

# Fearless Facilitation!™

How to Lead Effective Training  
 How to Lead Effective Meetings

**NEW RELEASE ON:** Fundamentals of Facilitation, Professional Presence, and Communication Skills  
**TARGET AUDIENCE:** Anyone who leads training and/or meetings

*Whether you are leading a meeting or training session, this program is a perfect foundation for building fundamental facilitation skills.*

### About How to Lead Effective Training

*How to Lead Effective Training* builds the confidence, poise, knowledge, and skills demonstrated by facilitators who are exceptionally competent. Participants will learn how to generate quality discussions, make smooth transitions between activities, and manage disruptive behaviors. Organizations will benefit by having facilitators who increase the value of their training sessions, thus building the skills of associates.

#### Key Learning Points

- Lead effective training sessions
- Explain adult learning principles and their applications
- Describe how to best accommodate each primary learning style
- Demonstrate fundamental facilitation skills
- Strike the right balance between purpose, process, and participation
- Exhibit the confidence and competence of a fearless facilitator

### About How to Lead Effective Meetings

Designed to build confidence and competence in leading effective meetings, *How to Lead Effective Meetings* will teach meeting leaders how to achieve desired results and manage relationships and process at the same time. By focusing on the roles, responsibilities, knowledge, and skills of a fearless facilitator, participants will learn how to increase the value and outcomes of their meetings, yielding wise decisions and actions.

#### Key Learning Points

- Lead effective meetings
- Prepare meeting attendees to participate effectively
- Make optimal use of people's time and talents
- Strike the right balance between purpose, process, and participation
- Exhibit the confidence and competence of a fearless facilitator

| Complete Training Kit Components:  | Pricing:                                |             |
|--|---|-------------|
|  | [subject to change]                     |             |
| Customer receives two large cases (one for "meetings" and one for "training"). Each case has its respective DVD*, VHS, facilitator guides, and reproducible participant materials.           | DVD                                     | VHS*        |
|  | FREE                                    | FREE        |
|  | License/Purchase:                       | \$995 \$795 |
|  | 15-Day Rental:                          | \$395 \$235 |
|  | 15-Day Extension:                       | \$195 \$160 |
| *DVD includes: <i>Fearless Facilitation!™ How to Lead Effective Training</i> or <i>Fearless Facilitation!™ How to Lead Effective Meetings</i> , SMART-START Motivation, and Bonus Materials. | *DVD options not available with VHS kit |             |

## VISIONPOINT

1985 NW 94<sup>th</sup> St, Suite C • Des Moines, IA 50325-6933  
 Ph: 800-300-8880 • Fax: 515-334-9967 • E-mail: [info@visionpoint.com](mailto:info@visionpoint.com)

[www.visionpoint.com](http://www.visionpoint.com)

# Fearless Facilitation!™

## Key Tactics

### How to Lead Effective Meetings - Key Tactics

| Chapter Board Title / Video Observation Form Title     | Key Tactics  |
|--|--|
| Preparation Pitfalls                                   | NA   |
| Staying on Track: Dealing with a Difference of Opinion | Acknowledge Concern<br>Ask Clarifying Questions<br>Get Commitment  |
| Staying on Track: Handling an Off Topic Conversation   | Recognize Importance<br>Use "Parking Lot"<br>Refocus and Move On   |
| Staying On Track: The Unexpected Departure             | Acknowledge Situation<br>Redirect<br>Refocus and Move On   |
| Managing the Process: Brainstorming                    | Assign Responsibility<br>Refocus & Move On   |
| Reaching a Decision: Consensus Building                | Define Consensus<br>Share perspectives<br>Summarize Areas of Agreement & Disagreement<br>Minimize Interruptions<br>Explore Concerns<br>Get Trial Commitment<br>Finalize Commitment |

### How to Lead Effective Training - Key Tactics

| Chapter Board Title / Video Observation Form Title  | Key Tactics  |
|---|--|
| Preparation Pitfalls                                | NA   |
| Generating Discussion: The Question that Stumps You | Ask Polling Question<br>Ask Open-Ended Question<br>Ask Building Question   |
| Staying on Track: Making a Smooth Transition        | Summarize<br>Connect Activities<br>-Describe Next Activity<br>-Relate to Previous Activity   |
| Staying On Track: Dealing with Sensitive Comments   | Acknowledge<br>Redirect  |
| Staying on Track: Challenge to a Learning Point     | Acknowledge<br>Ask Framing Question<br>Involve Group<br>Refocus & Move On  |
| Managing Disruptions: Cell Phones, Pagers, Etc.     | Remind About Groundrules<br>Share Impact on Others<br>Get Agreement  |
| Managing Disruptions: Progressive Intervention      | 1 <sup>st</sup> Level Intervention (move into space)<br>2 <sup>nd</sup> Level Intervention (address entire group)<br>3 <sup>rd</sup> Level Intervention (private discussion)<br>-State Situation<br>-Share Impact<br>-Ask Fact-Finding Question<br>-Get Commitment |

# Trainer Selection Questions

*When selecting trainer candidates, it is important to assess the individuals' readiness and evaluate their ability to be successful. Depending on skills and experience, you may need to provide a train-the-trainer session prior to launching a new training initiative. Ask yourself these questions before inviting participants to join in the train-the-trainer experience.*

1. What is the benefit to your organization that these individuals facilitate the [name of training or initiative] training program or series to your employees?
2. What are the support systems and resources available to these trainers before, during, and after the training rollout?
3. How much information sharing versus self and group discovery is required for this program?
4. Are you seeking individuals who would excel as technical trainers or group facilitators?
5. What are the characteristics, qualities, and skills that these individuals will need to enable them to effectively conduct the training?

## **FACILITATOR SELECTION CRITERIA**

### **Facilitation Skills**

- Knows key elements of facilitation
- Has good listening skills; clarifies and probes for understanding
- Is able to use a variety of media for delivery of information
- Is comfortable and articulate in front of groups
- Responds non-defensively to challenges
- Exhibits a good sense of humor; can laugh at self
- Is self-aware; can self-correct
- Puts people at ease; creates a comfortable learning environment
- Shows respect for the ideas and opinions of others
- Exhibits an ability to draw out differing ideas and opinions
- Is able to communicate and articulate her/his own and others ideas
- Is able to think quickly, improvise, and adjust to needs of others
- Is not judgmental

### **Organizational Relationships and Commitment**

- Is willing to devote the time required to prepare for training
- Is willing to provide continuous coaching and support for participants after training
- Has demonstrated success in working with groups as a leader or facilitator
- Is able to establish rapport with a wide variety of individuals at all levels of the organization
- Is credible and respected within the organization
- Is considered a positive model for the values being taught, both inside and outside the sessions
- Supports the training initiative and understands why it is important to the success of the organization

For assistance with trainer selection, train-the-trainer sessions, or any question related to a VisionPoint program, contact **TrainerTalk Help Line** at 800-300-8880 x 302 or write to us at [Trainer@vppl.com](mailto:Trainer@vppl.com)

## Workshop Agenda

The agenda below provides you with an outline of the full-day Workshop. Be sure to review this agenda and determine whether you will insert any of the optional activities provided in the Facilitator Resource Section.

| Step | Item   | Time       | Page |
|------|--|------------|------|
|      | 15 minute breaks in the morning and afternoon, and a 45 minute lunch break | 75 minutes | N/A  |
| #1   | Arrival of Participants  | N/A        | 15   |
| #2   | Introductory Activities  | 40 minutes | 17   |
| #3   | Preparation Pitfalls   | 30 minutes | 23   |
| #4   | Roles and Responsibilities of Fearless Facilitators                        | 10 minutes | 26   |
| #5   | Responsibility: Preparing and Setting up for a Meeting                     | 30 minutes | 29   |
| #6   | Responsibility: Getting the Best out of Meeting Participants               | 40 minutes | 32   |
| #7   | Responsibility: Resolving Differences of Opinion                           | 30 minutes | 35   |
| #8   | Responsibility: Managing Disruptive Behaviors                              | 60 minutes | 39   |
| #9   | Responsibility: Facilitating a Decision Making Process                     | 45 minutes | 46   |
| #10  | Responsibility: Building Consensus for Decisions and Actions               | 30 minutes | 51   |
| #11  | Responsibility: Concluding a Meeting                                       | 30 minutes | 54   |
| #12  | Responsibility: Following a Meeting  | 15 minutes | 56   |
| #13  | Pulling it All Together  | 45 minutes | 59   |
| #14  | Next Steps and Wrap Up   | 30 minutes | 62   |

### Send an Invitation . . .

A sample invitation is on page 122 in the Facilitator Resource Section.

# Fearless Facilitation!™

---

How to Lead Effective Meetings

Preview

copy

only

Facilitator Guide

Preview copy only

© 2004 VisionPoint Productions, Inc.

All rights reserved. Unless specifically indicated, no part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior written permission of VisionPoint Productions, Inc.

This publication is designed to provide accurate and authoritative information in regard to the subject matter. It is sold with the understanding that VisionPoint Productions, Inc. is not engaged in rendering legal, accounting, or other professional services. If legal advice or other expert assistance is required, the services of a competent professional should be sought.

# Table of Contents

|  |           |
|--|-----------|
| <b>IMPORTANT INFORMATION ABOUT THE WORKSHOP .....</b>                      | <b>1</b>  |
| Facilitators of This Workshop .....  | 2         |
| This Workshop is Designed to .....   | 2         |
| The Rock-Bottom Benefits of the Workshop are .....                         | 3         |
| Participants will be Able to.....  | 4         |
| Participants will Experience .....   | 4         |
| <b>ABOUT WORKSHOP MATERIALS .....</b>                                      | <b>5</b>  |
| The Complete Package Includes .....  | 6         |
| Icon Map.....  | 7         |
| What Can Be Reproduced and What Cannot.....                                | 8         |
| <b>PREPARATIONS .....</b>  | <b>9</b>  |
| Refresh Your Facilitation Skills .....                                     | 10        |
| Workshop Agenda .....  | 11        |
| Send an Invitation.....  | 11        |
| Final Preparation Checklist.....   | 12        |
| <b>CONDUCTING THE WORKSHOP .....</b>                                       | <b>14</b> |
| <u>Laying the Foundation</u>   |           |
| Arrival of Participants.....   | 15        |
| Introductory Activities.....   | 17        |
| Preparation Pitfalls.....  | 23        |
| Roles and Responsibilities of Fearless Facilitators.....                   | 26        |
| <u>Framing the Meeting</u>   |           |
| Responsibility: Preparing and Setting up for a Meeting.....                | 29        |
| Responsibility: Getting the Best out of Meeting Participants.....          | 32        |
| Responsibility: Resolving Differences of Opinion.....                      | 35        |
| <u>Supporting Progress</u>   |           |
| Responsibility: Managing Disruptive Behaviors.....                         | 39        |
| Responsibility: Facilitating a Decision-making Process.....                | 46        |
| Responsibility: Building Consensus for Decisions and Actions .....         | 51        |
| <u>Finishing Strong</u>  |           |
| Responsibility: Concluding a Meeting.....                                  | 54        |
| Responsibility: Following a Meeting.....                                   | 56        |
| Pulling it All Together.....   | 59        |
| Next Steps and Wrap Up.....  | 61        |
| <b>FACILITATOR RESOURCE SECTION .....</b>                                  | <b>63</b> |
| Know Your Role.....  | 64        |
| Know How to Connect.....   | 64        |
| Responsibilities and Tactics of Fearless Facilitators .....                | 66        |
| Overheads/PowerPoint® Slides .....   | 99        |
| Flipchart Masters.....   | 112       |
| Sample Invitation.....   | 120       |
| Pre-Workshop Assessment (Facilitator's Copy).....                          | 121       |
| Post-Workshop Assessment (Facilitator's Copy).....                         | 122       |
| Activity 1: Using the SMART-START™ Motivation video .....                  | 123       |
| Activity 2: When is it Best to Have a Meeting? .....                       | 125       |
| Activity 3: Five Types of Meetings .....                                   | 127       |
| Activity 4: Common Decision-making Tool: Easy Ranking .....                | 130       |
| Activity 5: Common Decision-making Tool: Advantages and Disadvantages..... | 132       |

|   |     |
|---|-----|
| Activity 6: Common Decision-making Tool: Paired Comparison Analysis .....                         | 136 |
| Activity 7: Common Decision-making Tool: Grid Analysis .....                                      | 139 |
| Activity 8: Common Decision-making Tool: Force Field Analysis .....                               | 142 |
| Activity 9: Common Decision-making Tool: Cost/Benefit Analysis .....                              | 145 |
| Activity 10: Common Decision-making Tool: Change Benefit Analysis .....                           | 147 |
| Practice Handout: Change Benefit Analysis .....   | 149 |
| Practice Scenarios for Conducting a Meeting.....  | 151 |
| Level 2 Assessment of Knowledge Gained Through the Workshop.....                                  | 154 |
| Workshop Evaluation (Facilitator's Copy).....   | 157 |
| Video script for <b><i>Fearless Facilitation!™ How to Lead Effective Meetings</i></b> .....       | 158 |
| DVD Bonus Material for <b><i>Fearless Facilitation!™ How to Lead Effective Meetings</i></b> ..... | 171 |
| Suggestions for additional training to improve professional presence.....                         | 172 |
| About VisionPoint .....   | 173 |

preview copy only

## **Facilitators of This Workshop...**

Facilitators of this Workshop should be seasoned professionals whose experiences and skills in both leading organizational meetings and training sessions will provide instant credibility. Participants will expect facilitators of this Workshop to be exemplary models of the confidence and competence of fearless facilitators.

## **This Workshop is Designed to...**

The Workshop is designed to build confidence and competence in leading effective meetings.

Meetings are a medium through which organizations communicate information, share ideas, plan strategies and tactics, gather input on issues, solve problems, discuss organizational goals and objectives, reach decisions on courses of action, and follow through on commitments.

When conducted effectively, meetings are powerful drivers of corporate success. When conducted ineffectively, meetings drain the energy of associates, fail to capitalize on rich diversity and talents, and squander the time and high cost of bringing associates together to address organizational issues.

The Workshop focuses on:

- The **roles and responsibilities** of fearless facilitators.
- The **knowledge and skills** of fearless facilitators.

Organizations expect effective and productive meetings. This means people who lead meetings must know how to achieve desired results and manage relationships and process at the same time. By the end of this Workshop, participants will be prepared to fulfill their organization's expectation for effective and productive meetings.

## The Rock-Bottom Benefits of the Workshop are...

### For participants:

- Develop skills that lead to effective meetings.
- Position themselves as fearless facilitators whose skills significantly impact team and organizational success.
- Increase career opportunities.
- Improve job and personal satisfaction.

### For organizations:

- Facilitators who impact organizational success by increasing the value and outcomes of meetings.
- Improved productivity through effective meetings that yield wise decisions and actions.

## **Participants will be Able to...**

The purpose of the Workshop is to enhance the knowledge and skills required to lead effective meetings. After completing the Workshop, participants will be able to:

- Lead effective meetings.
- Prepare meeting attendees to participate effectively.
- Strike the balance between purpose, process, and participation.
- Make optimal use of people's time and talents.
- Exhibit the confidence and competence of a fearless facilitator.

## **Participants will Experience...**

- Pre- and Post-Assessments of knowledge and skills.
- A variety of discussions and exercises that cumulatively build tactics to lead meetings that produce beneficial results.
- Video demonstrations of responsibilities and tactics.
- Applications of tactics through practices and feedback.
- Level 2 Assessment (optional).

VisionPoint's ***Fearless Facilitation!***<sup>TM</sup> program has two Workshop agendas: one for how to lead effective meetings and one for how to lead effective training sessions.

### **The Complete Package Includes...**

- Two Facilitator Guides
- Two sets of reproducible Participant Materials
- Two DVDs with:
  - Video vignettes
  - **SMART-START**<sup>TM</sup> ***Motivation*** video
  - Overhead/PowerPoint<sup>®</sup> slides
  - Interview with ***Fearless Facilitator*** content consultant
- Two VHS videos

For this Workshop, you will need this Facilitator Guide, the Participant Materials and the video (DVD or VHS) for ***Fearless Facilitation!***<sup>TM</sup> ***How to Lead Effective Meetings.***

## What Can be Reproduced and What Cannot...

We would really appreciate it if you followed the instructions below for reproducing or otherwise using the materials in this course.

Please do not make copies of:

- The DVD or videotape
- The Facilitator Guide

You may make copies of the Participant Materials.

preview copy only

The following pages include the first page of each workshop step to provide an idea of what it's about, what you'll need, and how to do it.

Preview copy only

# Step

# 1

## Arrival of Participants

**Time it takes:** As much time as necessary to set up the room, equipment, and materials prior to the arrival of participants

**What it is about:** Preparation of the room, equipment, and materials

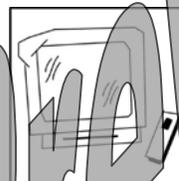
**What you will need:**

- Overhead/PowerPoint® slide # M-1
- **SMART-START™ Motivation** video (OPTIONAL)
- Name tents
- Markers
- Set of Participant Materials for each participant

**How to do it:**



1. Arrive early to prepare and model the responsibilities of facilitators prior to a training session. Also, display overhead/PowerPoint® slide #M-1(Welcome to Training).



2. Begin playing the **SMART-START™ Motivation** video at least 15 minutes prior to the expected arrival of the first participant. If you are using the DVD, set it to repeat itself. If you are using the VHS, the video should repeat automatically four times. An optional activity to help connect this video to the overall Workshop is provided on page 125 of the Facilitator Resource section.

# Step

# 2

## Introductory Activities

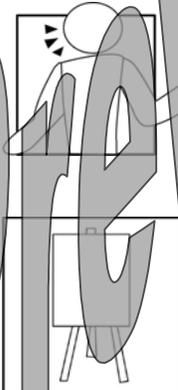
**Time it takes:** 40 minutes

**What it is about:** An introduction of you, a description of the Workshop, a review of the Desired Outcomes and Agenda, introductions by participants, and establishing ground rules or “agreements”

**What you will need:**

- Flipchart #1
- Overhead/PowerPoint® slide #M-2[a]
- Overhead/PowerPoint® slide #M-2[b]
- Overhead/PowerPoint® slide #M-3
- Overhead/PowerPoint® slide #M-4
- Flipchart #2
- Flipchart #3
- Participant Materials

**How to do it:**



1. Introduce yourself briefly and highlight your experience as a meeting facilitator.
2. Set the stage for a description of the Workshop by referring to Flipchart #1 (Characteristics of Ineffective Meetings) and asking participants to reflect on meetings they have attended and things that made the meetings ineffective.

# Step

# 3

## Preparation Pitfalls

**Time it takes:** 30 minutes

**What it is about:** Estimating the cost of meetings and a video demonstration of a facilitator whose lack of preparation is costly to his organization

**What you will need:**

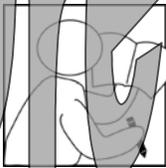
- DVD/video
- Flipchart #2
- Flipchart #4
- Participant Materials

**How to do it:**

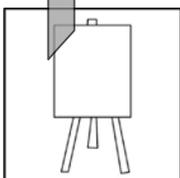


1. Introduce the activity (Estimating the Cost of Meetings) with comments such as:

- **During your introductions, you estimated the number of hours you spend each week in meetings.** (Point to Flipchart #2.)
- **Now we're going to calculate the hours to estimate the cost of those meetings.**



2. Refer participants to their materials, page 5 (Estimating the Cost of Meetings). Review the directions and ask participants to complete the worksheet.



3. Use Flipchart #4 (Cost of Meetings) to record each participant's cost. Tally the total cost for all participants.

# Step 4

## Roles and Responsibilities of Fearless Facilitators

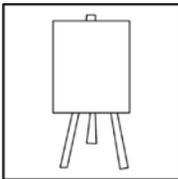
**Time it takes:** 10 minutes

**What it is about:** An overview of three primary roles and nine responsibilities of facilitators

**What you will need:**

- Flipchart #1
- Overhead/PowerPoint® slide #M-5
- Overhead/PowerPoint® slide #M-6
- Flipchart #5

**How to do it:**



1. Referring to Flipchart #1 (Characteristics of Ineffective Meetings) share how important it is to know your role and responsibilities as a meeting facilitator.

- **Typically, an ineffective meeting is not due to the participants themselves.**

Refer to overhead/PowerPoint® slide #M-5 (The Facilitator's Role).

- **It is generally caused by facilitators who do not effectively strike the right balance between the purpose of the meeting (the task at hand or the results expected), the process of the meeting (how you will accomplish the task), and the**

# Step 5

## Responsibility: Preparing and Setting up for a Meeting

**Time it takes:** 30 minutes

Note: There are optional activities in the Facilitator Resource Section of this guide that you may wish to insert prior to or after Step 5.

- Page 125 has an activity that helps participants know when it is or is not appropriate to have a meeting. Insert this activity before or after Step 5 if this is a topic you wish to emphasize and if you have time to extend your training session.
- Page 127 has an activity that describes types of meetings and their characteristics. Insert this activity before or after Step 5 if you are working with a group that needs basic information about different types of meetings.

**What it is about:** A discussion and exercise concerning tactics employed by fearless facilitators when preparing and setting up for a meeting; a practice in writing Purpose and Desired Outcomes, and creating an Agenda

**What you will need:**

- Participant Materials
- Flipchart #1

# Step

# 6

## Responsibility: Getting the Best out of Meeting Participants

**Time it takes:** 40 minutes

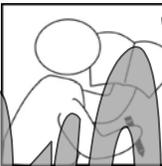
Note: This exercise allows everyone to prepare for a meeting and allows time for one demonstration (or one person to practice). Depending on your time restrictions and number of participants, this is a good place to extend your session and allow more people to practice.

**What it is about:** The importance of getting the best out of meeting participants and a practice exercise in applying tactics

**What you will need:**

- Flipchart #6
- Participant Materials

**How to do it:**



1. Refer participants to their materials, pages 15–18 (Responsibility: Getting the Best out of Meeting Participants).
  - Ask participants to review the information and to highlight tactics that they believe are especially important or of particular interest. Allow 3–4 minutes.
  - Ask participants to share their highlights.
2. Introduce the practice on page 19 (Practice: Getting the Best out of Meeting Participants) with comments such as:

# Step

# 7

## Responsibility: Resolving Differences of Opinion

**Time it takes:** 30 minutes

**What it is about:** Tactics for keeping a meeting on track by acknowledging and resolving differences of opinion

**What you will need:**

- DVD/video
- Flipchart #1
- Participant Materials

**How to do it:**

1. Introduce Step 7 with comments such as:



- **You may do a superb job of meeting your responsibilities in preparing for a meeting, setting up for a meeting, and getting the best out of meeting participants...**
- **However, it's likely that you will encounter a challenge to your ability to stay on track by participants who express strong differences of opinion.**
- **If differences of opinion are not resolved effectively, a meeting can spin off track, become chaotic, and prevent the achievement of the meeting's purpose and desired outcomes.**

# Step

# 8

## Responsibility: Managing Disruptive Behaviors

**Time it takes:** 60 minutes

**What it is about:** Tactics for managing behaviors that would otherwise disrupt the process of a meeting

**What you will need:**

- Index cards (or pieces of paper with behavior written on it)
- Flipchart #1
- Participant Materials
- DVD/video

**How to do it:**



1. Introduce Step 8 with comments such as:

- **It is rare that disruptive behaviors are intentional.**
- **People generally are not mean-spirited.**
- **Nevertheless, don't be surprised or paralyzed by disruptive behaviors that might erupt during a meeting.**
- **To begin our discussion, let's make sure we're all talking about the same thing when we speak about behaviors that might disrupt the process of a meeting.**

2. Introduce an exercise in demonstrating disruptive behaviors by describing the exercise:

- **This will be your chance to be on the giving side of disruptive behavior.**



# Step

# 9

## Responsibility: Facilitating a Decision-making Process

**Time it takes:** 45 minutes

Note: There are optional activities in the Facilitator Resource Section of this guide starting on page 132 that you may wish to insert before or after Step 9. These activities review in detail each of the decision-making tools referenced in this step and provide hands-on opportunities to apply tools in both sample and real situations.

### What you will need:

- Overhead/PowerPoint® slide #M-7
- Overhead/PowerPoint® slide #M-8
- Participant Materials

### How to do it:

1. Introduce Step 9 with comments such as:
  - **The challenge of facilitating a decision-making process effectively is making sure you're using a systematic process and using the right decision-making tools.**
  - **Some tools are highly sophisticated and complex, and in some cases facilitators enlist the services of an expert—someone who is knowledgeable and skilled with analytical methods and techniques.**

# Step 10

## Responsibility: Building Consensus for Decisions and Actions

**Time it takes:** 30 minutes

**What it is about:** The importance of building consensus for decisions and actions; tactics for building consensus

**What you will need:**

- DVD/video
- Participant Materials

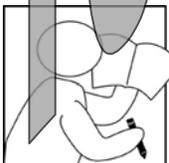
**How to do it:**

1. Introduce Step 10 with comments such as:



- **Reaching a decision is only a halfway step to implementing it.**
- **Without consensus, a decision may not be fully supported and will be in danger of failing.**
- **Therefore, building consensus is a critical part of a decision-making process.**
- **Your materials contain information about the importance of building consensus, what consensus is and is not, and tactics you can use to build consensus among meeting participants.**

2. Refer participants to their materials, pages 37–38 (Responsibility: Building Consensus for Decisions and Actions). Summarize the information and respond to questions.



# Step 11

## Responsibility: Concluding a Meeting

**Time it takes:** 30 minutes

**What it is about:** Responsibilities and actions to take when concluding a meeting; tactics to use; review of sample forms to use as part of the responsibility

### What you will need:

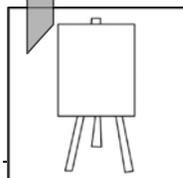
- Flipchart #1
- Overhead/PowerPoint® slide #M-9
- Participant Materials

### How to do it:

1. Introduce Step 11 with comments such as:



- **Meetings often end abruptly without attention to what was accomplished, actions and/or decisions the group made, and agreement concerning who is responsible for follow-up actions and by when.**
- **A consequence is that all the hard work done by you and the group results in nothing more than assumptions that someone will do something.**
- **Such assumptions are generally unfounded because there has been no commitment by someone to do something.**



2. Refer to Flipchart #1 (Characteristics of Ineffective Meetings) for items that might relate to concluding a meeting effectively.

# Step 12

## Responsibility: Following a Meeting

**Time it takes:** 15 minutes

**What it is about:** Responsibilities of facilitators after a meeting. The importance of keeping alive the ideas and actions generated in a meeting.

**What you will need:**

- Overhead/PowerPoint® slide #M-10
- Flipchart #7
- Participant Materials

**How to do it:**



1. Introduce Step 12 with comments such as:
  - **By the time you have concluded a meeting, you may be zapped or running off to your next meeting.**
  - **But don't waste all the time and energy you and meeting participants exerted in the meeting by not following up.**
  - **Even though actions have been agreed to and assigned to meeting participants, you can't assume that they will be taken.**
  - **Meeting participants get caught up in other job responsibilities and neglect or forget what they committed to do. Accomplishments and commitments made in the meeting can fall between the cracks unless you keep the meeting alive.**

# Step 13

## Pulling it All Together

**Time it takes:** 45 minutes

**What it is about:** Pulling it all together and practice conducting a meeting

Note: Plan for 15 minutes per person practicing, plus five minutes for a full group debrief after each practice meeting. This step, as outlined here, assumes the entire group will stay together providing time for two people to practice. If the size of your group is large enough, you can split it into two main groups, allowing four people to practice in the same amount of time. If you want each person in attendance to have an opportunity to practice, plan the overall session time accordingly.

**What you will need:**

Practice Scenarios: Conducting a Meeting situations found on pages 154–156 of the Facilitator Resource Section.

**How to do it:**

1. In advance, prepare how you will facilitate this exercise—how many people will practice and whether you will use the situations provided or whether you will customize the situations. There are ten situations provided.

# Step 14

## Next Steps and Wrap Up

**Time it takes:** 30 minutes

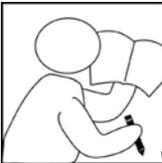
Note: An optional Level 2 Assessment is provided on page 157 of the Facilitator Resource Section of this guide. Use this assessment if you are interested in either testing for individual knowledge or refer to the assessment as an option for reviewing key information.

**What it is about:** Summary of the Workshop, comparison of Pre- and Post-Assessments, Level 2 Assessment (optional), and evaluation of the Workshop

### What you will need:

Participant Materials

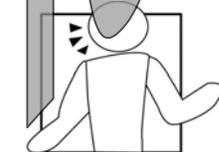
### How to do it:



1. Refer participants to their materials, page 45 (Next Steps) and ask them to complete the form. Allow five minutes.



2. Ask if any participants are willing to share their next steps.



3. Introduce the Post-Assessment with comments such as:

- **At the beginning of the Workshop you completed a Pre-Assessment of your knowledge and skills when leading a meeting.**
- **Completing a Post-Workshop Assessment will enable you to compare your ratings with those on your Pre-Workshop Assessment. Hopefully, you will believe that**

The following pages are the workshop PowerPoint® slides found in the Facilitator Resource Section. Please refer to the table of contents for a complete list of resources available in this section.

Preview

copy only

**Welcome to Training!**

**FEARLESS FACILITATION!™:**

How to Lead Effective  
Meetings

Produced By

**V I S I O N P O I N T**

## Purpose

Enhance meeting leadership skills that are effective and yield productive results.

## Desired Outcomes

- **Prepare yourself to lead productive meetings.**
- **Prepare others to participate in meetings effectively.**
- **Strike the balance between meeting purpose, process, and participation.**
- **Make optimal use of people's time and talents.**
- **Exhibit the confidence and competence of a fearless facilitator.**

## Agenda

- **Introductory Activities**
- **Roles and Responsibilities of Fearless Facilitators**
- **Tactics for Each Responsibility**
- **Video Models**
- **Practice and Application Planning**
- **Wrap-up Activities**

## Introductions

### Share:

- **Name, job title, responsibilities**
- **Approximate number of hours you spend each week in meetings as a leader or participant**

**(Do NOT include hours spent in training sessions)**

## The Facilitator's Role

**Balance the meeting purpose,  
process, and participation**

- **Manage the environment**
- **Manage the process**
- **Optimize participation**

# Facilitator Responsibilities

- **Manage the Environment**
  - Preparing for a Meeting
  - Setting up for a Meeting
- **Manage the Process**
  - Facilitating a Decision Making Process
  - Building Consensus for Decisions and Actions
  - Concluding a Meeting
  - Following a Meeting
- **Optimize Participation**
  - Getting the Best out of Meeting Participants
  - Resolving Differences of Opinion
  - Managing Disruptive Behaviors

## A Decision-Making Process

1. **Define and describe the issue.**
2. **Discuss alternative solutions.**
3. **Identify what data/information is needed.**
4. **Evaluate alternative solutions.**
5. **Select the best decision.**
6. **Get consensus.**
7. **Determine specific action steps.**
8. **Repeat the process if necessary.**

## Common Decision-Making Tools

- Rating
- Ranking
- Advantages/Disadvantages/Implications
- Paired Comparison Analysis
- Grid Analysis
- Force Field Analysis
- Cost/Benefit Analysis
- Change/Benefit Analysis (Pareto)

## Concluding a Meeting

1. **Allow ample time to conclude meeting effectively.**
2. **Summarize key points and accomplishments.**
3. **Review action steps.**
4. **Set the date and time for a follow-up meeting.**
5. **Ask the group to evaluate the process and results.**
6. **Thank group members.**

## Following a Meeting

1. **Send each group member reminders of:**
  - **Key information shared during the meeting**
  - **Actions and decisions**
  - **Agreed upon action steps**
2. **Keep the group aware of significant progress and results of the actions.**
3. **Schedule a follow-up meeting if necessary.**

V I S I O N P O I N T

copy only

Preview

1985 N.W. 94<sup>th</sup> Street, Suite C  
Des Moines, IA 50325-6933

**800-300-8880**

**[www.visionpoint.com](http://www.visionpoint.com)**

The following pages include a practice session for participants in applying tactics for leading a short meeting.

preview copy only

**Practice  
Scenarios**

**Conducting a Meeting**

---

Practice Situation #1 - Customers are complaining about parking. There is never enough space and the construction area has blocked off many prime parking spots. There is not much you can do about this. It will probably be another three months before the parking lot is clear. **You will be leading a conversation with your peers to brainstorm ideas on what you can do to alleviate the stress customers are experiencing.**

Practice Situation #2 - There is a shortage of office resources—people and supplies. Everyone is feeling the pressure. Paperwork is piling up. Everyone is impatient. Everything is a hassle. Work is not fun. **You will be leading a conversation to brainstorm ideas on what you can do to improve morale.**

Practice Situation #3 - There are several open positions in your department. Hiring good people as quickly as possible is a priority. HR is seeking input on what to really look for in a candidate to make sure he or she will be a good match and will have a high chance of staying on board for a while. **You will be leading a conversation to brainstorm ideas on what characteristics, skills, and experiences HR should look for in a candidate.**

Practice Situation #4 - There are bulletin boards everywhere and information tables spread throughout the hospital. Everyone agrees providing health information for patients is a good idea, but brochures are scattered and no one is really in charge of making sure the most current information is available and that dated information is removed. Frankly, it is a mess. **You will be leading a conversation to discuss what needs to be done to fix this problem.**

Practice Situation #5 - It has been brought to management's attention that the copier is being used quite frequently for personal use. The company policy is that equipment is used only for business, unless pre-authorized. There are exceptions of course, but there has been too much abuse to the flexible policy. **You will be leading a conversation to decide what should be done to eliminate (or reduce) the personal use of hospital equipment.**

Practice Situation #6 - Management is considering changing the vendor check-in procedure. **You will be leading a conversation to first outline what the current procedure is and then discuss ideas for how to make the procedure easier and better for vendors.**

Practice Situation #7 - In addition to the required safety and technical training, this year everyone in your department will have an opportunity to participate in a couple of professional development courses. HR needs to decide what type of training to offer. There are lots of choices: leadership, service, conflict resolution, problem solving, harassment prevention, etc. **You will be leading a conversation to narrow down the options and gain consensus on what will be made available.**

Practice Situation #8 - You are part of an Office Improvement Committee. The committee's mission is to find cost-effective ways to improve systems, procedures, and the overall office environment for the benefit of employees and customers. **You will be leading the annual planning meeting to narrow down the options and gain consensus on what next year's initiatives will be.**

Practice Situation #9 - Doctors, nurses, aids, administrative personnel, and volunteers are all essential to the hospital. No one disagrees with this, but there are rifts between different people, different departments, and different functions. Sometimes it seems that there is a lack of respect between people. It is time to do something about it. **You will be leading a conversation to discuss what things or conditions may be causing conflicts between people.** You will not have an opportunity to discuss solutions. This meeting has been called to get all of the issues out in the open.

Practice Situation #10 - **You are leading a follow-up and final meeting to discuss conflicts getting in the way of building positive and respectful relationships between people, departments, and functions.** In this meeting, you will narrow down actions and gain consensus among the group for specific steps that everyone will take to help alleviate the problem.

# Fearless Facilitation!™

---

How to Lead Effective Meetings

preview copy only

Participant Materials

Preview copy only

© 2004 VisionPoint Productions, Inc.

All rights reserved. Unless specifically indicated, no part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior written permission of VisionPoint Productions, Inc.

This publication is designed to provide accurate and authoritative information in regard to the subject matter. It is sold with the understanding that VisionPoint Productions, Inc., is not engaged in rendering legal, accounting, or other professional services. If legal advice or other expert assistance is required, the services of a competent professional should be sought.

# Table of Contents

|  |    |
|--|----|
| Pre-Workshop Assessment .....  | 1  |
| Introduction.....  | 2  |
| Purpose and Desired Outcomes.....  | 3  |
| Agenda.....  | 3  |
| Ground Rules (or “Agreements”) .....   | 4  |
| Estimating the Cost of Meetings.....   | 5  |
| Observation Notes for Video: Preparation Pitfalls.....                                       | 6  |
| Fearless Facilitator’s Roles and Responsibilities.....                                       | 7  |
| Responsibility: Preparing for a Meeting .....  | 8  |
| Responsibility: Setting up for a Meeting .....   | 11 |
| Practice: Writing Purpose and Desired Outcomes, and Creating an Agenda.....                  | 12 |
| Practice Scenario .....  | 13 |
| Practice Worksheet .....   | 14 |
| Responsibility: Getting the Best out of Meeting Participants .....                           | 15 |
| Practice: Getting the Best out of Meeting Participants.....                                  | 19 |
| Practice Worksheet .....   | 20 |
| Checklist for Giving Feedback.....   | 21 |
| Observation Notes for Video: Staying on Track: Dealing with a Difference<br>of Opinion ..... | 22 |
| Responsibility: Resolving Differences of Opinion.....  | 23 |
| Observation Notes for Video: Staying on Track: Handling an Off Topic<br>Conversation .....   | 26 |
| Responsibility: Managing Disruptive Behaviors.....   | 27 |
| Observation Notes for Video: Staying on Track: The Unexpected<br>Departure .....             | 29 |
| Observation Notes for Video: Managing the Process: Brainstorming.....                        | 30 |
| Responsibility: Facilitating a Decision-making Process.....                                  | 31 |
| Common Decision-making Tools.....  | 34 |
| Example: Rating as a Tool in Making a Decision.....  | 36 |
| Responsibility: Building Consensus for Decisions and Actions .....                           | 37 |
| Observation Notes for Video: Reaching a Decision: Consensus Building .....                   | 39 |
| Responsibility: Concluding a Meeting.....  | 40 |
| Sample Form for Recording and Tracking Decisions and Action Steps .....                      | 41 |
| Sample Format for Evaluating a Meeting .....   | 42 |
| Responsibility: Following a Meeting.....   | 43 |
| Different Ways to Communicate Following a Meeting .....                                      | 44 |
| Next Steps.....  | 45 |
| Post-Workshop Assessment.....  | 46 |
| Level 2 Assessment of Knowledge Gained Through the Workshop.....                             | 47 |
| Workshop Evaluation.....   | 50 |

## Pre-Workshop Assessment

For each statement below, circle the number that reflects the level of your knowledge and skills before completing the Workshop. At the conclusion of the Workshop, you will complete a Post-Workshop Assessment and compare your ratings to those on the Pre-Workshop Assessment.

1. I can describe the three primary responsibilities of a meeting facilitator.

High    4    3    2    1    Low

2. I am able to effectively manage differences of opinions that surface during meetings.

High    4    3    2    1    Low

3. I can successfully manage behaviors that could disrupt the process and results of meetings.

High    4    3    2    1    Low

4. I can articulate the steps in a decision-making process.

High    4    3    2    1    Low

5. I can lead meeting participants to reach a consensus on actions to be taken.

High    4    3    2    1    Low

6. I can explain why it is important to conclude meetings with definitive next steps.

High    4    3    2    1    Low

7. I know what my post-meeting responsibilities are as a facilitator.

High    4    3    2    1    Low

8. I am confident and competent in my ability to lead efficient and productive meetings.

High    4    3    2    1    Low

## Introduction

This workshop is designed to build confidence and competence in leading effective meetings.

Meetings are a medium through which organizations communicate information, share ideas, plan strategies and tactics, gather input on issues, solve problems, discuss organizational goals and objectives, reach decisions on courses of action, and follow through on commitments.

When conducted effectively, meetings are powerful drivers of corporate success. When conducted ineffectively, meetings drain the energy of associates, fail to capitalize on rich diversity and talents, and squander the time and high cost of bringing associates together to address organizational issues.

The Workshop focuses on:

- The **roles and responsibilities** of fearless facilitators.
- The **knowledge and skills** of fearless facilitators.

Organizations expect effective and productive meetings. This means people who lead meetings must know how to achieve desired results, and manage relationships and process at the same time.

By the end of this Workshop, you will be prepared to fulfill your organization's expectations for effective and productive meetings.

## **Purpose and Desired Outcomes**

The purpose of the Workshop is to enhance your knowledge and to lead effective meetings. When you have completed this Workshop, you will be able to:

- Lead effective meetings.
- Prepare meeting attendees to participate effectively.
- Strike the balance between purpose, process, and participation.
- Make optimal use of people's time and talents.
- Exhibit the confidence and competence of a fearless facilitator.

### **You will experience ...**

- Pre- and Post-Assessments for self-evaluating knowledge and skills.
- A variety of discussions and exercises that cumulatively build tactics to lead meetings that produce beneficial results.
- Video demonstrations of responsibilities and tactics.
- Applications of tactics through practices and feedback.
- Additional activities based on your organization's needs.

## **Agenda**

- ❑ Introductory Activities
- ❑ Roles and Responsibilities of Fearless Facilitators of Meetings
- ❑ Tactics for Each Responsibility
- ❑ DVD/Video Models
- ❑ Next Steps and Wrap-up Activities

## Ground Rules (or "Agreements")

- Start and end the meeting at agreed upon times.
- Respect the ideas and opinions of others.
- Invite others to share their ideas and opinions.
- It is okay to respectfully disagree with others.
- Limit conversations to agenda items.
- Meet all agreed upon responsibilities before, during, and after the meeting.
- Turn off cell phones and beepers.
- 
- 
- 
- 
- 

***Make amendments, additions, or deletions as decided in the discussion about the Ground Rules listed above.***

## Estimating the Cost of Meetings

1. Write the *estimated* number of hours per week you spend in meetings; for example, team meetings, department meetings, staff meetings, project meetings, problem-solving meetings, planning meetings, information exchange meetings, budget meetings, performance review meetings, etc.

\_\_\_\_\_

2. Multiply the number you wrote for #1 by the number of weeks you work per year (exclude vacation weeks).

\_\_\_\_\_

3. Multiply the number you wrote for #2 by your *average hourly wage*. If you are a salary employee, approximate an hourly wage by dividing your annual salary by 2,080 (average number of hours worked each year).

\$ \_\_\_\_\_

4. **Add 35%** to the number you wrote for #3 to account for administrative and overhead costs (preparations for meetings, additional resource time, printed materials, meeting room overhead costs, refreshments, etc.).

\$ \_\_\_\_\_

5. Add the dollar amounts in #3 and #4.

\$ \_\_\_\_\_

The dollar amount you wrote for #5 is the *approximate* annual cost to your organization just for you to participate in meetings. Consider the cost for all associates in your organization who attend meetings.

## Observation Notes for Video: Preparation Pitfalls

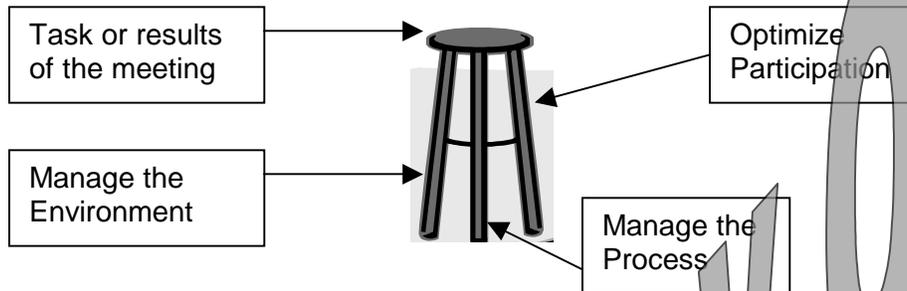
Use this form to take notes as you observe the video.

Craig (facilitator) is setting up for a meeting. Perhaps Craig does not understand all of the pre-meeting details he needs to address to assure an effective meeting. After Craig's demonstration, we will discuss your observations and reactions.

1. How do Craig's actions impact the meeting participants?
2. How do Craig's actions impact his credibility as a meeting facilitator?
3. How might Craig's lack of preparation affect the quality of the meeting?
4. Reference the flipchart titled "Characteristics of Ineffective Meetings." Which of the characteristics does Craig exhibit?

## Fearless Facilitator's Roles and Responsibilities

Strike the balance between **purpose, process, and participation.**



### RESPONSIBILITIES

|   |  |
|---|--|
| <p><b>Manage the Environment</b><br/>Everything you do to promote comfort and productivity, such as making sure the right resources, materials, and equipment are available, as well as attending to the physical layout and temperature of the room.</p>   | <ul style="list-style-type: none"> <li>❑ <b>Preparing for a Meeting</b></li> <li>❑ <b>Setting up for a Meeting</b></li> <li>❑ <b>Getting the Best out of Meeting Participants</b></li> </ul>         |
| <p><b>Manage the Process</b><br/>Everything you do to keep the meeting focused and on track. You are responsible for having an agenda, allowing the right amount of time (or adjusting the time), generating helpful discussion, and documenting key points, decisions, or topics for later discussion.</p>   | <ul style="list-style-type: none"> <li>❑ <b>Resolving Differences of Opinion</b></li> <li>❑ <b>Managing Disruptive Behaviors</b></li> <li>❑ <b>Facilitating a Decision-making Process</b></li> </ul> |
| <p><b>Optimize Participation</b><br/>Everything you do to inspire participants and provide them an opportunity to share their experiences, thoughts, ideas, concerns, and wisdom. Making sure the right people are in attendance. These are people who need to be at the meeting due to their knowledge or role within the organization—this lays the foundation for appropriate participation. Using a variety of facilitation techniques will help keep participation active and fitting.</p> | <ul style="list-style-type: none"> <li>❑ <b>Building Consensus for Decisions and Actions</b></li> <li>❑ <b>Concluding a Meeting</b></li> <li>❑ <b>Following a Meeting</b></li> </ul>                 |

The following pages are samples of exercises involved with putting the responsibilities and observations of the workshop into practice.

preview copy only

## Responsibility: Preparing for a Meeting

### Why the responsibility is important.

Meetings are effective when they focus on a defined Purpose, Desired Outcomes, and an Agenda. The focus is not accidental or incidental. It is the result of thorough planning by fearless facilitators. If you neglect to prepare, you will stumble through meetings, and meeting participants will quickly lose faith in your ability to guide them efficiently and effectively toward the achievement of Desired Outcomes.

---

### Twelve Tactics for Preparing a Meeting

1. Thoroughly study issues that pertain to the content of a meeting; for example, the organization's past history with the issues, current status of the issues, past meetings that have focused on the issues, and decisions and/or action steps taken concerning the issues.
2. Define the Purpose and Desired Outcomes of the meeting.

A **Purpose Statement** begins with an infinitive; for example, to discuss, propose, inform, analyze, or research.

Sample Purpose Statement: To explore proposed work processes in order to reduce the time required from product design to product delivery.

**Desired Outcomes** begin with a noun; for example, a plan for, a decision to, an agreement on, or action steps for.

Sample Desired Outcomes:

- A plan of action to test proposed work processes.
- Identification of personnel to test the processes.
- A deadline date for a decision on the most appropriate work process.

3. Draft a list of possible **Agenda** items. Agenda items are usually related to the Desired Outcomes of a meeting.

Sample Agenda items for a meeting to discuss a test of a new work process:

- Describe the current work process.
- Discuss problems with the current process and the need for a change.

- Brainstorm possible alternatives.
  - Plan action steps to test several of the proposed alternatives.
  - Identify personnel most appropriate to conduct and participate in the tests.
  - Agree on next steps.
4. After you have drafted an Agenda, you might decide if a meeting is necessary to achieve the Purpose and Desired Outcomes and to address Agenda items.

*Many meetings are unnecessary. Perhaps the Purpose, Desired Outcomes, and Agenda items can be achieved through other means; for example, e-mail, telephone, or one-on-one conversations. For instance, communicating information that is not complex and would not evoke confusion or questions might not necessitate the cost and time incurred by a meeting.*

*Meetings are appropriate when diverse talents, ideas, and opinions are valued to make a decision about a course of action; for example, exploring the feasibility of bringing a new product or service to market, or attempting to solve a nagging operational problem.*

*If the Purpose, Desired Outcomes, and Agenda items require a meeting, proceed with the items below.*

5. Estimate the amount of time you should allot for each agenda item. For example:
- Describe the current work process: *5 minutes*
  - Discuss problems with the current process and the need for a change: *10 minutes*
  - Brainstorm possible alternatives: *30 minutes*
  - Plan action steps to test several of the proposed alternatives: *15 minutes*
  - Identify personnel most appropriate to conduct and participate in the tests: *10 minutes*
  - Agree on next steps: *15 minutes*

*Research indicates that meetings lasting more than 1.5 hours typically become counter-productive. People lose concentration and energy. If you have more agenda items than can adequately be addressed within 1.5 hours, reduce the number by prioritizing agenda items. If all the items are important, consider chunking them into several meetings.*

6. Identify and personally invite individuals whose expertise and positions in the organization are needed to provide diversity of ideas and points of view.

*Facilitators often invite the wrong participants; that is, participants who do not have the necessary expertise or information, who will not be directly or even indirectly affected by actions taken and decisions made, or who do not have decision-making authority.*

7. Do not proceed with a scheduled meeting if individuals whose presence is critical are not able to attend. Reschedule the meeting. Otherwise, you will waste the time and energy of those in attendance.
8. Prepare those invited to a meeting:
  - Convince them that their presence at the meeting is important.
  - Communicate the Purpose, Desired Outcomes, and Agenda at least one week in advance of the meeting. More advance notice should be given if you are asking those invited to gather information or to bring pertinent materials.
  - Let them know the type of participation you request, for example:
    - Bring data, facts, or figures.
    - Share their ideas, opinions, and perspectives on the topics of the meeting.
    - Reflect on the ideas, opinions, and perspectives that others may have, how they differ, and how differences might be resolved.
9. Set an agreed upon meeting date, time, and location.
10. Gain up front commitment and participation by asking those invited:
  - For input regarding Purpose, Desired Outcomes, Agenda, and amend them as appropriate.
  - To assume responsibility for Agenda items within their areas of expertise.
  - To bring information and materials that will aid in achieving the Purpose and Desired Outcomes.
11. Send at least one week prior to a meeting (or whatever number of days your team or organization deems acceptable):
  - Revisions of the Purpose, Desired Outcomes, and Agenda items.
  - Information and materials pertinent to the meeting's agenda.
12. Make appropriate arrangements for a room that is conducive for a meeting: space to comfortably accommodate meeting participants, equipment, materials, and refreshments.

## **Responsibility: Setting up for a Meeting**

### **Why the responsibility is important.**

A facilitator who is not thoroughly organized and efficient in setting up for a meeting wastes the precious time of meeting participants, drains their energy from the start, and wastes the financial resources of an organization.

---

### **Nine Tactics for Setting up a Meeting**

1. Set up the room and materials on the day or evening prior to the meeting, or in plenty of time before the meeting starts, keeping in mind that some participants arrive earlier than expected.
2. If not using a conference room table, arrange seats in a U-shape or square so participants can see and talk easily to other participants.
3. Provide sufficient space for participants to spread out materials.
4. Ensure all seats afford a clear view of projections and flipcharts.
5. If using a U-shape table, save either the right or left front seat for yourself. Move your chair inside the "U" so you position yourself as one of the group, not as a teacher or lecturer behind a desk or table.
6. Check that all equipment is in working order and that you are familiar with how everything works.
7. Check that overhead/PowerPoint® slides and flipcharts are arranged in the order you will use them and cover them until you are ready to use them.
8. Lay out participant materials and handouts on a side table, if available.
9. Attend to physical distractions:
  - Adjust the thermostat to a comfortable setting and re-adjust it when you sense that participants become too cold or too hot.
  - Draw blinds (if available) if some participants will be facing windows and sun glare.
  - Press the "DND" (do not disturb) button on the telephone if there is one in the room.

## **Practice: Writing Purpose and Desired Outcomes, and Creating an Agenda**

### **Directions**

#### **Part 1:**

1. Read the Practice Scenario on page 13.
2. Use the Practice Worksheet on page 14 to write:
  - Purpose of the meeting
  - 2–3 Desired Outcomes
  - 2–3 possible Agenda items
  - Estimate the time needed for each Agenda item
  - Consider whom you will invite to the meeting and why (the important contributions they might provide)

*Note: For “who” you will invite to the meeting, use departments and/or functional responsibilities; for example, marketing, finance, operations, production, or human resources.*

3. Refer to page 8 (Responsibility: Preparing for a Meeting) to help in completing the Worksheet.

#### **Part 2:** After you have completed Part 1:

1. Pair up with a partner.
2. Take turns sharing your Purpose, Desired Outcomes, Agenda items, and the people/functions you will invite.
3. Give feedback to each other:
  - Are the Purpose and Desired Outcomes clear and understandable?
  - Are the Agenda items appropriate for the Purpose and Desired Outcomes?
  - Are the time frames for each Agenda item sufficient?
  - Will the appropriate people be invited to the meeting?

#### **Time for the Exercise:**

- Read the scenario: 2 minutes
- Write the Purpose, Desired Outcomes, and Agenda items for the meeting, who you will invite, and why: 5 minutes
- Share your work and feedback with your partner: 8 minutes (4 minutes per partner)

Total Time for the Exercise: 15 minutes

## Practice Scenario

You are an associate in the Product Development Department of XYZ Corporation, a producer of personal tax reporting software. You are concerned that, because it takes so long to update tax software and to develop more sophisticated software, XYZ will lose its position as #1 in the market.

You believe a lag in development is caused by inefficient and ineffective planning meetings. Examples are:

- Meetings are scheduled with only a few days' notice.
- Agendas for meetings are not known until associates arrive at meetings.
- The Purpose and Desired Outcomes are not clearly stated.
- Associates often come to meetings without information that would have helped in discussions.
- Discussions ramble from topic to topic, are dominated by vocal associates, and often get heated.
- The V.P. of Product Development leads the meetings and often unknowingly intimidates associates from freely expressing their ideas and opinions.
- Decisions are made without sufficient data, input, or consensus.
- The same associates are in every meeting whether their expertise is pertinent to agendas or not.
- Representatives from other departments whose contributions to discussions would be valuable are not invited.
- Meetings end without plans for follow-up on issues raised.

The V.P. has agreed to your request that you facilitate a meeting to:

- Review problems you see with the current way meetings are conducted.
- Propose a systematic process and specific procedures for meetings.
- Get buy-in from associates on the process and procedures.

---

Use the Practice Worksheet on the following page to write a Purpose, Desired Outcomes, and an Agenda for your meeting.

## Practice Worksheet

Purpose of the Meeting:

Desired Outcomes: (2–3)

Agenda items (2–3), and time frames for each item:

Representatives of functions/departments you will invite and why.

| Functions/Departments | Why |
|-----------------------|-----|
|                       |     |
|                       |     |
|                       |     |
|                       |     |
|                       |     |
|                       |     |
|                       |     |
|                       |     |
|                       |     |
|                       |     |

## Observation Notes for Video: Staying on Track: Handling an Off Topic Conversation

1. If you were Grace, what would you say or do at this point?
  
2. What insights does the narrator provide?
  
3. Grace employed three tactics for dealing with the sidebar conversation. What beneficial effects did Grace's management of the situation have on Nick and the others in the meeting?
  - Recognize the importance of Nick's comments:
  
  - Use a "Parking Lot" to capture Nick's comments:
  
  - Refocus and move on:

**Key Tactics:**

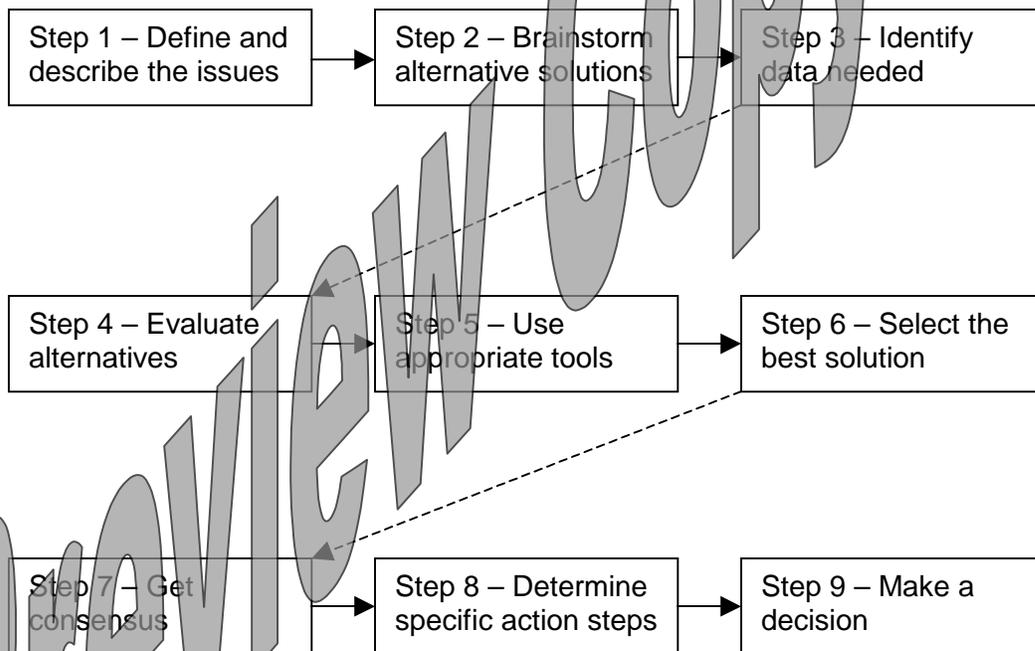
- ✓ Recognize Importance
- ✓ Use "Parking Lot"
- ✓ Refocus and Move On

## Responsibility: Facilitating a Decision-making Process

### Why the responsibility is important.

An organization's success is largely the result of making wise decisions. In turn, wise decisions are the result of using a systematic decision-making process. The process requires a significant investment in expertise and time to explore issues, to evaluate alternative solutions for issues, to select the best alternative, to build consensus for supporting the alternative, to implement the alternative, and to continuously monitor the alternative's strengths and/or limitations.

### Nine Steps in a Decision-making Process



## Common Decision-making Tools

Many decision-making tools are available to assess alternative solutions for issues. Some tools are complex and require the guidance of a highly skilled and knowledgeable facilitator. Some are relatively easy to use, yet are still effective.

A characteristic of fearless facilitators is that they know their limitations, as well as their strengths. Facilitators who do not consider themselves sufficiently skilled in the use of sophisticated tools often enlist the services of an expert—someone who is knowledgeable and experienced with analytical methods and techniques.

Remember a few “rules of thumb” concerning decision-making tools:

- Use tools to help evaluate options and make critical decisions.
- Do not make decisions based on the results of just a few tools. The results of different tools often contradict one another.
- Evaluate with a variety of tools until you see a pattern for or against an alternative.

Summarized below are eight of the most common tools.

1. **Rating:** Rating uses rows to list a number of alternative solutions for an issue and columns to write a set of guidelines; for example, cost, time, and customer acceptance. Each alternative is rated on a scale, such as: “10 = High Importance” to “1 = Low Importance.”
2. **Ranking:** Ranking is similar to rating. The tool has rows on which a number of alternative solutions for an issue are listed, and columns on which guidelines are listed; for example, cost, time, and customer acceptance. Each alternative is then ranked on each guideline, such as: “5 = High Priority” to “1 = Low Priority.”
3. **Advantages/Disadvantages/Implications:** It is important to check each alternative course of action to assess if it is likely to improve a situation. This tool uses a table with column headings of Advantage, Disadvantage, and Implications. In the column for “Advantage,” write positive effects of taking the action. In the column for “Disadvantage,” write negative effects. In the column for “Implications,” write down the implications and possible outcomes of taking the action, whether positive or negative. Using a scale such as “5 = High, 1 = Low,” assign a value: +5 for Advantages, -5 for Disadvantages, and either +5 or -5 for Implications. The scores you assign may be quite subjective, but that is okay as long as your scores are recorded with serious thought. A strong “Advantage” score suggests that an alternative solution should be taken, whereas a strong “Disadvantage” score suggests that

## Sample Format for Evaluating a Meeting

At the end of a meeting, group members may be a bit brain-weary for lengthy evaluations of the meeting. Keep it simple, but meaningful enough to provide you with feedback.

Sample evaluation questions are:

- Did we accomplish the Purpose and Desired Outcomes of the meeting?
- Did everyone have ample opportunity to express ideas and opinions?
- Did we resolve disagreements to everyone's satisfaction?
- Is everyone clear about and committed to accomplishing agreed upon next steps?
- Did the meeting move at an appropriate pace: neither too fast nor too slow?
- Was the meeting a worthwhile use of your time and expertise?
- Do you have suggestions on how we could have improved the meeting?
- Do you have other comments you wish to make about this meeting and/or future meetings?
- What went well? What do you recommend we do differently next time?

Optional  
Activity

2

When is it Best to Have a Meeting?

**Time it takes:** 15–20 minutes

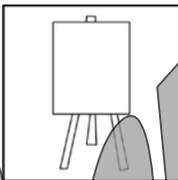
**What it is about:** Helping participants decide when it is or is not appropriate to have a meeting.

**What you will need:** Flipchart paper and markers

**How to do it:**



1. Lead a discussion to help participants begin to think about when it is or is not appropriate to have a meeting by drawing two columns on a flipchart and asking for volunteers to share first when it is best to have a meeting and then when it is not appropriate to have a meeting.



2. Chart Responses. The following page is an example of a flipchart drawing with expected responses. You can share these responses if participants are unsure.

| <b>Have a Meeting When ...</b>   | <b>Do NOT Have a Meeting When ...</b>  |
|--|--|
| <ul style="list-style-type: none"><li>• Input and discussion from several people is required.</li><li>• Input is desired prior to making an important decision that impacts several people or functions.</li><li>• Several ideas need to be generated.</li><li>• To build team involvement and rapport amongst team members.</li><li>• Two or more people need to figure out problems or issues.</li></ul> | <ul style="list-style-type: none"><li>• Communicating a final decision and you don't want any discussion.</li><li>• All the "right" people are not available.</li><li>• Information can be shared easily in an email or voice message.</li><li>• You know the meeting will have to be cut short due to other priorities.</li><li>• You are not prepared and have not given other people time to prepare.</li><li>• The purpose is unclear.</li></ul> |

3. Transition by sharing how this discussion pertains to the next Workshop activity.

Optional  
Activity



Common Decision-making  
Tool: Easy Ranking

**Time it takes:** 15–30 minutes

**What it is about:** How to use the Easy Ranking decision-making tool.

**What you will need:** Flipchart paper and markers

**How to do it:**

1. Introduce the topic with comments such as:



There are a few “rules of thumb” concerning decision-making tools to keep in mind:

- Tools are best used to help evaluate options and make critical decisions.
  - Decisions should not be based on the results of just one or two tools. The results of different tools often contradict one another.
  - It is best to evaluate with a variety of tools until you see a pattern for or against an alternative.
2. Discuss Easy Ranking with comments such as:
    - Ranking is similar to rating using a low, medium, high scale.
    - The tool has rows on which a number of alternative solutions for an issue are listed, and columns on which guidelines, or criteria, are listed.

- **Example criteria would be cost, time, and customer acceptance.**
  - **Each alternative is ranked on each guideline using a low, medium, high scale. This tool helps narrow options.**
3. Walk through an example of buying a car by first drawing the following grid (without the boxes filled in) on a flipchart. Explain that you list the criteria first [cost, styling, practicability]. Explain that if a vehicle costs a lot of money, then it receives a “low” rating (because “low” = “not good” in this example).

| <b>ALTERNATIVES</b> | <b>COST</b> | <b>STYLING</b> | <b>PRACTICABILITY</b> |
|---------------------|-------------|----------------|-----------------------|
| BMW Convertible     | LOW         | HIGH           | MEDIUM                |
| Cadillac DeVille    | MEDIUM      | HIGH           | MEDIUM                |
| Honda Accord        | MEDIUM      | LOW            | HIGH                  |
| Pick-up Truck       | MEDIUM      | LOW            | MEDIUM                |

4. As you walk through the example, eliminate any alternative that has received a “low” rating in more than one category. Look for any alternative that has received “high” in two or more categories. In the example, the Cadillac DeVille has the most “medium” and “high” values and, therefore, might be your choice—at least according to the Easy Ranking tool.
5. Ask for questions and comments. To conclude this activity, remind everyone that several tools should be used to help make complex decisions.

Optional  
Activity

9

Common Decision-making  
Tool: Cost/Benefit Analysis

**Time it takes:** 15–20 minutes

**What it is about:** How to use the Cost/Benefit Analysis decision-making tool.

**What you will need:** Flipchart paper and markers

**How to do it:**

1. Introduce the tool with comments such as:



- **Cost/Benefit Analysis is a quantitative analysis of whether or not to follow a course of action.**
- **The tool helps you decide if a potential solution for an issue is worth the time and expense. In essence, the tool guides you in adding up the value of the benefits of a course of action and subtracting the cost associated with it.**

2. Demonstrate a simple cost/benefit analysis by sharing the following example.

Example: Deciding whether to spend money on upgrading the computer system.

| Costs   | Value of Benefits   |
|---|---|
| <u>One-time Expenses:</u>                       | <u>Monthly Savings:</u>   |
| New server \$6,000                              | Reduction of monthly fees \$100                                   |
| 4 new computers \$4,200                         | Decreased down time \$1,000                                       |
| New software \$2,000                            | Reduction of maintenance \$200                                    |
| Training Staff \$1,200                          | Faster customer Interface \$300                                   |
| Time lost for transition \$8,000                | Estimated sales increase \$2,000                                  |
| Administrative costs \$2,200                    |   |
| Misc. expenses \$1,100                          |   |
| <b>Total Expected Cost: \$24,700 (one time)</b> | <u>Plus</u>   |
| Recurring monthly upgrades: \$300/month         | Increased morale leading value not to decreased turnover assigned |
|   | Recurring monthly Savings: \$3,600                                |
| <b>Total 1<sup>st</sup> Year Cost: \$28,300</b> | <b>Total Savings 1<sup>st</sup> Year: \$43,200</b>                |

3. Ask the group for their conclusion about whether or not it makes sense to upgrade the computer system based on the Cost/Benefit Analysis.
4. Ask for questions and comments. To conclude this activity, remind everyone that several tools should be used to help make complex decisions.

## Pre-Workshop Assessment

For each statement below, circle the number that reflects the level of your knowledge and skills before completing the Workshop. At the conclusion of the Workshop, you will complete a Post-Workshop Assessment and compare your ratings to those on the Pre-Workshop Assessment.

1. I can describe the three primary responsibilities of a meeting facilitator.

High 4 3 2 1 Low

2. I am able to effectively manage differences of opinions that surface during meetings.

High 4 3 2 1 Low

3. I can successfully manage behaviors that could disrupt the process and results of meetings.

High 4 3 2 1 Low

4. I can articulate the steps in a decision-making process.

High 4 3 2 1 Low

5. I can lead meeting participants to reach a consensus on actions to be taken.

High 4 3 2 1 Low

6. I can explain why it is important to conclude meetings with definitive next steps.

High 4 3 2 1 Low

7. I know what my post-meeting responsibilities are as a facilitator.

High 4 3 2 1 Low

8. I am confident and competent in my ability to lead efficient and productive meetings.

High 4 3 2 1 Low