Facilitation Skills for Leading Successful Teams

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Objectives

- Introduce the core meeting process framework for successful work sessions

- Share the key elements for the 3 stages of the core meeting process framework – set-up, conduct and follow through

- Learn key facilitative behaviors to lead better work sessions

Agenda

Agenda Item	Responsibility	Process
1. Good Meeting Skills/Facilitation	**A. Lee & K. Eng**	**Teach**
2. Introduction to Core Meeting Framework	**A. Lee & K. Eng**	**Teach**
A. Set-up • Plan for a Session	**A. Lee & K. Eng** All	**Teach** Hands-on Practice
B. Conduct • How to Manage Challenging People	**A. Lee & K. Eng** All	**Teach** Discussion
A. Follow Through	**A. Lee & K. Eng**	**Teach**

Video

Source:
http://www.ted.com/talks/
david_grady_how_to_save_the_world_or_at_least_yourself_from
_bad_meetings

Group Sharing:

Think about meetings you have attended recently….

What happens when meetings go badly?

- What did it look like?
- What are the attributes?

What happens when meetings go well?

- What was the last great meeting you attended?
- What are the attributes?

Good Meeting Skills
(Good Facilitation)

Purpose of good meeting skills

- Effectively manage team's valuable time in any collaborative effort to make decisions efficiently and effectively

Facilitation = Core Competency of Leaders

- Leaders lead change by:

  - Forming & maintaining teams

  - Generating active participation

  - Creating buy-in

  - Empowering people to take charge

  - Leading successful projects

For the purposes of this course - yes

Ideally, yes

or

For high-stakes topics

or

In reality, you may need to act in both roles

If you need the problem/process owner to actively participate

What is Facilitation?

A way of:

- Providing leadership to others through process

- Instead of being a player, facilitators act more like a referee

  - Watch the action vs. participate

  - Control the pace & which activities happen when

  - Help members define & reach goals

Content vs. Process

| What	How
• **The topics for discussion** • **The task/work** • **The problems being solved** • **The decisions made** • **The agenda items** • **The goals**	• **The methods & procedures** • **How relations are maintained** • **The tools being used** • **The rules or norms set** • **The group dynamics** • **The climate**

When a meeting leader….

offers opinion with the intent of influencing the outcome of discussions

= content leader

becomes neutral and non-directive in relation to the content

= process leader or facilitator

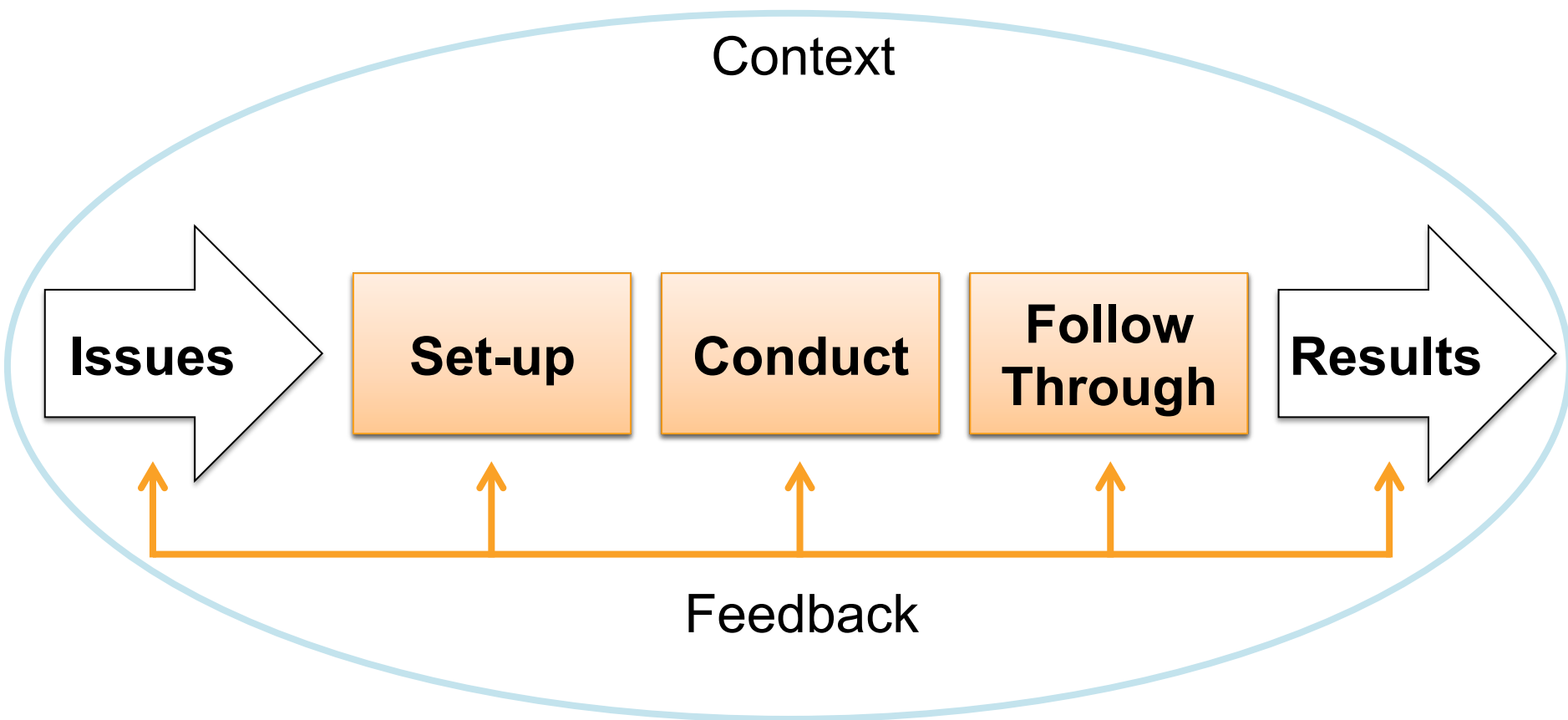# Introduction to Core Meeting Framework

Lean Thinking

Current

Future

GAP

Where are we?

How do we get there?

Where do we want to go?
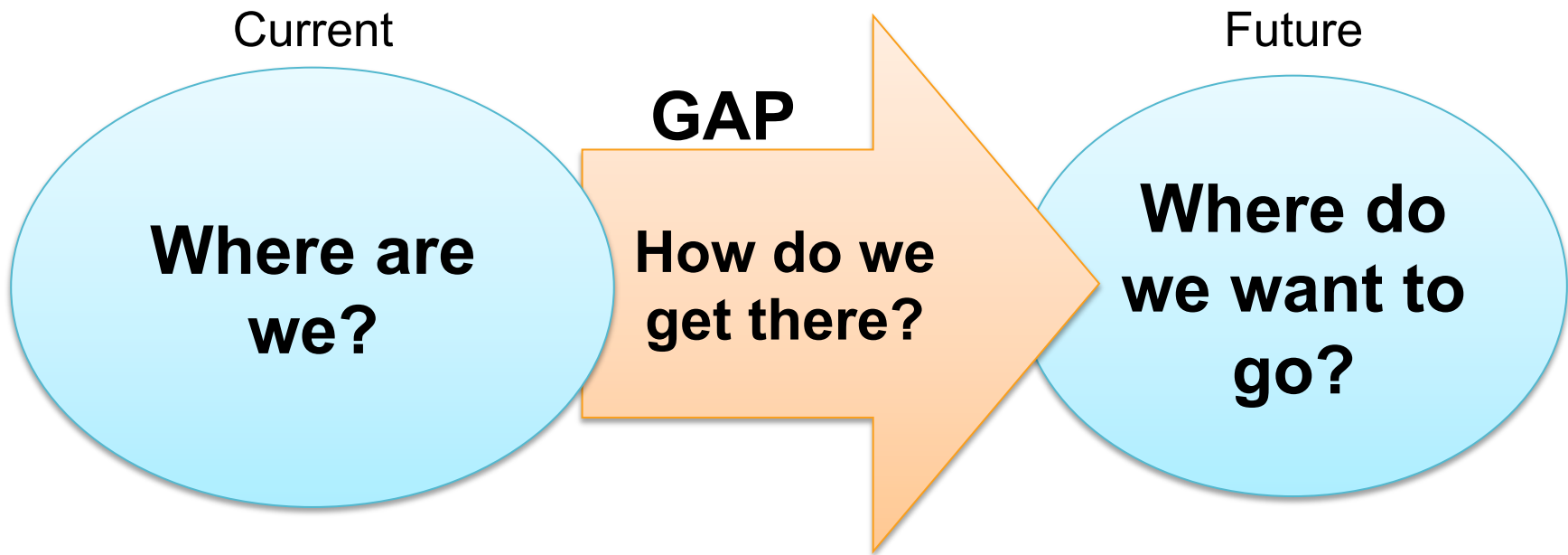
Successful meetings require a process & relationships
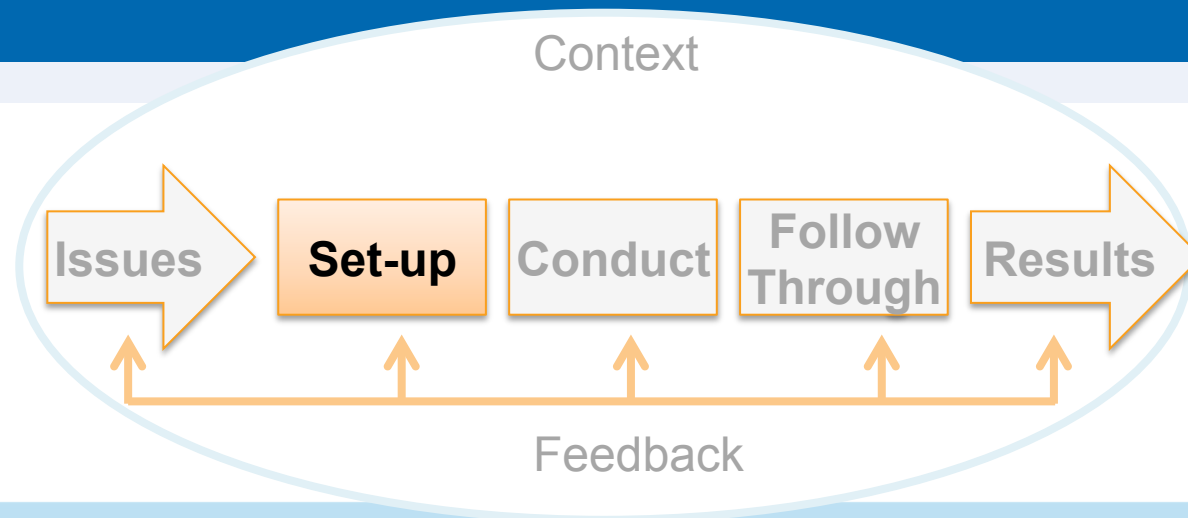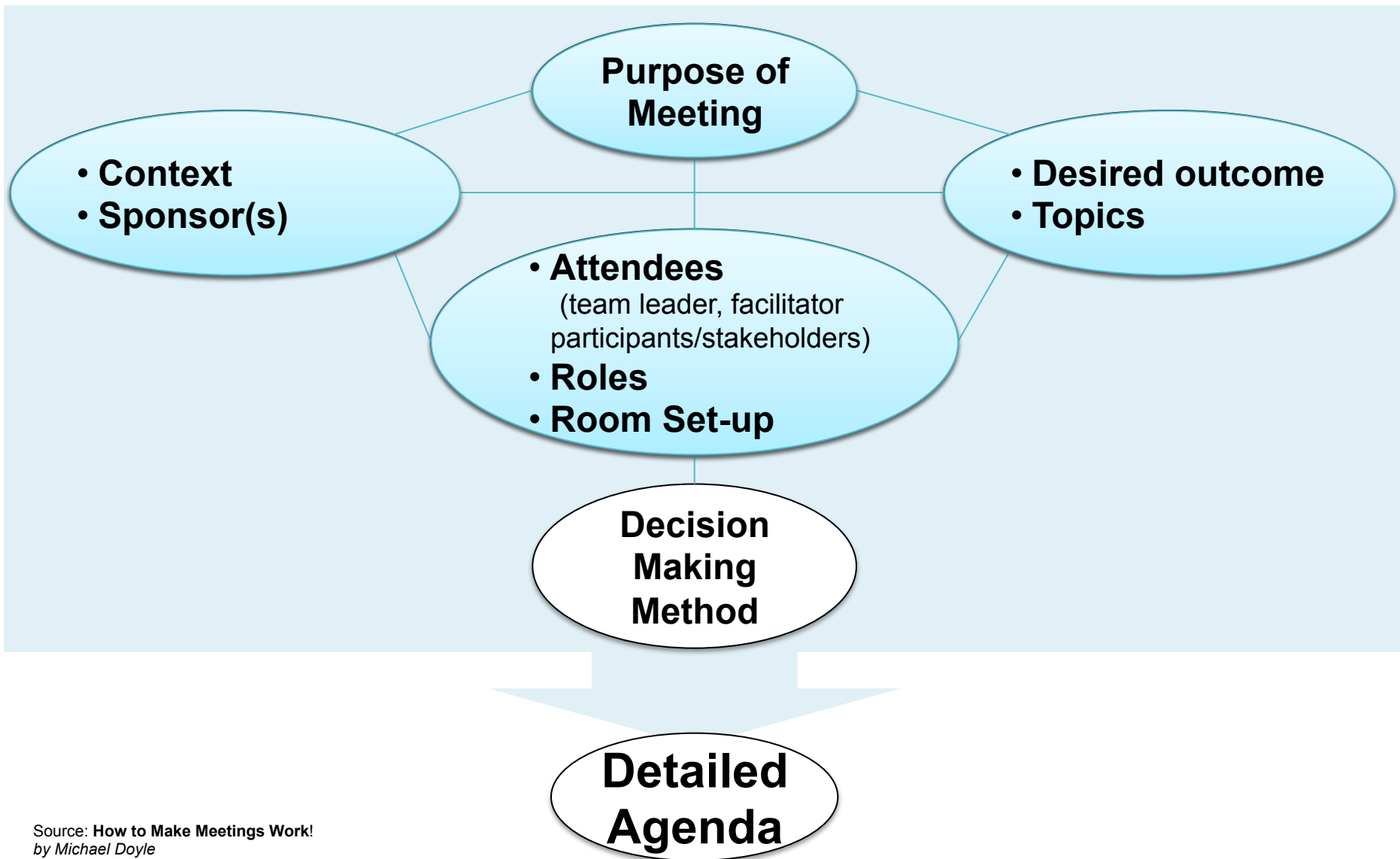
Defined results
(for meetings)

Core Meeting Process

Successful meetings = short, focused, yield desired outcomes

Source: **How to Make Meetings Work**!
by Michael Doyle

Meeting Set-up

Context

| Issues | Set-up | Conduct | Follow Through | Results |

Feedback

Key Elements of Setting Up

Purpose of Meeting

• **Context**
• **Sponsor(s)**

• **Desired outcome**
• **Topics**

• **Attendees**
  (team leader, facilitator
  participants/stakeholders)
• **Roles**
• **Room Set-up**

Decision Making Method

Detailed Agenda

Source: **How to Make Meetings Work**!
by Michael Doyle

Context

Issues **Set-up** Conduct Follow Through Results

Feedback
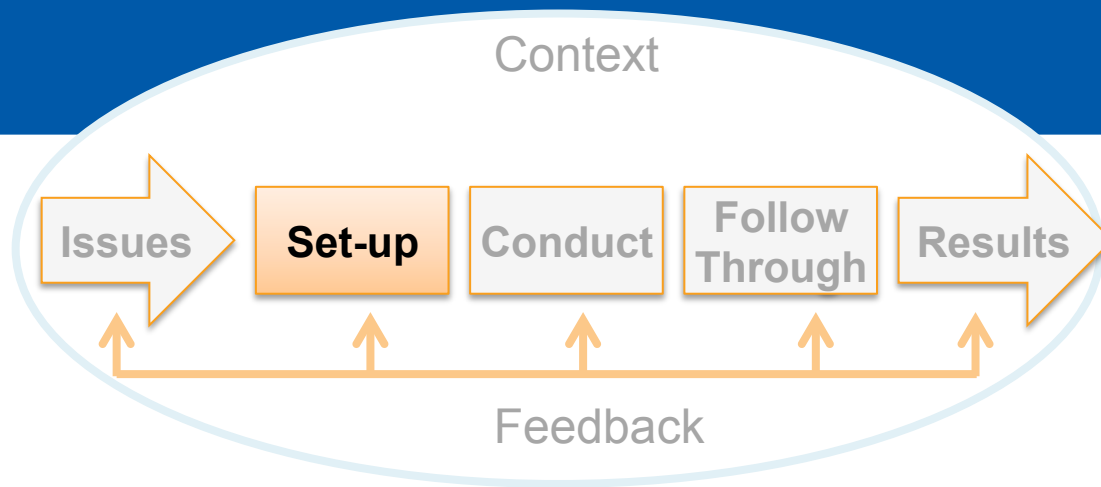
Why Meet?

5 Types of Meetings

Ask: What is the purpose?
Share: Within agenda before the meeting to set expectations

1. Sharing Information

2. Solving Problems

3. Decision Making

4. Planning

5. Reacting

- No decisions will be made
- Facilitation isn't critical
- Synergy isn't important
- Closure is not needed

- Decisions will be made
- A clear process is needed
- Facilitation is important
- People need to build on each other's thoughts
- Closure and clear next steps are needed

Source: How to Make Meetings Work!
by Michael Doyle

When NOT to have a Meeting

- Generally not a good idea when:
  - Deal with personnel issues
  - Inadequate data or poor preparation
  - Better communicated by phone, memo/email, or 1:1
  - Subject is confidential
  - Decision is made/or up to you
  - Subject is trivial
  - Too much anger & hostility in the group to be productive

Process & Content

Approach

Define goals, objectives, participants, etc.

Define why, what, how, who

Session Planning Tool

Charter

Agenda

Process: Plan for a Session

Ask:

- Purpose of the session?
- Number of participants?
  - Need introductions?
- Group warm-up for the task?
- Any buy-in challenges?
- What do participants need to know?
- Key questions?
- What could go wrong?
- Decision making process?

Use this worksheet to plan for a meeting or a series of meetings

Session Planning Worksheet

To aid you in planning your next session, consider the following:

1. Purpose of the session:_____

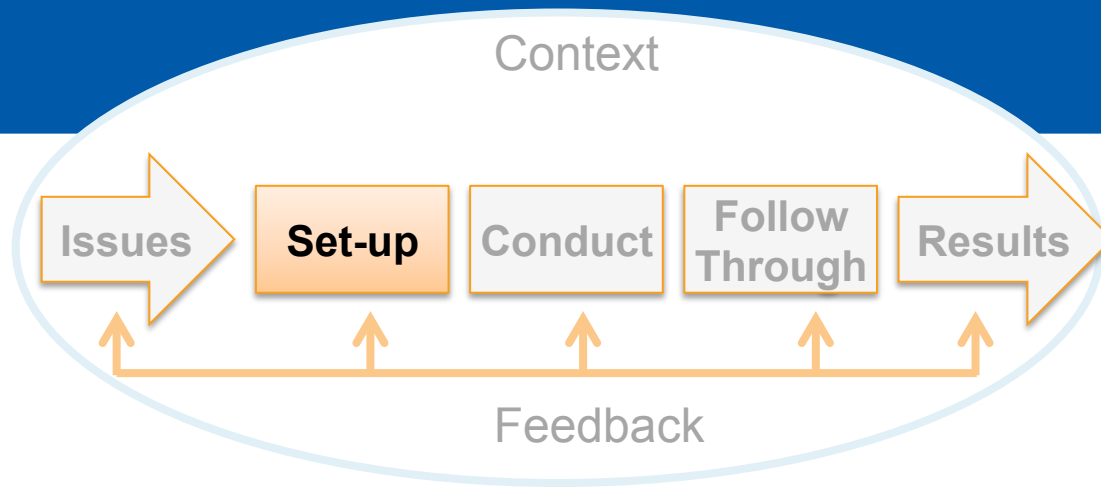2. Number of participants (odd number):_____ Do they need to be introduced? Y / N

3. What will you do to warm up the group to the task?_____

4. Will buy-in be a problem? If yes, what is the basic question you should ask?

8. How do we make decisions?

Facilitating with Ease!
© 2005 Ingrid Bens and John Wiley & Sons, Inc.

Context

| Issues | Set-up | Conduct | Follow Through | Results |

Feedback

Logistical Planning

Logistical Planning

- Planning is all about anticipation

- Avoid logistical problems with proper preparation

Logistical Planning – Considerations

- Physical room set-up
- Length of the meeting
- Participants
  - Name tents
  - Seating
- Visual focal points
- Supplies
- Refreshments
  - Rotating food menus

- Choose the right room
  - **Size**: Fits the group (# of participants)
    - Test by arranging chairs, tables, equipment before the meeting (dry run)

  - **Shape**: Arrange seats in appropriate configuration
    - Choose for flexibility so you can custom-design

  - **Arrangement of seats/tables**: Sets stage for meeting and can influence what will happen

- Arrangement of seats/tables

  - Semi-circular best to focus everyone & encourage collaborative behaviors to problem solve

  - Circular results in meandering discussions with no focal point but good for eye contact for intense face-to-face exchanges (or meals)
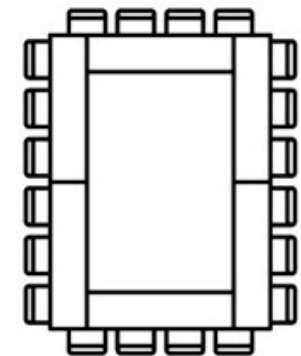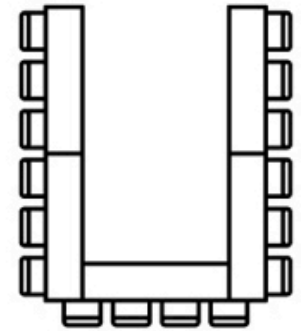
- ## Semi-circular setup

  - Face away from entrance to minimize disruptions of meeting flow

  - Seats face wall with group memory

  - Group memory wall needs to hold 4-6 or more flipchart sheets (8-16 ft of smooth wall surface)

  - Keep semi-circle diameter ≤ 15 feet for eye contact, normal conversation, reading group memory

    - Make 2nd row if needed to keep semi-circle tight

    - Ideally no tables
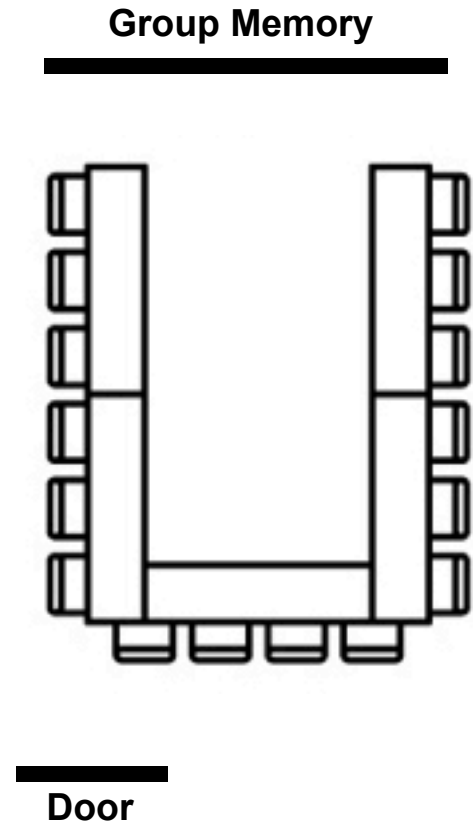
Group Memory

Door

- Tip for when you begin with a new group:
  - Shorter meetings with reduced scope and fewer objectives
  - More predictable and controllable
  - Don't overload your agenda - build in buffers!

- Consider:
  - Who is your audience?
  - What are the agenda items & process for each

Conduct Meeting

Context

Issues → Set-up → **Conduct** → Follow Through → Results →

Feedback
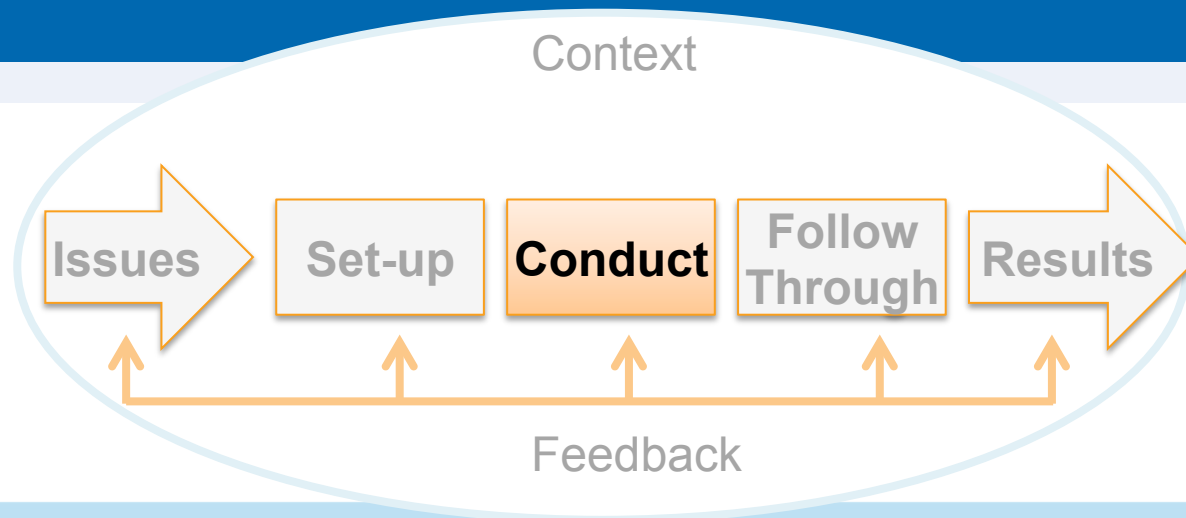
Are you ready to run the meeting?

What	How
Well-planned meetings	**Facilitation,** Session Planning
Clear team goal	**Facilitation,** Charter → Detailed Agenda
Productive & beneficial behaviors (i.e. group norms)	**Facilitation,** Ground rules
Balanced Participation	**Facilitation,** Ground rules
Clarity about decision-making options	**Facilitation,** Session Planning → Detailed Agenda
Minutes, Follow-up plan, decision log, issue log	**Facilitation,** Recorder
Clear & open communication	**Facilitation,** Charter, Communication Plan

How do I manage challenging people during a meeting?

Key Facilitative Behaviors

Preventions

- Get agreement on
  - Desired outcomes
  - Agenda
  - Roles
  - Decision making
  - Ground rules
- Clarify the process
- Maintain focus
- Focus on agreement, not disagreement
- Don't talk too much

Interventions
Start with lowest level intervention

- Boomerang
- Ask/say: "What's going on?"
- Enforce process agreements
- Regain focus
- Accept/ legitimatize /deal with or defer
- Use humor
- Use the group memory

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Context

Issues | Set-up | **Conduct** | Follow Through | Results

Feedback

Closing the Meeting

Issue Log
Action Items
Decisions Log

| ISSUES LOG									
#	Issue Description	Date Reported	Status	Priority	Resolution	Target Date	Closed Date	Assigned To	Reported By
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									

ACTION ITEMS LOG							
#	Action Item	Date Created	Status	Target Date	Due Date	Closed Date	Assigned To	Comments
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							

KEY DECISIONS LOG			
#	Decision	Decision Date	Decision Makers
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			

Closing the Meeting: Prepare for the next meeting

- Set expectations on progress to
  - Complete action items
  - Resolve issues
- Create communication plan
  - What does the audience need and want to know?
  - When do we need to communicate?
  - What is the regular or preferred channel for reaching this audience?
  - For this specific audience and message, what is the most effective way to get your message across?
- Draft agenda with the team

Meeting Follow Through

Context

Issues → Set-up | Conduct | **Follow Through** | Results →

Feedback
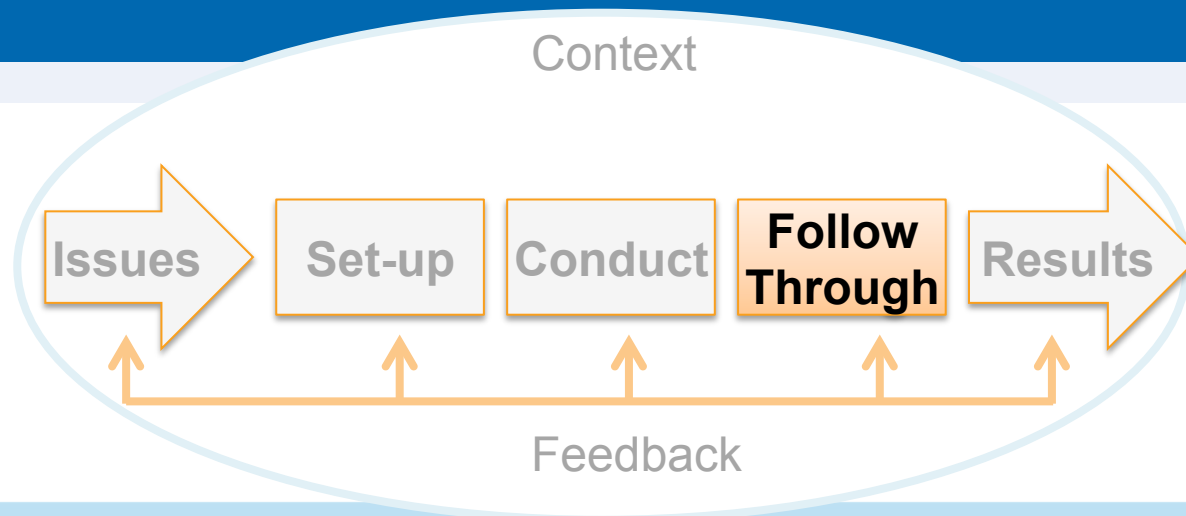
Meeting Follow Through

- ## What is it?

  - A process for **closing** or concluding a meeting in a way that **acknowledges** what happened during the meeting **sets in motion actions** to implement decisions made, and **carries forward** whatever has been learned to future meetings.

- ## Why it's important?

  - Following through is the simple (i.e. common sense), but often neglected, step that makes meeting results a **tangible reality**. The best meeting in the world will be a source of frustration if no action occurs as a result of it.

Thank you!