

3 Steps to Ensure Your Meeting Will Be a Success



Great Meetings Don't Happen By Accident

Have you ever walked into a meeting wondering what on earth you're doing there or worse, left a meeting still wondering the same thing?

Have you ever walked out of a meeting where important decisions were made only to overhear your colleagues say, "That's never going to work," as they walk down the hall?

Have you ever found yourself blindsided or unprepared for a meeting or, maybe you were prepared but left feeling unheard? Have you ever suffered through hours of heated debate on a sensitive topic only to walk away with no clear direction or idea of what the decisions or next steps were?

It is nearly impossible for a CEO to effectively facilitate a session and fully participate at the same time; the CEO's contribution and participation is usually very important to the outcome.

Great meetings don't happen by accident. They happen because someone is committed to THINKING through the purpose and outcome, PLANNING all of the details in advance, and DOING the hard work of running the meeting. This is the role of a Facilitator.



At Rhythm Systems, our coaches are trained facilitators. They are experts in helping you Think, Plan & Do great meetings. We have facilitated hundreds of successful Strategic Planning, Annual Planning, Quarterly Planning and Deep Dive sessions for our clients. As much as we love doing this for our clients, we know that we can't be there to facilitate every meeting for every client. That's what this guide is for; it's for those times when you have to facilitate your meeting on your own. We want your meetings to be productive and successful, whether we're there with you or not.



****Not all Rhythm trained facilitators/consultants are shown.*

Note to CEOs: Along with our ability to educate, coach and facilitate specific content and methodology during on-site sessions, one of the main reasons CEOs choose to bring us in to run their sessions is so that the CEO can fully participate. It is nearly impossible for a CEO to effectively facilitate a session and fully participate at the same time; and the CEO's contribution and participation is usually very important to the outcome. For this reason, if you are not bringing in an outside facilitator, you may want to consider selecting and preparing someone else on your team to be the facilitator. We have worked with several CEOs who are great facilitators and have managed to play both roles very well. However, if this is not a strength you possess, look around the room and choose someone who does. By working together with this person and using the tips outlined in this guide, we think you will see a big improvement in the quality of your meetings.

Step 1

THINK: Great Facilitation requires great forethought

Stephen Covey advises us to “begin with the end in mind.” What is the purpose of this meeting? What do we hope to accomplish? Who should attend? What are the specific outcomes or outputs we are looking for?

Answer this question: “This meeting will be successful if....?”

Creating an **Objective Statement** that you can share with the rest of the team in advance is a great way to ensure everyone who attends the meeting comes with shared goals and expectations for your time together. It will also give you clarity as you move into Step 2 and begin planning for the session.

An Objective Statement consists of three parts:

1. **TO:** What is the action? What are you going to do? Start with a verb.
2. **IN A WAY THAT:** How will you go about doing it? List criteria, scope, involvement, success measures, specific tactics, side benefits or any other relevant information. Use bullet points.
3. **SO THAT:** Why are you doing this? Why is it important? What is the one main benefit?



Sample Objective Statement for a company's Quarterly Planning Session

QUARTERLY PLANNING OBJECTIVE STATEMENT

TO: Conduct our Q4 planning session

IN A WAY THAT:

- » Brings the Senior Leadership Team together for two full days
- » Highlights the previous quarter's accomplishments
- » Updates and advances our Annual Plan
- » Allows us to discuss-debate-agree critical topics as a team
- » Prepares us to overcome any potential obstacles to hitting our year-end numbers
- » Identifies 3-5 Company Priorities, complete with owners and R/Y/G success criteria
- » Identifies clear Individual Priorities for each member of the leadership team
- » Prepares us to begin thinking about next year's Annual Plan

SO THAT: We finish this year strong and set ourselves up for a strong start to next year

Step 2

PLAN: Great facilitation requires great preparation

Anytime you bring your team together for a meeting, whether it's for a few hours or for a few days, you are making a big investment in time, energy and money. The way to make sure you get the most out of your investment is to make sure you are properly prepared. The preparation checklist below will help you.



Meeting Preparation Checklist

- **Select a location** – Having a meeting or planning session in your own conference room can be very ineffective; the opportunity to lose focus and be interrupted by operational issues increases exponentially. This is fine for short, weekly, routine meetings, but for 1-2 day planning sessions, we recommend taking your team off-site if you can.
- **Choose a Meeting Coordinator** – This person is in charge of handling all of the logistics for the meeting, making sure participants have made travel arrangements, booking the conference room (on-site or off-site) and setting up for the session, and making sure that all participants are aware of any homework/ preparation that is needed for the session. Use someone on your team who is meticulous with details, and have them build a checklist for future meetings.
- **Prepare the meeting material** – You and the facilitator should refer to your Objective Statement when creating the agenda. Be careful not to overload your agenda. Be realistic about what you can accomplish in the time you have available. Create a basic time plan to accompany your agenda. This will help you know whether or not you are on track during the meeting. Less is more when it comes to slides. The old rule was no more than 6x6 (six words long by six bullets). In today's Twitter and drive-through world, you're better served to stick to 5x5, or better yet, 4x4. Consider revealing information one bullet point at a time, especially if you must have more than 6x6 on a slide.

Be realistic
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the time you
have available.

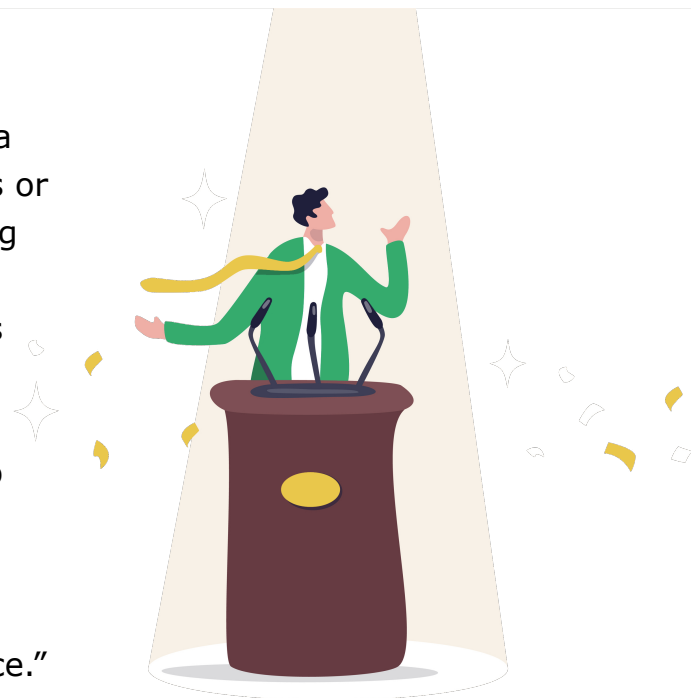
- **Email the agenda and pre-work to the attendees** - Communicate with all attendees about 2 weeks before the session, sharing the objective statement, agenda and any pre-work you want them to do. Realize that some people - even with proper instruction - may be in the habit of attending meetings unprepared. If you consider the pre-work essential, let the team know that it's mandatory. Require them to return it in advance, or instruct them to bring copies to the meeting and build time to share the output into your agenda.
- **Last minute details** - Work with the Meeting Coordinator to make sure all of the meeting details have been addressed: supplies ordered, lunch planned, technology arrangements made, attendance confirmed, etc.

Step 3

DO: Great Facilitation Requires Great Focus

Three Definitions of the Role of the Facilitator

1. "An individual who enables groups and organizations to work more effectively; to collaborate and achieve synergy. He or she is a 'content neutral' party who by not taking sides or expressing or advocating a point of view during the meeting, can advocate for fair, open and inclusive procedures to accomplish the group's work."
2. "One who contributes structure and process to interactions so groups are able to function effectively and make high-quality decisions. A helper and enabler whose goal is to support others as they achieve exceptional performance."



3. “The facilitator’s job is to support everyone to do their best thinking and practice. To do this, the facilitator encourages full participation, promotes mutual understanding and cultivates shared responsibility. By supporting everyone to do their best thinking, a facilitator enables group members to search for inclusive solutions and build sustainable agreements.”

The word facilitation means to make easy, too bad doing it isn’t. It takes a tremendous amount of energy, focus, quick thinking and patience to facilitate a great session. If you have followed the first two steps in this guide (Step 1: THINK and Step 2: PLAN), then you are set up for a successful session, but there is still a lot of work to do.

Here are 15 Tips you can use in the heat of battle to keep the meeting moving in a positive direction.

There may be times when things seem disjointed or the team doesn’t understand where you’re going. Let them know that there is a method to the madness and ask them to trust the process with you.

15 Tips for Facilitating a Great

1. Set ground rules at the beginning of the meeting. Let the team discuss their expectations for full participation, candor, side bars, interruptions, tangents, and cell phone and computer use. Having this conversation upfront creates an environment of accountability and a high level of commitment to the meeting. Ground rules will help reduce the stress of group interaction and make it easier to resolve problems when they arise. Capture your ground rules on a flip chart while discussing and post for reference throughout the meeting

2. Trust the process. Remember that you have put a great deal of time into Steps 1 & 2, so you are going into the day with a good game plan. There may be times when things seem disjointed or the team doesn't understand where you're going. Let them know that there is a method to the madness, and ask them to trust the process with you. When utilizing a slide deck and agenda provided by Rhythm Systems, know that the process and content has been tested and proven to work many times. It may not all come together until the very end, but if you are going in with a clear objective and well thought out agenda, the results you're looking for will follow.

3. Give yourself permission to deviate from the time plan if a topic requires more time than you thought it would. As long as the additional time is used for good, healthy debates on important topics rather than the beating of dead horses, it will be a good use of time. If you do deviate from the time plan, involve the team in deciding how you will make it up. You may choose to stay late or start early one day, or you may choose to cut or shorten the time allowed for another topic. Involving the team in this discussion increases engagement, energy and commitment (see #11).

4. Celebrate your progress as you move through the session. Reflect on learnings and breakthroughs. Acknowledge someone when they're brave enough to bring up a tough subject. Check in with each other along the way to make sure you're all staying engaged. After breaks, consider restating what's been accomplished and where you are in the agenda.

5. Use icebreakers with purpose. Icebreakers are quick, interactive exercises designed to get the team's brain working and mouth moving. They are usually used at the beginning of a session, after breaks and after lunch. They can also be great for raising the energy level late in the afternoon. A quick Google search will provide hundreds of ideas for icebreakers. One of our favorites is a quick round of victories or good news. This actually serves several purposes. It gives team members a chance to share information with each other, it allows team members an opportunity to get to know each other better and it starts the meeting off on a positive note. We recommend that you start every meeting with some version of good news.

6. Encourage full and equal participation. A team is made up of many different individuals, each with their own personality and preferred work style. Some are naturally more dominant and expressive, while others may be more thoughtful and reserved. One style is not better than another, and the fact that they're on your team means that you value their input. It's the facilitator's job to recognize these different styles and run the meeting in a way that gives each person a chance to contribute. This is a good discussion to have at the beginning of the session as you are setting the ground rules. Make the expectation of full and equal participation clear, and give the team a chance to discuss how they will do this. The facilitator may have to step in throughout the meeting, specifically calling on individuals that have not spoken up. The facilitator may also choose to design the meeting to include specific opportunities to hear from everyone. Examples of this would be small group breakout sessions or employing different brainstorming methods (see #8).

When done well,
brainstorming
should increase
participation,
reduce
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and increase
creativity.

7. Use visual aids effectively. Any combination of flip charts, white boards, sticky notes, posters, PowerPoint/Keynote and handouts will do. We've all seen the person that used every animation tool within PowerPoint - wiggly jiggly icons, annoying animations, slides swiping in from 20 directions in 5 different ways. Don't overdo it and allow your visuals to distract from the meeting (remember the word "aid") People have different styles of learning; some are visual learners, some auditory, some kinesthetic and some experiential, so mix it up and use all aids in moderation.

8. Use different methods for brainstorming. Round Robin, Freewheeling, Group Pass and Silent Reflection are all proven methods you may try. The point of brainstorming is to produce a comprehensive list of potential ideas, solutions or plans. When done well, brainstorming should increase participation, reduce inhibition, stimulate ideas and increase creativity.

The general rules for all brainstorming methods are:

- » Focus on quantity first — capture as many ideas as possible.
- » Encourage and welcome all ideas. Ask the team to dig deep and think beyond the obvious; every idea submitted should be captured.
- » Hold off on judgment, criticism or reality checks. This should be a “safe-time.” Ideas will be discussed and debated later.
- » Use short phrases and bullet points, rather than paragraphs and lengthy explanations.
- » “Piggy back” on others’ ideas. Outlandish ideas can be stepping stones to good, workable ideas.

Although it can be helpful to give a brief overview of brainstorming rules, there’s no need to go into an elaborate explanation. “Let’s brainstorm annual priorities that will move us toward our 3-5 year plan. Remember, let’s not judge the ideas but just capture and understand them first.” Then, begin your chosen method of brainstorming. As you move through the process, anticipate that someone will break the rules - that’s when the facilitator steps in and makes the correction.

Round Robin

Ask for a volunteer to start the brainstorming process with one idea. The facilitator captures the idea on a flip chart for all to see. Ask the volunteer to choose whether to go to the right or the left, allowing the person sitting next to them to offer one idea. The facilitator continues to chart the answers, going around the room until everyone has had a chance to contribute at least one idea. You can then try to take a second pass around the room if the ideas are flowing freely, or you may open it up to anyone who has another idea not previously mentioned.

Freewheeling

If you’re working with a group where equal participation is not an issue, you may be able to open the brainstorming session up by asking for ideas, allowing people to offer suggestions in any order at all. Be sure to chart all ideas with short bullet points using the participants’ words. This method can go fast, so you may want to ask for a volunteer to help chart answers using a second flip chart.

Group Pass

Each person in the group starts with a piece of paper, writes down one idea, and then passes the piece of paper to the next person. The next person then builds on the original idea, adding a few thoughts. Continue around the room until the owner gets their original piece of paper back. You can then ask each person to take a minute to review their original idea and share with the team.



Silent Reflection

Some people need a little time to think and formulate their ideas. Instruct the team that you are giving them a certain amount of time (5-15 minutes, depending on the topic) to think and write down their ideas. You can ask them to write their ideas on sticky notes, one idea per note, or list them on a sheet of paper. If you use sticky notes, you can then ask them to read one idea at a time and place them on the wall, grouping all similar ideas together. If they are written on a piece of notebook paper, you can use the Round Robin method to share and chart the ideas.

9. Use a Parking Lot. Stay on track by creating a place to capture ideas that are not appropriate to the discussion at hand but that you don't want to lose. Make it visible to all by using a white board, tear sheet, etc. This helps you keep the meeting focused without chasing too many "rabbit trails." It is important to honor all ideas, questions and concerns that come up during a session, and by placing the item in your parking lot, you send the subtle message that all contributions are important. Refer to the parking lot items while facilitating when appropriate and review any unresolved items at the end of your session, moving them to an action item list.

10. Deal with difficult people ahead of time. Before your meeting, think about participants who have a tendency to be outspoken, to dominate or to argue in meetings. Think also about participants who may have felt bullied or intimidated in the past, or who may have a history of not participating openly. Have a conversation with these people before the session, explaining your concern and asking for their help in creating a healthy and productive environment. Helpful language when talking to the dominant person might include, "Jim, I'm trying to increase participation in this meeting. I really appreciate your outspokenness and value your input. If it's ok with you, I'd like you to go last so I may first hear the rest of the team's thinking before you share yours." Be sure to circle back and give that participant a chance to share.

This is also a good topic to discuss while setting ground rules at the beginning of the session. Discuss in advance the expectations for politeness and tone during the meeting, and ask the team for permission to point it out if things get off track. If conflict arises during a meeting, the facilitator must be prepared to step in and take control of the meeting. Anytime the discussion becomes accusatory or personal, the facilitator can ask the participant to reword statements so that they are focused on solutions, facts and business issues, not people and blame. A great technique for redirecting a heated discussion is to ask the team to discuss their learnings rather than their frustrations. Be sure to do this every time the language becomes personal, and before you know it, your team will police this behavior, themselves.

11. Keep the energy high. Enthusiasm is contagious - so is negativity. Some people need to doodle while they think, some need toys like a Koosh ball or rubber Gummy, others need talk time with other participants, and others need to stand up or walk around the room from time to time. Think through your meeting day and plan ways to keep energy high for the entire time. Have participants work in pairs, write something down, work together on puzzles, make mini-presentations on topics assigned before and after breaks, schedule group breakout sessions, etc. Remember that the energy of the room is often a notch or two below that of the facilitator, so it is important to keep your personal energy high as well. Try to get plenty of sleep the night before, eat well, have plenty of water on hand and take breaks as needed.

12. Get to consensus. Many discussion topics require moving the group from several individual, independent ideas to one agreed upon group decision. **Consensus** can be defined professionally as an acceptable resolution that can be supported by everyone on the team. It does not mean that everyone on the team has to agree that this is their number one favorite resolution, just that they will support the decision going forward. Supporting a decision means that you will speak positively about the decision to others, you will do everything in your power to make sure the decision results in a positive outcome, and you will not say, "They decided." Explaining the definition of consensus and support to the team at the beginning of the discussion can be helpful in reaching a resolution.

An important step in getting to consensus is making sure that all ideas are evaluated and everyone's perspective is heard. This is not only important in getting buy-in for the final conclusion, but it also generates the best ideas and solutions.

Structuring a process for team decision making is an important facilitation skill. Here are some tips to help:

- » Use the brainstorming tips above to identify all possible solutions (see #8)
- » Combine and link similar ideas
- » Use structured methods, like The Six Thinking Hats, to help take the emotion out of the discussion
- » Set a time limit for discussion on each potential solution
- » Make sure everyone is participating in the discussion, and make sure everyone is actively listening
- » Work to narrow the options down to as few as possible

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- » Don't be afraid to call for a vote to see how close the group is to full agreement.
- » If there are just one or two holdouts, seek to understand what and how firm their objections are.
- » Engage the group in troubleshooting to minimize the potential negative impact identified by any objections or concerns raised.
- » Restate the most popular resolution, adding one or two points addressing the concerns raised, and ask the holdouts if they can support that decision.
- » Sometimes people will get caught up in the moment and continue the debate just for the sake of arguing. Ask the holdout if they will lose sleep if the group moves forward with the proposed resolution. Refer back to the definition of support, and ask if they will support the decision.

With consensus, there is often compromise. Not everyone gets everything they want out of the final decision. However, because you created an environment where everyone has had an opportunity for input, the decisions reached are often ones that will be very successful and highly supported.

Great facilitators are not born overnight. They develop and improve over years of experience. The most experienced facilitators know that the best way to get better is to ask for feedback.

13. Document and publish the Who-What-Whens. Who-What-When action items are leading indicators of successful meeting outcomes. How often do teams meet, discuss and debate critical topics, then set the next meeting date only to discover at the next meeting that no progress has been made? It is critical that you, as the facilitator, ensure that every critical discussion ends in a documented action captured in an action list of Who is accountable (one person only), What they will do and When it will be completed. Create a habit of ending meetings with a review of the Who-What-Whens and begin following meetings with confirmation on completion of the actions assigned.

14. Finish strong. People won't always remember what you do or say, but they will always remember how you made them feel, and what they will remember most is how they felt at the end of the meeting. Whether you completed every objective you laid out or worked all the way through the agenda, it's important to recognize the accomplishments of the team and celebrate their focus, contribution, time invested and hard work. Finish the meeting by recapping the decisions made, reviewing the actions committed to and confirming the next steps. We also recommend you give everyone a chance to share how they are feeling as they leave. You can go around the room and ask each person to share one closing phrase/statement or share one takeaway/breakthrough they gained during the meeting.

15. Ask for feedback. Great facilitators are not born overnight. They develop and improve over years of experience. The most experienced facilitators know that the best way to get better is to ask for feedback. You can ask the team before they leave to write down one bright spot from the meeting and one area to work on or do differently next time. You can email everyone after the session asking for feedback, or you ask for a quick one-on-one conversation from a few trusted advisors in the room. You want to encourage feedback on the agenda, pre-session communication, design of the day and homework, as well as how you performed and handled difficult situations during the session.

No matter how you choose to receive feedback, take it seriously. Don't take it personally or complain to others about it. All feedback, even negative feedback, is a gift. Thank the person who shared with you and make every effort to incorporate all helpful suggestions into your next session. Stay encouraged, and stick with it. You will get better every time you facilitate, so volunteer and look for opportunities to practice. Over time, the tips in this guide will become second nature. Good luck!



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TO 90+ primarily through

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