Planning and Strategy Meetings
A Short Facilitation Guide

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What is this?

This is a facilitator's guide for running a group working session designed to develop a strategy for dealing with an understood problem.

It is best suited for groups who have an established identity, and have worked together for some period of time. It is a set of questions the facilitator can use to structure the actual working sessions. The time required for each section will vary depending on the history of the group, the complexity of the problem area, the maturity of the group members, the nature of their interpersonal dynamics, and the number of people in the group. At minimum, more time can be used in a session that lasts several hours. Often such sessions, especially if they involve 8 – 12 people, may take 1 to 2 full working days.

The guide is set up as a series of questions. Each of these questions structures a working session among the group members. Their dialogue should be documented on flipcharts, or using an overhead projector. This way they can see how their contributions build upon one another. The facilitator must manage the content and process if the session is to succeed. The working notes should be returned to the participants as quickly as possible. (They can edit transcripts taken from the flipcharts or direct prints coming out of the computer software used to run the overhead computer projector.) In the best case scenario, the people would leave the session with a copy of the projected computer file in their hands.

1. What are we here to accomplish?

- The start-up of the session is often best done by the problem owner or business sponsor.

- It can be as short as a few minutes of verbal introduction and as long as a 10 to 15 minute formal presentation by this individual. The rest of the participants essentially listen.

- When the problem owner/business sponsor is finished, the facilitator should take some time to ask the other participants to state their version of the problem. Out of this dialogue, the facilitator will need to recommend a single problem statement in no more than 1 to 3 sentences. The facilitator will then poll each of the members to indicate publicly whether or not they are prepared to work on this problem statement for the rest of the session. If yes, move to the next section. If no, refine the problem statement until the participants are willing to do so. Generating this level of public commitment is absolutely essential to maintaining participants' involvement in the rest of the session. They must:

- Be working on “their problem”, even it this is simply their restatement of the session sponsor’s issue.

- They must be working on the same problem. The polling and cycling is needed to ensure this.

- Unwillingness to commit to the other participants must become an open issue now. If glossed over now, it will simply resurface again later on. When it does it will be experienced as frustrating and annoying. Once people have committed to work on something, they can change their mind later on. But it tends to be experienced as “more” contributory and meaningful if they have made a commitment to work together at the beginning of the session.

2. What is the current state?

- Data on the current state is best gathered by asking the participants to quickly brainstorm all the things they see as defining the current state of affairs.

- This is done so that the facilitator can summarize this information in 1 to 3 sentences. Once again, the facilitator should check with the participants to make sure that they agree that this is an accurate current state statement.

3. What are the COMPELLING threats, what are the COMPELLING reasons to PUSH forward from the present state?

- The facilitation process described under the previous section is used again and again.

- Therefore, it is summarized here and then assumed in all of the following sessions.

- The process can be summarized as:

  - state the question,

  - brainstorm or dialogue,

  - summarize the results in 1 to 3 full English sentences,

  - poll the members to see if they can concur or can move ahead based on this summary,

- if yes – move to the next step,
- if no – recycle through dialogue to refine the summary until they can.

4. What is the future state to which we need to move?

a. **What are the COMPELLING reasons to be there, what are the compelling things that are PULLING us to this state?**

b. **What are the major gaps between the current state and the future state?**

c. **What major activities or thrusts are needed to close each of the gaps?**

d. **Who are the stakeholders, that is the individuals, who are impacted by the actions needed to close the gaps?**

e. **What are the critical success factors that must be addressed if we are to reach the future state?**

- At this point the facilitator should introduce a definition of critical success factors. The best definition to use is as follows:
  - A critical success factor is something which all of the individuals who are involved in a situation or problem see as being critical to the success of an effort.
  - There should be no more than 3 to 5 of them. They are the most important issues NOT all of the issues.
  - They need to be stated in observable language. That is all of the individuals involved in the situation should be able to read the critical success factors and say "yes I can see where we are achieving success on these factors".
  - Asking critical success factors to take this form is not simple. People often cop out of the need to prioritize and sort through what they think has some relevance. That is, they make a long list of critical of key success factors that no-one can remember, and few people can really observe or measure progress in.
  - IF these critical success factors are to be meaningful, they must be reduced to no more than 3 to 5 (things which can be listed on the fingers of one hand).

- They must be written in such a way that any individual who is a member of one of the stakeholder groups can say “Yes, I can see that this is a critical success factor”.

- At the same time, these people should be able to say “I know that we are making progress on this critical success factor because this, and this, and this, has happened and is moving us forward”.

5. Given these critical success **factors**, which of the actions needed to close the gap are the most important?

- Facilitators should guide the people to pick no more than 5 to 7 of these actions. This can be done in a number of ways.

- Sticker voting – give each participant 5 to 7 “stick on dots” and let them mill around placing their dots on the actions as listed on flip charts on the walls;

- individual participant ranking of the actions that is then summarized into a group table;

- preparation of a matrix which identifies each action as contributing in a high, low or medium way to each critical success factor are all ways of doing this.

- This option takes the most time and produces the most insight into differences in the group through dialogue.

Each facilitator will have to make a judgment call on what is most appropriate given the group they are working with.

a. For each of the critical actions, what is the target date for first results, and what is target date for final results?

b. For each of these critical actions, who in the group is best suited to making sure that this action takes place?

c. When will this group get together again to monitor progress?

d. Are there any other things that must happen between now and the next meeting of this group to ensure that this plan moves forward?

6. Next Steps If You have to Chair Such a Meeting – Signaling When You are Doing What

Chairing a meeting is not an easy task. Yet most of us are called upon to do this without any training in the art of facilitating meetings. Sometimes we can bring in a facilitator to take responsibility for managing the 'process' – the way work is done in a meeting. That allows us to focus on contributing to the 'content' – the topics under discussion and consideration.

But this is not always possible.

7. My Approach to the Managing the Process | Contributing to the Content Dilemma

When I have to be both 'process facilitator' and 'content contributor', I try to use my body to signal the difference. I do my facilitation work standing up. I sit down to make content contribution. I clearly state the difference. When I stand up, I start talking by saying something "Ok, now moving to the next step in the way we are working together ….". I align such statements with non-verbal actions like pointing the next step in a flip chart mounted on the wall which contains the meeting's work recipe – the steps we are following.

When I need to get involved in the content, I sit down and preface what I say with statement like "I need to make a point about what we are discussing here. ….", or "Dropping out of my 'helping run the meeting role', let me make this about point about that …"

It is not easy. But it does tend to clarify when I am doing what. That helps people understand the difference between my 'running the meeting' work, and my 'contributing to the work we are doing' behaviors.

Who is Roelf Woldring?

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