

# Fearless Facilitation!™

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How to Lead Effective Meetings

Preview

Facilitator Guide

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## **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.

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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 copies 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

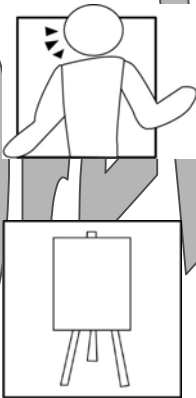
**Time it takes:** 40 minutes

**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

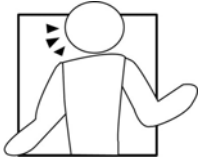
**Time it takes:** 30 minutes

**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:**

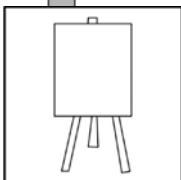


1. Introduce the activity (Estimating the Cost of Meetings) with comments such as:

- **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

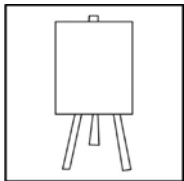
**Time it takes:** 10 minutes

**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 127 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 129 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

**How to do it:**



# Step

# 8

## Responsibility: Managing Disruptive Behaviors

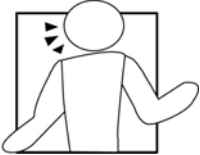
**Time it takes:** 60 minutes

**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 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

# 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

# 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:**

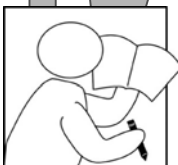
- DVD/video
- Participant Materials

**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:

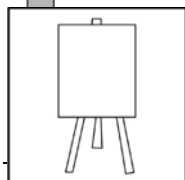
- Flipchart #1
- Overhead/PowerPoint® slide #M-9
- Participant Materials

### 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

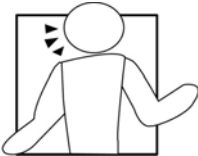
**What it is about:** Responsibilities of facilitators after a meeting. The importance of keeping alive the ideas and actions generated in a meeting.

**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.

**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.**

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

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**Practice  
Scenarios**

**Conducting a Meeting**

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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.