

## Advanced Facilitation Strategies Workshop

Toronto: Nov 26-27, 2009  
Led by Michael Goldman

How our two-day workshop takes your facilitation skills to the next level:

- Advanced intervention techniques
- Managing the consultant/client relationship
- Facilitating through conflict
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- Principles of buy-in and resistance
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*Collaborative meetings.*

*Expert results.*

## Make Your Meetings POP: Advanced Start Techniques

At Facilitation First, we're excited to be spending our summer vacation designing the **Master's Certificate Program in Facilitation with McMaster University's School of Business** (to be launched this fall). Here are a few key practices from that program I'd like to share with you that help distinguish expert facilitators from novices. Once again, I'm reminded that so much of the value we as facilitators bring is accomplished long before the meeting starts.

When training facilitation fundamentals, I focus quite a bit on the meeting POP (**Purpose, Outcomes, and Process**). When you're first beginning to run meetings, it's a great idea to always include the meeting purpose and outcomes in an agenda that you circulate prior to any meeting. In fact, if everyone followed just this one directive, meetings would be much more productive. But when was the last time you pushed yourself to really think about the power of the meeting POP and how you wield them? Let's take a closer look.

### Setting the Tone and Expectations with Purpose

The meeting purpose, or the "why" of the meeting, needs to get at the heart of the reason you're convening. A vague or a biased purpose won't excite participants or help them understand why they should dedicate their time and energy to your meeting.

Here's an example: your organization has been losing ground to competitors over the last few quarters. When polled, previous clients cite ineffective handling of complaints as the number one reason they left you for the competition. You've been asked to facilitate a meeting to tackle this situation. Good thing your VP has heard such great things about a new complaint tracking system that can be installed right into the company's existing CRM! During your scoping interview, it's practically all she could talk about, even though major decisions such as this are supposed to be made by the whole team rather than just the boss.

Now you're sitting down to prepare your meeting POP, starting with defining the purpose...

**Biased Meeting Purpose:** *To talk about the pros and cons of the proposed complaint tracking system and to plan for its implementation.* Can you hear participants asking themselves: "What do you need me for? Why bother debating the pros and cons if the boss is just going to swoop in and mandate this tracking system?"

**Vague Meeting Purpose:** *To discuss the dip in sales and think about appropriate responses.* Likely responses to receiving a meeting agenda with this purpose at the top include: "Great, *discussion* and *thinking* - like this is worth my time! We're hemorrhaging clients and they want to chat?"

**Clear, Neutral Purpose:** To sustain our existing customer base by identifying and agreeing to an effective customer complaint process/system. Notice how this meeting purpose doesn't assume the solution that participants will reach, or leave them hanging as to why we're meeting. The verbs 'identify' and 'agree' also enable the group a glimpse as to what they will be doing to achieve the purpose. People reading this know why they should invest in your meeting.

## Outcomes that Excite and Clarify

Meeting outcomes, or the "what" of the meeting, speak to the tangible and intangible results you hope to attain by the end of the meeting. Tangible results should include the actual things people will leave the meeting with such as. an action, a strategy, a document, a prioritized list, etc.. Intangible results include the emotional state or attitude people will leave the meeting with such as a greater willingness to commit, excitement, better buy-in, etc..

**Sample Meeting Outcomes:** *By the end of this meeting, we will have:*

- *decided on a new customer complaints process*
- *completed an action plan to implement our new process*
- *reinvigorated our commitment to great customer service!*

Outcomes are critical for defining the meeting process as they tell us what the ultimate destination is – how we get there will be defined by our steps in the 'process'.

## The Process – Giving Structure to Your Meeting

The final 'P' in POP is process. Process speaks to 'how' we are to achieve the outcomes and ultimately the purpose of the meeting. Your process focuses on two aspects of meeting management:

1. how the meeting is to be structured i.e. the activities and tools used for engaging the group and the respective sub-steps, the questions asked, the timing per activity.
2. How the people are to be managed i.e. what behavior guidelines or 'norms' are required that identify how the group wants to relate with one another i.e. *one person speaks at a time; all tech off or on mute*, etc.

Unlike the meeting purpose and outcome, I don't suggest sharing your meeting process notes with participants prior to the meeting. A thorough and well-worded agenda will do the trick. I am, though, a huge proponent of sharing your detailed process notes with your client to ensure buy-in before the meeting. If there are no surprises, your client is much less likely to sabotage your process during the meeting. You're not giving away trade secrets here, just clarifying the tools and steps that will result in achieving the agreed-to meeting outcomes.

We'll let you all know a bit more about our *Master's Certificate in Facilitation* with McMaster once some details are finalized. In the meantime, feel free to email us your meeting facilitation dilemmas or questions and we'll respond in an upcoming edition.

Michael Goldman and the Facilitation First home office team  
[info@facilitationfirst.com](mailto:info@facilitationfirst.com) 416-465-9494



## Your Say: Feedback from our last newsletter

We asked: "If you could ask meeting participants to follow only three new rules of engagement, what would they be?" Here are some of your responses...

From Kim Harris, E3 Resource Navigator:

- Turn off your cell phone. How important are you, really?? Is someone on their death bed? No? Then you don't need it on.
- Say SOMETHING at every meeting. If you just sit there, why be there? If you never have anything to contribute, maybe it's not the meeting for you. More than warm bodies are needed.
- Don't send someone in your place who doesn't have decision-making authority, and thus can't be helpful when asked what your agency/department/etc. will do. The folks that sit at the table need to be key players.

From Leonard Genova, Enterprise Databases Group, Office of Information Services:

- Focus on what you want, not on what you don't want
- Focus on your interest, not on your position
- Focus on the situation, issue, or behavior, not on the person
- Appreciate and encourage different points of view
- Enjoy the opportunity to collaborate
- Look for the opportunity to make this useful and enjoyable for you – together!

*Thanks for the comments and suggestions - keep them coming!*

## [Facilitating with Ease Workshop](#)

**Call 416-465-9494 to register today!**

Edmonton: January 25-26, 2010

