

# How to Facilitate Effective Meetings





# What is the Purpose?

One of the **key challenges** businesses face is not being able to properly advance agendas through meetings. Ineffective meetings tend to have a lack of purpose, pre/post-work and the right people present.

We've all wondered occasionally, "**Why am I included in this meeting?**", "**What is this meeting about?**" or "**Could this have been an email?**". Even though the meeting may have a clearly timed agenda of topics, meeting members are left drifting without context, trying to figure out the objective and how to participate with the material presented. Creating a well thought out agenda can only bring you so far. Sharing your **intent** up front will get you even further.

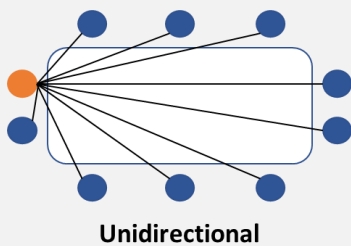
Meetings can be considered as a medium that allows us to **create a conversation**. Creating dialogue allows us to advance or achieve an objective. Having a clear intent provides participants with a lens through which to discuss the meeting and define the material you must include.

Sharing your intent can be done by creating a **purpose**. This purpose can be as simple as starting off your meeting with "We are gathered here today to...". This allows your audience to understand upfront, what your intent is for the meeting.

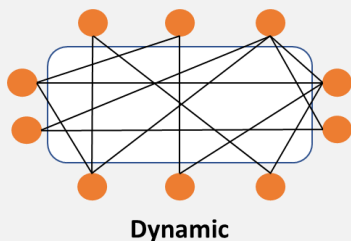


# Why Are We Coming Together?

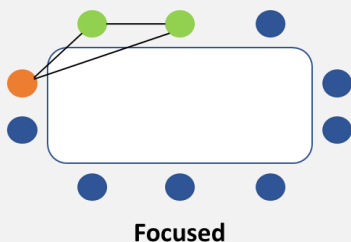
To zero in on your intent, ask yourself, “**What do we need to achieve by the end of the meeting?**” There are three kinds of conversations, which involve different dynamics: **information-sharing**, **problem-solving**, and **decision-making**.



**Information-Sharing:** In this conversation, the facilitator needs to establish context, data and facts with the participants. This conversation is **unidirectional**, meaning only one person is sharing information at a time. However, you can still have more than one attendee sharing information during the meeting, as long as one individual is sharing at a time.



**Problem-Solving:** Once you’ve shared information or articulated the problem, you can start the problem-solving process. Here, we’re interested in **making choices** and **developing ideas**. The context that we established in the earlier phase will be brought forward and decisions on key points will be debated. This conversation is usually **dynamic** and takes the longest amount of time, as everyone should be engaged and contributing.



**Decision-Making:** This conversation is where we’ve formulated a specific proposal. The **decision-making power** is usually delegated to a **small number of participants** in the room and tends to be a focused conversation, as most of the talking was previously done. The other participants are there as they’re the ones who will most likely be impacted by the change.

## LEGEND

● Key Content Contributor

● Participants

● Key Decision-Maker





## Determining the **RIGHT** Attendees



In order to facilitate an effective meeting, it is important to have the right people present. After establishing your purpose and the conversation, you can focus on having the right people at the table.

**It can be frustrating when:**

- 1) **The wrong people are in the meeting** – i.e. those at the table who don't have the authority to a make decision or to influence others outside of the meeting.
- 2) **The people who should be at the meeting are not there** – i.e. the individuals who need to hear the messages or contribute to the discussions, but are not included.

Having a well-defined meeting **purpose**, and a clearly articulated set of meeting objectives, should allow you to quickly identify whose **participation** is necessary.

*“If you don't know where you are going,  
you'll end up someplace else.”*

– Yogi Berra



# The Importance of Documentation

Effective documentation not only **builds your credibility**, but also makes it easier to understand your overall purpose. Documenting allows you to take on complex agendas and to position yourself as an effective facilitator.

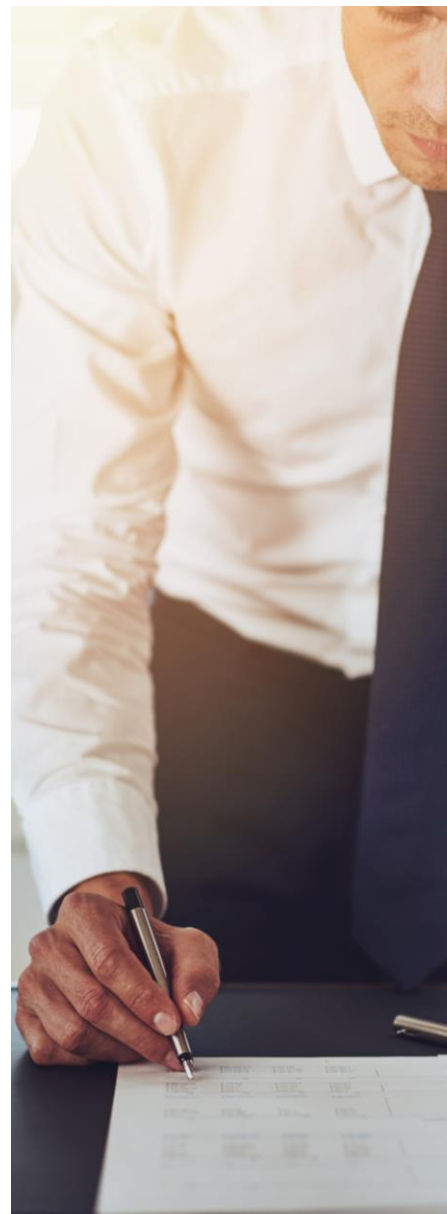
Before your meeting, it's important to send out **pre-work** to make your meeting a success. This step, sets-up the meeting and clarifies how it will be conducted. Once the meeting is over, doing the necessary **post-work** ensures that everyone has a common understanding of the next steps and tasks.

## Pre-work

- **Send out the necessary materials in advance.** This will give everyone a chance to review the material and be more prepared for the meeting.
- **Share the materials and content** in the room or on the call.

## Post-work

- **Ensure decisions have been made** and no actions are left without a deadline.
- **Ensure the next steps are clearly defined** and **owners** for action items are **identified**.
- **Ensure risks and initiatives** are thought through.





# Develop the Expertise to Facilitate Effective Meetings

Find out how your team can benefit from training through practical scenarios.

[Click here](#) to learn how Blue-Mark's **Facilitate Effective Meetings** course can help you improve the way you design meetings, lead and manage discussions, and drive quality decision making.

## *Additional Support: Strategy & Planning Facilitation*

If you are regularly trying to gather everyone's opinions but find there are a lot of conflicting views, [check out our free article, \*\*Get the Most Out of Every Meeting with a Neutral Facilitator\*\*](#), and see how your meetings can benefit from a Blue-Mark Consultant.

