

1 UNDERSTAND YOUR AUDIENCE

Solicit feedback from all participants prior to the session. Their input will help you to understand the dynamics of their key issues, generate consensus and provide you with valuable perspectives. This could be accomplished in advance, by a formal interview or an informal memo.

Be cognizant of the personalities of your participants. It is important to gain everyone's involvement in a meeting. Some personalities can be overly aggressive or reticent contributors. A skilled facilitator will get full participation.

2 KNOW YOUR MEETING OBJECTIVES

Identify a clear and concise purpose for the meeting. Keep the focus on two or three key objectives. Morning sessions are the most productive, so start early.

Be clear about what issues are not going to be discussed. Reviewing this at the beginning of your session will reconfirm expectations and help to keep the meeting on track.

Establish ground rules. They will help you to handle the most challenging personalities and issues proactively.

3 DESIGN A DETAILED AGENDA

Build a detailed agenda which becomes the framework for your session. It should include defined blocks of time for each key issue. Include check-in points to ensure that you have time to cover all of the

SIX STEPS

TO EFFECTIVE RETREATS AND MEETING FACILITATION

FACT

After more than twelve years of facilitating meetings and retreats in professional services, I have concluded that there are three major factors that make up a successful meeting. They are (1) preliminary planning, 2) skilled facilitation and 3) post session output and communication.

I attribute my success to the creative facilitation and planning technique, called "storyboarding." This process helps me to quickly identify key issues, uses planning and decision making time efficiently, gains consensus and allows for free and creative thinking.

Looking forward to hearing from you the next time you want your retreat or meeting to be productive.

Hollis R. Chase, President

issues planned. Stay true to these time lines during the session. Create and communicate an abbreviated version of the agenda prior to the meeting, including logistics and time frames. It will set the stage for a productive session. Use a separate white board or flip chart, to "capture other issues" that arise, but are not part of the primary agenda. This will provide a way to capture information for future discussions.

4 INCORPORATE CREATIVE EXERCISES

Include a creative exercise early in the meeting, after the kickoff, which will help everyone to think "out of the

box," to identify new solutions to business challenges. Creative exercises also help to generate camaraderie, even for those tough egos. Exercises help to create a common playing field because everyone is a participant.

5 GENERATE AN ACTION PLAN

Develop a real-time action plan tied to your key objectives. Be sure to allow time on your agenda to bring the session to closure. Recapping with the group 2 will identify actions, next steps, projected time lines and accountability. This plan will also establish a process for follow up. It will provide you with the road map to measure success and progress after the meeting.

6 HIRE A PROFESSIONAL FACILITATOR

Use these steps to plan and conduct smaller or internal meetings. But, when it comes to more challenging issues, strategic initiatives, off-site planning or retreats, hire a professional facilitator!

As a facilitator, I have developed a technique and methodology that works. My clients are able to accomplish more in a shorter time, which enables key decision makers to be active participants and contributors.

Remember facilitators can be your eyes and ears to create objectivity and meet your overall goals.