



Strategic Facilitation

Meeting Planning Guide

● ● SIMONS STRATEGY
● & COMMUNICATIONS

springboard
partners



GOAL

Where are you going?

Start with a clear idea of what you want to accomplish. Your goal should be as specific as possible and focus on an outcome, not just the process. For example, simply discussing a topic is not a strong goal. Instead, think about what you want to come out of the discussion. Define what success looks like and how you will know if you achieve it.

Types of Goals

- Generate ideas
- Understand where you agree or disagree
- Create an action plan
- Get feedback
- Make a decision
- Build trust

Think It Through

Is your goal realistic and achievable?

1. Will you be able to get the right people to make it happen?
2. Does the size of the group lend itself to this type of outcome?
3. Does your goal fit with the amount of time available?

Travel Tip

If your goal seems unrealistic, is there a way to use pre-work or meeting design to align your goal with meeting constraints?



PARTICIPANTS

Who's coming with you?

Who needs to be in the room to achieve your meeting goal? Make a list of key participants.

Think It Through

1. Do you have the right mix of expertise and perspectives to achieve your goal?
2. If your goal focuses on making a decision, will the people you listed have the authority to decide?
3. How will you make sure they attend?
4. Where are people starting with regard to your meeting goal (knowledge, viewpoints, etc.)?



Anticipate Hazards

Is there anyone in the group who is likely to dominate the conversation or not participate?
 Are there conflicts among individuals in the group that you need to take into account?
 Are there gaps in knowledge that you'll need to address?



AGENDA

How will you get there?

Seventy percent of strategic facilitation takes place before you start the meeting. Take the time to plan the specifics: decide what will you do to help the group reach the meeting goal, how much time you will need for each piece of your agenda, and what logistical support you will need along the way.



PRE-WORK

Pack your suitcase

Pre-work is the homework you and others do before the meeting so that everyone is ready to have the conversation you want to have in the room. It can save precious time and help you understand participants' perspectives and expectations coming into the meeting.

Travel Tip

As you think through pre-work, mark out the timing on your calendar. How long will it take for you to do your own research, recruit participants, or review others' pre-work? When will you do it? When will you require others' to do pre-work?

Think It Through

1. What do you need to do before the meeting to understand participants' perspectives or create buy-in?
2. What will you ask people to do to prepare? Why?
3. Is this a realistic time commitment for people?
4. How will you use pre-work insights or results in the meeting?



Anticipate Hazards

What will you do if participants don't complete the pre-work?



OPENING

Get on the road

The opening of your meeting sets the tone for the rest of the event. You can use this time to raise peoples' energy, get perspectives out on the table, or tee up the issues you will discuss.

Icebreaker Ideas

Get to know each other

- Pairs introduce each other to the group.
- Everyone answers a personal question – favorite travel destination, best part of your summer, etc.
- Everyone shares three things about themselves, two truths and one lie, and the group guesses the lie.

Build trust

- Each person says something he or she values about the person to the left.
- Participants share their biggest hopes or fears related to the meeting topic.

Tee up the conversation

- Each person shares what he or she would like to see come out of the meeting.
- Participants explain to the group or a partner why the meeting topic matters to them.

Lighten the mood

- Each person tells a story about an embarrassing childhood moment or nickname.
- The group plays a short game. For example, the group tells a story by having each person quickly add a phrase to the tale (e.g., the dog went to the park and ...).

Travel Tip

Map out the details of how much time you will use with an icebreaker. Having each person give a one-minute answer to a question doesn't sound like it will take much time, but if you have 30 people, it adds up quickly!

Think It Through

1. What do you need to accomplish with your opening?
2. What will you do?
 - Icebreaker activity? What?
 - Introductions? How?
 - Share agenda?
 - Set ground rules? What are they?
3. How will you link your activities to the meeting goal?
4. How much time will you use?



ACTIVITIES

Plan your stops along the way

The activities you plan make up the bulk of your meeting – they create the roadmap you'll use to reach your meeting goal. Start by identifying the key steps that need to happen to achieve your goal, and then decide what you'll do in the room to get to these landmarks. Do people need to first understand each others' perspectives and then identify common ground or differences? Do you need to get more ideas on the table and then come up with an action plan? How will you make this happen?

Activity Ideas



Share information with the each other

- Provide background and context on the meeting topic or peoples' experiences.
- Present research findings, a tool, or a straw proposal.



Draw out perspectives or new ideas

- Brainstorm solutions.
- Solicit feedback – ask participants what works and what needs to be improved on a specific product or action plan.
- Talk in pairs and share perspectives on a topic before reporting to the full group.
- Go around the room and hear opinions from each person in turn.
- Work in small groups to fill in a template, like an action plan.



Discuss options or issues

- Discuss a topic or decision in small groups and then report summaries of these conversations to the full group.
- Develop a pro/con list.
- Answer a pre-planned series of questions to advance the discussion.



Decide on a specific option or action

- Narrow or prioritize issues by giving participants an anonymous way to vote for one or more option (e.g., sticker dots).
- Make a proposal, ask for amendments, and then confirm agreement.
- Vote publicly through a show of hands.

Think It Through

1. What are the key things that need to happen to achieve your goal?
2. For each of these steps, what activity will you do? Will you do this with the full group or divide into smaller groups?
3. How much time will you need for each activity? For the transition between activities?
4. What energy level is likely during each activity? Can you pair higher-energy activities (e.g., people working in pairs or small groups) with times of the day when people are likely to be tired or distracted?
5. What logistical support do you need for each activity? How will you set up the room? Will you need specific materials or supplies? Note-takers?
6. Will you take any breaks? How long will they last and how will you get people to refocus afterward?



Anticipate Hazards

Where might the group get stuck? What will you do if they go off on a tangent or are reluctant to talk? What if your activities take longer than planned? Think through potential issues and how you'll deal with challenges in the meeting. See the "Challenges" section at the end of this worksheet for ideas on how to deal with specific problems when they arise.



CLOSING

Arrive at your destination

It's important to close your meeting on a strong note that recaps what happened in the room and sets clear expectations for next steps. Don't let people just fade out – package your ending and plan parting words so that participants leave with a feeling of closure.

Travel Tip

Don't forget to leave enough time for your closing. Plan specific times at which you will stop other activities, gather the group, and start your final remarks. Keep an eye on the clock to make sure you stick to your plan.

Think It Through

1. How will you or the group summarize the meeting accomplishments?
2. How will you capture next steps?
3. How will you get people to commit to these steps?
4. What is your one- or two-sentence final message?



YOUR ROLE

Driver, navigator, radio controller?

As a facilitator, you have many jobs. Once you have your agenda in place, visualize how you will lead the group through the meeting. Consider what techniques you will use to hold the goal for the group, manage the flow of conversation, ensure balanced participation, and clarify and connect ideas. If you will need to both facilitate and share your opinion, decide how you will maintain credibility as a facilitator while contributing your own viewpoint.

Tips and Techniques: Facilitating in the Room

Hold the goal

Keep the meeting goal front and center to focus the conversation and avoid tangents.

- Write the goal on a flip chart and post it in the room. Refer to it throughout the meeting, especially if conversations begin to get off topic.
- Ask: “This feels a little off topic from our goal, what do others think?”
- Have a visible place (e.g., list on flip chart) to capture side issues for later discussion.

Manage the flow of conversation

Track time, read the energy in the room, and follow the meeting plan, but adapt when necessary.

- Wear a watch and write down timing guideposts for easy reference.
- Create time and space for people to participate. Ask questions to get conversations started, identify when the group needs more time to resolve issues or hear from everyone, and encourage contributions that move the conversation forward rather than repeating covered ground.
- Don't rush: give people at least ten seconds to consider and respond to hard questions.
- Don't dwell: notice when there aren't any new contributions and keep the meeting moving. If there is energy around a specific topic and the discussion is taking much more time than planned, give the group a choice about whether to continue that discussion or move on to other agenda items.
- Prioritize activities ahead of time and know which ones you might be able to shorten if needed.

Ensure balanced participation

Draw out the full range of perspectives and manage air time so that everyone can contribute.

- Understand different perspectives coming into the meeting and be prepared to help individuals vocalize them.
- Acknowledge that you've heard a lot on one side of the issue and ask for other perspectives.
- Call on individuals who haven't spoken up and ask if they have input or opinions on the topic.
- Ask people to play devil's advocate.

Clarify and connect ideas

Help the group understand what others are saying and identify areas of alignment.

- Listen carefully and repeat a short summary of key comments so you can be sure you understand.
- Write notes on a flip chart so that people can see the conversation and correct any misinterpretations of their points.
- Ask questions to clarify the rationale behind a position (e.g., “Why do you think that?”).
- Highlight areas of alignment or disagreement that you hear emerging and ask for the group’s confirmation of these points.

Can you wear two hats?

Facilitators typically remain neutral on the issues they moderate, but sometimes you will be asked to both facilitate and participate in a meeting. If this is the case, think through your own opinions on the issues you will discuss and how you will navigate both facilitating and sharing your opinion.

- Do you have a strong opinion on the issue at hand that is unlikely to be swayed by others’ input? If so, it may not be appropriate for you to facilitate.
- Can you put your opinion aside and simply focus on facilitating?
- If you need to offer your opinion as part of the discussion, how will you do that? Will you share your opinion at the start of the meeting and state that you’re open to feedback and want to reach a group decision? Or can you be explicit mid-discussion by saying, “Stepping out of the role of facilitator for a moment, I think X. What do others think?”



CHALLENGES

What hazards do you anticipate?

We have all participated in meetings that have gone awry or felt like a waste of time. Even with the best planning, it can still be difficult to keep meeting participants engaged and energized. Think through the challenges you expect to face in your meeting and consider how you will navigate these situations.

Tips and Techniques: Addressing Challenges

Low energy

The group is tired, restless, or showing body language that indicates disinterest.

- Take a ten-second break: have the group stand up, stretch, and shake it out.
- Divide people into pairs or small groups to stimulate participation (more talking, less listening).
- Get the group up and moving: have people change seats or put sticky notes on the wall as they present ideas.

Crickets

You introduce a discussion topic and . . . silence.

- Prior to the meeting, ask specific individuals to be prepared to start the discussion if no one else jumps in.
- Ask specific questions that are likely to elicit a response (e.g., “What do you like about X?” or “What doesn’t work about X?”).
- Call, or threaten to call, on people.
- Ask why no one is talking. Do they all know the answer? Is there an elephant in the room that no one is comfortable talking about? Don’t be afraid to push people a little to engage.

Someone dominates or disrupts the conversation

You have an over-talker, powerful leader, or naysayer in the room who makes it difficult for others to participate fully.

- Know your participants as well as possible prior to the meeting so that you can be prepared to take on challenging personalities and, if needed, have pre-meeting conversations to enlist others in ensuring balanced participation.
- Ask those who haven’t spoken to contribute.
- Consider taking the person aside during a break and explaining that you appreciate his or her input, but want to make sure others contribute.
- Call out the situation explicitly and challenge the group to engage or ask why they haven’t.
- If needed, politely and respectfully cut off a domineering speaker by summarizing comments or explaining that you want to hear from someone else (when this is hard, remember that it’s for the good of the group and others in the room usually want you to do it).
- Use a visual “parking lot” of ideas to house complaints or concerns so that naysayers feel heard. Suggest that the group tackle these issues at another time and focus on next steps aligned with the meeting goal.

Someone never talks

You have a person or group of people who are not engaged or too shy to speak.

- Stand near the person and ask directly for his or her input.
- Divide the group into pairs or small groups so that everyone must speak and can do so without the pressure of the full group.
- During a break, talk with people individually to ask why they aren't participating.
- Give people roles that help them engage (e.g., ask a specific person to report to group).

The group is stuck

A planned discussion seems to only go in circles, or the group is unable to agree on a course of action.

- Know areas of disagreement in advance and design your meeting to deal with these issues. Don't wait to find out in the meeting.
- Take a short break so that people can come back to the conversation refreshed.
- Ask why a topic is so difficult. Use the conversation to draw out underlying issues or rationales behind peoples' positions. This deeper insight into others' perspectives often defuses frustration and can help the group find new solutions.
- Check in with the group. Ask whether anyone sees a way forward.
- If nothing else works, sometimes you need to stop the meeting or move on to something else. To do this, summarize areas of alignment and disagreement. Propose that the group move on and suggest that they "agree to disagree" or return to problem issues at a later time. Outline specific next steps they need to take to resolve disagreements.