

# QUICK GUIDE TO EFFECTIVE MEETINGS

## Keys to Success:

- **Build on the Basics** - Connect your meeting to your mission, vision, values, and goals.
- **Prepare Agenda for the Meeting Type** - The agenda should include the purpose of the meeting, and a clear/concise list of the meeting topics, speakers, time, and purpose of the information.
- **Plan for Success** - Provide adequate time and prep-material for facilitator and participants.
- **Set the Environment** - Create a distraction free space that sparks creativity and comfort.
- **Clarify Desired Outcome** - Are meeting topics seeking input, reporting information, making a decision, or something else?
- **Create Some Drama** - Don't be afraid to uncover relevant, constructive, ideological conflict.
- **Ensure All Voices Are Heard** - Each person has a different "volume" and preferred style of communication.
- **Facilitate Well** - Take responsibility for helping the group work efficiently and get tasks done.
- **Get to a Decision** - Explore the issues and come together on solutions. Discussion is not decision.
- **Record Commitments** - Who is responsible for doing what by when?

## Types of Meetings:

Not all meetings are created equal. Having the appropriate amount of time, purpose and format assigned to different meeting types will create a more effective meeting rhythm.

Try these four types:

**Daily Check-in** - This is a quick 5-min meeting to share daily schedules and activities. Stay standing, keep it administrative, and succinct.

**Weekly Tactical** - This 45-90 min meeting reviews weekly activities and metrics and resolves the most immediate obstacles and issues. Collaboratively set the agenda in the moment and postpone larger strategic discussions.

**Monthly (or Ad Hoc) Strategic** - This 2-4 hour meeting is used to discuss, analyze, brainstorm, and decide upon critical issues affecting long term success. Limit to one or two topics. Prepare and do research. Engage in good conflict.

**Quarterly Off-site Review** - This 1-2 day meeting is used to review strategy, industry trends, competitive landscape, key personnel, and team development. Get out of the office, focus on work, and don't overstructure or overburden the schedule.

\*Adapted from "Death by Meeting" by Patrick Lencioni



# What is Facilitation?

Facilitation is about taking responsibility for making meetings effective and inclusive. The facilitator is creating a space where everyone feels valued and is able to participate fully in discussions and decisions, while helping the group identify and resolve barriers to accomplishing tasks.

## Facilitators:

- Help the group decide on a realistic agenda and time-frame for the meeting.
- Keep the meeting on time.
- Regulate the flow of discussion.
- Keep the meeting focussed on one item at a time.
- Resolve conflicts as necessary.
- Use facilitation tools where appropriate (see ideas in the toolbox)

## Skills for Facilitation

**Active listening:** Set aside your own response and focus on what the person is really saying until you have an accurate understanding of where they are coming from.

**Questioning:** Ask questions to clarify issues from individuals, or put open questions to the group to open up more exploration.

**Summarizing:** Regular summaries of the discussion can help avoid repetition by reassuring people their points have been heard, and highlighting the key issues raised. Give the summary tentatively so people have space to correct the summary. Structure summary with "What I've heard people saying so far is ... Did I miss anything?"



## FACILITATOR'S TOOLBOX

**Agenda:** What needs to be covered in the meeting. Sets expectations around structure and focus. It can be made in advance, or collaboratively at the start of the meeting. Estimate the time needed and prioritize. Move agenda items to the appropriate TYPE of meeting (checkin, tactical, strategic, review).

**Go-rounds:** Hear from each person on a certain topic or question. Clearly state the topic and model the length of answer to ensure you stick to the time. This helps the group hear from those who haven't spoken much and can test for agreement.

**Brainstorms:** Get as many ideas out as possible in a short amount of time. Give a clear question and write answers down for everyone to see. Remember the rules of a great brainstorm: suspend judgment, build on the ideas of others, stay focused on the topic, encourage wild ideas, and go for quantity.

**Break into Groups:** Splitting into smaller groups or pairs can help more people participate actively. It gives people a chance to work out thoughts before coming back to the larger group for discussion. Explain clearly to topic, the time they have, and what to report back to the group.

**Breaks and Energizers:** breaks give people time to move around, process information, and sort through their thoughts.