

ESSENTIAL MEETING TOOLS

Agenda

Structured time and sequence of topics for the meeting.

Groundrules

Ground rules or meeting norms are often used to help groups establish guidelines for participation. They are a set of agreements, which help participants create cooperative and supportive environments. Using groundrules effectively can also give greater authority and effectiveness to the facilitator

Futures

List of issues and topics that may be out of scope of current meeting and may be addressed at future meetings

Actions

List of actions agreed to during the meeting. Each action must include the “who” and “when” to ensure accountability, clarity and results

Parking Lot

Temporary holding place for topics and issues that are “off subject” from the current conversation. Parking Lot should be revisited later in the meeting and some parking lot items may be discussed at a later point in the meeting.

Meeting Record Sheet

Simple documentation of meeting content and results. Essential to maintain continuity, accountability and “group memory”

Important Meeting Tips

To use ground rules:

- Have participants develop them together if possible.
- Post ground rules on a flip chart paper.
- Ensure entire group agrees to follow the ground rules. Get explicit agreement.
- Gain permission from the group to enforce the ground rules as facilitator.
- Encourage participants to self-enforce ground rules.

Commonly used Ground Rules:

- Use I statements
- One conversation at a time
- One topic at a time
- Respectful communication
- Take care of yourself
- Seek to understand, then be understood
- Share relevant information
- Stay full engaged to the end
- Focus on interests, not positions
- Be on time; start on time, end on time

Turn off cell phones (or other rules around technological interruptions)

Effective Charting Techniques

The use of charting techniques helps people visually track information produced and discussed in a meeting. Writing information down allows people to feel “heard.” The use of charts also provides a visual focus point to keep the conversation on track.

Tips for charting include:

- Write exactly what people say. Get permission to abbreviate/substitute.
- Use dark colors for text (black, blue, green, brown). Highlight with bright colors or light colors.
- Keep letters one to two inches high. Print as clearly as you can.
- Alternate colors from line to line. No more than 3 colors per page.
- Keep drawings simple. Use arrows, circles, and underlines.
- Pre-tear pieces of tape—or better yet, use Post-it type flip chart paper.
- Rip with confidence.
- Post only the charts you need to refer to later. Be aware of visual overload.
- Keep a “Parking Lot” and/or “Future’s List” to record important ideas which are out of the day’s meeting scope. This allows those issues to retain importance without sidetracking the day’s agenda.

Meeting Space

- Be aware of the impact of the physical space and the set up. The room itself serves as an actor in the meeting.
- Room size, windows, natural or artificial light affect people's energy level and thought processes.
- Think of your room as a container for conversations: large open spaces will engender more large open conversations.
- Small tight rooms will compliment tight closed conversations.
- Plan your room for your conversation. For example, meeting outside in the open air, will produce very different conversations than meeting in a tight room standing up. A quick "update meeting" is more conducive to a tight space, while a philosophical brainstorming meeting would benefit more from a wide open outdoor type space.
- If you are going to use flip charts and/or other visual aids, be sure the space can accommodate these needs.

Room Set Up

- How the room is set up and arranged affect how the participants engage each other.
- The meeting space must allow for people to engage and hear each other.
- The most intimate meeting space is a closed circle of chairs.
- The least intimate meeting space is auditorium style.
- A U-shaped space allows all participants to see and engage with each other. This set-up works well for many meetings and is favored by many facilitators.
- A large conference table may add formality and structure to your meeting and may stifle participation.
- Several round tables aid the use of small group/large group conversation tools.
- Use your experience of different room set-ups to guide your room arrangement decisions.

Room Energy Management

- Time of day is an important consideration. People are generally more alert and active in the morning.
- People are more likely to be sluggish after lunch. Plan and design your meeting accordingly. If you are meeting after lunch, ensure the topic and/or the conversation tool provides enough energy to combat after lunch fatigue. The use of an icebreaker or other energizer after lunch also works well.
- Low energy. When energy is low, get people up and moving. Put people into small groups. Conduct part of the meeting standing up. Have people write things on flip charts. Take a break. Conduct an energizer. Lead a brainstorming session. Check-in with the group—is energy low because the topic is wrong?