



Top 7 Meeting Facilitation Tips

- 1. Be strategic about how you can build ownership and alignment as you create the agenda.**
 - a) *Get input from stakeholders about the desired outcomes for the meeting before you prepare the agenda.* This builds ownership and alignment with the plan, often preventing disruptions to the plan in the meeting itself.
 - b) *Consider asking a couple of key people to help you build or review the agenda.* They are likely to know of any land mines, hot spots, or unfamiliar practices.
 - c) *Consider sending the agenda out in advance* and asking for input, changes, or questions. Your meetings will be more productive if you establish norms for making one's wishes known in advance, so the meeting time isn't wasted going around in circles.

- 2. Prepare an agenda in advance.**
 - a) The agenda is to be used as a guide. You may have to change it or even drop it once you're in the room (virtual or IRL), but have a plan.
 - b) Collaboration thrives when things are spelled out (explicitly). For every topic, think through *what process would be best* for handling the topic. Good meetings consider both content (the what) and process (the how).
 - c) If a decision is to be made in the meeting, consider what process you'll use to get there.
 - i. How will you know a decision has been made?
 - ii. Who has decision rights in this organization?
 - iii. Will the decision be supported? Match the kind of decision process to the importance of the decision. Not every decision has to be consensus!
 - d) Consider your agenda as a key piece of communication and *make it easy for every participant* to know:
 - i. When and where the meeting is
 - ii. How to join
 - iii. How to prepare
 - iv. Who will be there
 - v. What the outcomes will be
 - vi. How they can succeed as a member

- 3. Think about preventions and interventions.** Good facilitators do most of their work before the meeting ever happens.
 - a) Find out from insiders what could go wrong. Make a list and think of ways those dynamics could be *prevented* or how you will *intervene* in the meeting to address the situation.
 - b) Find out what seems to work best in this organization already.
 - i. What are they used to?
 - ii. What is sacred to them?
 - iii. What is comfortable?
 - iv. How can you build on those strengths?



4. Be transparent about what role you're playing during the meeting.

- a) If your intent is to be neutral, let participants know that.
- b) If you have to step out of being neutral during the meeting, tell participants you're doing that and then step back into the neutral role in the same way.

5. Build connection time into the start of your meetings.

- a) If you want your meetings to be interactive, be sure there is an activity to *get people speaking* as early in the meeting as possible.
- b) Consider establishing a brief *check-in process* if you're going to be working with the same team over time. Check-ins help people relax, connect, and get to know each other.
- c) For hybrid meetings, consider *opening the room 5 or 10 minutes before the official start* and offering a fun activity to get people talking to each other. Or just have some open space with a little music.
- d) Expressing gratitude in some way at the beginning of the meeting raises the energy and also aligns with wellness.

6. Enlist people to help during meetings. This builds ownership and alignment! Do you sense a theme? Good! Here are some possibilities.

- a) Ask someone to read through the desired outcomes.
- b) Ask someone else to give an overview of the topics and time allotted to each.
- c) Give participants an opportunity to make changes to the agenda order, time allocations, or even topics.
- d) Ask someone to be a timer.
- e) Ask someone to be a recorder.
- f) Ask someone to be a group conscious (or "squirrel" tracker) if the group starts getting distracted or off track.
- g) Ask the sponsor to come to the meeting to help the group understand the context for the meeting, the project, their expectations, etc.
- h) Ask someone to take charge of reviewing and nailing down the action items during and at the end of the meeting.
- i) Ask someone to be a dissenting voice. Their job is to tell you why it won't work and to poke holes in your plan. This helps you steer clear of groupthink.

7. End the meeting with appreciation.

- a) Consider ending the meeting with a chance for people to make meaning about what happened in the meeting. A "check-out" process helps you gauge how effective the meeting was and helps avoid the "meeting after the meeting."
- b) Gather quick feedback about what worked and what could be better can keep you on track as a facilitator. Every minute spent on group maintenance pays off later with smoother task accomplishment.