FACILITATING EFFECTIVE MEETINGS

Effective meeting leaders—or facilitators—organize the conversations that other people have. They guide the conversation by defining the desired outcomes, deciding the sequence of topics, ensuring that everyone's voice is heard, asking relevant questions, limiting non-productive communication, and summarizing the conclusions reached.

In so doing, they generate value for a group or an organization in five ways:

- By advancing goals and objectives (e.g. planning and implementing major projects and initiatives);
- By increasing capacity (e.g. improving coordination within or between units, clarifying roles and responsibilities);
- By building internal intelligence (e.g. understanding how a potential change or trend may affect the organization);
- By building teamwork and trust (e.g. building confidence that team members can rely upon one another);
- By resolving issues (e.g. addressing opportunities and challenges).

Habits of Successful Meeting Facilitators

Effective meeting facilitators do the following 12 things regularly. They:

1. Communicate the meeting purpose (or goal) and how this fits within a broader organizational goal or process
2. Define the meeting's agenda (ideally in advance of the meeting)
3. Establish ground rules
4. Clarify decision-making roles and responsibilities
5. Ensure that everyone's voice is heard
6. Keep their own voice and personality in check
7. Probe for clarity; make sure everyone understands what's being said
8. Document the key points and agreements so they are visible to the group
9. Help people put their conflicts on the table and address them productively
10. Test and validate consensus, as needed
11. Document action steps, responsibilities, and timing
12. Clarify what communication needs to happen after the meeting

Meeting Purpose

An effective meeting starts with clarity of purpose. Here are some examples of meeting purpose statements:

- To share updates from the team and determine the team's work priorities for the week.
- To review the performance of the department and determine whether any changes or improvements are needed.

Every meeting typically involves one or more of the following activities:

1. Information sharing	Exchange information so that people are able to work effectively.
2. Problem solving	Make decisions about how to solve a specific problem.
3. Brainstorming	Generate ideas and options.
4. Planning	Decide goals, objectives, strategies, action steps, timetables, roles and responsibilities.
5. Performance review	Review individual, team or organizational performance. Decide areas of strength and areas of improvement.

Many meetings move quickly among these different activities. A piece of information gets shared, for example, that triggers a problem-solving or brainstorming discussion. That's fine, so long as the meeting sticks to its intended purpose and agenda.

Key Meeting Roles

There are three key roles in an effective meeting: the meeting leader, the scribe, and the coordinator. Sometimes the same person holds all three roles.

The leader's role is to:

- Decide and communicate the purpose of the meeting.
- Develop the agenda.
- Define what advance information is needed.
- Convene the meeting on time.
- Ensure everyone is clear on the agenda and decision items.
- Ensure equal talk time.
- Invite dissenting points of view.
- Push the group toward action.
- Ensure the group decides how to share information from the meeting.
- Monitor the clock (or have another person serve in this role).
- Adjourn the meeting on time.

The scribe's role is to:

- Take notes.
- Based on the notes, prepare a synopsis of the meeting.
- Distribute the synopsis promptly.

The coordinator's role is to:

- Arrange for the room.
- Supply the room (as needed) with conference phone, laptop and projector, flip charts, easels and markers.
- Distribute the agenda and handouts.

The leader also may need to appoint a "pot stirrer" for the meeting – someone to provide a dissenting point of view. Not all meetings need a pot stirrer. But when major issues or problems are on the agenda, the team will benefit from listening to two or more opposing points of view.

Here are some tips for scribes in creating effective meeting synopsis:

- Use the agenda as the template for the synopsis.
- Indicate in the synopsis who attended.
- Keep the meeting synopsis fairly brief by capturing the key discussion points, decisions, and action steps. Action steps should include the task, the person who will complete the task, and a deadline for completion.

Agendas

The meeting leader has the responsibility for maximizing the value of meeting time. A key element is an agenda, prepared and distributed before the meeting starts. Agendas should define the topic, the main presenter, and the amount of time needed for each item.

In preparing an agenda, the meeting leader should think about what decisions need to come out of a meeting. By focusing on decisions, the meeting leader can consider what advance materials are needed – and who needs to participate.

Agenda Format:

- Welcome, purpose of meeting (Charles); 5 minutes
- Project status report (Bob); 15 minutes
- Trends affecting long-term success of project (Julie, Bob); 15 minutes
- Discuss potential changes to project plan (Bob); 30 minutes
- Determine decisions and action steps (Charles); 15 minutes
- Determine communication needs (Charles); 10 minutes

Communicating what happened in the meeting is a crucial step in generating value. Consider not only what needs to be communicated, but to whom—which internal stakeholders need to be informed? Are there individuals or groups outside of the organization that need to know? Also be sure to include in the meeting's action steps who will be the one to communicate, and how and when s/he will complete this task.

Evaluating the quality of the meeting is often over-looked, but it is the best way to provide immediate feedback to the meeting leader and help him or her maximize its value to the organization. By inviting feedback, the meeting leader also builds trust within the group by showing that s/he is aware of his or her role in managing people's time effectively.

Clarifying Decision-Making Roles

It is the job of the meeting leader to define the decision-making role of the group – and of key individuals within the group. Are decisions being made by a single person after gaining input from others? Are decisions being made by consensus? There are five types of decisions – and only five – and knowing when and how to use each type is an important aspect of effective meeting management.

Autocratic	You make the decision by yourself using the information you have available.
Consultative	You involve others, either individually or in a group, by sharing the issues and obtaining their ideas, suggestions or recommendations, then you decide.
Consensus	You involve others, either individually or in a group, by sharing the issues, then you generate and evaluate alternatives and agree on a decision. The standard of consensus is that everyone agrees with the decision or agrees to support the decision, despite reservations.
Delegated	You determine that another individual or group has the data and judgment to make the decision, so you delegate it and accept/support the decision that they make (unless there is a significant change in circumstance).
Democratic	You use a voting system to make the decision, making sure that the rules are well-understood by everyone.

If a decision is a *consensus* decision, the leader needs to be sure everyone understands what that means. First, consensus means that every viewpoint has been heard and understood during the process. Ample time needs to be given to the collection of information and debate of alternatives. Second, there are different standards of consensus. One standard is 100% agreement. A second standard is that the vast majority of people in the group agree and the others agree to put aside their concerns and support the decision. If a few people are wavering or do not support the direction, then you have not achieved consensus.

Using the G.R.O.W. Model to Facilitate Effective Conversations

Teaching people the G.R.O.W.[1] model helps them feel more confident and comfortable in managing effective conversations. Using this model, people can tackle complex issues more effectively because the discussion is organized in a way that everyone understands.

The G.R.O.W. model assumes that a logical sequence to a discussion is better than having people speak randomly. Here's how it works:

Goal

The "G" in G.R.O.W. stands for "goal." The first thing in any important conversation is to establish the goal of the discussion – and its connection to a larger goal for the organization. For example, let's assume the initial goal is defined as: "How to fix our web site." As you talk about the goal, it becomes clear that the real goal is to deal with all potential competitors who might try to copy your services using information from your web site. Talking first about the goal ensures people are oriented toward the real goal.

[1] The G.R.O.W. model was introduced by John Whitmore in his book "Coaching for Performance." Boston: Nicholas Brealey, 1996.

Reality

The "R" stands for "reality." The second thing people need to talk about is the current reality. What's going on? How did we get here? What do we know? What don't we know? Using the example, the reality may be that the web site was developed without sufficient attention to how easily competitors could copy sensitive information.

Options

The "O" stands for "options." This is the part that people typically jump to before they talk about the goal and the reality. What should we do? Hire a contractor? Change our management approach? Scrap the existing platform? Here's where people need to engage in creative brainstorming and share their ideas.

Will

Finally, the "W" in G.R.O.W. stands for "will" – as in what will we do? This is the time to decide on the next step. It can be the toughest part of the discussion, since people need to commit to action. If the decision is being made consultatively, one person can decide. If by consensus, it can take several rounds of asking each person what they would like to do. But ultimately, people are likely to come to agreement, at least on the next steps.

STEP	QUESTIONS TO ASK
Goal	**What is the idea, topic or issue we want to tackle?** ▪ What are we here to talk about and why? ▪ What are our long-range goals related to this issue? ▪ What are our goals for this meeting or discussion?
Reality	**What is the context, the current reality in more detail?** ▪ How does this idea, topic, or issue relate to our long-range goals? ▪ What do we currently know? ▪ What data do we have? ▪ What is currently being done? What strategies have been tried? ▪ What are our concerns about this issue? ▪ What is really the issue here, the nub of the issue or the bottom line?
Options	**What are the different ways we could approach this?** ▪ What are our ideas to address this issue? ▪ What could be done if we had more time or a larger budget, or if we were in charge? ▪ What alternatives are worth seriously exploring? ▪ What are the advantages and disadvantages of each of these? ▪ Which do you think would give the best result? ▪ Which of these solutions appeals to you most, or feels best?
Will	**Which option or options should we pursue?** ▪ What next steps would we like to take? ▪ What additional information would we like to get? ▪ Who needs to do what? What is the desired timeline? ▪ What support do we need and from whom? ▪ What do we need to do to obtain that support and when? ▪ Who needs to know what our plans are?