

Meeting Facilitation

Structure Your Meetings for Success



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Last month I wrote about the need to view meetings as part of a structured process and about the importance of the meeting agenda as the first step in that process. That [article](#) turned out to be one of the most popular ones I've written to date. This month we'll consider the next step in the process and I'll share some of the techniques I use to facilitate meetings.

Neutrality is the key

An effective facilitator is neutral. As soon as you appear to be using your role as facilitator to influence the outcome of a meeting, you lose your credibility. Consequently, if you have a strong interest in the meeting outcomes or want to participate in the debate, ask someone else to facilitate the meeting. Colleagues are generally willing to do this, particularly if you offer to reciprocate.

Meeting tools

You *can* just walk into a meeting without preparation but it is the equivalent of going camping without the necessary gear. There are a number of basic tools you should have in place before the meeting starts:

The agenda – as I discussed previously, the agenda is the backbone of meeting facilitation. It is the tool you will use to keep the meeting on track and to achieve the desired outcome.

Ground rules – I find it useful to articulate a few basic rules before starting a meeting. These are generally pretty innocuous, such as respecting others opinions, not interrupting, no texting, cell phones, etc. but they have on occasion allowed me to maintain control of tense meetings by reminding participants about the rules. I generally post them where they can be seen by the participants.

Group memory – these the area where you record group comments, decisions, etc. I'm old fashioned, so I prefer to use flip charts but I've also used dry erase boards and electronic systems. It's important that the participants be able to see the group memory so they know that their comments have been captured and recorded accurately. I generally delegate the actual recording to another participant but I have on occasion served as my own recorder.

Parking lot – This is actually a subset of the group memory. It's a place you record those items that have come up

but will not be addressed in the meeting. This should also be visible to the participants – it's a valuable tool to getting someone to let go of a pet issue and focus on the actual agenda items.

Keeping the meeting on track

There are some very specific steps you want to follow to make the meeting productive:

Consensus – One of the first things I do is to get the participants to agree on the purpose of the meeting, the expected outcomes, the ground rules and the agenda. Go over them and ask for a verbal agreement. This is the time to make changes and adjustments to the agenda and to deal with any misunderstandings. Agreeing to these items makes participants partners in achieving the meeting objectives.

Follow the agenda – With up-front consensus, you can hold participants to the agenda. For example, if discussion is getting long-winded, you can remind the group that they only allotted so much time for discussion and ask if they want to allocate more time to the discussion or move on.

Notice this technique. You don't order the group to do something. You remind them of what they agreed to do and ask if they want to change that agreement. You remain neutral. If the group chooses to discard the agenda mid-way through the meeting and focus on an emerging issue, they can do so (assuming there is no legal requirement to provide public notice of agenda items). In my experience, this rarely happens.

As the group identifies issues or makes decisions, record this in the group memory *verbatim*. Check with the person speaking to make sure you got it phrased correctly. This is important because it signals to the speaker that

his ideas have been acknowledged and recorded. If he or she tries to bring up the issue again, you can remind them that you've already recorded his or her comments.

The same techniques work with the parking lot. As issues come up, the group has the option of changing the agenda or moving an issue to the parking lot. If it comes up again, you can remind them that they've already captured the issue and decided to consider it at a future meeting.

Action Plan

Moving a group from discussion to action is the hard part of the facilitator's job. Always reserve a few minutes for the development of an action plan. I allow 5-10 minutes depending on the group. During this period, I go through the group memory and my own notes and identify potential action items. Then I help the group decide what action needs to be taken, who will do it, and when it will be done. There are usually a few items that the group discards and a few that have long range implications but the bulk of action items are able to be accomplished before the next meeting. Buy-in is the key here: the group agrees what needs to be done and who will do it.

Meeting review

My final step is to ask the group to review the meeting. I ask two questions, "What went well?" and "What could be improved?" This allows to the participants to provide instant feedback on the meeting. In most cases, participants are surprised at how much they accomplished with a structure process. It also gives me ideas for how to structure the agenda for the next meeting.

Remember that your ultimate goal is to help the participants achieve their meeting objectives and to move beyond talking to action. 