

# Facilitating Productive Meetings

**I**F YOU ARE GOING to be a meeting facilitator or cast someone else in that role, there are certain steps you can follow to ensure a successful outcome.

This month's Training 101 covers the four stages of a problem-solving meeting, and the steps involved in facilitating it effectively and efficiently.

## HOW TO RUN A PROBLEM-SOLVING MEETING

BY MARK J. FRIEDMAN

**I**n the *Wizard of Oz*, Dorothy always had the power to return home just by clicking the heels of her ruby shoes together three times.

Of course, she didn't know she had that power until the Wizard told her.

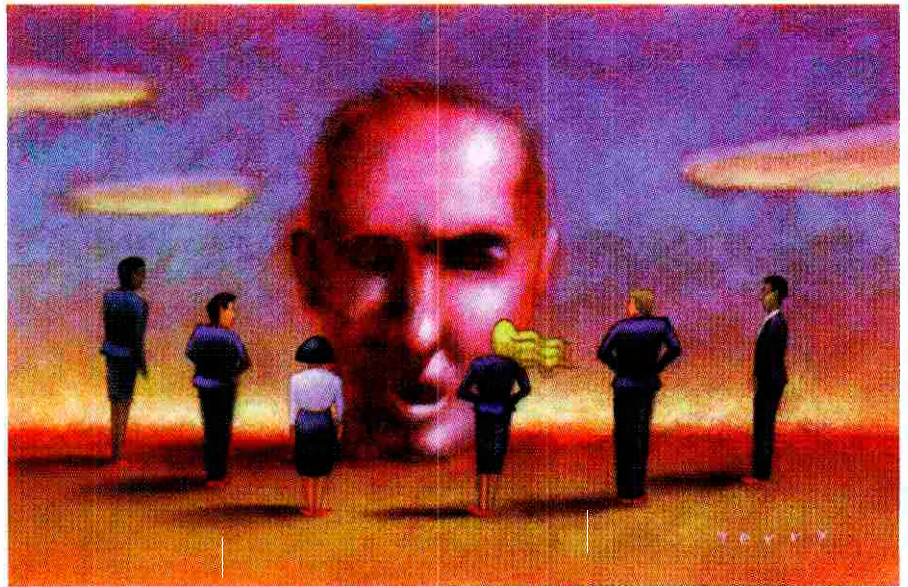
In many organizations, teams and problem-solving groups also have the power to get the results they need. But talk to many that have used those forums, and you're likely to get a stream of invectives. To ensure excellent outcomes, it would help if each team had a wizard, better known as a facilitator.

Management usually invites a facilitator to help a team meet its objectives. Facilitators can be external consultants or internal staff members. They need not be technical experts, but they should be experts in group process—how a group conducts business—rather than in the tasks or business at hand.

For example, a team may meet to discuss strategic planning, which is a business issue. But group process examines *how* the team addresses strategic planning: who communicates with whom, how decisions are made, how responsibilities are assigned, who leads the group, and how the team uses its time. High-performance teams monitor both their results and process. That's the only way they can ensure they are doing the right things the right way.

Typically, managers try to perform the roles of manager and facilitator—a difficult, if not impossible, task. Facilitators should not have an investment in any particular solution. Their neutrality opens the door for innovative strategies.

Problem-solving meetings are different from regular staff meetings.



They usually involve a task force or "tiger team" composed of content experts from different areas of the organization. Typically, a problem-solving team will work until it finds a solution. It may meet several hours or several months, depending on the problem. Once they agree on a solution, team members assist the rest of the organization in implementing it.

Every meeting has three stages: preparing and planning, conducting, and evaluating. A facilitator must manage each stage effectively.

### Stage 1. preparing and planning

Preparation is critical to a successful meeting. Prior to the meeting, the facilitator should meet with the team's manager to discuss which topics to cover and the expected outcomes. If necessary, the facilitator should help the manager clarify the meeting's objectives. For example, if the goal is to downsize a work unit, management should be clear about what it wants the team to accomplish. Is it to determine the number of people to cut? The percentage of cuts? The organizational structure after the cuts? The people who will be affected? Or, all of the above? If management is unclear about desired results, the chance of success is greatly reduced.

During this stage, it's essential to

consider team membership. Too often, the wrong people are invited to participate—such as when team members are selected for political reasons rather than their expertise. Clearly, that's a waste of time for the individuals and the team. In fact, it's likely to be a distraction. Only people who can help a team accomplish its objectives should participate.

It's also important to consider the number of team members. Teams are most effective when the members can communicate with each other and when each has an opportunity for "air time." Teams of six to 12 members are best; any larger, and it's difficult for everyone to contribute.

Establishing an agenda is another critical planning activity. (See the sample agenda on page 12.) Distribute the agenda to all team members several days before the meeting, and ask for their input. That gives them a chance to contribute to the meeting content, and helps them commit to the task. It also gives them time to prepare.

From the facilitator's standpoint, preparation involves gathering the information, materials, supplies, and handouts for accomplishing team goals. As facilitator, will you need easel stands, magic markers, tape, or flipcharts? Will handouts be used? Do you have enough copies? Will you use overheads, films, audiotapes, or videotapes?



## SAMPLE MEETING AGENDA

### Step 1: Introduction and vision statement

- A. General introduction and purpose of meeting
- B. Introduction of team members (name and position)
- C. Introduction of facilitator and description of facilitator's role
  - ▶ Establish an atmosphere of cooperation and accountability.
  - ▶ Assist team process.
- D. Agenda (presented by management)
- E. Vision and mission (presented by management)
  - ▶ Determine how success will look.
  - ▶ Identify goals.
  - ▶ Get target dates for completion. Can they change?
  - ▶ Discuss format and frequency of status reports to management.
  - ▶ Describe the kind of support the team can expect from management.
  - ▶ Identify possible barriers.
- F. Final questions to management

### Step 2: Meeting kickoff

- A. Set ground rules based on the vision and on expected, desired outcomes
- B. Identify key issues, concerns, and business opportunities.
  - ▶ Determine the critical issues.
  - ▶ Identify the concerns and barriers to overcome.
  - ▶ List issues in order of priority.
- C. Plan for solutions.
  - ▶ Determine roles: Who does what?
  - ▶ Identify the required information and resources.
  - ▶ Establish a work plan with milestones and target dates.
- D. Plan how to present information to management.
  - ▶ Create an agenda for the presentation. (See step 2, B and C.)

### Step 3: Summary of accomplishments and presentation of findings and current status to management

### Step 4: Evaluation exercise and closing remarks

Preparation also involves checking that all equipment is available and working before the meeting and that the set-up is appropriate for the planned activities. And, finally, notify all participants where and when the meeting will take place.

## Stage 2: conducting

As shown in the box, meetings have four major steps: introduction and vision statement, meeting kickoff, summary of accomplishments and management presentation, and evaluation exercise and closing remarks.

**Step 1: introduction and vision statement.** Start with general comments about the purpose of the meeting and why the team members were selected. Next, ask participants to introduce themselves and briefly explain their job responsibilities and areas of expertise. Then, have the manager introduce the facilitator and explain the role he or she will play. The manager

can also tell something about the facilitator's background. That gives the facilitator credibility and legitimizes his or her role—to help the team manage itself effectively and efficiently.

Now, it's time to get down to business. The manager should discuss why the meeting was called and which results are expected.

The manager should have a vision of the ideal outcome and should convey the vision to the team. Team members should be free to plan solutions. That builds their commitment to the immediate task and later implementation.

In explaining the vision, the manager should discuss the business reasons that led to it, using facts and figures in support. He or she should encourage team members to ask questions. The manager also should review his or her expectations of the team—such as, how the team will report results and how often management needs to be updated. Managers should also discuss

anticipated obstacles and the kind of support they will give the team. When the discussion is completed to everyone's satisfaction, the manager leaves the meeting. Step 1 can take an hour to 75 minutes.

**Step 2: meeting kickoff.** Now, the facilitator takes the floor. The first team task is establishing the ground rules—the meeting procedures on which all team members can agree. The ground rules quickly get the team working together and provide a common understanding about meeting etiquette. Ground rules may address such areas as attendance, participation, assignments, decision making, feedback, and team roles. Ask the team to discuss the ground rules and post them in a visible location. Ground rules, particularly those dealing with attendance issues (such as the length of breaks) help team members stay committed to the main task. They also help the facilitator and team members manage the group process effectively.

The team is now ready to get on with the task at hand. It will spend most of its time engaged in problem solving.

During this step, team members identify the critical issues causing concerns and business opportunities. After identifying the issues, the team lists them by priority. To determine which issues are the most important, use the ABC approach: A is the most critical, B is important but not critical, and C is least critical. The team will want to apply its greatest efforts to issues that have the biggest payoff.

As the work progresses, list barriers and potential resolutions. Chart information at the front of the room. The team should discuss each item and post specific action plans. Next, assign accountabilities—who will be responsible for which actions—and determine the due dates.

**Step 3: summary accomplishments and management presentation.** During step 3, the team summarizes completed actions, future plans, and items needing clarification from management. The purpose is to share its accomplishments and its progress with management.

Save at least an hour to 90 minutes to plan and prepare the management presentation. During that time the



team should address these points:

- ▶ what to discuss and why
- ▶ team goals
- ▶ which problem-solving approach was taken and why
- ▶ the key issues identified
- ▶ the decisions, agreed-upon actions, individual responsibilities, and the dates for completing the actions
- ▶ the next steps.

Team members should decide how to brief management. Will one person speak for the entire group, or will each team member speak?

Last, the facilitator and team solicit management's reactions and answer questions.

**Step 4: evaluation exercise and closing remarks.** Before adjourning, the team may complete an optional exercise to evaluate the results or its process. One method involves using 3-by-5-inch Post-it notes. Each team member receives one Post-it. Ask team members to divide their Post-it notes in half and answer "What worked well?" on the left side and "What could have gone

better?" on the right side.

Members can also make comments on their Post-its before turning them in anonymously. Managers and team members may make closing remarks. Then, adjourn the meeting.

### Stage 3: evaluating

At the meeting's conclusion, the manager and facilitator can compare the team's accomplishments with the vision. A review of "did well," "do better" feedback is useful. The comparison and review should provide clues for improving team operations. Carry over any objectives that haven't been accomplished to the next meeting.

Oftentimes, a problem can't be solved in one meeting, even when the meeting lasts all day. Some problems can take months and involve several meetings. In such cases, the facilitator and team should plan follow-ups, using feedback from past meeting reviews to improve procedures and processes. A follow up meeting is straightforward.

▶ Review accomplishments; ask where the team is now.

▶ Determine what remains to be done. For example, have new or different issues surfaced since the team began working together? Who should do the remaining work and when?

▶ Review such reporting responsibilities as in what form and how often the team should report to management.

▶ Set the date for the next meeting.

If it seems appropriate, you can discuss process issues with the team. Generally, it's better to raise such issues at the start of a meeting—prior to discussing tasks. You might review the events of the last meeting, share feedback, and solicit ideas for improvement. The team should try to implement all ideas that seem workable. That will encourage others to keep contributing new ideas.

.....  
**Mark J. Friedman** is a principal of *MJF Associates*, 12381 Ella Lee Lane, Suite 201, Houston, TX 77077-5914. Phone 713/493-0641.

## EduSys 2000

## It delivers, manages and tracks multimedia training...anytime, anywhere.

Use **EduSys 2000** to take your training out of the traditional classroom and into a 'virtual' one. Our wide bandwidth client/server system will raise your training mission to new levels of trainee and staff interaction.

Running under Windows® 95 or Windows 3.1, **EduSys 2000** delivers any Windows compliant courseware throughout your network. Students can access the exciting world of audio and video enhanced learning, regardless of where they are.

With **EduSys 2000**, the demands of developing and maintaining complicated instructor and classroom schedules are reduced or made obsolete. Travel costs are trimmed and trainees' in-office time is increased.



**EduSys 2000** takes care of administration by tracking all trainee activity for internal records, reporting and courseware vendor payment.

Simple-to-establish security levels assure testing and grading integrity.

You will simplify and enhance the multimedia training process, from single departments to enterprise wide environments by implementing **EduSys 2000**.

Call, fax or e-mail us today for more information on **EduSys 2000**... the training matrix for the 21<sup>st</sup> century.



Tel: 1-800-903-1888 Fax: (512) 838-0050  
Email: [ttittle@ibm.net](mailto:ttittle@ibm.net)  
Visit our Web Site: <http://tech.singalab.com.sg>

Windows is a registered trademark of Microsoft Corporation. SingaLab is a trademark of SingaLab Pte Ltd.