



We Are HatchWorks

Driven by a mission: we create software that improves how people live, work and interact.



Meet Hatchworks

We create custom software, emerging technology solutions, and advanced data to transform business.

15 years
of experience

Strategists

+300
Products
Developed

Designers

Techology
Innovators

**Give
Back**
To our
community

Problem
Solvers

Developers

109
Programming
Languages

Data Scientists



We Don't See Clients, We See Partners



We Create Solutions That Transform Business

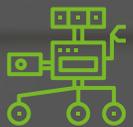
Emerging Tech



IoT



AI / Machine Learning



RPA



BlockChain

Custom Design & Development



Mobile Apps



BI / Dashboards



Enterprise Applications



System Integrations





FACILITATION BEST PRACTICES

May 22, 2018

SPEAKERS

LIGHTS

RIGGING

SECURITY

REHEARSALS

ENERGY

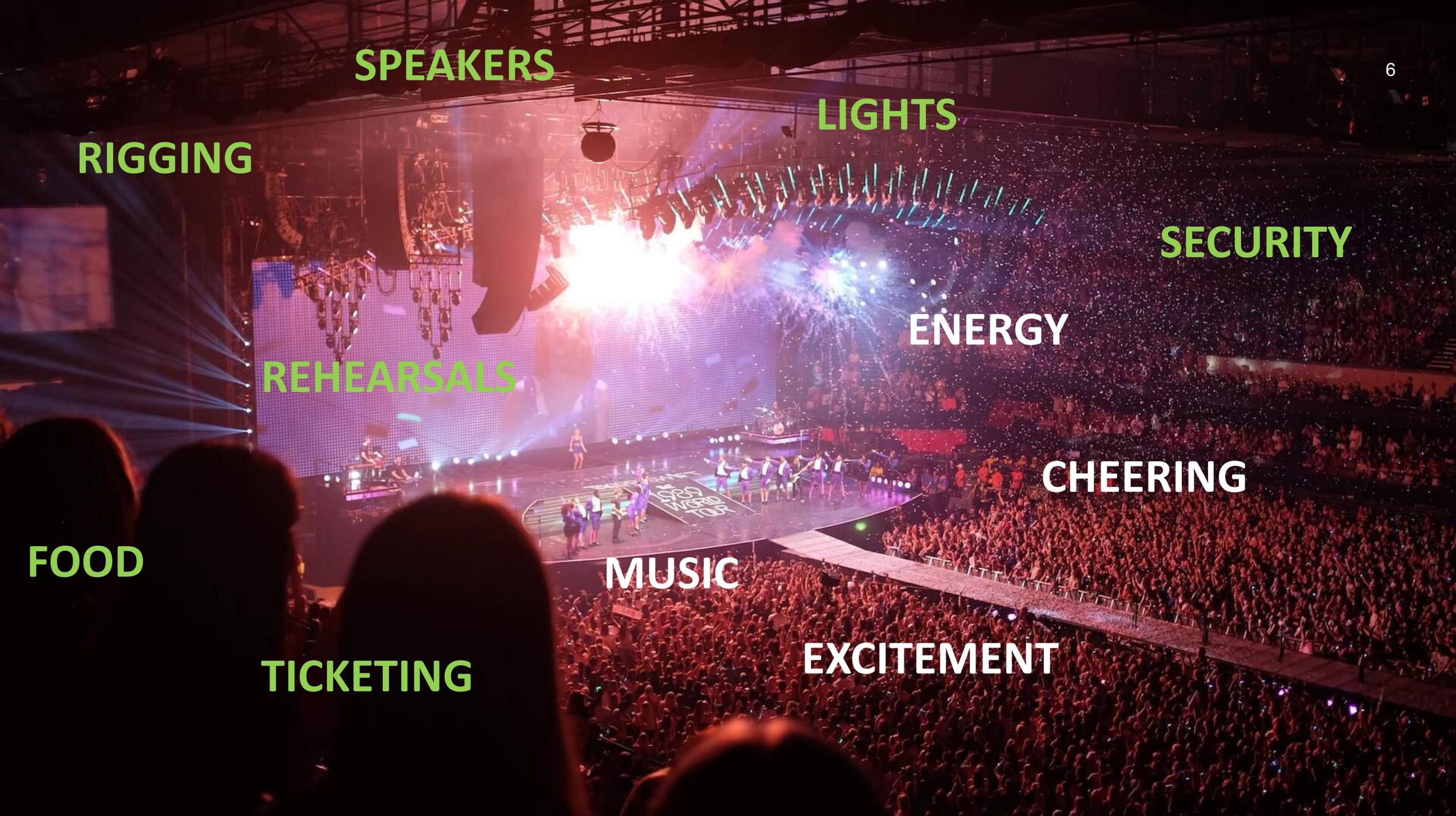
CHEERING

FOOD

MUSIC

TICKETING

EXCITEMENT



OBJECTIVES

-
- Learn the essential facilitation skills to plan effective meetings
 - Review key steps to prepare and facilitate a meeting
 - Explore what's inside a facilitator's toolkit



A Quick Comparison

- 1 FACILITATOR
- 2 TRAINER
- 3 PUBLIC SPEAKER

Facilitator	Trainer	Public Speaker
Help groups of people be productive	Ensure individuals understand new material	Delivers a message to an audience
Generate consensus	Rehearsed	Rehearsed
Achieve measurable outcomes	Moderate 2-way communication	Little or no 2-way communication
Thought provoking		
Objective		
Improvisational		
Lots of 2-way communication		

Meeting Killers

- Purpose unclear
- No agenda
- Try to accomplish too much
- Starts late
- Too many people
- Leader loses control
- One person dominates
- Go back over old items
- No clear direction reached
- Don't have time
- Last too long
- Mostly irrelevant
- Too many
- Too much side talk
- Poor preparation
- Lack of listening
- Lack of participation



PLANNING



Why are we here?



Planning Your Meeting

Planning is a demonstration **by you** to your meeting participants that **you care**.



Planning the Meeting's Purpose: What type of meeting are you holding?



We all participate in numerous types of routine meetings each day:

- Status Meetings
 - Product Demonstrations
 - Executive Summaries
 - Requirements Gathering Meetings
-



We occasionally participate these dynamic, more intense meetings:

- Strategic Planning
 - Project Planning
 - Process Re-engineering
 - Stakeholder Alignment
-

Comparing and Contrasting Types of Meetings



DELIVERING A MESSAGE
That's not going to change



COLLABORATING ON AN IDEA
That's up for debate



DEMONSTRATING A PRODUCT
That is what it is



DEMONSTRATING A PRODUCT
For which you want feedback

Delivering a Message	Collaborating on an Idea	Demonstration of a Product (static)	Demonstrating a Product (feedback)
Structured agenda	Less rigid agenda	Structured agenda	Less rigid agenda
Well-articulated message	Blinders for the topic, collaboration space, and materials	Blinders for the demo	Blinders for the demo
Unambiguous materials to present/print/share	Right attendees	Excellent presentation space	Excellent presentation space
Right attendees		Right SMEs, know the product	Right SHs, collaboration spaces, and materials

A Well-Rounded Purpose

To fully understand the meeting's purpose, identify the 6 P's when preparing for your meeting. This will give you a very well-rounded picture of the Purpose of the meeting.

- **Purpose:** Why are we having this session?
 - **Product:** What key results would you like to achieve? "We will consider this session a success if..."
 - What will they have in their Hands (tangible)
 - What will they have in their Heads (what will they know)
 - What will they have in their Heart (what will they believe)
 - **Participants:** Who will attend?
 - **Probable Issues:** What are the issues that will need to be discussed to create the product and achieve the purpose?
 - **Process:** What thoughts do you have on the steps that should be taken in the meeting to achieve the purpose?
 - **Place:** Where will the meeting be held? Who should I speak to about needs for the room?
-

Planning Your Meeting Participants

All meetings have participants. It's critical to understand the nuances of the people attending and surrounding logistics.



- 1** **Expectations, Concerns, Issues**
 - Who is not in favor of holding the session? Why?
 - Who believes they stand to lose something if the session or project achieves its purpose?
- 2** **Empowerment**
 - Are the participants actually empowered to make a decision?
 - Can the decision-makers attend? If not, can they send an empowered delegate?
- 3** **Attendance**
 - Who is nice to have in the meeting? Who must be in the meeting? Who needs awareness, but will not be an active participant?
 - Is inclusion in the meeting critical or is there another way to get people up to speed?
- 4** **Schedule**
 - Does the meeting have a time-boxed schedule? Are there other options?
 - Do we need to send a Doodle poll to identify best meeting date and time?

Logistics

Common logistical challenges:

- The projector isn't working
- The conference phone won't dial out or isn't functional
- The whiteboard is covered with content when you enter the room
- People are lost and can't find the meeting space



Planning meeting logistics:



Optimal facilities:

- Built-in equipment
 - Check it out WAY ahead of time
 - Availability
-

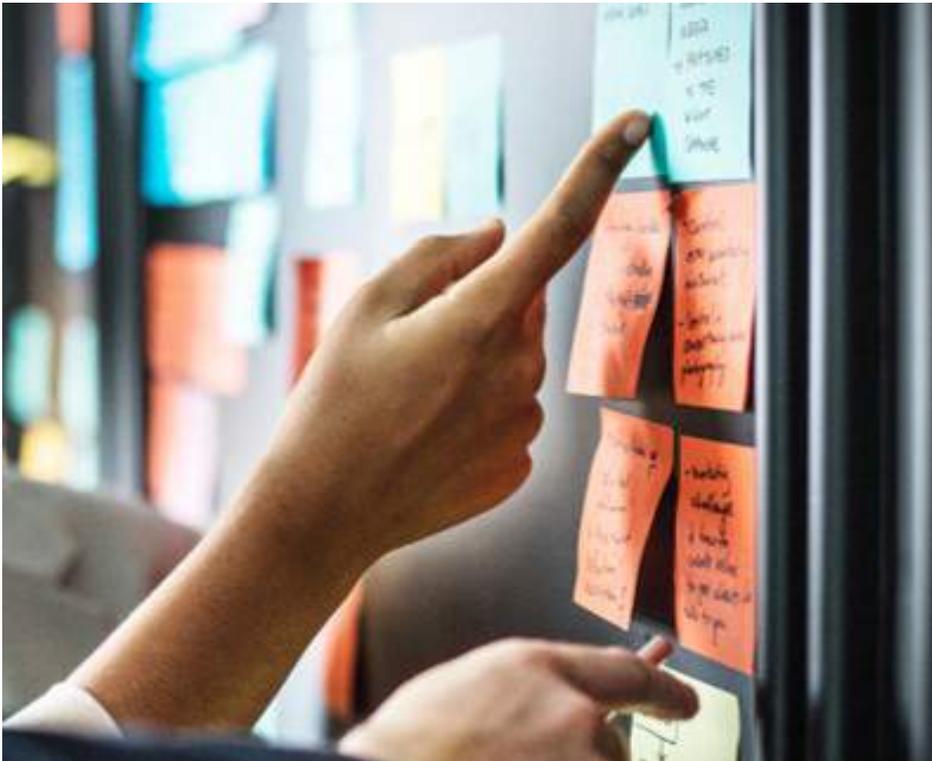


Room Preparations:

- Table arrangement:
 - U-Shaped, Horseshoe, Semi-circle
 - Avoid classroom and board room table arrangements
 - Food & beverage
-

Planning Your Meeting Materials

What possible materials could you need for the meeting?



Possible materials:



Portable equipment:

- Laptop
 - Projector
 - Speakers
 - Camera
-



Working tools:

- Whiteboard markers
 - Large and small Post-it Notes
 - Permanent Markers
 - Tent cards
 - Voting dots
 - Name tags
-

AGENDA

What do we seek to accomplish?

The agenda is the vehicle for communicating to participants what will happen during the session



Adapt the Agenda to Address the Need



1

ADAPT THE AGENDA TO ADDRESS THE NEED

- Create an agenda based on objectives
- Create an agenda that is reasonable to accomplish
- Incorporate consensus-building principles into your plan
- Confirm the agenda with the meeting sponsor(s) ahead of time
- Track performance against the agenda / Did we meet our goals for the meeting?
- What are our success criteria for the meeting to be considered a good use of the participants' time?

2

PLANNING THE AGENDA (BEFORE THE MEETING INVITATION IS SENT)

The agenda is one of the most critical, and often overlooked, elements of conducting a productive meeting.

- Discuss the objectives of the meeting with your key participants.
- How much time does the team feel will be necessary to address each agenda item?
- Will any pre-reading be required? Is it ready to go? What's the plan if participants do not pre-read?
- What context do participants need to have in order to be productive?
- How will background be shared? Who will share it?

Identify Your Participants



1

WHO ABSOLUTELY MUST BE IN THE MEETING

- Is everyone empowered as a decision-maker?
- Are decision-makers able to attend?
- If not, can they send a delegate who is empowered to make decisions?

2

WHO WOULD IT BE NICE TO HAVE IN THE MEETING?

- Is there anyone that should attend from an awareness perspective?
- Is meeting attendance the best method to inform these individuals?
- Do you have a plan to inform these individuals without burdening them?

3

ARE YOUR PARTICIPANTS AVAILABLE TO ATTEND ON THE DESIRED DATE AND TIME?

- Is your meeting planned based upon a time-constrained schedule?
- Is there flexibility to schedule your meeting for another time?
- Is it possible to send a poll to identify the best time and date options?

Identify Your Facilities



1

WHAT FACILITIES ARE REQUIRED FOR YOUR MEETING?

- Do you need a whiteboard?
- Do you need a projector or large screen TV?
- Do you need a conference phone?
- Do you need a video conference?

2

ARE THE FACILITIES YOU WILL BE USING IN WORKING ORDER?

- Have you visited the facilities recently to check their working order?
- Are there outstanding requests to Building Maintenance to prepare the room?
- Will the requests be completed before the meeting?

3

ARE THE FACILITIES YOU REQUIRE AVAILABLE AT THE TIME AND DATE OF THE MEETING?

- If so, book for at least a half hour before the meeting for setup, and a half hour after the meeting for tear down.
- If not, are there alternative locations available (e.g. Roam, Hotel conference room, restaurant private dining room)?

Identify Your Equipment



1

WILL YOU NEED ANY SPECIAL COMPUTER SOFTWARE OR HARDWARE FOR THE MEETING?

Think about specialized tools like screen sharing software or visualization tools.

2

WILL YOU NEED ANY FACILITATOR KIT ITEMS?

Do you need to purchase these or acquire them elsewhere?

- Whiteboard markers
- Large Post-It pages
- Small Post-It Notes
- Whiteboard markers
- Permanent markers
- Name tent cards
- Name tag stickers
- Voting dot stickers

Agenda Timing



Have you sent a meaningful invitation to participants?



Have you entered the conference bridge ID in a fast-dial friendly format?



Does your meeting invitation include a descriptive subject line?



Have you pre-tested the URL for screen sharing and video conference?



Does your meeting invitation include clear location information and directions?



Does your meeting invitation include a copy of the agenda?

Rehearse

Practice makes perfect! Use your facilitation plan to do a trial run of the agenda with willing participants.

Remember that facilitating a workshop means your personal mission is to make the session effective and productive. It is not to self-promote, wow, or impress participants. You are the guide helping them climb the mountain.

Guide without influencing. Remain objective.
Manage the mechanics of the session.



STARTING

Step off on the right foot. When facilitating, how you start is equally as important as how you finish.



Ground Rules

- Everyone speaks.
- But one at a time.
- Titles left out the door.
- There are no bad ideas.
- Use the parking boards.
- Avoid sidebar conversations.
- Start and end on time.



Body Language

—

Don't:

- Don't slouch
- Don't hold papers
- Don't speak to slides
- Don't talk to flip charts – at least not during the opening
- Don't turn your back to participants, especially during the opening statement



+

Do:

- Stand tall
- Speak loudly and clearly with expression in your voice, and vary your tone and emphasis
- Vary your rate of delivery, and avoid speaking too fast or too slow
- Be animated
- Make eye contact
- Use defined gestures
- Avoid “self-talk”
- Avoid filler words (“ah”, “um”)
- Avoid extremes in dress and grooming
- Match your facial expressions to what you are saying
- Use appropriate movement
- Cross the invisible barrier immediately. Move deep into the “U” to build rapport

CONDUCTING



The best-laid plans of mice and men
often go awry



Focus the Conversation



Every facilitated session will be divided into several facilitated activities. At the beginning of each activity, take a checkpoint by doing the following:

- **Review:** Review quickly what has just been done to date.
- **Preview:** Describe briefly what the group is about to do.
- **Big View:** Explain how the previewed agenda item fits into the overall objective of the session



Sample Agenda:

- Introduction
- How does it work today?
- What are the problems and root causes?
- What are the potential improvements?
- Prioritize improvements
- Develop an implementation plan
- Review and close



Example:

“We have just completed the functional decomposition, which told us that there are six major business processes in the accounts payable area. Our next step is to look at each of the processes separately and identify what information comes in, what information goes out and what information is stored. This will help us ensure that the new computer system will accommodate the way that we use information in the course of our business. Any questions about where we are? Okay, let’s start with the first process...”

Information Gathering

1

START WITH AN IMAGE BUILDING PHRASE

“Think about... Imagine... If... Consider...”

2

EXTEND THE IMAGE

So that participants can see the answers

3

FOLLOW UP

With a direct question

Example: “Think about the vacations you have been on when you have had the most fun. Think about the things you were doing, the things that you absolutely enjoyed, the things that really thrilled you. Let’s build the list – what do you like to do on vacation?”

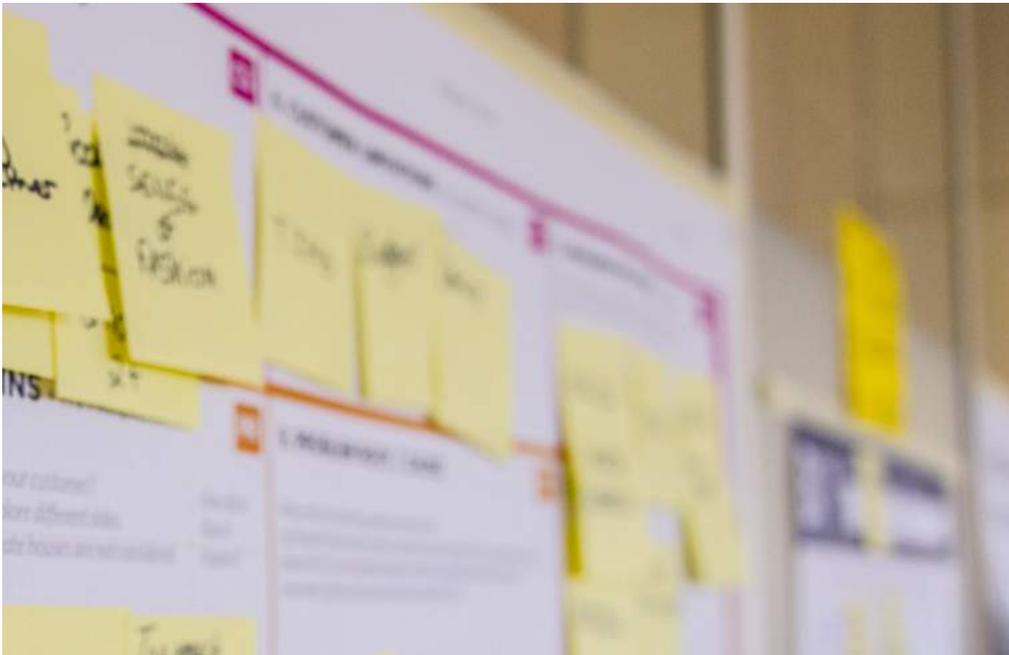
Type	Purpose	Example
Direct Probe	Challenge or Probe You don’t think what was said is correct, or you need additional explanation	Why is that important? What causes that? How do you mean? Can you tell me more about that?
Redirection	Get back on track The point is not relevant to the current discussion	That’s an interesting point. Can we put that on the issues list?
Playback	Confirm Give the speaker assurance that you understood the point.	It sounds like what you are saying is... Is that right? Is what you are saying...?
Leading	Lead to other thoughts You want to guide the group to other solutions	Are there solutions in the area of...? What other alternatives are there? Is there a way to achieve this and that too?
Prompt	Keep the ideas flowing The group had temporarily stalled and needs prompting	What else? What have X, Y and Z. What others are there? Is there a different area we should explore?

Record Everything



Record Well

- Write large
- Write straight
- Leave space for corrections
- No more than ~10 lines per page
- Avoid using red as a base color / use red for edits
- Write neatly
- Form letters distinctly



Once you have asked a question, you must record the answers:

- If what is said is incomplete ...
- If what is said can be improved upon ...
- If what is said is not the answer you were looking for ...
- If what is said is obviously wrong ...



Why?

By recording what is said, as the facilitator, you are implicitly saying “Thank you for making a contribution.” It is vital to positive group dynamics that this happens regardless of whether the contribution was good, bad or indifferent.

After you have recorded the comment, you can use questioning techniques to refine or delete the comment.

Seven Deadly Sins of Facilitation

1

The facilitator chooses which comments merit recording on the flip charts

2

The facilitator records his/her interpretation of what is being said instead of what is actually said

3

The facilitator permits the group to wander away from the stated objective for extended periods of time

4

The facilitator permits the ground rules to be broken without taking visible, corrective action

5

The facilitator is perceived as losing neutrality and favoring one position over another

6

The facilitator uses emotionally charged words with a session attendee or permits a session attendee to speak emotionally-charged words to another attendee without taking visible, corrective action

7

The facilitator allows an atmosphere of distrust or disrespect to build between himself/herself and the session attendees

CONCLUDING

—
Are we there yet?

Your time and your participants' time is a precious commodity. Don't waste it.



Need More Time?

If you track actual times against anticipated times for each agenda item, as you go, you will know well in advance if the session is likely to conclude on time.



If you determine the ending time will slip, you **must get permission from the participants to continue past the agreed upon completion time.** Why?



- Respects their time and avoids resentment about running over
 - Maintains the integrity of the process by putting the decision for whether or not to extend in the hands of the attendees
 - Provides a forum for addressing the needs for anyone who cannot stay later
 - Allows an alternative action to be created and agreed upon by the group if the time is not extended
-

What To Do



- 1** **ALERT THE PARTICIPANTS**
“At this point, it appears that we are not going to be finished by the time we planned on.”
- 2** **ESTIMATE TIME NEEDED**
“I believe we will be able to finish within 30 – 45 minutes of the time we had originally scheduled.”
- 3** **ASK FOR ALTERNATIVES**
“Should we continue or is there a better alternative?”
- 4** **CHECK IMPACT OF CONTINUING**
“Is there anyone who can’t continue?”
- 5** **CONFIRM AGREEMENT**
“So we are agreed to continue to no later than ... is that right?”
- 6** **HOLD FIRMLY TO AGREEMENT**
if you determine the additional time will not be adequate, start back at 1.

Wrapping Up



- Review:
 - Activities performed. Use the wall charts to point out documentation that resulted from the process.
 - Session purpose. Have the participants review the purpose and indicate if it has been completed.
 - Key topics. With each topic, ask participants “Was this topic covered?” Encourage participants to be very boisterous (e.g. cheer or clap)!
 - Parking boards:
 - Issues: Have we covered it? Do we need to cover it? Now?
 - Actions: Who is it assigned to? By when will it be completed?
-



- Check off each topic from the agenda.
 - Evaluate the experience: Ask participants for feedback on the session.
 - Remind participants of next steps: The place, date, time and purpose of the next session.
 - Thank the participants for participating.
 - Debrief with the team.
 - Debrief with the sponsor.
 - Document session results.
-

FACILITATOR'S TOOLKIT



Helpful tangibles and intangibles



Facilitator's Toolkit



INTANGIBLES

- Improv
- Facilitation Training
- Whiteboard Recording Experience
- Public Speaking
- Overall Practice
- Broad knowledge in the domain space: read up, listen, watch, relay
- Broad knowledge of current day events: headlines (national and local), weather, stressors

TANGIBLES

- Fresh Dry Erase markers
- Fresh Permanent markers
- Small, Medium and Large Post-It Notes
- Giant Post-It Notes (canvas sized)
- Voting Dots
- Pipe Cleaners – something to fidget with
- Easel
- GoPro / Tripod
- Laptop
- Portable Projector
- Extension Cords

Thank You

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