

American Society for Quality Presents...
The Art of Facilitating Effective
Meetings



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Workshop Overview

Facilitating a meeting is a skill that challenges our abilities to focus, encourage, and support the thoughts, opinions, and values of others while ensuring a quality discussion that targets the tasks and goals at hand. This one hour interactive workshop *will identify core skills and tools and demonstrate methods* to enhance your ability to *conduct and facilitate effective and productive* meetings.

- How to facilitate a productive, relevant, and effective discussion.
 - Preparing the agenda
 - Setting tone and pace
 - Keeping participants on task
 - Assessing participant's concentration and engagement
- How to handle difficult personalities
- How to keep the meeting from disintegrating.
- How to conduct a meeting that makes a difference!
- The Eight Step Approach
- Implementation Check List

A g e n d a

A Thought To Ponder...

What makes a meeting effective and productive?

Does this sound familiar...

Scene 1: “Our leader needs to learn something about facilitation...What a waste of time!”

“Right! I know it’s John’s meeting but he never shuts up! The one time I tried to say something he cut me off.”

“And, he never gave Amy’s idea a second thought, and it sounded interesting.”

“Yah, and then we went off into never, never land again.”

“So we’re right back to square one.”

“Yah, see you next week...same time, same place, same outcome...”

Important points to consider

- Duties and responsibilities
 - Plan
 - Incorporate
 - Prioritize
 - Co-ordinate
 - Facilitate
 - Follow-up

Identify Purpose

“Purpose” answers the questions...

- Why are we having this meeting?
- What are our objectives?
- What outcome are we seeking?
- How are we going to accomplish this...
 - Type of meeting
 - Information Exchange
 - Brainstorming
 - Problem Solving
 - Project Planning
 - Training

Key point—One of the main criteria for excellent facilitation is focus...having a very clear vision of what needs to be accomplished and conducting the right type of meeting to produce the desired results.

Core Skills and Tools...

How to facilitate a productive discussion:

- Prepare an agenda
- Set tone and pace
- Keep participants on task
- Assess participant's concentration, engagement, and sense of well-being

Preparing the Agenda

Key Skills and Tools...

- Identify why you are meeting
- Identify type of meeting
- Outline and prioritize objectives
- Define desired outcome/deliverables
- Set timing requirements
 - Topic discussion
 - Presentations, guest speakers
 - Breaks, if required
- Establish agreement on who will...
 - Record minutes and distribution method
 - Record decisions
 - Record actions
 - Follow-up

Setting Tone and Pace

Key Skills...

- Making everyone feel comfortable and valued
- Encouraging participation
- Managing conflict
- Listening and observing
- Engaging and guiding the groups discussions
- Clarifying issues to ensure quality decisions
- Maintaining focus on objectives to ensure outcome-based meetings

Key point—Keep meeting moving.

Keeping Participants on Task

Key Skills and Tools...

- Maintain Focus on Purpose and Objectives...
- Follow agenda
- Probe for agreement
- State key points-post them if possible
- Postpone...“Park” non-agenda topics...

“That is definitely an issue we need to discuss, let’s right it down so we can address it later.

Key point— Make sure you address “parked” issues at the end of the meeting even if it’s only to include them in the minutes for future consideration.

Assessing Concentration, Engagement, and Sense of Well-being

Key Skills and Tools...

- Assess participants' level of energy, enthusiasm, and interest
 - Use brainstorming tools and polling to engage none participation
 - Round table approach
 - Ask open ended questions (How do *you* feel about that Frank?)
 - Listen, maintain eye contact, and nod head to promote confidence
 - Address silent members directly
 - “Mary, you were about to say something?”
 - “Let’s get a few comments from members we haven’t heard from yet.”

Assessing, continued...

- Assess body language, tone and length of discussion
 - Observe whose doing the talking and whose listening
 - Always thank the member for their input...then ask...
“What are your thoughts about Mike’s suggestion?”
 - Listen for unfamiliar terms, and clarify confusing discussions
 - Summarize main points after lengthy discussion
 - Probe for agreement
 - “Do other members share Mary and John’s concern?”

Key point— Avoid meetings with dim lights, comfortable chairs, & meals.

Know Your Audience

Making the “Chemistry” work for you.

Something to consider...

*When all people **feel** respected and encouraged...they are more inclined to come out of their “safe place” and make a “real” contribution.*

Psychology and Facilitation...

Top 20 Rated Personalities

- Clock Watcher
- Dozer
- Need to be somewhere else
- Run off at the mouth
- Know it all
- Dominator/last word
- Power Player
- Likes to hear oneself talk
- Interrupter
- Bull in a china shop
- Silent thinker
- Off on a tangent
- The face maker
- Own agenda
- Speak without listening
- Daydreamer
- Zoned out
- Whisper
- Wigglier
- Paper wrestler

Handling Difficult Personalities...

Thoughts on...

- “Interrupting” an overzealous participant
- Curtailing the inevitable “disagreement”
- Awakening the “lost” participant

Questions To Ask Yourself

- Who's doing the talking? For how long? How often?
- Who's not talking?
- Who are people looking at when they talk?
- Who talks after whom, or who interrupts them?
- What style of communication is used (assertiveness, questions, tentative statements)?
- What tone of voice is used?
- What is being said nonverbally through body language, posture, gestures, or seating arrangements?
- Who are the followers?
- Are people listening carefully to others?
- Are minority opinions being solicited and respected?

Communication Tips

- *“We teach people how to treat us.”* Dr Phil
- Shutting down people gently:
 - At their first breath—break in with a question, focus on content not behavior.
 - At first breath—break in and summarize, this prevents interaction, and confrontation.
 - Ask group if they wish to continue on subject or move on in the interest of time; table issue.
 - Use non threatening language— “I see your point”, “That’s a good thought; and how about...”, “Yes; and in addition to that how about...”
 - Listen carefully, be attentive, acknowledge—

“Seek first to understand, than to be understood.” Dr. Covey

Keeping the Meeting from Disintegrating...

Thoughts on...

- Enforcing ground rules
- Clarifying confusing discussion
- Guiding positive discussion

Do's and Don'ts

- Do—Explain Agenda
 - Set goals with participants
- Do—Address who will take minutes
 - Good minutes need undivided attention
- Do—Stay task oriented
 - Focus on tasks not personalities or irrelevant issues
- Do—Set the ground rules
 - Make expectations clear...participate, keep focus, maintain momentum, and reach closure
- Do—Be an impartial moderator
 - You are seeking to “enable” not dominate
- Do—Establish a climate for sharing
 - Protect the rights of individuals
- Do—Let everyone be heard
 - Acknowledge all ideas

Key Points...

- The leader should:
 - Make clear what the objective is for each specific topic
 - Give an overview
 - State importance
 - Explain the current situation
 - Define what the needs are
 - State possible course of action
 - Assign clear, agreed upon “*action items*” with direction and timeline, whenever possible.

Note: A decision is worthless if no plans are made to assure its implementation. Follow-up on action items.

Don'ts

- Don't—Control or monopolize
- Don't—Allow “others” to take control
- Don't— Make personal, give permission to disrespect, get off focus, argue, or show hostility
- Don't—Invade territories
- Don't—Spend too much time on any one objective unless the group agrees to it.
- Don't—Set a meeting goal then ignore it.

Encourage a Clash of Ideas

- Maintain a climate of constant inquiry in which all assumptions (including your own), can be questioned and tested.
- Encourage different points of view, critical thinking, and constructive disagreement.
- Stimulate creativity and counter the group's desire to reach an early consensus.

Key point— Productive meetings often involve conflict, but it should be a clash of ideas, not personalities.

“Encourage The Heart” Warren Bennis and Burt Nanus

Conducting a Meeting that Makes a Difference...

Thoughts on...

- Reaching conclusion
- Assigning action items
- Following-up

Closing The Meeting—Reaching Conclusion...

- Summarize highlights, decisions, and restate all agreed-upon assignments and deadlines.
- If group needs to meet again, schedule while the group is right there.
- Thank participants for their attendance and contributions.

Key point—It is very important the meeting ends on a positive note with participants feeling that the meeting accomplished its objectives.

Follow-through...

Addressing Action Items

- Contact persons assigned action items and ask if assistance is needed, and verify timeline.
- Prepare minutes and have your key participants verify main points prior to distribution.
- Ask for feedback from key participants.
- Distribute minutes by next day (same day is better) adding date/time of next meeting, if applicable.
- Begin to plan next meeting while thoughts are still fresh in your mind; jot down notes.

Follow-up ...

- Evaluate meeting...
 - Determine what the session accomplished.
 - Consider how results or findings fit into overall objectives and overall vision/purpose.
 - Decide what the next logical steps should be.

Ask these questions:

Were the goals of the meeting met?

Did everyone participate adequately and professionally (side conversations, uncertain expressions; surface agreements)?

Were the physical arrangements satisfactory?

What could have been done better?

Facilitation...The Eight Step Approach

1. Plan and prepare agenda defining *purpose* and *type* of meeting (Brainstorm, problem solving, information exchange, planning, or training.)
2. Define objectives and desired outcome
3. Establish rules
4. Conduct open, relevant, thought provoking and respectful discussion
5. Listen, encourage, and acknowledge all thoughts, ideas, and challenges
6. Maintain control and focus
7. Close outlining results and thanking participants
8. Follow up and assess results

Facilitating Powerful Meetings

Scene 2:

“Time for the Computer Technology Committee meeting.” “OK. I’m anxious to see what information was collected this past week.”

“The agenda says Jones from *Invision* is giving a report. Maybe there’s a new development.”

“I’ve got some data to share that might give us a lead.”

“Sounds good, let’s go.”

Key point—People need to “feel” enthusiastic about what they are “part” of...

Summary

The role of a Facilitator is to focus, encourage, and support the thoughts, opinions, and values of others while ensuring a quality discussion targeting the tasks and goals at hand.

We focused on Core Skills and Tools...

- How to facilitate a productive, relevant, and effective discussion: Preparing the agenda, setting tone and pace, assessing participant's concentration, engagement, sense of well-being, and keeping participants on task.
- How to handle difficult personalities: "Interrupting" an overzealous participant, curtailing the inevitable "disagreement", and awakening the "lost" participant.
- How to keep the meeting from disintegrating: Enforcing ground rules, clarifying confusing and guiding positive discussion.
- How to conduct a meeting that makes a difference: Providing feedback, reaching conclusion, assigning action items, and following-up.

Finally, The Eight Step Approach ...

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6. Maintain control and focus
7. Close outlining results and thanking participants
8. Follow-up and assess results

Implementation: Skills and Tools Review...

Check list...

- Prepare the Agenda (focus on-purpose, decide meeting type)
- Establish and enforce ground rules
- Set Tone and Pace
- Keep participants on task
- Assess participant's concentration, engagement, and sense of well-being
- Handle difficult personalities
- Clarify confusing discussion
- Maintain focus on objectives
- Manage conflict—clash of ideas
- Probe to reach quality conclusions
- Provide feedback
- Assign action items
- Summarize and close meeting with thank you to participants
- Follow up

**Thank you for your kind attention
and participation...**

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