The President as Facilitator-in-Chief

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Lessons from your experiences

When you’ve been part of a well-facilitated conference call, meeting, workshop, or strategy session, what made it work?

Anyone can (and everyone should) make facilitative contributions.

Making connections and helping make meaning.
Providing leadership without taking the reins while operating from a position of restraint.

Managing (or balancing) content and process and ideas and action.

Building the capacity of individuals and groups to accomplish more on their own, now and in the future.

Helping surface the unacknowledged or invisible beliefs, thoughts, patterns, etc.
Helping create a safe (or brave) climate....

Facilitation Practices

- On your own, scan through your assigned list.
- Note any you want to ask about or comment on.

Common Situations

1. The “real conversations” seem to happen during breaks, offline, or outside the actual meeting or calls.
2. A few individuals seem unwilling to adapt or compromise to meet the needs of the group.
3. The group has poor follow-through on agreements and/or assignments.
4. Tension has increased and discussions are getting heated.

Change your focus and change your facilitation.
Managing the Ladder of Inference

- Stick with observations.
- Check out your inferences.
- When others infer, ask them to connect to observations.

Digging Below the Surface

Go deep looking for patterns, structures, and mental models or work in reverse from mental models to events.

A great guidebook of tools, tips, and techniques to help you manage common situations that emerge in groups, meetings, and decision-making.

“Becoming a facilitative leader means changing how you think in order to change the consequences you help create.”

— Roger Schwarz, The Skilled Facilitator
20 Tiny Tips & Tactics for Effective Facilitation

1. Have someone else scribe while you facilitate.

2. Enhance readability by alternating marker colors when writing on flipcharts.

3. When facilitating conference calls, place a checkmark next to each person’s name when s/he speaks to track engagement.

4. Ensure everyone understands both the purpose and the desired end results for the effort.
20 Tiny Tips & Tactics for Effective Facilitation

5. Shift participants’ focus and attention. Stand in different places as you facilitate.

6. Blank out the projector screen when the slides aren’t necessary. “B” key on your laptop; separate key on some remotes.

7. Offer activity instructions both in writing and verbally to ensure understanding.

8. For longer programs/sessions, periodically mix up the groups so everyone gets connected.
9. Invite people you haven’t yet heard from to speak first. “I’d love to hear from folks who haven’t yet shared today.”

10. On major decisions, ask everyone to weigh in: “Let’s go around and hear from everyone on this question.”

11. Have more than one format option for different agenda items so you can shift gears to better engage people.

12. Periodically summarize progress. “So here’s what we’ve decided so far.” “So here’s where I think we are at.”
13. Always have Post-Its, index cards, markers, and tape ready.

14. Look for the minimum commitment that can be agreed upon in the meeting. “What can we all agree on right now so that we can get in action?”

15. Allow time for those more introverted to think a bit before asking them to extrovert. (i.e., in a brainstorming session)

16. When lots of people want to speak, make a list and work through it. This helps people focus on listening.
17. Involve the group in assessing its own efforts based on the norms it established. “So how are we doing so far?”

18. Ask questions of the group more than you make declarations to the group. “Do we need to move on?” is different than “Let's move on.”

19. Ensure everyone understands key terms, acronyms, etc. (i.e., strategy, mission, vision)

20. When seeking concrete responses to broad or vague questions, give an example of what you want people to share.