



Jordan-Webb

High Performance Facilitation Virtual Collaboration Tools & Strategies

Effective Meeting Skills for Meeting Leaders – Course Content

This is an intensive one-day course designed for those who need to develop effective meeting leadership competencies (i.e. facilitation skills). The course provides meeting leaders with opportunities to review the knowledge, skills, abilities and behaviors that experienced facilitators use to conduct meetings, manage collaborative discussions, build group consensus, etc. Participants will learn, practice and internalize essential competencies of planning, preparation and execution that will result in significant improvements of meeting outcomes. Key takeaways include practice sessions where participants apply lessons learned and process improvement sessions where participants share feedback with peers. Ideal Class Size: 15-20.

Topic Areas Include:

- 1. Planning – Setting & Maintaining Momentum:**
 - Best days/times for your meetings
 - Best activities for high/low energy times
 - Opening strongly - Speaking practice
 - Using your voice & movement for energy
 - Giving/receiving feedback
 - Application of lessons learned
- 2. Planning – Decision Group Effectiveness:**
 - Determine meeting type & group size
 - Define Purpose, Scope, Objectives (PSOs)
 - Define meeting deliverables
 - Determine required experience & expertise
 - Stakeholder analysis / whom to invite
 - Determine if external resources required
- 3. Planning – Urgency, Importance & Risk:**
 - Immediate response or time to plan
 - Importance versus Urgency
 - Neutral leader perspective required
 - Risk of unsettled organizational issues
 - Decision Point – Ready to Proceed (Y/N)
- 4. Planning – Meeting Design Effectiveness:**
 - A Meeting as process
 - Bottom-Up design principles
 - Design for fast (urgent) problem-solving
 - Levels of Authority (Group/Project Charter)
 - Impact of design on meeting outcome
- 5. In-Meeting – Commencement, Ground Rules:**
 - Capture participant expectations
 - Ground rules to keep meetings on track
 - Empower group to enforce ground rules
 - Define a common language/terminology
 - Define a communication plan
- 6. In-Meeting – Leading:**
 - Keep participants involved & energized
 - Leading without directing
 - Managing bias – group bias, leader bias
 - Levels of Agreement (consensus or less)
 - Working with a co-leader
- 7. In-Meeting – Behaviors:**
 - Recognizing problematic behaviors
 - Reasons for problematic behaviors
 - Dealing with problematic behaviors
 - Diffusing and resolving conflict
 - Recognizing cultural differences
- 8. In-Meeting – Information Capture:**
 - Documentation techniques
 - Capture Mode (Post-It, Flip Chart, GDSS)
 - Capturing what is said without interpreting
 - Information Displays – Wall Plan Design
 - Scribe/recorder/documenter/technographer
- 9. In-Meeting – Information Management:**
 - List Building, Brainstorming, etc.
 - List Reduction, Merge/Purge, Categorizing
 - Ways to Prioritize/Choose from alternatives
 - Using voting results to trigger discussions
 - Automating information management
- 10. Additional Topic – Negotiation Primer:**
 - Negotiation versus Facilitation
 - Recognize when Negotiation is needed
 - Basic Negotiation principles
 - Review/discuss Negotiation example
 - Distinguishing Interests from Positions
- 11. Additional Topic – Virtual Meeting Primer:**
 - Virtual meeting types
 - Virtual meeting issues
 - Leader issues
 - Participant issues
 - Web Conferencing issues
 - Group Decision Support issues
 - Working with a technographer
- 12. Post-Meeting – Closing, Review, Follow-up:**
 - Closing strongly – Speaking practice
 - Review completed/open activities
 - Celebrate & Recognize accomplishments
 - Review Expectations/Importance/Changes
 - Plus-Delta – Process Improvement
 - Distribute post-meeting documentation
 - Review post-meeting action plan(s)