

MEETING FACILITATION TECHNIQUES

Anyone can host a meeting, run a brainstorming session, or collect ideas from a team. But not everyone can do it efficiently. It takes the right balance of project knowledge, team expertise, timing, tools, and—you guessed it—facilitation skills.



Before you jump into a meeting, think about what will make for a great session. These tips and techniques can help you lead successful meetings that get things done with all the right people involved.

BE PREPARED

If you want to get the most out of your session, you'll need to do some prep work. This might mean you have to spend time thinking through how the meeting will flow, what you'll present, or what questions you'll ask to ignite conversation and debate.

Need someone else on the team to take responsibility? Give them time to prepare as well. After all, there's nothing worse than attending a meeting that feels disorganized.

CREATE THE RIGHT ENVIRONMENT

Meeting space comes at a premium in many offices, and you have to be sure the room you book will accommodate the work you need to do.

Think about the space and materials you'll need to run an effective session. Here are a few things to consider:

- Whiteboards
- Group seating
- Table setup
- Wall space
- Flip charts, sticky notes, markers
- Technology set up for remote attendees to participate

The more intentional you are about preparing your space and materials, the better the environment will be—and the more engagement you'll see from your team.

Note: If you're running a remote meeting or session, get into your meeting room 10-15 minutes early to get the technology sorted so you can start without any delays.

ENSURE THE EXPECTED OUTCOMES OR OBJECTIVES ARE CLEAR

Set an agenda that clearly states your meeting goals. And at the top of the meeting, be sure to review these with the group. You may even want to discuss what accomplishing these goals will mean to the rest of the project. Setting context can help keep everyone on track.

ESTABLISH EXPECTATIONS

Your agenda will set expectations for what you need to get done. But it's also wise to set ground rules for how your meeting will be run. For instance, if time is limited, you might agree that any mention of an outside topic will be shut down by the facilitator and added to a list of things to discuss later.

DO WHAT WORKS

Your facilitation style needs to meet the needs of the group and the goals for the meeting. For example, you may decide to step back and let the conversation unfold so you can observe interactions and record decisions. Or you might lead a group exercise to evaluate options and arrive at a decision. No matter what, you have to recognize that a one-size-fits-all approach to facilitating meetings does not work.

HELPFUL FACILITATION TOOLS

There are plenty of ways to engage a team, lead them to healthy conversation, and even make decisions. Some are simple conversational tactics, and others are interactive activities. Do what feels right for each meeting you lead based on what you need to accomplish and who will be part of the conversation.

Here are a few meeting facilitation techniques you may want to try.

1. GATEKEEPING

The loudest voice can't win! Everyone on a project should have equal footing when it comes to collaboration and discussion. With gatekeeping, all participants have an opportunity to influence the decision being made. As a facilitator, you can help make this happen by gate opening and gate closing.

GATE OPENING

There's always a quiet team member who tends to sit back and speak less—or not speak at all. The problem is, that person may have input that can impact decisions or, better yet, help your team make them.

As the facilitator, it's your job to get those people talking. Open the gate by asking quiet attendees direct questions. Engage them with the group. Sometimes you may put them on the spot, but their voice is necessary for a well-rounded, inclusive conversation.

GATE CLOSING

Don't let one person dominate a conversation or a meeting. You'll end up with annoyed team members who are less motivated to act on ideas.

It's simple: Inclusion builds trust, motivates teams, and helps drive decisions. So if John is dominating a meeting, simply interrupt him and ask if anyone else has a perspective to add. It might feel awkward, but your team will thank you for it later—and your conversation will be better in the end.

2. USE FLIP CHARTS, STICKY NOTES, AND MARKERS

Sounds like an endorsement for office-supply stores, huh? Well, it kind of is! It's amazing how many highly technical teams use paper to generate ideas and build consensus.

The thing is, providing a hands-on experience allows all participants to share ideas or input—bonus points for those shy people who’d rather write than speak—and encourages everyone to discuss, merge, and even visually represent complex ideas as a group.

Looking for tactical exercises to boost meeting engagement? Check out *Gamestorming* by David Gray, James Macanufo, and Sunni Brown. It includes several group activities, exercises, and games you can use to make your meetings more fun and effective.

3. BRAINSTORM

We all conduct brainstorming sessions with the intent of generating as many ideas as possible. But are they always effective? Probably not.

Brainstorms go more smoothly with a little structure and a few basic ground rules. If you want to create an environment that’s truly open and creative, remind everyone that:

- There’s no such thing as a bad idea.
- Good ideas can come from anyone on a team.
- The goal of the meeting is to generate as many ideas as possible.
- You’ll discuss the merits of all ideas as a group.
- You’ll refine the list of ideas and remove the ones that just won’t work.
- There are no hard feelings if your idea isn’t selected.
- You will end the session with at least one final idea.

4. CLUSTERING

Need to answer a complex question or gain consensus on a topic or issue? Guide your team to a quick decision with a clustering exercise.

There are a number of ways to go about it, but you can start with this technique:

1. Pose the question/topic/scenario, and have each attendee write their ideas or responses on sticky notes (one per note).
2. Then have everyone quickly place the stickies into groups. Let participants do the work. You can step back to facilitate the process, watch for emergent themes or outcomes, and question final results.
3. This should lead to a productive conversation with the goal of making a decision.

Clustering can be very helpful when you're trying to diagnose an issue or pain point, generate ideas, gain feedback, and much more. Plus, it's a fast and easy way to get anything and everything on the table (or wall).

5. THE "T"

The "T" is a focusing technique that can put an end to what may feel like a never-ending debate, while also helping your team come to a decision with confidence and ease. Here's how it works:

1. Draw a T for each item under debate on a whiteboard or flipchart.
2. Have the group brainstorm and record the pros and cons on sticky notes (again, one point per note).
3. When they're done, ask participants to place their points on the T.
4. From there, you should see themes emerge that either lead to consensus or further debate, which is a discussion you'll facilitate.

This exercise is really great for resolving issues or discussion points that stand in the way of a decision.

FACILITATING MEETINGS

Every project manager's day is filled with meetings—and that can be a problem! Too many meetings can lower productivity, while too few can strain team communication and leave people in the dark. Figuring out the right balance between meeting time and value is tricky.

As the project manager, it's up to you to make meetings worth the time your team and clients invest in them. And you can do it! With these facilitation techniques, you'll be on your way to becoming an expert meeting facilitator who's mastered the "art" of communicating a meeting's value and the "science" of leading it well.

