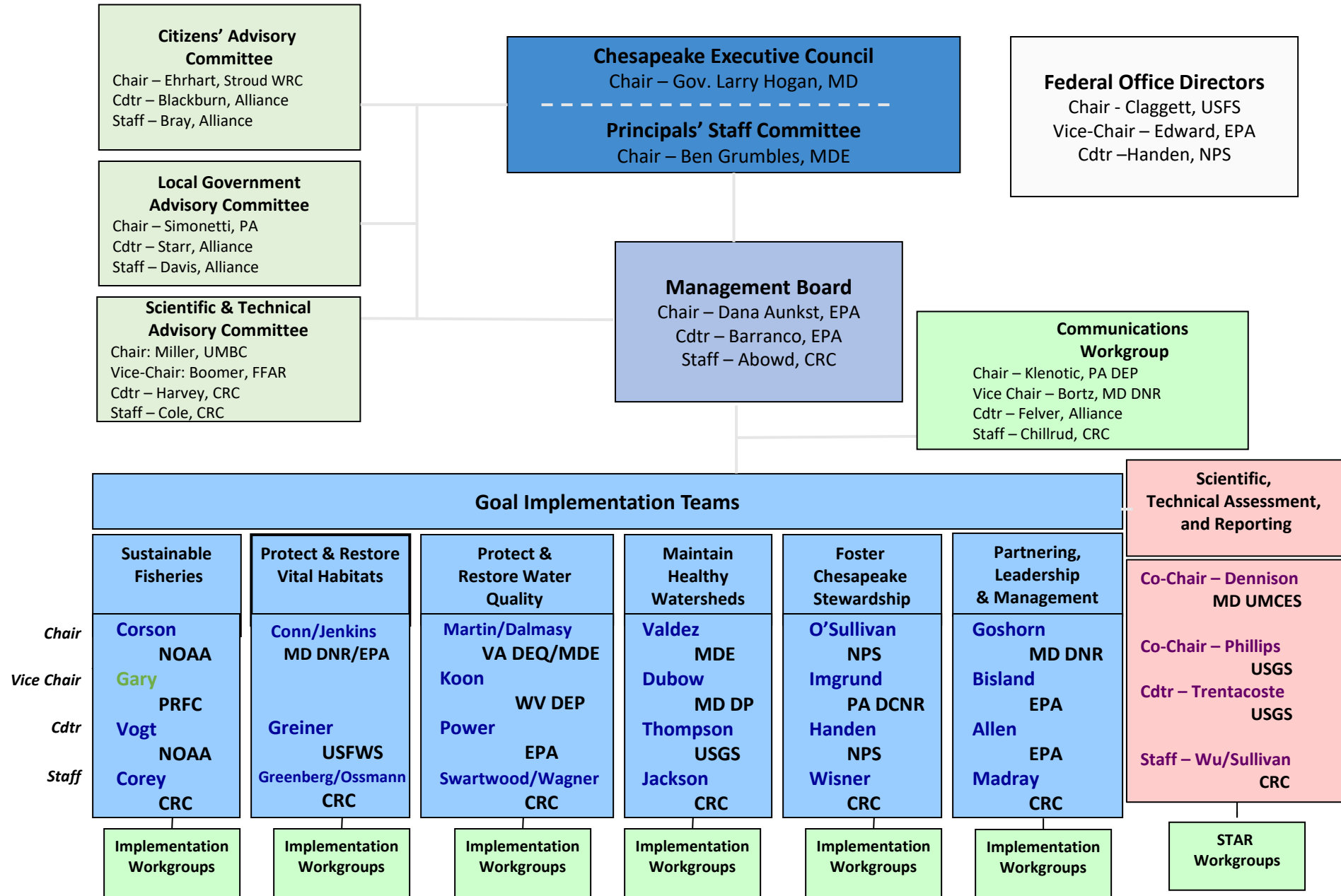


Designing Effective Meetings

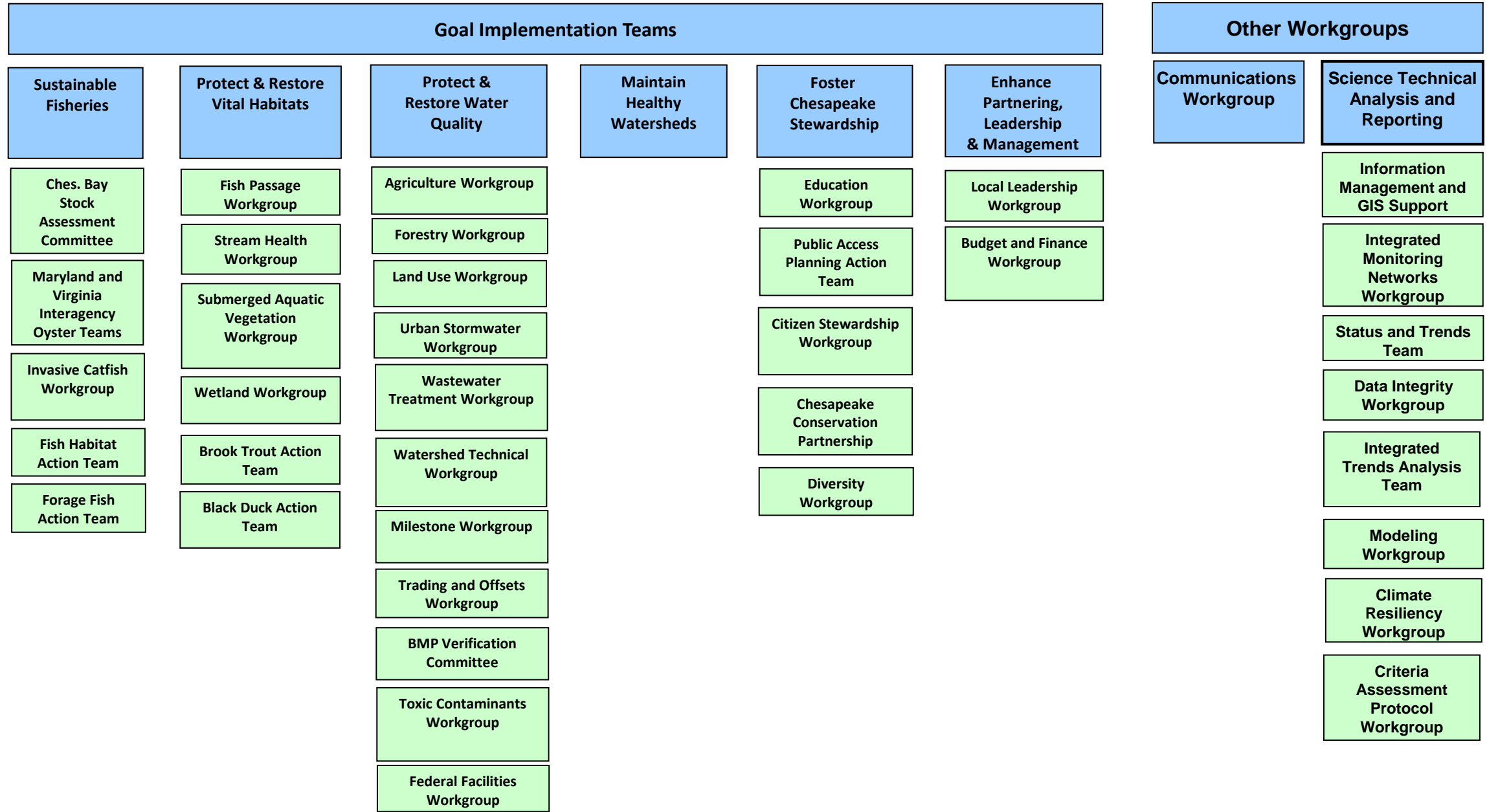


Sherry Witt (GDIT, Senior Facilitator/Senior PM)

CBP Organizational Structure and Leadership 9/3/19



CBP GIT Implementation Workgroup Structure



Go to www.menti.com and use the
code 72 84 50 4

What makes a good meeting?



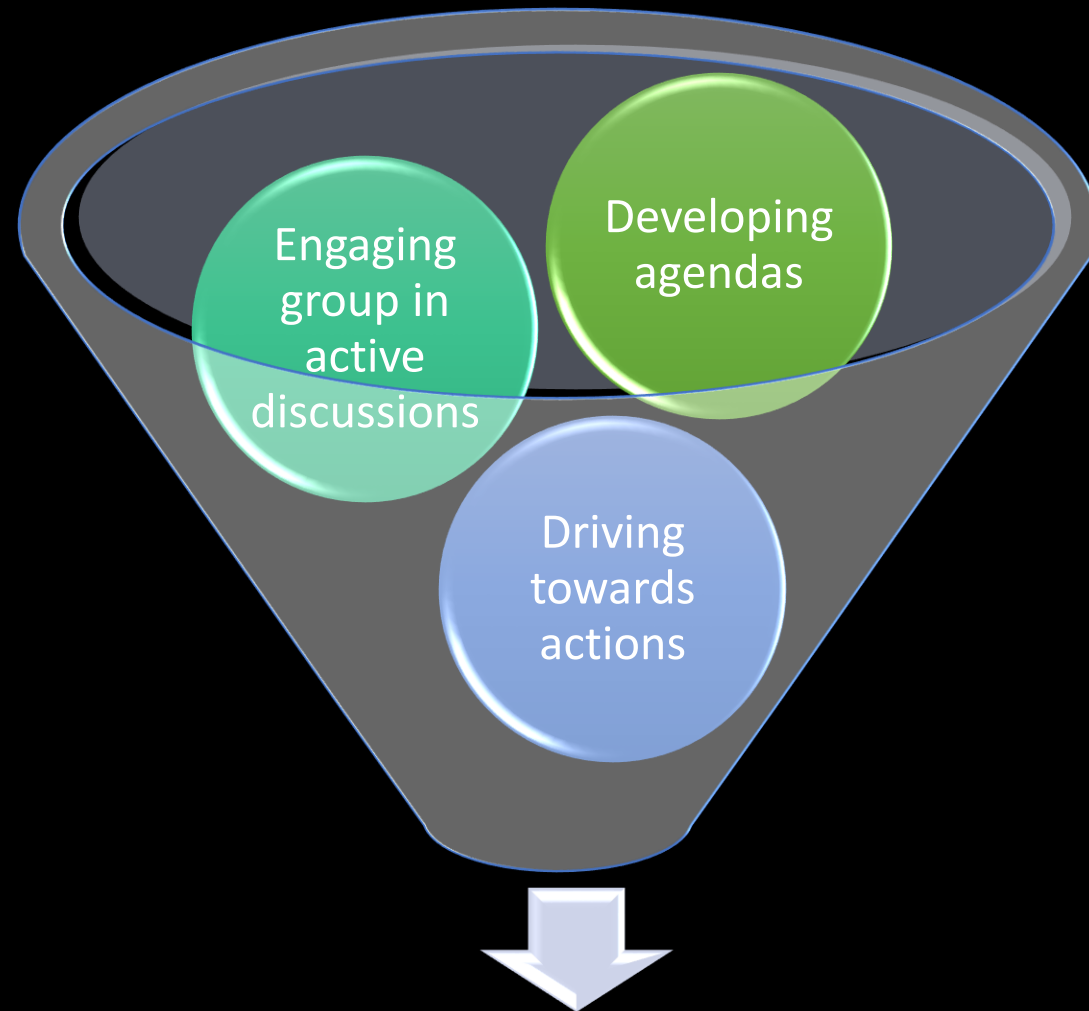
Purpose:

- Enhance your **facilitation skills** and **meeting design capabilities**

Outcomes:

- Understanding of **how to engage your group more effectively**
- Knowledge of how to **design meetings that produce results**





Designing Effective Meetings

75% of your success happens before you start your meeting!

Facilitation is about what you did in preparation for your meeting.



Planning is key!

- ✓ Desired outcomes
- ✓ Promotion of participation and interaction
- ✓ Consideration of group dynamics
- ✓ Results in a significant return on investment for all!

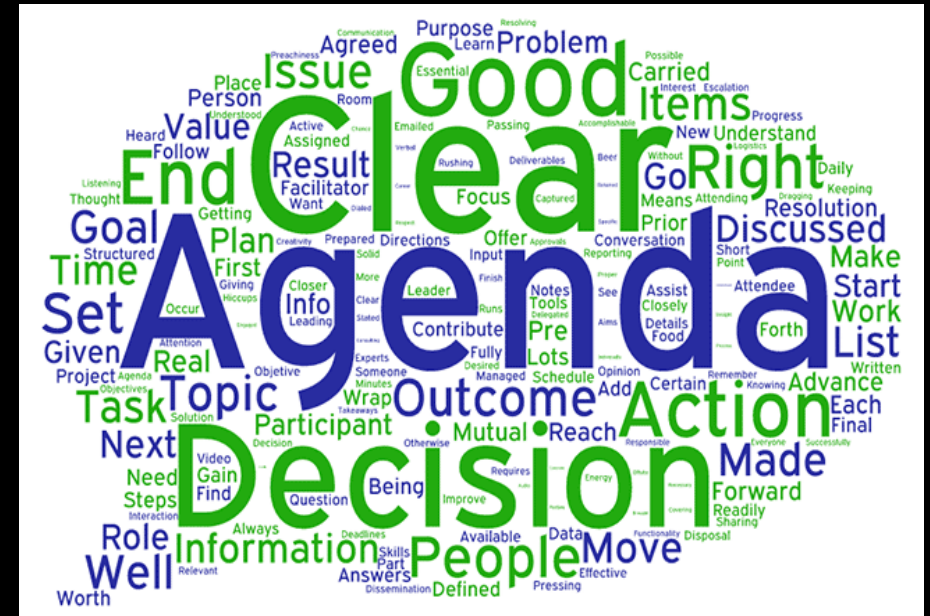
Designing Effective Meetings

- Clearly define your **meeting purpose** and **expected outcomes**
- Make sure agenda **reflects members needs** by seeking input
- Topics should **affect the entire group** and needs the **whole group to solve** them



Designing Effective Meetings (cont'd)

- List **agenda topics as questions** that members need to answer
 - Define the **type of meeting** or **purpose of the topic**
 - To share information
 - To seek input for a decision
 - To make a decision
 - To brainstorm
 - To data gather
 - Ensure **realistic time** for each topic
 - Invite those who **really need to be there**
-

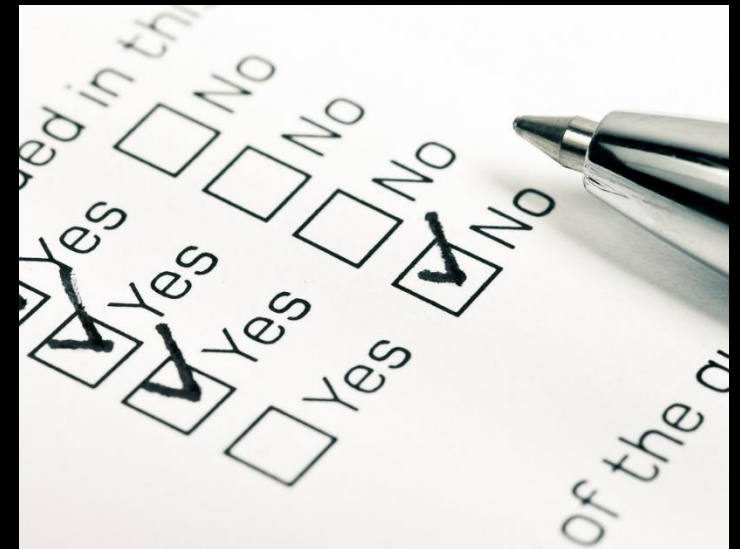


Designing Effective Meetings (cont'd)

- Identify a **process for each agenda item** and include in agenda
- Tell members **how to prepare** for the meeting
- **Assign a lead** for each agenda topic
- **Assign meeting roles** to make your meeting run smoother (leader, facilitator, recorder, action tracker, timekeeper, participant, tech specialist)
- Think about **design elements** (tone, energy, information)
- Implement continuous **improvement**

Validating your Design

- ✓ Are we getting to the outcomes **as quickly as possible**?
- ✓ What will it **feel** like?
- ✓ Do I have a **balance of energy**?
- ✓ Is it **confusing or clear**?
- ✓ Am I **over-committing the time**?
- ✓ Can I **reframe the agenda topic** as a question?



Practice Tool

Topic	Who	Process	Desired Outcomes	Duration (mins.)	Start Time	End Time	Preparation Notes

Building the Agenda

- **Opening**

- Set the course
 - Include both the larger strategic context and the session objectives and outcomes
 - Review meeting logic, expectation setting, house keeping, executive kick off
- Initial exercises
 - Introductions
 - Ground rules
 - Connection conversations (i.e., ice breakers)
 - Get their voice in the room as quickly as possible and get yours out
- Expand information or define the problem

- **Narrowing**

- Major “conversations’ (big group, little groups, transitions, energy maintenance)
- Identifying solutions
- Making decisions/ recommendations

- **Closing**

- Issue resolution, review, reflection
- Take action/make commitments
- Check-out
- Evaluations



Engaging in Active Discussions

- Having good questions
 - Types of questions
 - Useful questioning
 - Targeted questions
- Managing the conversation
- Working with the group dynamics
- Applying facilitation techniques



Highlights of Facilitation Techniques

- Brainstorming
- Consensus
- Live Polling
- Action Planning
- Meta-Planning
- Backcasting Exercise
- Charrette
- Breakout Groups
- World Café
- Round-robin Brainstorming
- Voting



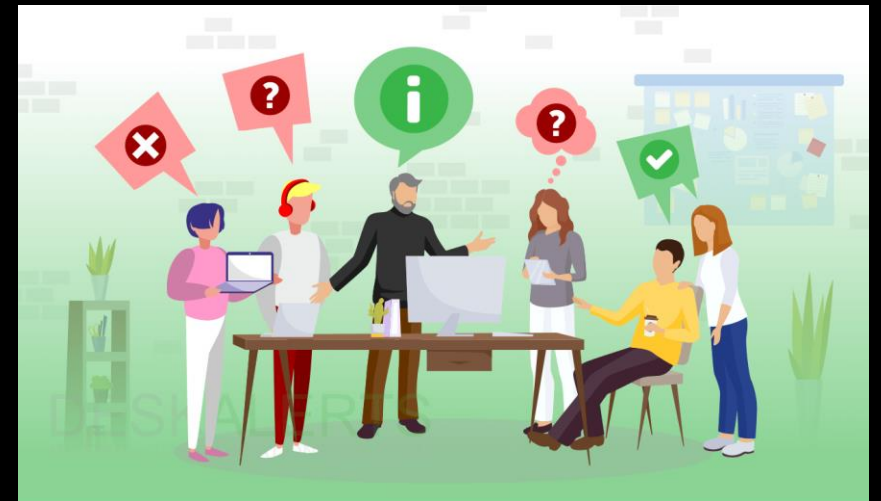
“Managing” the conversation

1. Identify **where you are** in the agenda
2. Describe the **objective of the conversation**
3. Get agreement that the **conversation is worthwhile**
4. Describe the **process** by which that objective will be achieved
 - If there are more than two things you want the group to do, provide directions
5. Set the **time frame** and **assign roles**
6. Ask the group if what you are asking is **clear**
 - Don't assume nodding heads equals understanding

“Managing” the conversation (cont’d)

7. **Facilitate the discussion** and apply appropriate **techniques**

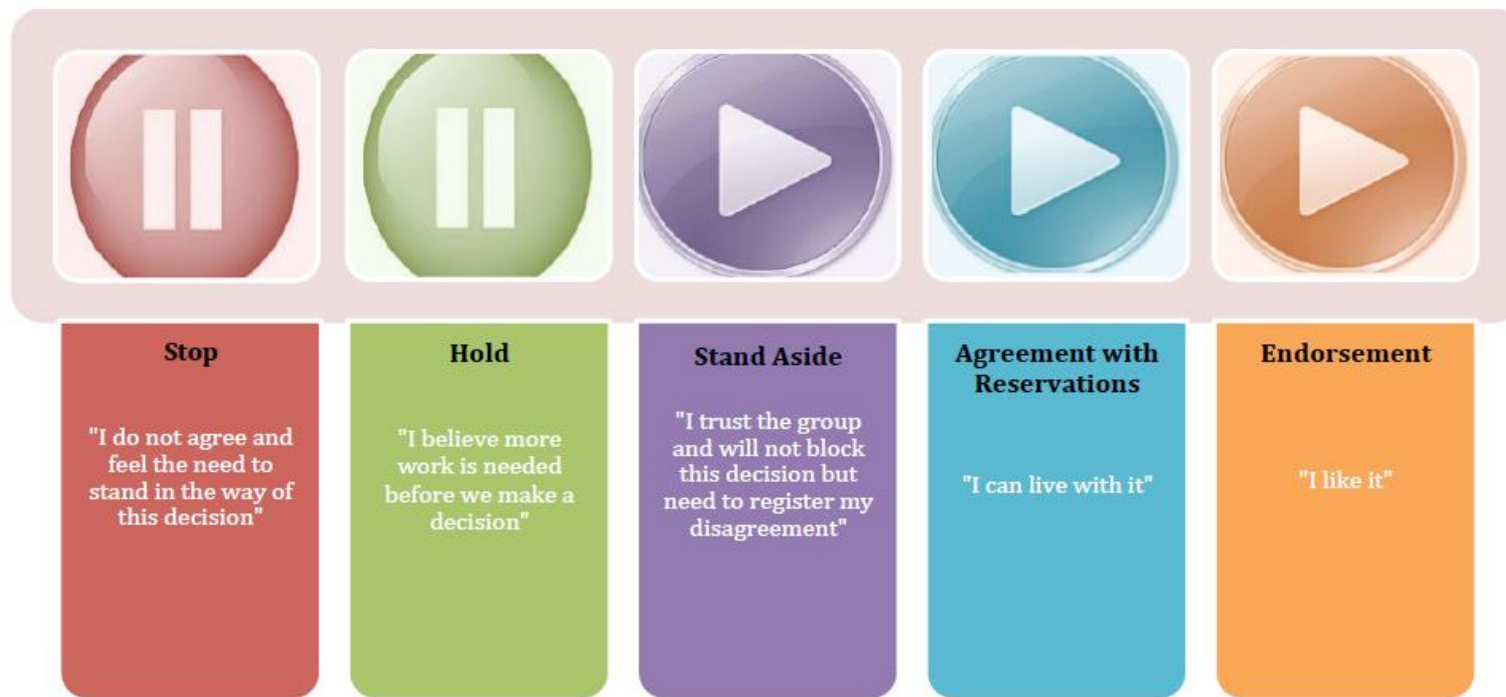
- Broaden ideas, clarify, close
- Writing participant comments on a whiteboard
- Asking follow-up questions
- Paraphrasing comments
- Initiating questions
- Asking for clarification/elaboration
- Encouraging others to react or add ideas



Driving Towards Action

1. Set **expectations** prior to meeting
2. Send out **background materials** prior to the meeting – and tell them why it's important to review
3. If a decision is being made, provide **viable options**.
 - Yes/no with discussion and amendments
 - Multiple choice
 - Narrowing down a larger list, applying a technique to vote or rank options
 - Consensus Continuum or “Fist to Five “





Which best describes your level of agreement?



Driving Towards Action (cont'd)

4. **Evaluate** each option

- Hear strong opinions
- Identify all reasons to select an option
- Voice reasons to oppose it
- Use techniques to hear from everyone (i.e., round robin)

5. Make the **decision**

- Use an agreed upon methodology to decide (i.e. consensus continuum, majority rules)

6. **Wrap it up** – restate decision, identify next steps, allocate necessary resources, celebrate and move on!

Other Facilitation Tips

- Know Your Role
- Building Momentum and Energy
- Utilizing a Parking Lot
- Keeping Meetings Positive and Fun
- Engaging Participants and Drawing Persons into the Conversation
- Off Topic Discussions or Tangential Discussions
- Finishing on a High
- Managing good video meetings



Questions & Feedback

