

Practical tips and tools for engaging meetings

Most facilitators will tell you that there is little facilitation can't do, and they are right. For nearly half a century, facilitation has been used to solve problems, be more creative, see eye to eye, develop action plans, and much more. It is easy to imagine how you can benefit from using facilitation. Most facilitators will also tell you that you should use facilitation tools and methods in your work; they are right about this, too. But when you imagine doing it, it might feel impossible. When should you use facilitation, and how should you interpret the general idea of *applying facilitation*? After all, facilitation is made up of tools, methods, and ideas. Before we can use facilitation in our work, we need to be more specific. We can first identify a problem, an interpersonal conflict between two workers, for example, and then begin to think about how we can use facilitation tools to solve the issue. Another approach is to focus on the desired outcome and then go through facilitation tools to use.

This guidebook will take a different approach by demonstrating how facilitation can be used during various points of the working day. You will see how you can apply facilitation:

- **To prepare for a meeting**
- **At the beginning of a meeting**
- **As a core meeting tool (building a meeting around facilitation)**
- **To end a meeting**

Before we go any further, we must spend a minute discussing the terms used in this guidebook. First, you will see the terms *facilitator* and *group leader* used interchangeably. We also use the term, *leader*. Also, some case studies talk about planning a workshop, while others mention meetings. The tools and methods presented here work for meetings and workshops, and are valuable to anyone who wants to work effectively with groups.

1

Applying facilitation to prepare for a meeting

The work starts before a meeting does. You can implement facilitation before a specific session begins. This helps you prepare yourself, and it also can help prepare the group you are working with. What do I mean? A good facilitator makes sure people feel relaxed in their meetings.

To do this, you must prepare for your meetings ahead of time. You must identify the meeting objective and choose group tools to help people participate effectively in the meeting to reach the objectives. As a group leader, you must remember one of facilitative

leadership's most important rules: focus on the process. Focusing on the process will allow you to guide people through any distractions and uncertainties that may arise, freeing up the group's energy and brainpower to focus on the task at hand. All the leader's responsibilities are related to the process of the meeting—tool selection, time allocation and so on—while the content of the meeting (ideas, decisions, breakthroughs, etc.) is left to the participants.

An experienced facilitator will keep the following factors in mind when they are planning a meeting:

- **Time constraints:** How much time is there for the meeting? Some facilitation tools only take a few minutes, while others can take hours. Identify how long the meeting will be, and then choose tools that will work within those time constraints.
- **Group size:** How many people are going to be attending the meeting? Most tools can be adjusted for use with a few people to a few dozen (or hundreds of people in some cases), but you will want to have a rough idea of how many attendees there will be so you can be prepared. Many facilitation tools require participants to break into small groups to chat and write down ideas, so be prepared to

have enough space and materials for everyone.

- **Required information for participants**
pre-meeting: Do people need to know anything or review materials before the meeting starts? Should they have an idea of the meeting topic or come prepared in any way? Sometimes, to save time, a facilitator will provide a topic and any meeting materials when sending the meeting invitations out. This way, participants can review this information on their own time, and the meeting can focus on discussion instead of reviewing information together.

Preparing a group before a meeting is especially important for virtual meetings. The cornerstones of preparation for virtual meetings are planning and scheduling the process, selecting tools and planning your presentation, and being familiar with the technology. Has everyone attending the meeting used the virtual meeting software before? Do they have all the hardware needed to connect to the virtual meeting? It is a good idea to remind people to check into the virtual meeting a bit early to avoid spending a lot of the meeting time troubleshooting technical issues. Also, be sure that the meeting software has everything you need. For example, does it have the necessary options for dividing the group into small

groups, each with its own chat room? Does it have built-in activation activities? By checking the technology, you become familiar with it and can quickly solve any problems that may occur during the meeting.

2

Applying facilitation to start a meeting

Think back to a meeting that you have attended. More specifically, an important meeting that you were a part of. Perhaps it was a strategy session where people needed to outline important company policies. Or maybe it was a meeting to negotiate a new contract. Have you thought of a meeting yet? The meeting you are thinking of probably had a serious feeling to it. After all, important topics like contract negotiation deserve to be taken seriously. How would you feel if this very serious, important meeting began with a game requiring you to chat about your favourite candy? Or debate where the best vacation spot in the world is? How about if you started this very serious meeting by playing with Lego toy building blocks? That might sound strange, but believe it or not, these are examples of warm-up activities that facilitators can use to begin a meeting.

A warm-up activity (also called warm-up tools) is designed to get people relaxed and in the right frame of mind for the rest of the meeting. Warm-up activities are also known as *Icebreakers*, a name which comes from the phrase "to break the ice". This phrase means to eliminate any tension or awkwardness between two people who do not know each other very well, and this is precisely what warm-up activities do. They get folks comfortable with chatting with each other. This is very important to most facilitators because most core facilitation tools require people to work in groups, so people must be as comfortable as possible. Since facilitators are focused on the process of a meeting, getting participants comfortable and engaged is key, so it is easy to understand why warm-up activities are so popular with facilitators. There are hundreds and hundreds of group warm-up activities to choose from, and most only take around fifteen or twenty minutes, so they are easy to integrate into your meetings. If you are struggling to find opportunities to apply facilitation to your work, using warm-up activities would be a great way to start. Let's look at a few different warm-up activities and how they work.

Hello

Hello is a tool created by Sivasailam Thiagarajan, who commonly goes by the name Thiagi. He has created dozens, if not

hundreds, of warm-up tools and games that make meetings and work more fun and playful.

Hello is an excellent warm-up to use for several reasons. First, it gathers a lot of information related to the workshop. You can begin a session with serious topics, and it is still engaging because it is so fast-paced and chaotic. People are forced to work in teams to decide how to pull off the task of interviewing the entire room. It also gets people to connect right off the bat. It is not a tool for deep discussion, but it opens people up and gets them focused on the topics and themes of the day. The questions can be adjusted to the situation, and fun questions, like, *What is the meaning of life?*, can be mixed in to keep things light. There are some questions that you should consider using all the time:

- **Why are we here?**
- **Who are the people here?**
- **How do the participants feel today?**

The remaining questions are a mixture of light-hearted questions and questions that relate to the current meeting. For example, if the topic of the meeting is developing values,

you would ask about personal values, company values, when values are important, and so on. Some people do not like the Hello activity, and if you run enough workshops, you will come across them sooner or later. Hello is challenging for those who don't like chaos. The allotted amount of time given during Hello will always be less than what is needed to interview and talk with everyone. This is by design but can cause participants to become frustrated or think that the activity is poorly designed or that you do not know what you are doing as a group leader. Nevertheless, it is an excellent tool for connecting and focusing participants. If someone does not like a specific part of a meeting, they will not have to wait long for a new stage to begin, complete with new tools and ways of working.

Hello (interviews)

Hello is a tool for collecting information quickly, e.g., about the topic to be discussed during the meeting. The method also helps people to get to know each other.

1. Division into small groups with assigned questions

Divide the group and give each small group a question. The task of the small groups is to make a mini-survey about the topic assigned to them by interviewing all participants. Prepare the topics beforehand. Try using both easy / funny questions as well as questions about the day's topic.

For instance:

- Expectations?
- Experience with the topic?
- How do the participants feel today?
- Vacation plans?



2. Quick preparation for the interviews

Assign roughly 3 min for the groups to prepare themselves for conducting the interviews (for the groups to think how they are going to interview all participants).

3. Quick interviews

Depending on the size of the group, assign between 3–7 min for conducting the interviews. The aim is that all participants are interviewed for all topics (including the members of one's own group).

4. Analysing and documenting information

Participants meet with their small group members and document the gathered info on a flipchart to be presented to the others (around 3–4 min time).

5. Presentations

Each small group presents their findings (around 30 seconds per presentation).

Morning Walk

Morning Walk is a tool that gets people energised and moving around as they discuss a mix of questions. It's important to move around a bit before a long meeting that will require people to sit for a long while. Morning Walk also has people talk in pairs, which is less intimidating than speaking in larger groups.

Morning Walk

How it works

Participants start to walk around the meeting room. The leader gives a sign when participants need to find a partner to talk to. The leader assigns the discussion topic, and the pairs discuss for 2 minutes. To be repeated 2–3 times.

Examples of questions:

- How was your morning?
- What energises you?
- What are your expectations for this meeting?

Purpose

- Walking is energising; participants tune in to the event better by moving than being static in their chairs.
- It is recommended to let the participants talk about an easy topic first. Afterwards, it is easier for them to start discussing the actual meeting topics.
- It's easier to speak in pairs than it is in front of a large group. This makes Morning Walk a good warm-up activity.

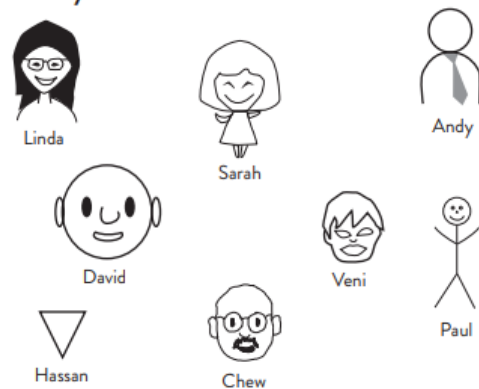


Virtual warm-up activities

Make sure to use a warm-up activity if you are leading virtual meetings. Most people become disengaged more quickly in virtual meetings than they would in person, so it is important to have exciting activities for them. When leading a virtual meeting, it is best to start with a dynamic warm-up. This can be a game to get people thinking or a conversation in small groups to get people to talk to each other. After the group is activated, the meeting leader can proceed with the agenda

and monitor how engaged everyone is. If people seem impatient or distracted, give the group a short break or start a new activity to draw them back into the workshop. In virtual meetings, you can utilise the meeting technology to your advantage. Most meeting software programs come with a shared virtual whiteboard loaded with features. It is an excellent piece of technology, and you can do all sorts of things with it, including using smileys and voting icons, polling, drawing, and writing. Use these techniques to ensure the group is paying attention and to refocus participants. The virtual meeting tools make activities like Self-Portrait possible. Self-portrait is an activity that is used at the beginning of virtual workshops. It asks participants to draw themselves using the virtual meeting software and write their names next to their drawings. This tool provides a buffer of time for people to troubleshoot their technology or log into the meeting if they are running late. As people draw their portraits using the meeting software, they get used to the technology and learn how to use it, which will come in handy throughout the virtual meeting. Once everyone has drawn themselves, they can give a brief presentation of their work of art and introduce themselves to the rest of the group.

Draw a self-portrait of yourself in a creative mood and write your name next to it.



When planning your next meeting, don't look at warm-up activities as an optional "we'll do it if we have time" activity. They are much more important than that. They set the stage for the rest of the session by getting participants comfortable and talking with each other. You can even use warm-ups to introduce serious topics that will be covered later in the meeting. For example, you can have people discuss their expectations for the day in small groups to familiarise them with the content and what's to come later.



3

Facilitation concepts make up the core of meetings

So far, we've seen bite-sized examples of using facilitation before a meeting to prepare a group and then as a warm-up activity. There are also larger facilitation concepts that you should keep in mind when looking at the big picture. These concepts will influence the entire structure of your meeting, what tools you choose, and the order of activities. These concepts aren't something you apply at a specific. Instead, they are being applied all the time.

4

Principal one: emergent and convergent thinking

To apply facilitation correctly, you need to account for two ways of thinking: emergent thinking and convergent thinking (also known as emergence and convergence). You account for these by using group tools that focus on

emergent thinking and group tools that promote convergent thinking.

Emergent and convergent thinking modes



Emergence occurs when ideas are created, explored, understood, developed, merged, and rejected. The result of emergence is a common understanding of the best ideas and their logic—the ideas that survive people's resistance and scepticism become obvious options. Sometimes one breakthrough idea is so strong and overwhelming that it kills all other options, while sometimes, there are several breakthroughs or simply potential ones. The convergence phase is when ideas are logically inspected, often keeping implementation and practicality in mind.

Convergent thinking is for comparing ideas and deciding which are the best of the bunch. This creates a new type of discussion around the ideas—often more profound and sometimes longer than during the emergence phase. The outcome of the convergence phase is a choice.

Emergence always comes before convergence. This order is always the same. The group leader can use their understanding of emergence and convergence to choose the right tools and modify the workshop plan as

needed. Creating the perfect plan for breakthrough decision-making is all about balancing the two modes of thinking. Depending on the group's need, you may want to spend more time on emergence or perhaps more time on convergence. They may decide that equal time for each mode is best. If the priority is creativity and understanding of ideas, then I give more time to emergence. If a strong commitment to ideas is most important, spend more time using convergent tools. The group leader must understand these phases and their purpose in order to plan and execute effective meetings.

Emergence is the phase where people begin to share their reasoning and interest in the shared ideas. This begins the process of group members understanding each other. During emergence, ideas are shared, understood, and combined, which creates something new. Some ideas transform into new concepts, while others naturally die off and are discarded. A successful emergent phase involves people looking at the logic and reasoning that support or weaken an idea. Why was the idea suggested in the first place? What are the goals and beliefs tied to this idea? When someone explores and understands the pros and cons of an idea, they become connected to it and can make it their own by further developing it or using it as inspiration to create a new idea. As you lead a group through emergence, you might observe one major breakthrough, such as the

creation of a new idea that everyone loves, or there may be several smaller breakthroughs when people come to understand other frameworks and perspectives. People and organisations are full of ideas that have never been adequately discussed.

Emergence is the phase where people share their ideas, logic and assumptions with each other; ideas gain acceptance (or die) and ideas are combined to create breakthroughs.

Some emergent tools you can try are Ideologue and Dynamic Facilitation, to name a few.

Emergent tools for dealing with one question

Basic tools

- Listing

Tools for better communication

- Me/We/Us
- Ideologue

Tools for dealing with emotions and conflict

- Dynamic Facilitation



Convergence

Convergence is about making a choice. It is where ideas are compared, and their future impact and potential are explored. If there is one piece of wisdom to gain from this book, it is about the importance of spending adequate time on convergence. There are many people capable of leading a group to create ideas. Classical brainstorming is an excellent tool for this, and it is not a tricky tool to use. The challenge is getting an entire group aligned and committed to the ideas.

Convergence is the phase where people compare ideas and make a choice.

Convergent tools can be used to align priorities. Some tools are suitable for dealing with one topic, while other convergent tools can deal with multiple topics simultaneously. It is up to you to identify how many simultaneous topics or questions are being covered and then choose the right tool for the job.

Convergent tools for aligning priorities

Basic tools

- Prioritising individually
- Silent Moving

Tools for better communication

- Me/We/Us
- Me/We/We..../Us



Convergent tools for aligning priorities with multiple simultaneous questions

Basic tools

- Prioritising individually
- Silent Moving

Tools for better communication

- Me/We/Us
- Me/We/We...Us
- Bus Stop (rotating sets of solutions between small groups and prioritising)
- Group Ranking (rotating sets of solutions between small groups and ranking)



To be a great leader, you need to know how to use quite a few different group tools, and you also will need to know when to apply them. By having a wide selection in your toolbox, you can design meetings that achieve a variety of objectives and fit different time constraints.

Choose the right tools

- The group leader knows how to use both emergent and convergent tools. They can pick the right tool to match the group's needs and they can select tools that fit the available amount of time.



One common mistake people make when applying facilitation is using too many tools. They try to be overly thorough to guarantee they meet the workshop objectives. This results in leading a group through repeated activities that do the same thing. In addition, using too many tools can make things cluttered, making the later stages of the workshop less effective. Think carefully about what each tool provides and where to use it. By reviewing these things beforehand, you can avoid misusing tools or using redundant tools.

When you put it all together, using facilitation as a guiding force to plan a workshop, it can look something like this sample goal-setting workshop, shown below:

(Continues in next page)



Workshop process: Clarifying goals

Objective: To find the key elements of a common goal

Time: 60 minutes

Intro (5 minutes)

Presenting the objective and what a common goal looks like

Check-in tool: Pair discussion (5 minutes)

1. Find a pleasant person and discuss why you are here today.
2. Now I would like three of you to comment, whether the objective is right.

Emergence tools: Me/We/Us and Wishing (20 minutes)

1. Write down wishes, it would be great if we....
2. In groups of four participants create 2–4 key wishes.
3. Write your ideas on jumbo Post-it notes with big letters.
4. Post and check if ideas are understood.

Convergence tools: Me/We/Us, Dartboard, and Dot Voting (20 minutes)

1. Think on your own and choose your favorite goals (3–5 years perspective).
2. In new groups of three, influence each other.
3. In silence move the Post-it notes on the right place on the dartboard... Everyone can move the Post-it notes whenever they feel like. When the Post-it notes do not move anymore, we are ready.
4. Take three stickers and place them on key goals

Check-out: Pair discussion (8 minutes)

1. Find a pleasant person next to you and discuss whether we reached the objective.
2. Now I would like three of you to comment.

Final Check-out: "Is everyone happy?" (2 minutes)

The sample workshop above contains all elements of applying facilitation that have been presented so far—creating such a plan requires the group leader to plan ahead and build the workshop well before it begins.

5

Applying facilitation to end a meeting

Applying facilitation techniques like polling or group memory to end your meetings is important. It will ensure that the progress and

breakthroughs during the meetings last longer than the meeting itself.

One way to apply facilitation to the end of your meeting is to use a polling tool. Polling is asking the group to vote on something. There are many ways to do this. Countless books on group voting and polling tools have been published, and quite a few well-known businesspeople claim these tools as their calling cards. One popular tool is Dot Voting, which looks like this. You are handed three (or five or ten...) dots and instructed to place them next to your favourite ideas within a minute.

Dot Voting

- A tool used to visualise group priorities
- A convergence tool
- Quick to set up and use

Dot Voting seems like a reasonable way to poll a group, right? It can be, but only if the session had a dedicated and developed time for evaluating the options before. Simply polling will show us where the group is at a given moment but is not enough to create understanding about why the ideas should be chosen or to create a commitment to execute the ideas. The results of Dot Voting (or other similar polling tools) are incomplete without the time for discussing and understanding the content.

No matter how good a workshop feels in the moment or how happy the participants seem

with the results, it would be best if you always asked people to share some feedback on how they felt the meeting went. You can ask a few volunteers to share their thoughts, or you can use a group feedback tool, like Talking Stick, to collect feedback.

The rules of Talking Stick are simple; the only person who can talk is the one holding the talking stick. Once they are finished, they pass the stick on to the next person. You can cut the activity short after a few people have spoken, or you can decide to let the talking stick work its way all around the room, giving everyone a chance to speak. Don't have a stick? That's OK. You can use a talking ball, talking cup of coffee, pen, anything you like.

Talking Stick

- This method borrows from an old Native American tradition and lets everyone share something about their experience or feelings regarding the meeting. Talking Stick isn't meant for giving long speeches or an individual's conclusions, but rather short comments about personal experience.
- Everyone gets to say something. In a smaller group the stick can move clock-wise from person to person. In a bigger group, the eager ones can start the discussion by saying something. You can use a small object like a microphone as the talking stick.
- The amount of time needed for implementing this tool depends on the number of participants, but you shouldn't use more than 30 minutes. It is good to plan your check-out to ensure that the energy level rises instead of drops. Try doing Talking Stick by standing in a circle.



If you want to collect feedback quickly at the end of a meeting, you can use a tool called Five Fingers. This tool asks participants to put one to five fingers in the air to show how much they agree with a statement. You can use Five Fingers at any point during a meeting,

which is an excellent way to quickly assess how a group feels.

Five Fingers

A voting tool where a value is assigned to each finger, which creates a scale of feedback, that can express anything ranging from strong dislike to strong support.

The following instructions can be used to introduce Five Fingers:

- Put 1 finger in the air if you really don't like this idea
- Put 2 fingers in the air if you don't like this idea
- Put 3 fingers in the air if this idea is OK
- Put 4 fingers in the air if you like this idea
- Put 5 fingers in the air if you really like this idea



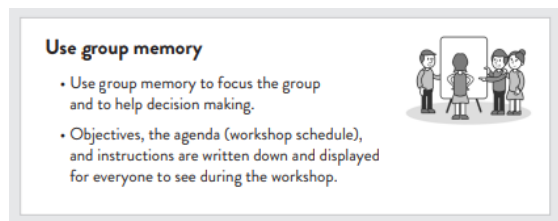
You may take the temperature of a group by using Five Fingers to get feedback about a proposal, plan, idea, etc.

6

Use Group Memory to visualise your process throughout your meetings

A simple facilitation technique that applies to the beginning, middle and end of your meetings is called Group Memory. Group memory is an ongoing record of the work a group produces during a workshop or meeting. To use group memory, you need to display ideas and other essential pieces of information in the workspace so everyone can always see them. Group memory is something anyone can master. It does not require any special skills or attributes, yet I see people

mess this up again and again. Using group memory to visualise ideas helps people focus on decision-making as they can see the subject matter right in front of them, and they are reminded of the task at hand. It also helps the decision-making process because the group can simultaneously keep track of multiple ideas, expanding their brain capacity.



You also need to visualise the instructions for each group tool you use. Write them down large enough for everyone to see. If your instructions are unclear or ambiguous, you can cause disarray and disorder in the group, and if a few people lose focus, this spreads within the larger group, and soon the leader has a real problem on their hands. Be sure to come to your meetings with the materials needed for Group Memory. Some companies will provide a space with a large whiteboard or projector, which makes using Group Memory easy. But sometimes, you will have to make do with your own materials. Bring a flipchart or jumbo Post-it notes and tape so that you are prepared for anything.

7

What's next?

By now, you have seen how to use facilitation throughout the whole meeting process. You have a few tools in your toolbox to use the next time you lead a meeting, and you are now familiar with some facilitation concepts like emergence and convergence that you should keep in mind when planning meetings. But believe it or not, the tools and concepts presented here barely scratch the surface of what facilitation has to offer. So have fun practising the tools and techniques presented here, but also stay hungry to learn more about facilitation—there is much more to learn!

Writer

Pepe is a trailblazer of facilitation in Finland. He is the first certified professional facilitator in the country, one of the founders of Grape People – Finland's first company focusing on facilitation – the inaugural chairman of the Finnish Association of Facilitators, developer of the Idealogue method, and author of the first Finnish books on facilitation and virtual facilitation.



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