Facilitating productive meetings

Life is too short to waste time in inefficient, unproductive meetings. Quality facilitation helps create conditions that support focused teamwork and ensure a group’s time is well spent. If you are tapped to facilitate, here are a few tips to help you get ready.

Before the meeting

➤ Put together a facilitator tool kit. Include chart paper, pens, markers, masking and duct tape, post-it notes, voting dots, and an extension cord. It is also helpful to include a small tabletop clock and a chime or bell to bring participants back to order after breaks or small group discussions. Hint: Wrap several layers of masking tape around some of your markers to avoid having to carry an entire roll of tape.

➤ Start with a clear and shared purpose (agenda). Work with the team leader – and planning team, if appropriate – to develop an agenda for the meeting. It is usually best to do this well in advance so the agenda can be distributed to attendees and other interested parties before the meeting. If that is not possible, start the meeting by creating an agenda with the attendees so that all participants know why they are there and what they intend to accomplish while they are together. It is very hard to help the group stay on track if what constitutes being “on track” has not been defined.

➤ Know the participants. What are their interests and values and their concerns and fears? What do they already know, or think they know, about the meeting topic and purpose? Are they accustomed to sitting? If they are accustomed to being active, you may want to add additional stretch breaks and/or incorporate exercises that include forming into subgroups for purposes of discussion before reporting back to the large group.

➤ Know the “norms.” Has the group established “norms” to address how they act together? For example, you will want to know if they have rules about frequency and/or length of breaks, side conversations, note taking, long-winded commentary, etc. If so, one of your tasks as facilitator is to notice and call out violations of the team’s norms. Consider doing this in the form of a question, “I notice that there are quite a few side conversations happening right now; is this working for the group?”

➤ About a week in advance, confirm audio/visual needs and estimated number of attendees with the team leader. If you are not familiar with the meeting room, check it out before the day of the meeting. This will give you time to plan how to make the best use of the room layout. Verify the availability of electrical, phone, and data outlets for any needed equipment. If you are planning meals or distributing materials, play it safe – overestimate!

➤ Dress for success. Wear professional, comfortable, and non-distracting attire. Choose clothing that will not bunch or gape when you kneel down or raise your

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arms. You do not want to worry about exposing yourself when you need to focus on more important things.

- Arrive at least an hour early. Assume nothing. Verify that electrical, phone, and data outlets are all operational. Check also for the presence of needed equipment. Place markers near the appropriate writing surfaces to minimize the risk of using a permanent marker on a white board. Permanent marker notations can be removed from a white board surface by tracing over the notations with a white board marker before erasing.

- Test equipment. If there will be a presentation during the meeting, ensure all audio/visual equipment is in good operating condition and that it accentuates, rather than distracts, from the presentation. Practice turning the projector on and off (each projector is different). Make note of where presenters should stand so they do not block anyone’s view. When in doubt, ask participants if they can all see.

- Tend to the physical setting and seating layout. Which pieces of furniture are movable? Circular or U-shaped seating works well. It is important that participants can see each other’s faces if the meeting will include discussions. Optimal layout depends on the number of attendees and the type of meeting. Avoid layouts that allow the participants to separate into factions that sit apart from each other. You may want to ask a few attendees to arrive early with you and spread out so participants who arrive in groups must disperse. This can help break down barriers and facilitate greater creativity and productivity.

**During the meeting**

- Minimize distractions. Keep in mind Maslow’s Hierarchy. Team members will not be able to participate fully if something is amiss in their physical environment. This includes rooms that are too warm, too cool, or too noisy. Turn off the projector or cover the lamp if the projected image is not relevant to discussions of the moment. Do what you can to minimize distracting/annoying noises, including those coming from neighboring rooms. Ensure adequate quantities of food and beverages so participants can focus on the purpose of the meeting rather than their hunger or thirst.

- Care for your throat. As facilitator, you may be doing a good bit of talking. Avoid drinking liquids that you cannot see through. Milk makes mucous; caffeine restricts the throat. Water works best! Make sure you have plenty of water available before and during the meeting. If you feel your voice waiver as you speak, increase your volume slightly and the waiver will diminish or disappear. Check to see if participants at the back of the room can hear you easily.

- Share ownership of questions. If an unanticipated question catches you by surprise, do not be afraid to “boomerang” the question back to participants. Ask the group what they think. A facilitator’s job is to attend to the physical and interpersonal conditions in the room while guiding the group through their chosen agenda; you are not expected to know everything.

- Break appropriately. Offer sufficient (as addressed in team norms) breaks. Many times “bio-breaks” of 5 minutes in length are sufficient, especially when interspersed with other, longer breaks throughout the day. Make sure members know where the restrooms are and, if possible, remain available during breaks for members to approach you and discuss suggestions and concerns about the meeting in private.

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Quick fixes for common problems

Sometimes the equipment and/or room configuration you requested will not be there when you arrive for your meeting. You will need to decide quickly if it is still feasible for the team to accomplish their objectives. When at all possible, the show must go on!

➤ No screen for the projector? If space is tight and the meeting calls for a projector, consider projecting on a blank wall instead of a screen. Walls cannot be knocked over and usually offer a larger image area than a screen. Even walls with a subtle wallpaper print can be used effectively. If there aren’t any blank areas to project against, you can create one by taping blank chart paper together on the wall where you want to project. If you will be projecting against a white board or other reflective surface, cover it with chart paper to protect the audience from glare.

➤ If the room configuration is awkward, acknowledge it and ask participants if they have suggestions. This is true for other logistical problems. Participants appreciate the opportunity to be part of the solution.

➤ If your meeting starts on the heels of another gathering, arrive 15 – 20 minutes before your meeting’s start time anyway; the first meeting might finish early. Have the agenda and templates for noting action items and meeting evaluations already printed out on chart paper so you can post them quickly and get your meeting started on time. Spend “waiting time,” reviewing notes from the last meeting and/or checking in with other meeting members who arrive early. If the previous meeting starts to run over, knock, step in, and with a big smile announce that your meeting participates are eager to start on time. After the other group clears the room, ask team members to assist in rearranging the room as necessary.

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