

Meetings That Get Results

A Facilitator's Guide to Building Better Meetings

by **Terrence Metz**

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THAT GET
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THE SUMMARY IN BRIEF

There's nothing more frustrating than an unproductive meeting—except when it leads to another unproductive meeting. Yet, every day millions of people conduct meetings—in person or online—without the critical understanding or formal training on how to plan and lead them effectively.

Meetings That Get Results offers a structured method to ensure that meetings will produce clear and actionable results. Meetings that are profitable and productive ultimately lead to fewer meetings. This book offers a significant edge by empowering readers to help their groups create, innovate, and break through the barriers of miscommunication, politics, and intolerance; shows how to help others forge consensus and shared understanding; and offers proven agenda steps, tools, and detailed procedures.

In a world of back-to-back meetings, *Meetings That Get Results* explains the how-to details behind game-changing tools and techniques. Ultimately readers will be able to resolve or manage common problems, inspire creativity, and transfer ownership to their meeting participants.

IN THIS SUMMARY, YOU WILL LEARN:

- Why great meeting facilitators are servant leaders.
- Three essential communication skills for meeting facilitation.
- Easy steps for structuring and designing effective meetings.
- Detailed strategies for planning and making decisions.

Introduction: Launching

In a world of back-to-back meetings, you barely have time to find the right resources and training to become a better leader. Yet, while you would not attempt to build a boat without the proper training, equipment, and support, every day millions of people are conducting meetings without critical understanding of or formal training on how to be an effective meeting leader in person or online.

Rarely do events, meetings, or workshops proceed in a linear fashion. They don't just "start here" and then "end there." Rather, they continually loop and twirl—for reasons such as these:

- Someone joins the meeting late, online or in person.
- A subject matter expert gets called away unexpectedly and upon return discovers that some critical information was not included.
- You are asked to go back and add something.
- Someone changes her mind because her introspection has found a connection between a few things previously not considered.
- Two people start arguing because they refuse to agree with each other based on "principle."
- You need to fully define something.
- You do a poor job handling participants' electronic leashes (cell phones, laptops, etc.), and when every one wakes up, they quickly unravel what has already been accomplished.

Making It Easy

Business facilitation is a method that removes all distractions, making it easy or attainable for a group of experts to gain traction by focusing on the same question at the same time, led by a meeting facilitator who knows how to sequence questions, ask questions with precision, and guide consensual understanding and agreement around optimal solutions for that specific group of experts.

When a group of subject matter experts manages to stay focused, miracles can happen. What follows is a method for managing anything that develops or erupts during your meetings. It will make it easier for you to be a credible meeting leader and meeting facilitator when leading diverse types of meeting sessions, for all types of groups, organizations, teams, and tribes.

Serving: Discipline of Servant Leadership

In most organizations, change begins during meetings. The problem is that meetings often fail for one of three reasons:

- The wrong people are attending (rare).
- The right people attend but are apathetic and don't care (rarest).
- The right people care, but they don't know how to conduct an effective meeting (bazinga!).

In recent centuries we relied on executives and managers for their experience and machine knowledge. As leaders, they told us what to do. Today's complex knowledge base and knowledge transfer technique, however, require a new breed of servant leaders. Most of them are trained to avoid problems attributable to weak meeting leadership, poor facilitation, and lack of meeting design. This new breed is not a person but a role—the role of the meeting facilitator.

The Servant Leader Solution

As a servant leader and meeting facilitator, you become the change agent, someone who takes meeting participants from where they are at the beginning of the meeting to where they need to be at the conclusion. All leaders must know where they are going. They must know what the group is intending to build, decide, or leave with when the meeting is done. Effective servant leaders also start with the end in mind.

A neutral meeting leader values rigorous preparation, anticipates group dynamics, and designs the meeting accordingly. The meeting leader becomes responsible for managing the entire approach—the agenda, the ground rules, the flow of conversations, and so on—but not the content developed during the meeting.

Facilitation Liberates Leaders

In the past, leaders needed to be experts on content. Today, organizations already employ and engage a wealth of subject matter experts. What organizations need are leaders who know how to be facilitative while managing context. In the past, leadership was about giving answers. Today, leadership is about asking precise and properly sequenced questions while always providing a safe environment for everyone's response.

Imagine the following scenario: Your team is tasked with developing a plan to solve the problem of employee burnout in the cybersecurity department. To assess the value of

Mastering three concepts will enable you to lead any group in any type of situation.

proposed solutions, the team needs to know the purpose of the cybersecurity department—why it exists.

A “presenter” might access the cybersecurity department charter from human resources. In most organizations, this task would take from 15 minutes to five hours or longer. Then the presenter might spend another 15 minutes putting together PowerPoint slides and then take five minutes to present the slides and another 10 to 20 minutes to manage questions and answers about content on the slides. Call it one hour total, minimum. At the conclusion, the presenter owns the content on the slides.

Alternatively, you, as the meeting leader, can use a procedure, such as the Purpose Tool (explained further below). The Purpose Tool distills a consensual expression about the purpose of the cybersecurity department directly from the subject matter experts who understand both the purpose and the problems in the department today. In 15 minutes or less, you can lead the team to build an expression of shared purpose using the Purpose Tool. Most important, at the end of the 15 minutes, the meeting participants, not you, own the results.

Leading: Be a Servant, Not a Senator

Clear leadership consciousness integrates the why, what, and how. Exceptional meeting leadership also requires keen awareness and the ability to describe to participants where they are going (so they know what “done” looks like); why the meeting is important (if it is not, it should not take place); what questions they need to answer and in what sequence; meeting roles and rules, leading to who does what; planned activities and procedures, leading to how participants will get done.

Mastering three concepts will enable you to lead any group in any type of situation:

- The holarchy, or graphical view, operating throughout an organization.
- The trichotomy, or first-cut analytical method, for applying structure that immediately divides complex issues into three manageable portions.

- The meeting roles that must be respected because you want subject matter experts to strive for objectivity and, therefore, leave their egos and titles in the hallway.

Holarchy: It begins with DONE. In his book *Holism and Evolution*, Smuts defined holism as “the tendency in nature to form wholes that are greater than the sum of the parts through creative evolution.” In a holarchy, each cell is both a whole and a part; systems are nested within one another.

An effective leader begins by documenting the meeting objectives, frequently called deliverables. To understand the value of a deliverable, it should be viewed with respect to its impact on all other objectives of an organization, as part of the organizational holarchy. The organizational holarchy represents the web of interdependent connections throughout an organization. The holarchy represents the unity of all the objectives, from business units to answers developed in meetings.

Understanding the organizational holarchy requires one to “begin with the end in mind,” as Steven Covey put it. If actions taken or decisions made within an organization do not harmonize with the organization’s purpose, stay within the organization’s scope, and support the organization’s objectives, the actions or decisions are unwarranted. For this reason, before we begin our meeting, we need to know what DONE looks like. In other words, where are we going?

Trichotomy: Foundation of structure. The structure of trichotomy helps you break down complex issues into manageable pieces. Structure begins with the trichotomy as a function of will, wisdom, and activity. In sequence, the trichotomy of meeting discipline fundamentally looks like this:

- **Will:** Why is something important (abstract thoughts)?
- **Wisdom:** What are we going to do to support it (transformation of the abstract into the concrete)?
- **Activity:** How are we going to get it done (clear and concrete actions and results)?

Become a disciplined leader by applying structure before

your meeting begins. Once you develop awareness about where and why you are leading a group, apply critical thinking and discipline to understand what is needed. Then you can determine how you are going to lead a group to build it consensually.

Consciousness: Meeting roles. Effective meeting leaders frequently perform four roles. When all four roles are performed by one individual, it makes that person much, much more than a facilitator; that person becomes the meeting leader. The four roles include these:

- Meeting coordinator (reserving meeting rooms and arranging for coordination, refreshments, supplies, and travel).
- Meeting documenter (documenting outputs and inflection points, not verbatim conversations; distributing meeting notes; managing edits, document versioning, and archiving).
- Meeting facilitator (conducts meetings; diplomatically channels diverse ideas into meaningful action; directs groups toward shared purpose and objectives; galvanizes consensus while remaining resilient about managing uncertainty and other open issues).
- Meeting designer (helps stakeholders codify deliverables and draft agenda steps; develops succinct questions to be answered; structures the sequence of questions; specifies tools and procedures for converting answers into final form such as a decision, plan, recommended solution, and so on).

Facilitating: Making It Easier with Three Core Skills

There are three core skills for meeting leaders who value facilitation, servant leadership, and getting DONE faster (structure). As meeting facilitator, you need to command these core skills but, at the same time, remember to always reduce or eliminate distractions so that your group stays focused.

Speaking and questioning clearly. Clarity represents the extent to which a speaker's intent secures the understanding they seek. Unfortunately, numerous filters and obstacles stand between a speaker's intent and a listener's understanding, such as biases and prejudices, perceptual challenges, speaking mannerisms, technology hiccups, vague word choice (lack of rhetorical precision).

Strive for precision, especially with your questions. For

example, "Under what circumstances . . . ?" is immediately more effective than "Are there any circumstances . . . ?" In addition, "Who would like to share their thoughts . . . ?" does not compel a detailed response as well as "What are the arguments supporting [or against] . . . ?"

Actively listening and observing constantly. For servant leadership and effective facilitation, active listening becomes indispensable. As a practitioner, you will discover that feeding back (reflecting, restating) what the participant said never compares to the value of understanding and sharing why they said it.

People don't care what you know until they know that you care. Genuine active listening connotes empathy and requires four activities:

- Contact—Connect with the participant who is speaking. Make eye contact. Maintain an open posture.
- Absorb—Take in all aspects of what is being said. Do not judge or evaluate.
- Reflective feedback—Mirror, reflect, or give feedback about what you have heard and why the participant's claims are valid.
- Confirm—Obtain confirmation that you heard the participant's message accurately. If not, start the sequence over again at the beginning by having the participant restate his or her view.

Remaining neutral and controlling context without fail. Neutrality may be your most significant challenge, but it is also a defense mechanism. Being neutral means letting go of the "I," the ego, a personal stake in the specific output of a meeting. Neutrality means staying focused on the Meeting Approach, not a specific solution.

Neutrality represents a discipline that does the following:

- Conveys acceptance of opposing views.
- Draws out quiet people and perspectives.
- Prevents facilitator alignment with "sides."
- Validates the Meeting Approach.

Collaborating: How You Manage Conflict

Meeting conflict derives primarily from individual thinking styles, individual behavior, group dynamics, and oth-

er situational factors, including the facilitator and their environment. The meeting facilitator is not responsible for resolving conflict. However, they must have a procedure for (and therefore be confident about) managing arguments, conflicting claims, and contradictory evidence.

Rules help you and the group establish decorum, keep conversations on track, and get DONE faster.

Ground Rules

Ground Rules provide norms for the behavior of groups. Rules help you and the group establish decorum, keep conversations on track, and get DONE faster. Ground Rules apply to participants equally and, therefore, are unbiased. Consider these primary ground rules:

Be here now. Encourage people to keep laptops down and phones on stun (vibrate only). Do not permit text messaging during the meeting.

Silence or absence implies consensus. As meeting facilitator, you must stress that each participant has a fiduciary responsibility. If participants have content relevant to the conversation, it is their duty and responsibility to mention it.

Consensus means “I can live with it.” Carefully define consensus so that people know it does not necessarily mean that they will get their “favorite” outcome. However, consensus does imply that we are 100 percent in agreement to support the result, though it might not be everyone’s or even anyone’s personal favorite.

Make your thinking visible. People do not think causally. They think symptomatically. For example, two people eating the same type of curry may argue over how “spicy” it is. To one, the curry is hot. To the other, it is not. They are both correct. A great meeting facilitator will get the two people to “objectify” their claims so that they both can agree that the curry rates 1,400 Scoville Heat Units.

No hiding. For video conferences, enforce a rule that pro-

hibits people from turning off their live video stream. When people are hidden, no one has any idea what they are doing or if they are even listening.

Conflict as Challenge and Opportunity

There is no instructional class in the world that will teach you how to facilitate a resolution to all meeting conflict, especially arguments. Sometimes, people or parties refuse to agree simply because they do not like each other. It is not your responsibility to resolve the conflict. However, you can rely on four steps to help you manage meeting conflict that frequently yield consensus:

Confirm or clarify purpose. Effective conflict resolution depends on shared purpose. Competing purposes lead to competing solutions.

Document positions and interests. When meeting conflict develops, participants may hear what was said, but they need to understand under what conditions the position holds true (and remains valid or not). Understanding the why behind their positioning requires additional challenge, leading to disclosure of their true interests.

Appeal to objectives. To help resolve conflict, learn to sequentially appeal to objectives, starting with the objectives of the product or project and then proceeding with objectives of the department or program, of the business unit, and of the entire organization that your meeting supports. If the CEO were in the meeting, which argument would he or she say better supports organizational objectives—and, more important, why?

Escalate. If the first three steps, in sequence, fail to drive consensual resolution, escalate decision-making by taking the documented positions back to the executive sponsor, steering team, or decision review board.

Structuring: Meeting Design Made Easy

No group wants the leader to ask group members how they want to proceed. They need a meeting leader prepared with the right approach and tools who will tell them how to proceed, keep them focused on the right questions, and explain how their responses support the deliverable (getting DONE).

Successful meetings demand a clear purpose (beginning), a meaningful Meeting Approach (middle), and a consensual

review and wrap (end). A Basic Agenda lists the Agenda Steps (topics to be covered) and is used by participants to track progress.

An Annotated Agenda describes in detail how the facilitator will lead the group to get DONE. Each Annotated Agenda includes a Basic Agenda but details and explains the tools used during each Agenda Step. Each tool uses procedures that a meeting facilitator unveils at appropriate times as discrete activities, questions, tasks, and visual prompts.

By using tools, each Agenda Step produces its own deliverable, such as prioritized criteria or a decision or assignments.

Use the following guidelines for every significant meeting you lead:

1. Codify the purpose and scope of the meeting:

What project or product are you supporting? Stipulate what it is worth in currency and FTP (Why is it important? How much is at risk if we fail?).

2. Articulate the deliverables: What specific content represents the output of the meeting and satisfies what DONE looks like?

3. Identify known and unknown information: What is already known about the organization, business unit, department, program, product, or project? What information is needed to fill the gaps?

4. Draft Basic Agenda Steps: Compose a series of steps from experience or other proven approaches that would be used by experts to build the plan, make the decision, solve the problem, or develop the information and consensus necessary to complete the deliverable and get DONE.

5. Review Basic Agenda for logical flow: Walk through the Agenda Steps with others to confirm that they will produce the desired results.

6. Identify meeting participants: Determine the optimal subject matter expertise you require or the meeting participants who can provide the information required.

7. Detail the procedures to capture information required: Gather and assemble specific questions that need to be addressed, even questions for which subject matter experts are seeking answers. Sequence the questions optimally. Build your Annotated Agenda, including the appropriate Tools and activities to produce the information.

8. Perform a walk-through with business experts, the

executive sponsor, project team members, and anyone else who will listen to you.

9. Refine: Make changes identified in the walk-through, edit your final Annotated Agenda, firm up your artifacts, fill out your glossary, complete your slides, distribute your handouts, and rehearse.

Planning Approach for Any Group: Who Does What, by When?

The word “plan” can be defined with three words (preferably five), namely “who does what” (by when)—that’s a plan. This section shows you how to facilitate consensual agreement around those answers for any group.

A robust Planning Approach defines vision factors, success measures, actions, and responsibilities. While a planning session’s input begins with why a group exists, the output documents what team members agree to do.

Here is a Basic Planning Agenda:

- Launch.
- Mission (why are we here?)
- Values (who are we?)
- Vision (where are we going? How do we know if we got there or not?).
- Success Measures (what are our measurements of progress?)
- Current Situation (where are we now?)
- Actions (what should we do?—from strategy through tasks).
- Alignment (is this the right stuff to do?).
- Roles and Responsibilities (who does what, by when?).
- Communications Plan (what should we tell our stakeholders?).
- Review and Wrap.

Let’s discuss the first three of these. **Launching** is when you introduce yourself and stress the importance of meeting roles; unveil your meeting purpose, scope, and deliverable; cover “administrivia” to clear participants’ heads from thinking about themselves; provide a check-in activity or icebreaker, especially for online meetings and workshops.

Values define the principles or internal rules, laws, policies, and philosophies of conduct—the “stuff” we carry with us and value.

You also carefully explain the logic behind the sequence of your Agenda Steps; explain how Agenda Steps relate to one another; and share Ground Rules.

Mission defines the why of any business area or organizational scope. Mission expresses why the participants, or group, or organization show up—the purpose and reason for their existence. The Mission expression provides the foundation upon which other Planning Approach Agenda Steps are built. Each subsequent Agenda Step refers to the Mission expression (as purpose), ensuring harmony with the Mission of the group and organization.

For example, the Ritz-Carlton’s mission is “Ladies and gentlemen serving ladies and gentlemen.”

Values define the principles or internal rules, laws, policies, and philosophies of conduct—the “stuff” we carry with us and value. They answer simply, “Who are we?”

Values may be narrative descriptions of policies or philosophies. They may be full-sentence descriptions or phrases. For example, “The Ritz-Carlton experience enlivens the senses, instills well-being, and fulfills even the unexpressed wishes and needs of our guests.”

Keep in mind that groups can identify both descriptive values (we are this way and walk the talk) and prescriptive values (hopes and aspirations). The former is associated with traditional management, while the latter is more associated with servant leadership.

Deciding About Anything Approach: Agree on the Why Before the What

Frequently you discover that people have similar purposes, values, and criteria, and yet they cannot agree. Why? People cannot agree because they have different priorities.

This section shows you how to forge consensual decisions by developing purpose, options, and decision criteria. Whether you are deciding which new software to use, which product to develop, or which corporate acquisition

will be your most valuable target, several building blocks are required for all decisions:

Purpose of the object. The purpose of the object establishes the why before the what. Understanding why is so critical to building consensus that it needs to be listed as a separate Agenda Step, even though it may take less than 10 minutes to accomplish. Use the Purpose Tool to construct a basic requirement (I want X so that I can do Y) or to build consensual expressions that capture the benefits, intent, purpose, and reason for any scope of work. Prompt your participants: “The purpose of [insert object] is to . . . so that . . .”

Options (for the Object). This is a list of options, the myriad objects from which to choose. Depending on the situation, these could range from a few (for example, half a dozen) to many (dozens). Facilitate a quick and thorough Listing with no discussion.

Decision criteria (for the object). Decision criteria capture the reasons for deselecting or getting rid of poor options. While engaging in some Listing activity associated with Brainstorming, do not mandate or enforce that “all ideas will be allowed.” Here we are restricting ourselves to appropriate reasons. Embrace the sense of “no discussion,” but also confirm appropriateness if there is any doubt.

Deselecting and decision. Deselecting and decision smash together the options and decision criteria. The result is a consensually agreed-on decision, selection, or determination of the object. Eliminate any options that do not satisfy mandatory requirements such as not exceeding budget. Eliminate any options participants personally object to after they give specific reasons for their objection and those reasons are considered valid by others.

The simplest and most frequently used PowerBalls Tool provides quick support, especially for deselecting. PowerBalls help a group quickly and simply prioritize, using the Pareto principle (also known as the 80-20 rule) to help a group deselect and eliminate as many options as quickly as possible.

Controlling: Online Challenges and Special Situation Tools

Effective online facilitation requires line of sight, listening skills, conflict management acumen, and meeting design. In fact, learning what to do remains most critical, because how you complete facilitated meetings can be easily modified once you know what to do.

The larger the group, the more your meeting facilitation skills need to keep any one person from dominating online meetings. Remember, scope creep begins in meetings.

Research and results are quite clear: You can expect online meetings to take much longer to accomplish the same amount of work than in-person meetings. Participants stay more fully engaged when they are observed, can observe others, and “feel” nonverbal clues and intonations. Moreover, 30 to 60 percent of “meaning” (the intent behind the words or message) is communicated or expressed outside of the words that are selected.

Launching

Getting and keeping people involved takes a concerted effort from start to finish. Get off to a good start by setting a good example:

- Log in first and early.
- Set camera at face height, or very slightly above (not below, looking up at rolled chins and nose hairs). Look at the green dot on the camera, not your monitor. Please smile.
- Introduce each participant to subsequent arrivals.
- Lean forward into the camera to command attention. Your head should normally occupy about 25 percent of the screen.
- Confirm early that every one can hear each other clearly.
- Provide Ground Rules and then enforce them. Add the Ground Rule “no hiding.”
- Consider assigning people separate roles to help you, such as a time-keeper or a specialized note-taker for each of the following: action items, decisions, communications about who needs to be informed what updates, and so forth.
- Establish and enforce protocol demanding that speakers announce their names (or nicknames) when taking a turn speaking.
- Regularly remind participants where you are in the agenda, preferably with a visual indicator.

We’re all connected. On occasion, our cords get knotted. World-class facilitators are servant leaders. Potent servant leaders should be facilitating, because facilitating removes knots, making it easier for connections to flow.

The first step to becoming a world-class meeting facilitator is to be a servant leader, and the first step to becoming a world-class servant leader is to become conscious of natural law and the importance of helping others remove their knots.



As a Certified Structured Professional Facilitator (CSPF), lead instructor, and managing director of MG RUSH Facilitation Training and Coaching, Terrence Metz is passionate about training students to lead meetings that produce clear and actionable results every time. His professional experience has focused on mergers, organizational design, problem solving, process improvement, product development, and strategic planning. His decision-making tools for galvanizing consensus, including Perceptual Mapping and Quantitative TO-WS Analysis, are used worldwide.

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