



IMPROVINGBIZ

Performance through People

Helping you to improve your ... **Meeting & Facilitation Skills**

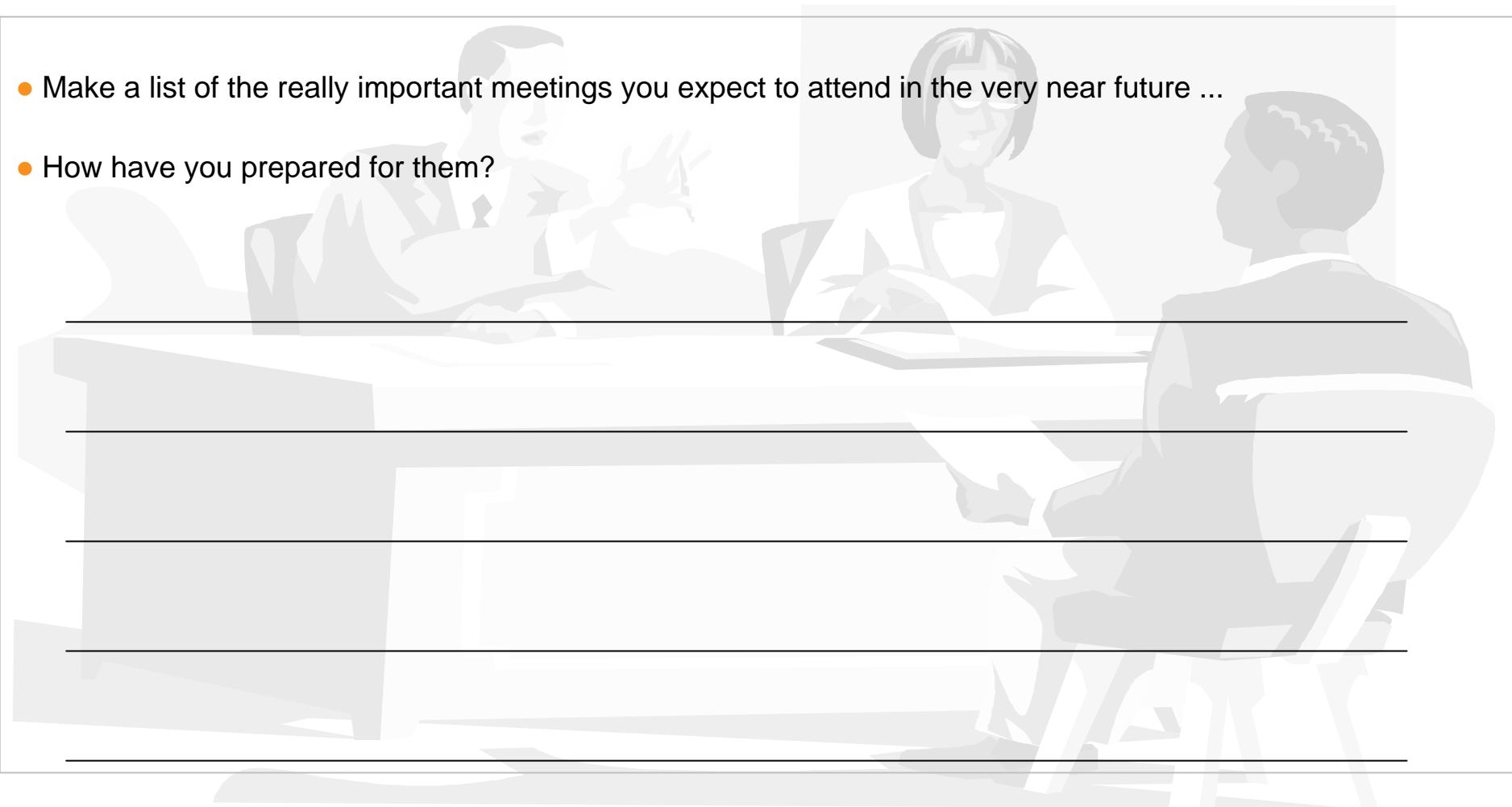


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MEETING SKILLS PREPARATION



- Make a list of the really important meetings you expect to attend in the very near future ...
- How have you prepared for them?



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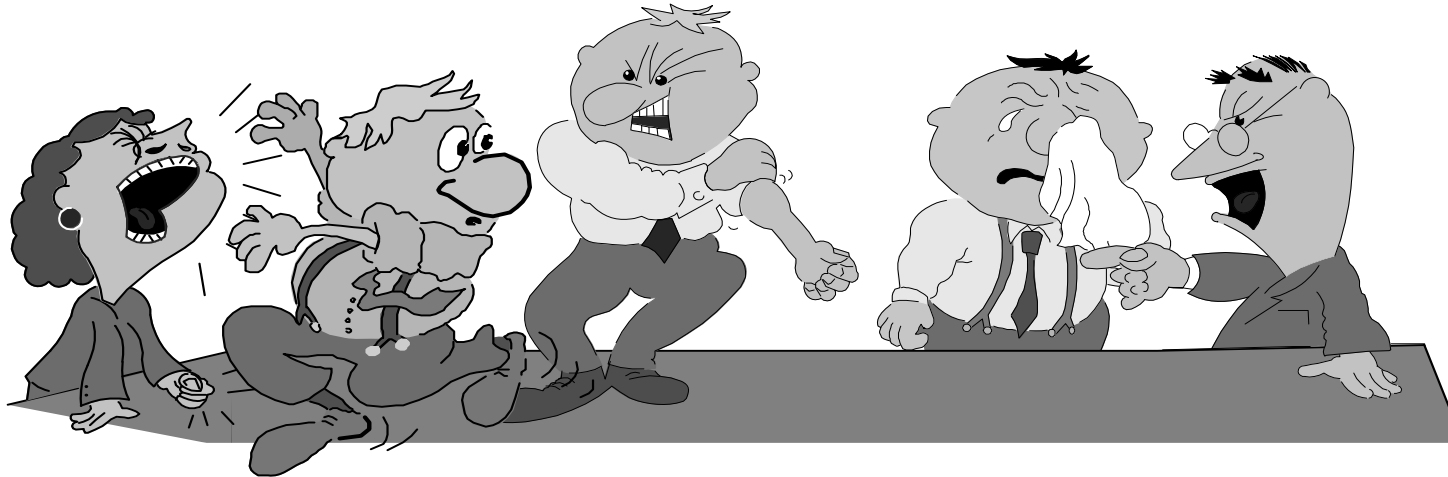
A MEETING IS A WAY OF ...



- Sharing information and communicating
- Solving problems
- Raising and discussing issues
- Recruiting, Promoting, Demoting or Firing people
- Discussing & reviewing projects or work
- Planning future requirements & strategies
- Ensuring consensus and making decisions

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... AND NOT FOR RESOLVING PERSONAL BATTLES



- Avoid surprises and known conflicts
- Discuss & Resolve major differences off-line beforehand
- Use tools like Problem Solving to deal with differences

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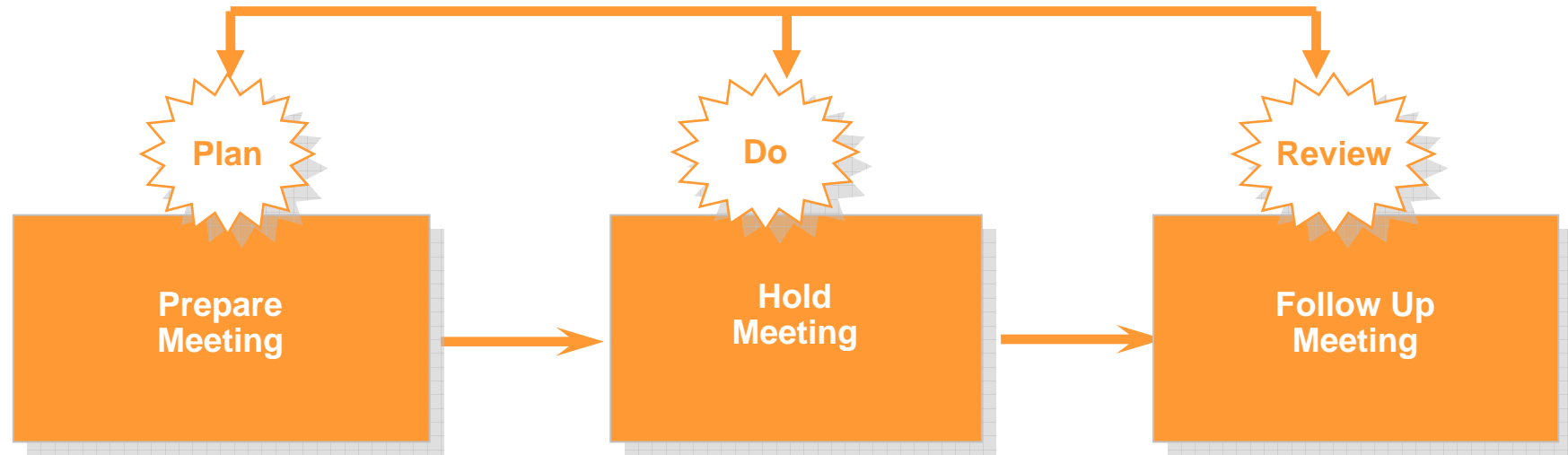
MEETING GOALS



- Common ownership of the meeting objectives
- Direction and purpose of action
- A plan to deal with issues and resolve problems
- How to share key information
- Open dialogue and building of consensus
- Decisions reached and SMART results

“Improving communication and ensuring on time attendance produces a measurable improvement in each person and the team”

MEETING PROCESS



- Determine Objectives & Agenda
- Determine process required to meet objectives
- Identify inputs required
- Determine who needs to attend & what their role is
- Arrange Logistics
- Pre-position Key Contributors

- Lead through each item following defined process
- Ensure all contribute
- Visibly document actions and decisions as you go
- Use “Car Park” to capture issues to return to

- Review (what worked what did not)
- Publish Actions/Decisions within 24 hours
- Follow-up on next steps
- Who needs to be debriefed
- Store documents

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THE THREE MEETING CONTRIBUTORS



1. Facilitator

- Focuses on the process to help meet objectives
- Helps resources get more done in less time
- Promotes team-work



2. Meeting Owner

- “Owns” the meeting and the objectives
- Is accountable for preparation
- Focuses on content

3. Attendee (s)

- Contribute ideas & expertise
- Follow the process
- Represent & communicate to people concerned

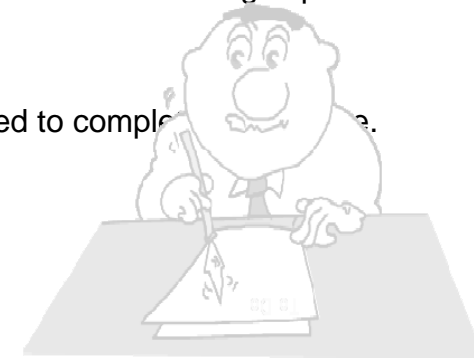


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PLAN & MANAGE THE MEETING



- Ask attendees for agenda items if necessary
- Send the agenda to attendees in advance of the meeting – so they are prepared and can offer changes prior to the meeting.
- Re-send the next steps from the previous meeting to everyone so they are prompted to complete them.
- Ask attendees to confirm attendance or offer apologies if they can't attend
- Book a meeting room and ensure its the right size e.g. you might need more space for team building activities
- Provide refreshments especially for longer meetings/workshops
- Organise overhead projector, flipcharts, pens, masking tape, blue tack etc.



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MEETING PREPARATION – FORMAT EXAMPLE



- Meeting Subject is :- Sales Management Presentation....
- The meeting owner & facilitators work together on preparing the agenda
- Below is an example of a meeting preparation format that's easy to use:



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GOOD AGENDA EXAMPLE



- Record the expectations of each Attendee
- Review the Agenda
- Review of previous actions
- Complete the body of the meeting
- Record the agreed next steps/actions after the meeting
- Review the overall Meeting

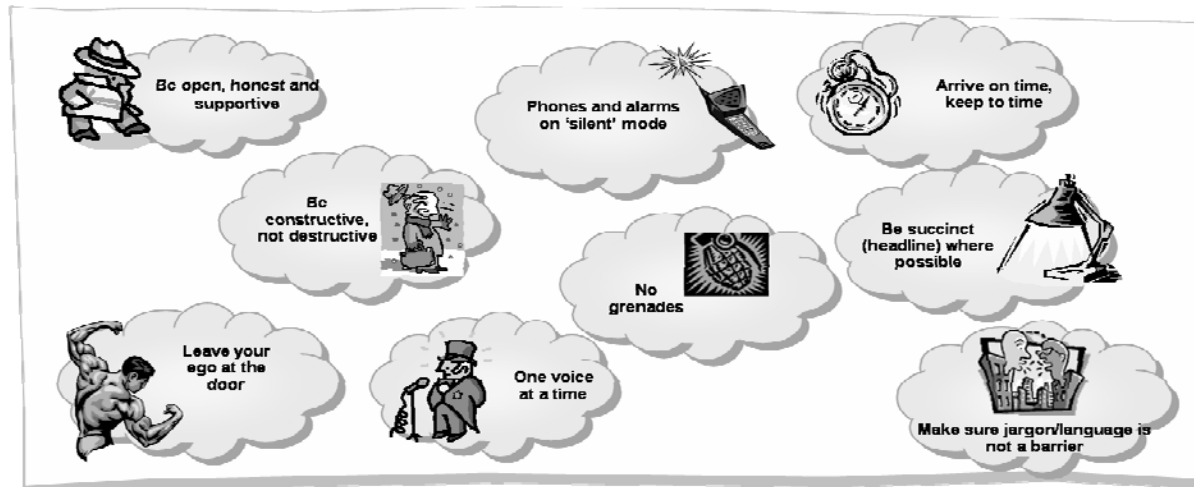


Reviewing expectations and agenda at the start of the meeting, ensures attendees are in agreement on the agenda. Reviewing the meeting at the close allows for any concerns to be raised.

CREATE GROUNDRULES



Use Groundrules...



Standard ground rules can be used, or you can establish your own set of rules which can be reviewed at the start of meetings.

MEETING ADJOURNMENT...CAR PARK



- When more information is required
- Where inputs are needed from people who are not present
- When more "thinking time" is required
- Where not enough time is left to complete all the agenda items
- Where a smaller number can resolve the issue



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CLOSING THE MEETING



- Review recorded actions/decisions from the meeting
 - Action, By Who, By When
- Review the expectations of the attendees recorded at the beginning of the meeting:
 - %, Smiley Face, Pie Chart
- Review meeting process; what worked what did not



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AN EFFECTIVE MEETING TOOK PLACE WHEN...



- The right people were present, prepared and participated
- Information was shared and processed appropriately
- Objectives and expectations were met
- Attendees felt a sense of accomplishment
- Plans were set with responsibilities assigned
- Enough time was allocated to the meeting to cover all the items on the agenda
- The meeting started and ended on time

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WE REMEMBER WHAT WE DO...



We remember . . .

- 10% - 15% of what we hear



- 15% - 30% of what we hear and see



- 30% - 35% of what we say



- 50% - 75% of what we do



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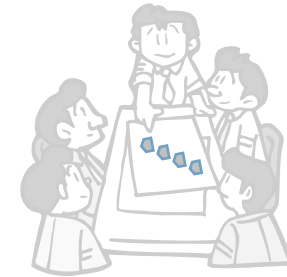
RESULT OF EFFECTIVE MEETINGS



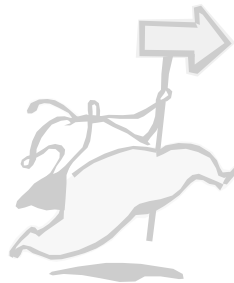
Best use of Time



Structured Communication & Flow



More Energy and Focus

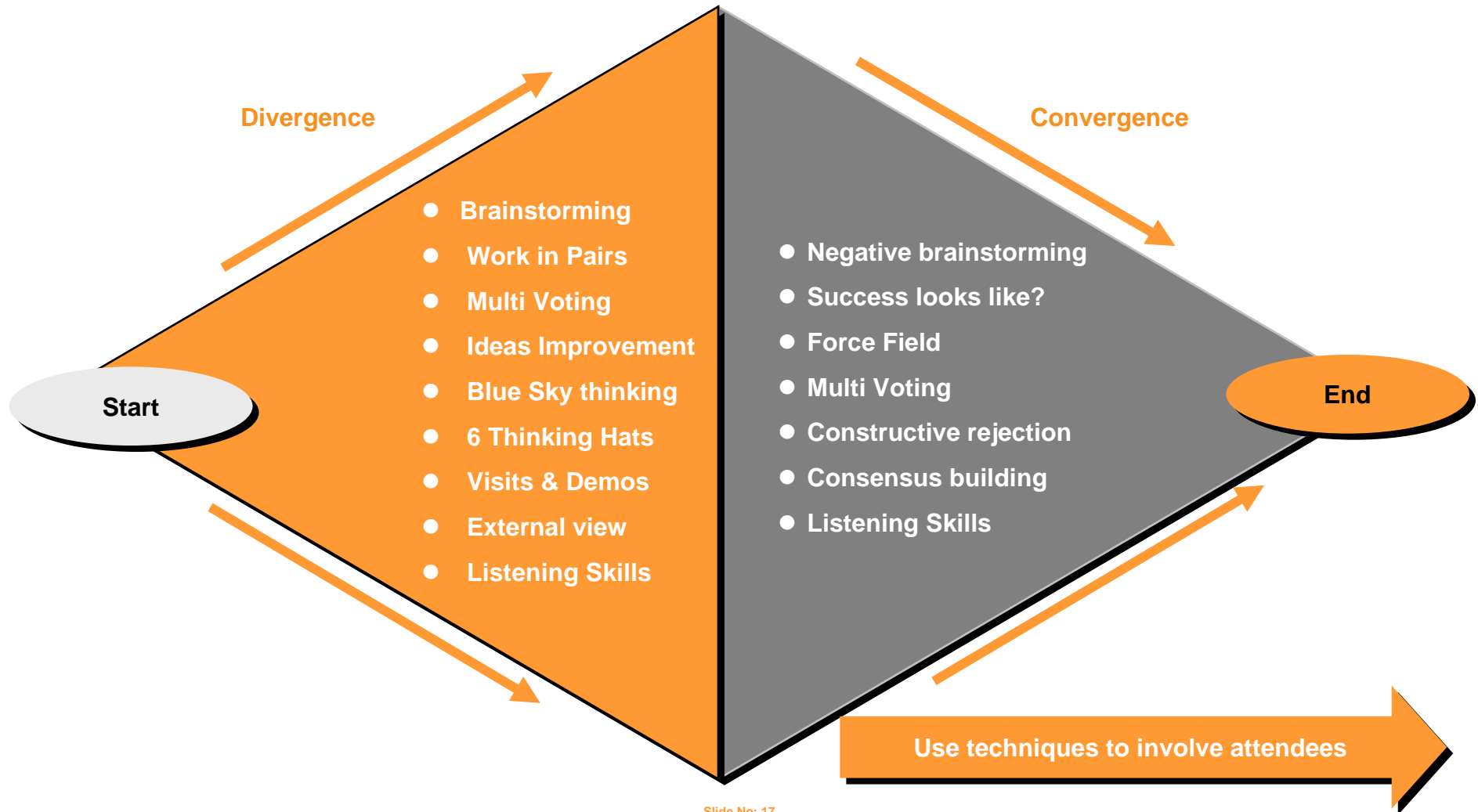


Best use of Resources



Effective meetings utilise the strengths of the team which is greater than the sum of the individuals...

FACILITATION SKILLS



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BRAINSTORMING...



What is it?

- Brainstorming is a participative process to generate large numbers of ideas in a short time.

The idea is to use relaxed free thinking to generate ideas without reference to links, value or practicality

How to use it

- Early on – let people brainstorm to identify constraints, formalise assumptions and identify risks
- In the middle of a project to resolve risks

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BRAINSTORMING TECHNIQUE



Be positive

- Yes!! not "yes, but..." to build on ideas
- Value originality, not practicality!

Be ambitious

- Try to generate lots of ideas
- Have stretch goals

Be inclusive

- Get everyone involved
- Write down the ideas from quiet participants

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BRAINSTORMING – SUCCESS CRITERIA



- Clearly define objectives and provide the context
- Set the ground rules early on
- Small Groups (5-10 people maximum)
- Don't censor ideas – ask questions for clarification
- Select participants at the same level
- Have mavericks/outsidere
- Don't force conclusions or consensus (allow time for convergence if possible)
- Write **everything** down

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WORK IN PAIRS



A combined divergence/convergence technique that works well by ensuring there is equal involvement from all members

- POST IT'S – Write ideas on post-it's for 2-3 minutes
- ROUND ROBIN – Add 1 new idea each round
- CLARIFICATION – Discuss ideas to get common understanding
- RANK – Vote on ideas
- CONSENSUS – Use group discussion to form a consensus

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MULTIPLE VOTING ON IDEAS



What is it?

- Voting individually might not deliver a clear winner and does not produce consensus. It might also miss an opportunity to create ideas which are ultimately better.
- Multi-voting avoids these problems
- It can be a slow way to achieve convergence.

How to use it

- Give everyone “x” votes (weighted equally) and take the top 3-5 ideas through to a further round of discussion.
- Avoid strongly held ideas that receive little support, causing disaffection later
- Prioritise votes and carry forward:
 - highest scoring idea
 - most mentioned ideas
 - top priority ideas

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IDEAS IMPROVEMENT



Ideas improvement forces the group to improve ideas rather than dismiss them

- Narrow the list of ideas down to a limited list to be agreed
- Ask people to agree or reject an idea
- No complete rejection - instead demand a response of the form:
"I could only accept "x" if you changed feature "y" or if "z" were true"
- Identify more ways to improve the rejected solutions
- Close only when the group has achieved an acceptable number of solutions of which every member can say:
"I can live with that; I can support it and carry it through"

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BLUE SKY THINKING



What is it?

- "Blue sky" thinking is an extension of brainstorming that gets people to think "outside the box" by removing rules and frames of reference
- Can you imagine in 5 years time...

How to use it

- Early on when you want to push the boundaries of logic
- When you want to reveal hidden assumptions rules
- When you want to re-energise the discussion...

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WEAR THE SIX THINKING HATS



White

...white paper

This is the logical hat, coolly concerned with data, facts, and figures ... not emotion



Red

... tired and emotional

The opposite - red hat thinking legitimises personal feelings and intuition about the topic



Black

... black robed judge

Judgement and caution. Always logical, the black hat looks for risks and dangers. Questions how the proposal will fit the facts, match experience, the system, the system in use, present policies etc



Yellow

... sunshine

The voice of optimism. The logical inverse of the black hat. Explains why something will work, locates the benefits. Finds the value in current events



Green

... trees, growth

The spirit of creativity, always seeking alternatives, provocation, change



Blue

... cool skies

The process master - observing from the outside the balance of thinking, the clock, the dynamics etc. Keeps the problem in perspective

VISITS AND DEMOS



What is it?

- Visits and demonstrations are ways to ensure that people who are unfamiliar with products, services, processes, technologies etc gain hands on experience and then apply it to their situation.

How to use it

- At the start of a project to ensure all team members have the same level of understanding.
- As part of the problem solving process as most people prefer to see and do rather than follow instructions use a analytical approach.

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EXTERNAL VIEW



What is it?

- Uses an independent outsider to evaluate the situation and goals and then provide insights by using experience in other industries/situations

How to use it

- Early on to enrich understanding of the problem and improve hypothesis generation
- As an extension of brainstorm sessions to re-energise discussion
- To leverage know how from other people and industries...

NB: Reverse role playing can also be a powerful tool with similar effects

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OTHER TECHNIQUES...



Fish bone analysis

- A graphical technique for laying out cause-and-effect relationships
- Highly iterative, consensus driven approach - can generate deep insight into the relationships within a complex system

Force field analysis

- A structure for analysing the current situation to locate problems/ opportunities
- Premise is that the current state is a balance between forces pushing toward and restraining movement towards a desired state

Delphi narrowing

- A solution generation and voting technique
- Useful when group members are physically dispersed, require anonymity or to reduce impact of personality or status differences

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LISTENING SKILLS...



- **EXPLORE**
- **ACKNOWLEDGE**
- **RESPOND**

EAR - Source: Finch, Blanchard

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EXPLORE



- People are more receptive to your ideas if you are receptive to theirs
- Ask questions to probe their position
- Ask questions to show positive & negative consequences of their position

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ACKNOWLEDGE



- Demonstrate understanding
- Avoid words that make people dig in and be defensive
- Don't use "irritators"
 - e.g. sensible position, right thing, best idea

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RESPOND



- People are least receptive to an idea/proposal immediately after they have put forward an idea of their own
- People often give their best ideas at the worst possible time
- If you introduce a counter position, introduce it as a way out of identified & agreed problems not as a competition.

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LISTENING STRATEGY



Questions Persuade – Telling Doesn't

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GOOD FACILITATORS...



- Ask open ended questions
- Positively respond to contributions
- Ask for more specific examples where clarity is required
- Redirect comments or questions to other group members to ensure all contributions can be made
- Avoid stating their opinion while facilitating
- Summarise for clarity and understanding
- Are Role models and encourage good meeting behaviours



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MEETING & FACILITATION PRACTICE



Organize a meeting on one of the following three subjects...

- **How to reduce Customer Complaints...**
- **How to double Profit...**
- **What needs to change to be more successful in future...**

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