.

*What is the conflict?* \_\_\_\_\_

*What are the consequences if this conflict remains unresolved?* \_\_\_\_\_

*What is the best way to manage this conflict?* \_\_\_\_\_

4. During a particularly busy work week, and with deadlines looming, you realize you are going to need your already exhausted and irritable team to continue to work on their project through the weekend.

*What is the conflict?* \_\_\_\_\_

*What are the consequences if this conflict remains unresolved?* \_\_\_\_\_

*What is the best way to manage this conflict?* \_\_\_\_\_

5. As a project manager, you sense that a long-time employee on your team appears threatened by the ideas and input coming from a recent hire.

*What is the conflict?* \_\_\_\_\_

*What are the consequences if this conflict remains unresolved?* \_\_\_\_\_

*What is the best way to manage this conflict?* \_\_\_\_\_



*Communication works fine  
for those who work at it.*

—John Powell



## EXERCISE: Facilitator's Challenge

**As a facilitator, how would you handle the following scenarios?**

1. A member of the group asks a question that seems to include an embedded statement (e.g. "Bill, do you really think that the marketing department can turn that around in two weeks?").
2. The topic of conversation seems to switch without the group agreeing to do so, or someone in the group says, "This is a little off topic but..."
3. A member of the group makes a point that is rather vague, scattered or confusing.
4. One or more members of the group have been silent for an extended period of time.
5. One member interrupts another member who is in the middle of a thought.
6. A member takes a cheap shot or makes a sarcastic statement about another member or his idea.
7. One member has difficulty putting his thoughts into words and finally gives up, saying, "Nevermind. I don't know how to say it."
8. The facilitator has been unable to get the group's attention because several conversations are happening simultaneously.





## Three Keys to Effective Meetings

### KEY ONE: Pre-Meeting Preparation

Efficient and effective meetings don't just happen. They take lots of preparation and planning. Going back to the Three Keys we spoke about earlier, preparation is vital for success in facilitating a productive meeting. The preparation portion of successful facilitation is certainly the most time consuming.

Facilitators should know what problems the group faces, the solutions they have tried, and how each of the individuals has contributed to the problem or helped to reduce it. This involves building trust between facilitator and the group so that the facilitator does not take advantage of disclosures and instead proceeds with empathy and support.

Questions for pre-meeting facilitation:

- What is the duration set aside for meeting?
- What objective does the group hope to accomplish?
- What problems is the group experiencing?
- What are the consequences if these problems are not resolved?
- What is the root cause of the problem?
- What has been done to try and resolve the problems up to now?
- What is the history of the group?



### Things to consider when preparing:

1. **Objective.** When planning a meeting it is essential that you define what your goals and objectives are. What do you hope to accomplish? What is your intention? This will also help define whether or not you have been successful once the meeting is over.
2. **Audience.** Decide whom needs to attend this particular meeting and what their specific roles will be.
3. **Site.** The designated meeting site is also a crucial decision that can play directly into the success or failure of a meeting. Ask yourself if the space you have chosen will meet the requirements for the participants involved. Is the location easily accessible to people or is it out of the way? Is the equipment provided at the site adequate for the meeting?
4. **Timing.** Make sure that the date and time you have chosen for the meeting works for the participants attending. Be sure to allot enough time so you are able to get through all of the material you hope to discuss.
5. **Facilitator.** Decide ahead of time who will be running the meeting. This is important to help keep things moving and on track.
6. **Agenda.** It is helpful to establish a clear agenda before the meeting takes place to help keep things flowing. It also can serve as a roadmap to make sure everyone remains on the same page.
7. **Room Set-Up.** Try to get into the actual meeting room ahead of the actual meeting. Arrange the chairs and tables in the most useful way possible so that everyone can see the facilitator and visual aids. Also, make sure seating distinguishes participants from non-participants.
8. **Roles.** Often it is helpful to assign different roles to people in the meeting. Who will be presenting? Who will be a timekeeper? Who will take notes?
9. **Turnout.** Poor attendance can torpedo a promising meeting at the very last moment. It is not enough to simply invite people and hope that they show up. Reminders are essential as you get closer to the actual meeting day and time. Calls, emails, written reminders and public announcements are all good ways to make sure turnout is maximized. Keep track of the percentage of people who actually show up to help calculate future turnout.
10. **Materials.** You should prepare the necessary materials for the meeting and be ready to distribute.



## KEY TWO: The Actual Meeting

Now that all of the preparation has been done, it's showtime! Meetings are a vital part of doing business and can make or break an organization. Meetings should be informative, forward moving and efficient. And above all, they should be enjoyable!

Some tips for successful meeting facilitation:

1. **Start the meeting promptly.** This means starting no later than ten minutes after the official start time.
2. **Greet attendees.** Introduce yourself if necessary and welcome everyone to the meeting. If there are people who are new or unknown to the group, take the opportunity to introduce them.
3. **Establish agenda.** Lay out the agenda for the day so people have an idea what to expect from the meeting.
4. **Set ground rules.** Set up an agreement with attendees so that rules are established from the outset.
5. **Encourage participation.** It is important that you create an open, comfortable environment for people right off the bat. This will encourage everyone to participate.
6. **Stay on track.** Try to keep the meeting moving forward by sticking to the agenda you established at the start of the meeting. Always end on time.
7. **Seek action.** Meetings should not generally be held to simply discuss and educate. Try to define specific "calls to action" for attendees so they can be held accountable. Get confirmation that they can and will deliver.
8. **Bring closure.** If possible, bring closure to a particular subject or issue before moving on to a new one. Most groups will spend much more time discussing an item than is actually necessary.
9. **Stay flexible.** As a facilitator you must remain alert and nimble as meetings can shift focus on a dime. If an issue arises that you sense must be addressed right away, be prepared to alter your agenda to accommodate it.
10. **Closing.** As you draw the meeting to a close, it is helpful to review what has been covered, what decisions have been made and what commitments are still outstanding. Thank the attendees for attending. Always end the meeting on time or slightly early.



### **Kicking Off a Meeting**

1. Make introductions
2. Check for expectations and concerns
3. Agree on agenda/time allocation
4. Agree on process and ground rules
5. Define roles

### **Ending a Meeting**

1. Summarize decisions made
2. Review plans for action
3. Schedule next meeting
4. Tie up any loose ends
5. Do a self-critique (divide flip chart in half)



## KEY THREE: Post-Meeting Follow-Up

Once a meeting is finished, there is still one last piece of the puzzle that must be addressed: the follow-up. It is essential that a meeting follow-up takes place as soon as possible after the completion of the meeting. This will help avoid things falling through the cracks with the passage of too much time.

### Tips for good meeting follow-up:

1. Make sure accurate and thorough notes were taken.
2. Thank anyone who helped to make the meeting a success.
3. Check your agenda to make sure you covered all the info.
4. Provide meeting notes to anyone who wanted to attend but could not.
5. Privately seek feedback from any attendees who might be willing to provide it.
6. Decide on a date for a follow-up meeting to gauge progress.

## Action planning

An action plan is a series of steps for continuous improvement or practice that will help move you towards a specific goal or objective. An effective action plan should include the following steps:

- Step 1: **Define the objective.** This means having a clear goal and purpose for the plan, including any pertinent tasks that must be completed for success.
- Step 2: **Identify critical success factors.** These are the steps or tasks that must go right if you are to succeed, including deadlines, measures or results sought.
- Step 3: **Delegate tasks.** Once you see the entire project from beginning to end, look at each task in greater detail and assign tasks to specific individuals for accountability.
- Step 4: **Track and assess progress.** It is not only important to regularly assess progress for an action plan, it is also essential to decide how you will respond to the results of these assessments.



**EXERCISE: Facilitating a Problem-Solving Meeting**



**EXERCISE: Facilitating a Brainstorming Meeting**



## (SAMPLE AGENDA)

Acme thanks BellStar for hosting today's meeting.

Acme Enterprises' Customer Development Center, located in Orlando, FL, has developed, strategized, and organized a contact center that in less than two years has started generating over \$8.5 million in revenue per day, serving more than 500,000 inside sales accounts, and handling more than 125,000 inbound service calls per week.

<b>Facilitator:</b>	<b>Jennifer Drew</b>
<b>Recorder:</b>	<b>Janet Van Dyne</b>
<b>Date/Time:</b>	<b>6/22/14</b>
<b>A/V:</b>	<b>Digital Presentation</b>
<b>Location:</b>	<b>Deluxe Hotel, Las Vegas</b>
<b>Distribution:</b>	<b>Managers, VP's, and Associates</b>

**June 22, 2014**

**8:30 a.m. Registrations and early networking**

**9:00 a.m. Welcome and opening remarks**

Introduction of guests and visitors:

- Robert da Costa, ABC Corp.
- Hal Jordan, YYZ, Inc.
- Alan Scott, Big Biz Enterprise

**9:15 a.m. Overview of Acme Enterprises operations and initiatives**

Sam Wilson, Director of Operations: Overview of operations and sharing various initiatives implemented to reduce turnover.

**10:00 a.m. Presentation from our meeting sponsor**

Jim Hammond, Black Star: Emerging Workforce – The Great Divide:  
The Employer-Worker Disconnect

**10:45 a.m. Roundtable discussions**

Planners Inc. – Hiring the right person, Coaching/Training,  
Employer/Employee Surveys

**11:30 a.m. Tour of Acme Enterprises contact center**

**Noon Wrap-up and closing**



## EVALUATION FOR FACILITATORS

- ✓ Was this particular meeting successful?
- ✓ If so, what made the meeting successful?
- ✓ What did the facilitator do that helped make the meeting successful?
- ✓ Did the facilitator help keep the meeting on track?
- ✓ Did the facilitator set an agenda at the outset?
- ✓ Did the facilitator have a good opening for the meeting?
- ✓ Did the facilitator close the meeting properly?
- ✓ Did the facilitator involve the entire group in the meeting?
- ✓ Did the facilitator seem at ease and in control of the meeting?
- ✓ What could have made the meeting even more successful?