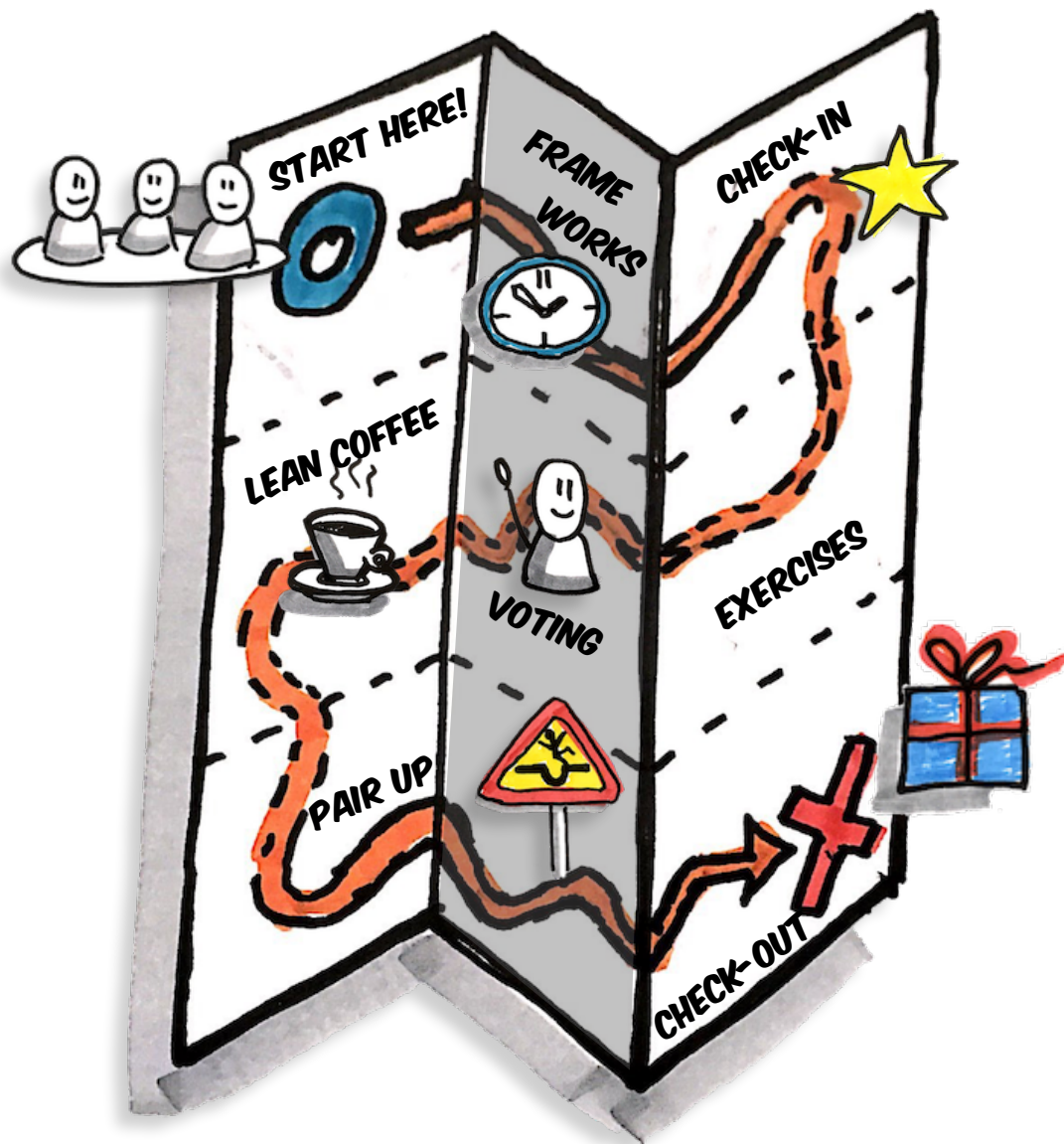


zerodistance *to facilitation*

how to effectively design and lead meetings



DRAFT

WHAT'S THE PROBLEM?!

What kind of problem am I trying to solve in this guide? *Why* is it important to design good meetings and learn how to be a good facilitator?

Waste

I have attended way too many meetings that has drained me of energy, instead of giving me energy. And many of those meetings have been a waste of time, instead of an investment in time.

I want to change that!

I want to create valuable meetings!

Value

This guide is for people who wants to

- Create meetings that give energy
- Create meetings that engage people
- Create meetings with a clear purpose

NOTE!

I use the term *meeting* in its broadest sense and mean almost any interaction between people.

You can interchange *meeting* with: *workshop, training, retrospect*, or any other meeting you have.

Content

This is an attempt to gather the exercises, models, frameworks and tools that I've been using every day for many years.

- **Start here**
 - Planning is everything
 - The learning loop
 - Expectation management
 - Engagement ladder
 - Energy line
 - A show in three acts
- **Frameworks**
 - Purpose, purpose, purpose
 - I DO ART
 - 7Ps
 - Meeting mapping
- **Examples of exercises**
- **Check-in**
 - Question
 - Rollercoaster
- **Voting**
 - Roman vote
 - Fist of five
 - Dot voting
 - Feet voting
 - The line
- **How to pair up**
 - Even version
 - Odd version
- **Lean Coffee**
- **Check-out**
 - Close the meeting

Magnus Andersson works as an Agile Coach at zerodistance.

"zerodistance to..." is a series of lightweight publications, and is our way of providing knowledge to the agile community in less than a heartbeat.

START HERE!



Dwight D. Eisenhower

Planning and training time

Designing and facilitating meetings is like a contact sport: You have to jump in with both feet. Try out ideas, fall, get up, train and learn.

You have to *do it*, in order to get good at it.

The *act of planning* is more important than the actual plans. The effort invested into the planning will pay off during the meeting, *even if you don't follow your plan*.

Plan for success, but be prepared for the worst.

No matter how much you plan, you can never predict all situations in the meeting. Plan for different options and plan loosely, so you can adapt your plan during the meeting.

Iterative process

To become a better meeting designer and facilitator, I've found it useful to work in iterations.

After every meeting, reflect on what happened and bring your learnings into the next meeting.

START HERE!

**ADAPT &
CHANGE**

**PLAN &
DESIGN**

**REFLECT
& LEARN**

FACILITATE

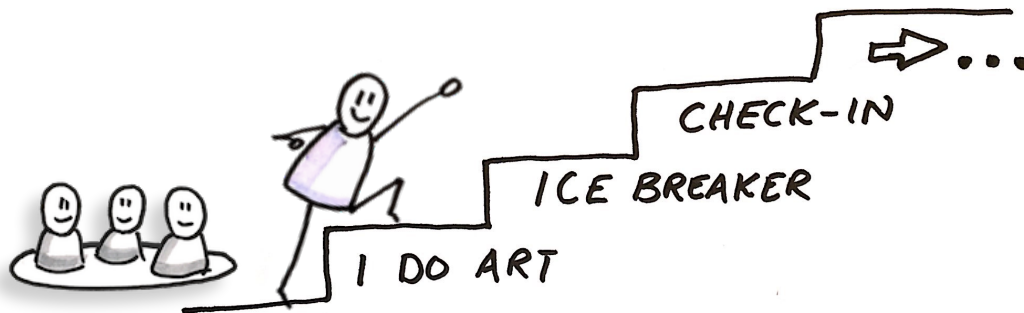


Expectation management

**ACTUALLY...
START HERE!**

Align on the expectations with your client before the planning. Ask for the purpose and the desired outcomes. Repeat back what you think you hear and ask for clarification and confirmation. Ask the client for contact information to a couple of participants, and align with them as well.

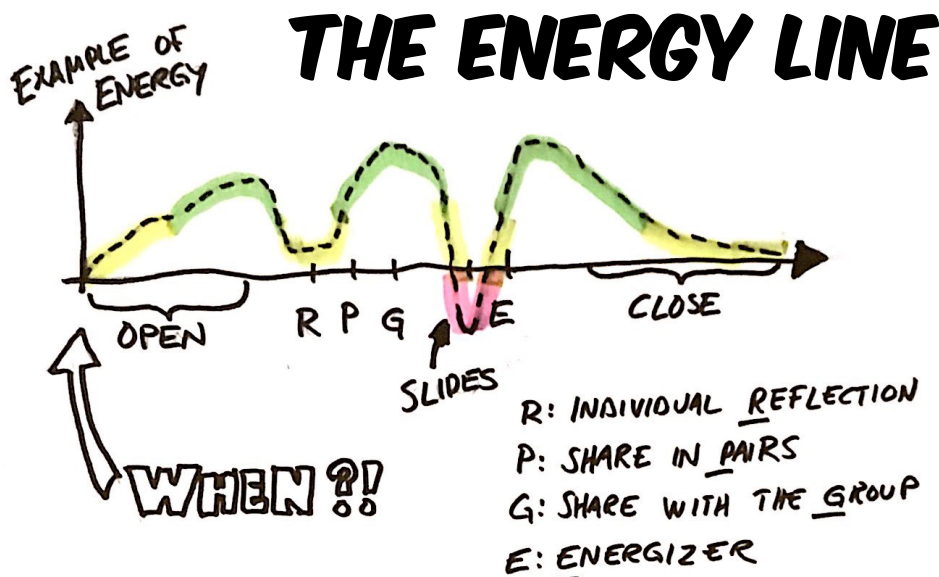
THE ENGAGEMENT LADDER



Engagement plays a key part of successful meetings. As a facilitator, I want to take up as little time and space as possible and let the participants play a leading role.

I use a model called *Engagement ladder* to help the participants get engaged and to speak up. The idea is to start the meeting on the *first step*, which should be something very non-threatening and then slowly move up the ladder, step by step, to build social safety. Each step on the ladder is an activity that is a bit more challenging than the previous one.

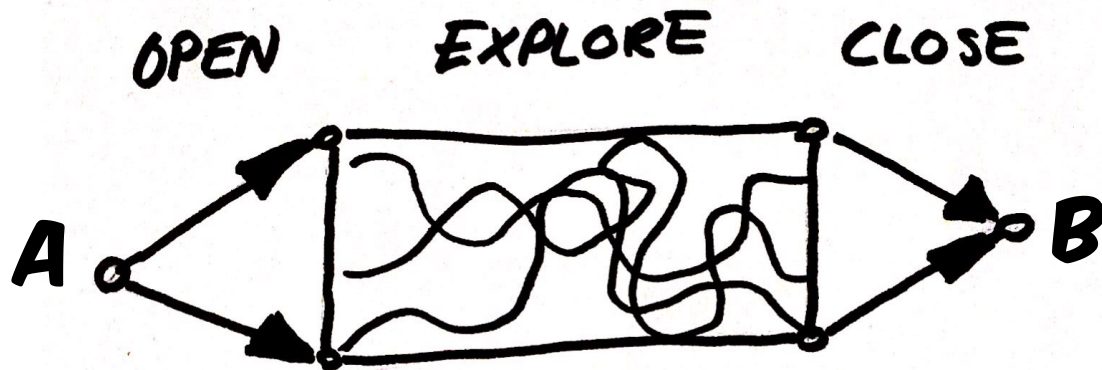
This model usually works really well. I've tried it with groups with many introverts, as well as with groups where people meet each other for the first time.



Think about the energy level you want during the meeting. By varying the energy level you will keep the meeting *alive*, just like a good movie or storytelling. Sometimes people need to be calm to reflect, and sometimes people need shout and laugh. And sometime after lunch you might need to run an energizer after showing to many slides. (Or even better: *Never show slides!*)

Also think about *when* you want to start the meeting. You could get very different results if you run the meeting in the morning compared to the afternoon.

A SHOW IN THREE ACTS



This model is presented in the book Gamestorming, by Dave Gray.

A helpful view on meetings is to look at the three acts: *Opening*, *Exploring* and *Closing*.

Instead of viewing a meeting just as a lot of different bullet points on an agenda, view it as a journey, from A to B, where you're guided by a clear purpose and desired outcome.

Each act has its own (sub-)purpose and should therefore consist of activities that fulfil that.

Example:

Let's say you invite to meeting with the purpose to find and decide on a solution to a problem.

Open

Start with some activity to present, understand and align on the purpose and problem to solve. Open up different perspectives of the problem and brainstorm on different ideas for a solution.

Explore

Next step is to explore the problem and solutions. Perform different activities to explore. Work in different constellations and come up with pros and cons, risks and rewards for the different solutions.

Close

Finally perform some kind of voting or decision-making activity to reach a decision on what to do. Maybe also create an action plan for the way forward.

Read more about different frameworks for designing meeting in the next chapter.

Frameworks

for planning and facilitation

I am presenting three different tools or frameworks for designing a meeting.

📋 **7PS**

📋 **I DO ART**

📋 **MEETING MAPPING**

Know the purpose

The most important thing for all of these frameworks is to know the *purpose* of the meeting.

Why are we having a meeting?!

Do we need to take time from each others life to have a meeting?

Or can we just send an email instead?

It can help to divide the purpose into a *general* and a *specific* purpose:

General purpose

Examples of general purposes:

- Spread information
- Create alignment
- Getting answers
- Planning
- Taking decisions
- Teambuilding
- Education
- Entertainment

Specific purpose

For instance, if the *general purpose* is to spread information. Then the next step is to think about the *specific purpose*...

- What am I communicating?
- Why am I doing it?
- Why a meeting and not an email?
- Who is the audience?
- How do I want the audience to react?
- What do I want to happen afterwards?

How to use these frameworks

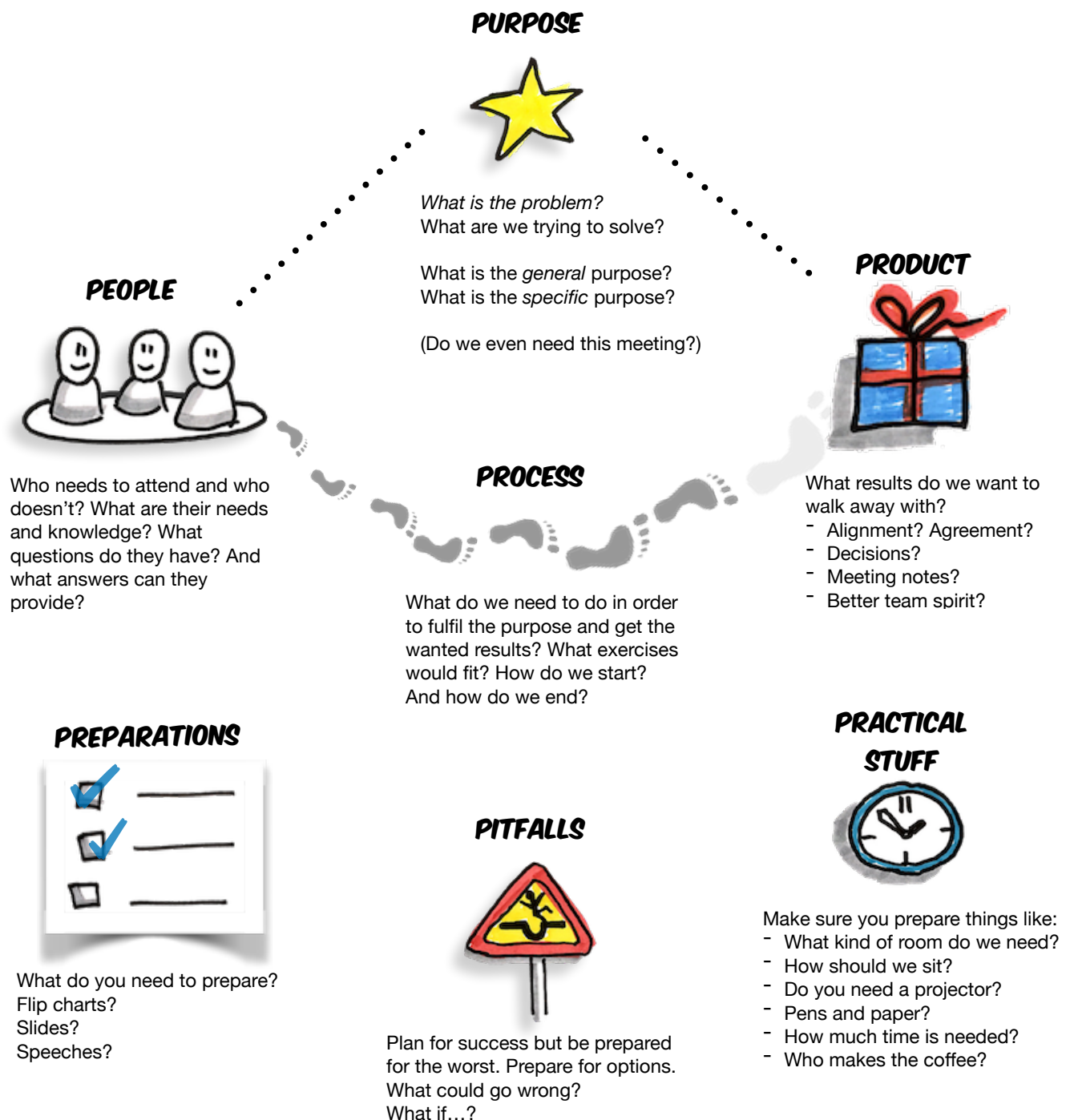
These frameworks are meant to be a help for both *planning and facilitating* a meeting. When you design a meeting you can use these as a checklist, and when you start a meeting you present the checklist to make sure everyone align on the purpose and the goal.

By sharing this when you open the meeting, you're contributing to the security in the group, which helps the participants and yourself to have a successful meeting.

Seven Ps

Use this as a checklist when you design the meeting *and* go through this checklist in the beginning of the meeting with the participants.

This is my take on Dave Gray's framework 7Ps from his book *Gamestorming*, see <http://gamestorming.com/7ps-framework>



I DO ART

Use this as a checklist when you design the meeting *and* go through this checklist in the beginning of the meeting with the participants.

I don't know the inventor of this, but more information can be found in the Hyper Island Toolbox: <http://toolbox.hyperisland.com/idoart-meeting-design>.

I

INTENTION



What is the *problem*?
What are we trying to solve?

What is the *general* purpose?
What is the *specific* purpose?

(Do we even need this meeting?)

DO

DESIRED OUTCOME



What results do we want to walk away with?

- Alignment? Agreement?
- Decisions?
- Meeting notes?
- Better team spirit?

A

AGENDA



What do we need to do in order to fulfil the purpose and get the wanted results? What exercises would fit? How do we start? And how do we end?

R

ROLES



Who is the facilitator? And do we need to point someone to take notes?

RULES

&



What are your game rules or Way of Working? Decide on if you should turn off computers and mobile phones. Decide on how you want to behave toward each other.

T

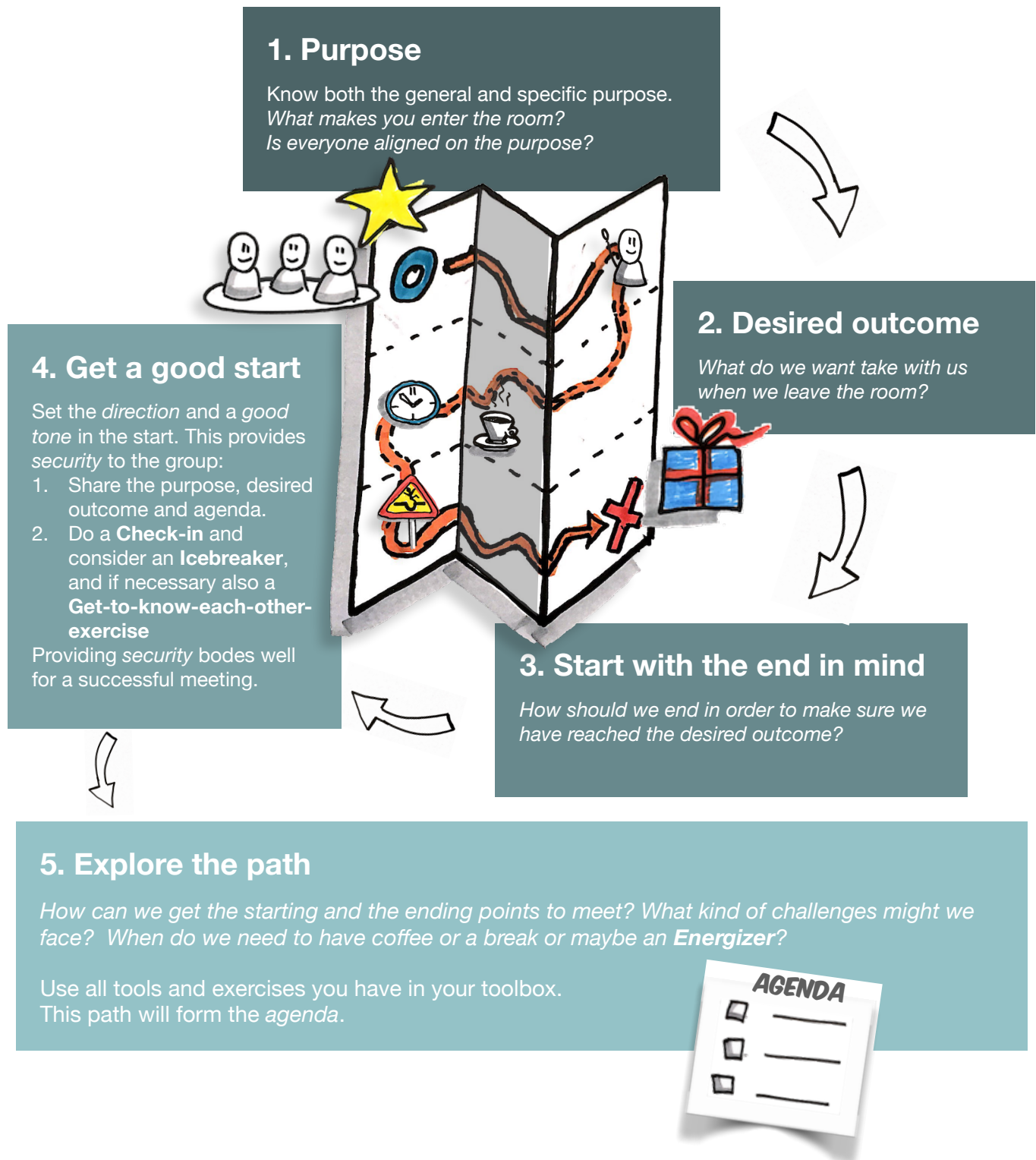
TIMES



Plan the meeting and the activities with the time in mind. Plan for when you need to have breaks. Plan so you reach your goal and end in time.

Meeting mapping

This is my own model for designing a meeting.

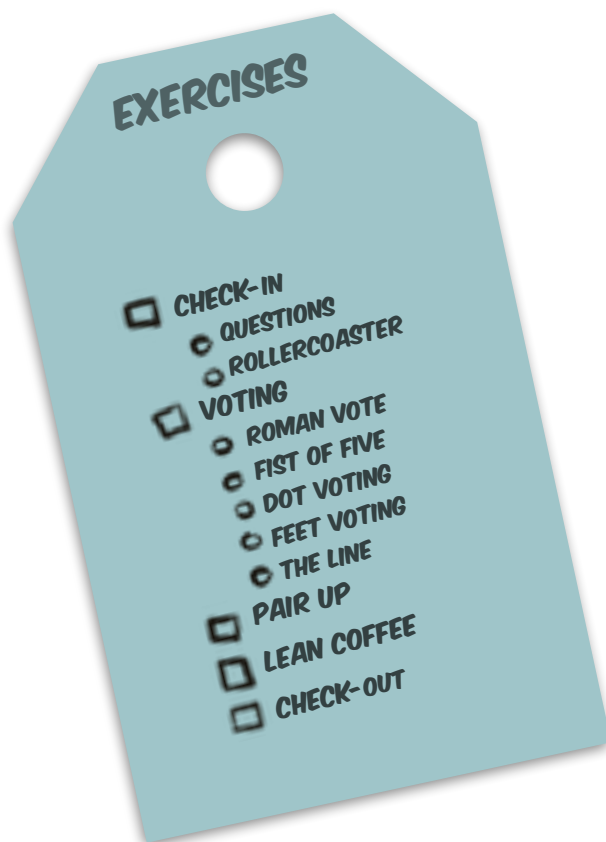


Exercises

different types of exercises

By having a wide variety of exercises in your toolbox, you can chose the right tool for the right situation, and you can design meetings that don't suck.

CHECK-OUT CHECK-IN ENERGIZERS ICE BREAKERS
 SHARING TEAM BUILDING
 VISUALIZATION FEED BACK GET TO KNOW EACH OTHER
 VISION EXPLORATION SIZING
 STRATEGY INNOVATION VOTING PLANNING
 PROBLEM-SOLVING PRIORITIZATION
 DECISION MAKING SORTING



Engage the participants

Meeting design and facilitation is very much about engaging the participants.

Stop using Powerpoint as your default tool. Use it only if it's absolutely necessary.

Start using different tools, exercises and materials which engages the participants and make them more active.

Just like a director creates a movie with different scenes with different content and emotions, you can design a meeting with different type of activities that supports the different parts.

Check-In

Engage the participants

To help the participants to get engaged from the start of the meeting, start with an easy exercise that involves each and everyone.

Such an easy exercise to start with could be some kind of *Check-In*.

STEP BY STEP

1. An easy exercise will help people to start opening up and take their *first step* into interaction.
2. Anyone who has started to interact and speak, will find it *easier to continue* doing so.
3. By taking an *easy first step*, it's easier take the next step, doing more *challenging* exercises.

SHARING

1. You and the participants can bring up things you need to share before you dive in.
2. By sharing these thoughts, it gets easier to park them, to then focus on the actual meeting.

WHY DO A CHECK-IN IN THE BEGINNING OF THE MEETING?

INFORMATION

1. The group will gain from listening and sharing with each other.
2. As a facilitator, you have a chance to pick up valuable input for the continuation of the meeting.

LET GO...

1. This is also a first step for you as a facilitator to let go of the microphone.
2. By not speaking so much as a facilitator, you'll invite others to speak.

Check-In exercises

These Check-In exercises are inspired from Hyper Island. For more information see:

<http://toolbox.hyperisland.com/check-in-questions>

<http://toolbox.hyperisland.com/rollercoaster-check-in>

ANSWER A QUESTION

Purpose?

Think about what your specific purpose is with the Check-In.

It could be: Getting to know how people feel, or getting to know what they want to learn, or maybe you want them to start thinking about the theme of the meeting already in the start.

Choose Check-In question depending on your specific purpose.

Time management

If you are many people in the meeting you might have to run a quick Check-In. Sometimes you want a more in-depth Check-In. Here are some examples of how to phrase your question depending on how much time you have:

In one word...

With two word...

In just one sentence...

Think of three things...

Take as much time you need...

Example questions:

What do you need to share to be present?

How do do feel?

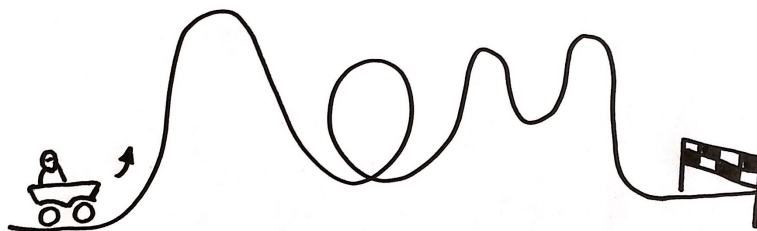
What do you look forward to in this meeting?

What are your expectations for today?

What do you need from todays meeting?



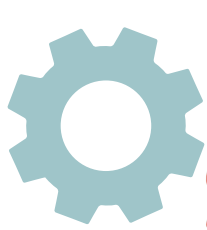
ROLLERCOASTER



Need inspiration?

This visual way of checking-in is often a good way to help people spark new ideas and could help quiet persons to share.

1. Draw a rollercoaster.
2. Tell them they can interpret the rollercoaster anyway they like.
3. Ask them to place themselves anywhere along the ride, (with a pen or a Post-It-note).
4. Let them take turns to show where they are, and let them share what it means to be there.



How to...



let everyone pair up

"Even"
version

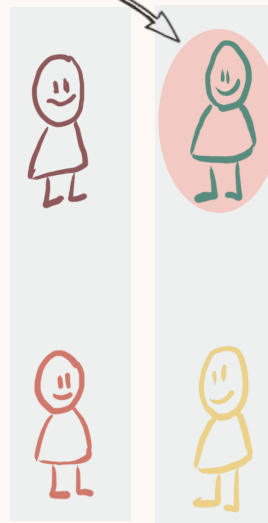
Even number of participants

If you want everyone to pair up with everyone else in an ordered way

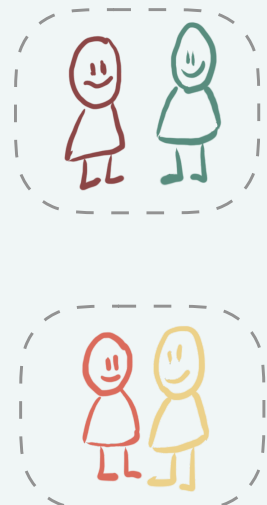
1. Create two lines facing each other. Select 1 person that will always stay in place.
2. First interaction in the initial pairs.
3. Everybody, except for the one person, moves clockwise and form new pairs.
4. Interaction in the new pairs.
5. Continue moving clockwise, *jumping over the one person*.
6. Interact in the new pairs.

If there is more than 4 persons, then just continue until everyone has paired up.

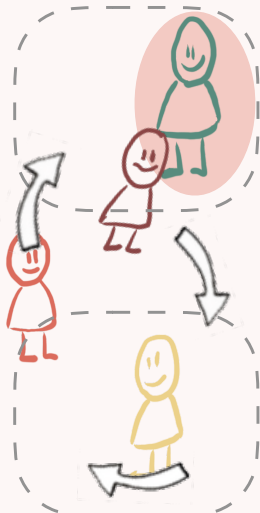
1. Setup



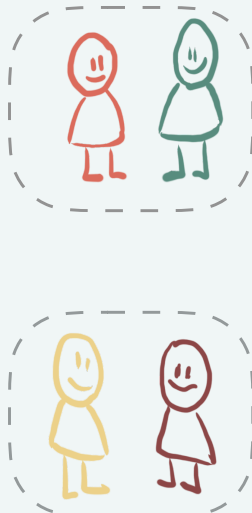
2. First Interaction



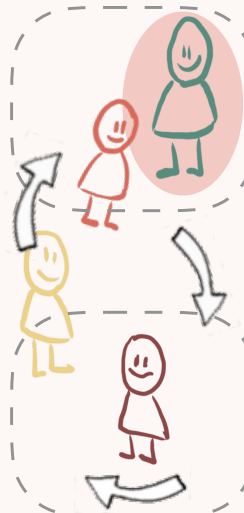
3. Change places



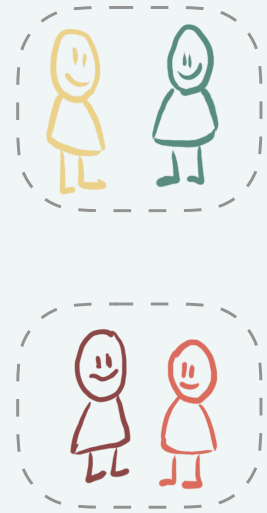
4. Second interaction

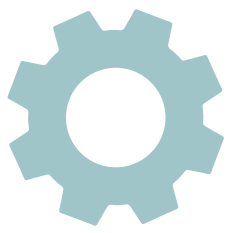


5. Change places again



6. Third interaction





How to...



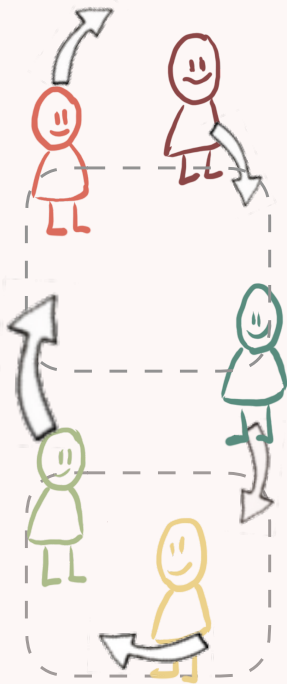
let everyone pair up

"Odd"
version

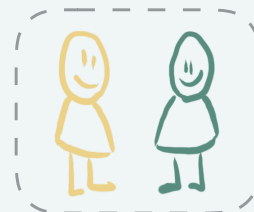
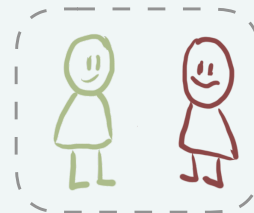
1.



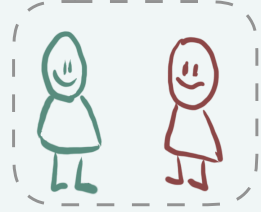
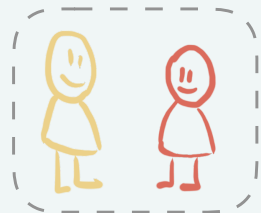
Change places



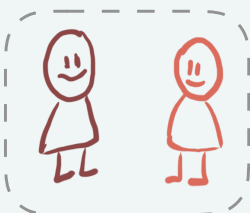
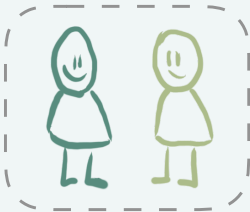
2.



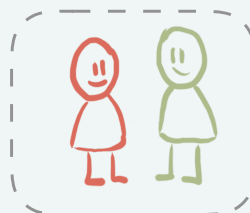
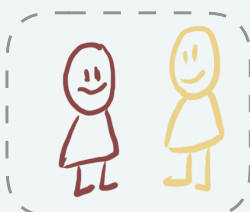
3.



4.



5.



Odd number of participants

If you want everyone to pair up with everyone else in an ordered way.

Create two lines facing each other, with the odd one out standing by one side.

1. First interaction in pairs.

Everyone moves clockwise, so a new person becomes the odd one out, and new pairs forms.

2. Interaction in the new pairs.

3-5. Continue moving clockwise and interact in new pairs until everyone paired up.

Voting exercises

If you want people to be engaged in collaborative decisions, these exercises can be used.

Roman vote

If you want a simple yes, no or I don't care vote.

On a given signal, everybody state their opinion by showing:

1. Thumb up for **Yes**
2. Thumb down for **No**
3. Thumb sideways for **I don't care**



Fist of five

If you want more than just yes or no.

On a given signal, everybody state their opinion on scale of 1-5, by show of fingers.



Dot voting

If you have many different options on a whiteboard.

Everybody votes by using a whiteboard marker and place 3 dots among the options. Place the dots any way you like. Count the dots and *prioritise* the options accordingly.



Feet voting

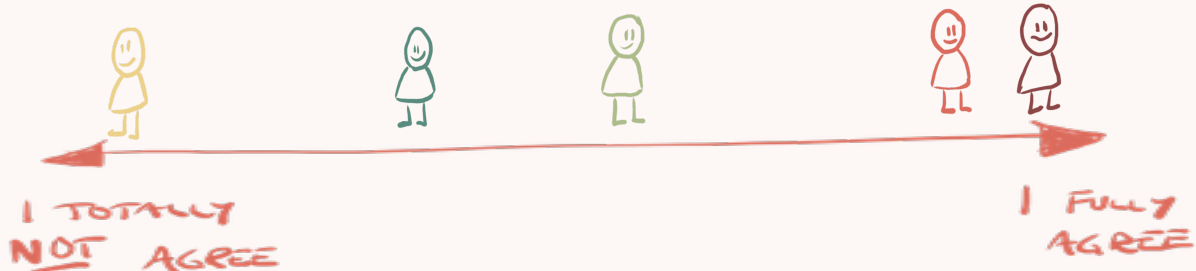
If you have topics that doesn't need prioritisation, since they could be worked on in parallel.

Write the different topics on different papers and place them around in the room. Let everybody walk up to the topic of choice and form small groups. Ask them to discuss the topic and if necessary they can chose a time and date to continue working on this topic. Topics that doesn't get any interest could be ignored and thrown away.



The line

If you have two options but it's a *sliding scale* between the them.



Then let either side of the room mark each option, and let everyone place themselves along an imaginary line between the two options, on the spot that best represents their opinion. You can then ask some of them to share *why* they placed themselves on that specific spot.

Lean Coffee

Great way to facilitate a meeting where the people themselves build the agenda and the content. Created by Jim Benson and Jeremy Lightsmith. See <http://leancoffee.org/>

The idea behind

Let people self-organize and discuss different topics in an ordered way.

Avoid being influenced by loud talkers, and instead be democratic on which topics to discuss.

You need

1. Post-Its
2. Pens
3. Whiteboard or similar
4. A timer



Depending on how much time you have, set the timer for what gives you the most value. Sometimes we go for 5 minutes and sometime we go for 10.

How to play

Phase 1

1. Individually, everyone write down what they want to *share* or *ask*, on Post-It notes.
2. Take turns and place the notes on a whiteboard, and read them out-loud.
3. Cluster the notes if needed. Remove duplicate notes, if any.
4. Dot vote among the topics.
5. Prioritize the notes accordingly.

Phase 2

1. Start discussing the topics from the top.
2. Set the timer for *10 minutes*.
3. The author of the note opens the topic, and invites the rest to join the discussion.
4. Whenever the time is up, do a quick Roman Vote:
 - Should we continue with this topic. If so set the timer for *5 more minutes*.
 - Or should we move on to the next topic. Reset the timer for *10 new minutes*.

Check-Out

This exercise is inspired by Hyper Island: <http://toolbox.hyperisland.com/check-in-check-out>

Engage the participants all the way to the end

One way of avoiding that meetings just fizzle out, is to have a clear and purposeful ending. This could be done with a so called *Check-Out* exercise.

A Check-Out can help the participants reflect, and formulate their insights. It can also help them remember their insights and follow up on decided actions after the meeting.

ANSWER A QUESTION

Purpose?

Think about what your specific purpose is with the Check-out. It could be: Getting feedback on the meeting, or helping the participants express a reflection. Choose the Check-Out question depending on your specific purpose.

Examples

If you have been exploring ideas: *What's your biggest insight.*

If you have been talking about the future: *What's your next action?*

Time management

Just as with the Check-In, you might want to manage how long time this exercise takes.
See Check-In.

Step by step

1. Stand in a circle
2. Ask the question
3. Give everyone some time to think
4. Take turns, one by one, to share