

The Project Meeting Facilitator

Facilitation Skills to Make the Most
of Project Meetings

**Tammy Adams
Jan Means
Michael S. Spivey**

 **JOSSEY-BASS**
A Wiley Imprint
www.josseybass.com



John Wiley & Sons, Inc.

More Praise for *The Project Meeting Facilitator*

“Jan, Tammy, and Michael have done it again! Their previous masterwork, *Facilitating the Project Lifecycle*, was a must-have for every project manager. This time their focus is even sharper: a whole book devoted specifically to the facilitator’s role—and to the skills and mindset required to execute that role effectively. This book is so loaded with tools, techniques, and templates that even seasoned project managers will keep their copies close at hand.”

—Sam Kaner, author, *Facilitator’s Guide to Participatory Decision Making*

“Ineffective meetings become a thing of the past when you put the ideas in *The Project Meeting Facilitator* into practice. The authors not only offer a practical guide to every type of meeting in the project life cycle, they also let practitioners know when they have taken a wrong turn.”

—William M. Ulrich, president, Tactical Strategy Group, Inc., and author, *Legacy Systems: Transformation Strategies*

“At last—a practical guide to effective facilitation geared exclusively to the unique needs of project managers! Chock-full of easy-to-apply tools and tips, this book affirms that with proper planning and follow-through, project meeting facilitators really can play a critical role in helping teams accelerate time to results. Virtual project teams and those that work face-to-face will benefit equally.”

—Nancy Settle-Murphy, president, Guided Insights

“If we had to pay for every hour we spend in meetings, would we say they are worth it? Not usually in my experience. Well-run meetings, however, are worth every penny. This book provides practical tools and, more importantly, some real insight for the reader to evaluate their personal skill set and target areas for improvement.”

—Lynn McDonald, president, Greenlight Dynamics, Inc.

“Finally, a book that specifically addresses the unique facilitation skills required in project management meetings. PMs can easily match the different types of project management meetings with the skill levels and processes best suited for what they are trying to accomplish in each.”

—Charles Tombazian, director, Global Strategic Planning Avnet, Inc.

“We know facilitators and facilitation help project teams to be more effective and efficient, but who helps the facilitators? Tammy Adams, Jan Means, and Michael Spivey do, and the opportunity to connect to their knowledge and skill through this book is an important one.”

—Cameron Fraser, IAF certified professional facilitator and chair,
International Association of Facilitators

“Adams, Means, and Spivey have created a very accessible book for project managers and team leaders who want to improve their facilitation skills. There is a lot here for experienced facilitators, too. Having clearly presented the book in an organized format and a conversational tone, the authors demonstrate their own skills in facilitating (or making easy) the process of planning, running, and troubleshooting project meetings. The opening chapter includes a self-assessment of our project meeting facilitator skills—a quick way to help us pay attention to what we already know and what gaps the book can help close. I like the approach of looking at different types of meetings through the life cycle of a project from initiation to closure. This book is a great reference guide to keep dipping back into as we move through the various stages of a project.”

—Julia Young, vice president, Facilitate.com

The Project Meeting Facilitator

Facilitation Skills to Make the Most
of Project Meetings

**Tammy Adams
Jan Means
Michael S. Spivey**

 **JOSSEY-BASS**
A Wiley Imprint
www.josseybass.com



John Wiley & Sons, Inc.

Copyright © 2007 by John Wiley & Sons, Inc. All rights reserved.

Published by Jossey-Bass
A Wiley Imprint
989 Market Street, San Francisco, CA 94103-1741 www.josseybass.com

Wiley Bicentennial logo: Richard J. Pacifico

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning, or otherwise, except as permitted under Section 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, Inc., 222 Rosewood Drive, Danvers, MA 01923, 978-750-8400, fax 978-646-8600, or on the web at www.copyright.com. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, 201-748-6011, fax 201-748-6008, or online at www.wiley.com/go/permissions.

Limit of Liability/Disclaimer of Warranty: While the publisher and author have used their best efforts in preparing this book, they make no representations or warranties with respect to the accuracy or completeness of the contents of this book and specifically disclaim any implied warranties of merchantability or fitness for a particular purpose. No warranty may be created or extended by sales representatives or written sales materials. The advice and strategies contained herein may not be suitable for your situation. You should consult with a professional where appropriate. Neither the publisher nor author shall be liable for any loss of profit or any other commercial damages, including but not limited to special, incidental, consequential, or other damages.

Jossey-Bass books and products are available through most bookstores. To contact Jossey-Bass directly call our Customer Care Department within the U.S. at 800-956-7739, outside the U.S. at 317-572-3986, or fax 317-572-4002.

Jossey-Bass also publishes its books in a variety of electronic formats. Some content that appears in print may not be available in electronic books.

Library of Congress Cataloging-in-Publication Data

Adams, Tammy, 1959–

The project meeting facilitator: facilitation skills to make the most of project meetings / Tammy Adams, Jan Means, Michael Spivey.

p. cm.

Includes bibliographical references and index.

ISBN-13: 978-0-7879-8706-0 (pbk.)

1. Project management—Handbooks, manuals, etc. 2. Meetings—Handbooks, manuals, etc.
3. Group facilitation—Handbooks, manuals, etc.
 - I. Means, Jan. II. Spivey, Michael, 1969– III. Title.

HD69.P75A334 2007

658.4'56—dc22

2007017413

Printed in the United States of America FIRST EDITION

HB Printing 10 9 8 7 6 5 4 3 2 1

The Jossey-Bass Business and Management Series

Contents

	Introduction	xi
Section I	PROJECT FACILITATION BASICS	1
1	What Is a Project Meeting Facilitator?	3
	Profile of a Project Meeting Facilitator	4
	Are You the Right Facilitator for the Meeting?	6
	Assessing Your Skill Level	10
	Applying Your Skills	10
	Summing It Up	15
2	The Basics of Project Meeting Facilitation	16
	When to Meet—and When Not to Meet	17
	Profile of a Productive Meeting	25
	Types of Project Meetings	26
	Summing It Up	30
3	Facilitation Tools for Keeping Meetings on Target	32
	Tools for Meeting Preparation	33
	Tools for Managing Momentum and Focus	36
	Tools for Clarifying Communication	42
	If It's a Virtual Meeting	47
	If There Are Telephone Participants in Your Meeting	50
	Tools for Sharing Meeting Results	51
	Summing It Up	55
4	Facilitation Tools for Keeping Everyone Engaged	57
	Meeting Engagement Tools	58
	Meeting Management Tools	64
	Summing It Up	72

Section II	FACILITATING MEETINGS WITHIN EACH PHASE OF THE PROJECT	75
5	Facilitating Project Initiation Meetings	81
	Overview of the Initiation Phase	82
	Project Initiation Meetings	83
	Troubleshooting Guide	98
6	Facilitating Project Planning Meetings	102
	Overview of the Plan Phase	103
	Project Planning Meetings	104
	Troubleshooting Guide	123
7	Facilitating Project Execution Meetings	130
	Overview of the Execute Phase	131
	Project Execution Meetings	132
	Troubleshooting Guide	154
8	Facilitating Project Control Meetings	161
	Overview of the Control Phase	162
	Project Control Meetings	162
	Troubleshooting Guide	177
9	Facilitating Project Close Meetings	182
	Overview of the Close Phase	183
	Project Close Meetings	184
	Troubleshooting Guide	193
Section III	RESOURCES AND REFERENCES	197
	Resource A: Recommended Reading	199
	Resource B: Recommended Websites	203
	Resource C: Recommended Organizations	207
	The Authors	209
	References	212
	Index	215

**To my husband, Howard, for challenging me to
live, love, learn, and leave a legacy.**

—Tammy Adams

**To my parents, Harry and Dorothy Means.
May everyone who reads this remember those
who shaped their life and be thankful.**

—Jan Means

**To my mentors for their wisdom and faith.
To my parents, Gayle and Peggy Spivey, for their love
and constant encouragement,**

and

To my sister, Andrea, for her love and support.

—Michael S. Spivey

Introduction

OBVIOUSLY THIS BOOK IS about projects. It says so right in the title—*The Project Meeting Facilitator*. Projects are how work gets done. They can be as grand as building a space shuttle or as small as building a birdhouse. Regardless of the size, they all have objectives, expected outcomes, a defined start and end, a budget, tasks, and assigned resources (even if that's only you). In organizations, projects are the method for bringing the company's vision to fruition. Projects enable change. They are initiated with various goals aimed to improve service, increase profit, reduce waste, enlarge market share, or speed up cycle time. Such ambitious efforts require diligent oversight and coordination to ensure that projects attain their intended objective. That's where the project manager (PM) comes into the picture. The PM is the person responsible for making sure the project gets from here to there successfully with a minimum of unanticipated problems and risks. But projects involve many more roles than just the PM. There may be leads, analysts, customers, technology and quality resources, business experts, management, and a host of others with the knowledge, authority, or expertise necessary to make the project successful.

This brings us to the topic of *meetings*—the third word in the book title. Meetings are a vehicle for exchanging information, confirming progress, creatively developing deliverables or solutions, making decisions, and growing as a team. Unfortunately, we seem to have a dysfunctional relationship with meetings. We need them, but hate them. Sure, we may have too many of them. Recent surveys show that we spend anywhere from 25 to 50 percent of our time in meetings (depending on our role and responsibilities) (PASS Online, n.d.). But ultimately, meetings provide a means for collaborative thinking, discussion, and deliberation that is invaluable in getting project work done. Sad to say, most of the meetings we've attended fall short of their potential.

But wait. The title of this book includes one more word we have yet to mention—*facilitator*. This word holds the key to making project meetings effective. The facilitator is the one who guides the meeting process—making sure everything and everyone is prepared to do their best work, managing the meeting itself, and documenting the meeting outcomes. Through intentionally planning, using facilitative techniques, and managing group dynamics, this person can transform useless meeting time into productive results. This facilitated collaboration helps people work better together to create the outcomes and project deliverables you need in a focused period of time.

But despite the demonstrated value, extended training in human dynamics and facilitation skills are not a standard part of project, quality, or process management training. This is unfortunate. Knowing how to facilitate people toward desired results greatly increases the potential for both project and self-success. So if you are the project manager, team leader, or in an other support role that regularly places you in situations requiring facilitation of groups or teams, *The Project Meeting Facilitator* has been written for you.

Our goal is simple—to help you become a better project meeting facilitator. We will not attempt to teach you how to facilitate. To do so requires watchful coaching and feedback that simply cannot be provided in book form. We will, however, help you look at project meetings with the eyes of a facilitator, and we'll provide collaborative techniques and practical tips we've found useful in our practice. We'll also share new insights into some well-known meeting tools to help you learn how to actually use them to manage your meetings more effectively.

How to Use This Book

This book is intended to be used as a reference manual. Although we've tried to include enough stories to educate and entertain you, it was never our intention that you sit down and read it through from cover to cover. Instead, let your situation and need guide you to the section and chapter that is most relevant to you.

Section One provides the basics around meeting facilitation and tools. Chapter One introduces the role of the project meeting facilitator (PMF). If you're curious about how to determine whether you're the right facilitator for a particular meeting or how your skill set stacks up against core facilitation competencies, you'll want to read this chapter. Chapter Two looks at two foundational meeting concepts—when to hold a meeting (and when not to) and what constitutes a productive meeting. Chapters Three and Four outline facilitation tools and techniques that can be applied to any type of meeting to better prepare, manage momentum, keep discussions focused, clarify communication, get and keep people engaged, and

manage those pesky dynamics of working together. You'll want to delve into these sections to find nuggets that will help you see immediate results.

Section Two looks at twenty of the most common project meetings. For each one we've provided stories and helpful tips, along with the following information:

- When it should occur in relation to other project meetings
- The meeting purpose and objectives
- Suggested participants
- Typical inputs required for the meeting
- Expected outputs of the meeting
- Suggested agenda topics
- Do's and don'ts learned from experience
- A troubleshooting guide for those unique situations

To best use this section, we recommend that you go to the Contents and look up the specific meeting you'll be facilitating. Read through the related information and use it to guide your planning efforts. Prior to the meeting, scan through the Troubleshooting Guide to make sure you've incorporated best practices and know what to do if something unexpected comes up.

And if you want to continue to expand your skills and knowledge, Section Three is for you. In it you'll find some of our favorite books and websites, along with a list of organizations that promote continued learning, networking, and growth in the areas of facilitation and project management.

Like you, we love to learn. So please share your lessons learned, meeting insights, questions, and triumphs with us at TheTeam@FacilitatingProjects.com.

The Project Meeting Facilitator

Section I

Project Facilitation Basics

HAVE YOU EVER BEEN INVOLVED in a project that didn't require a meeting? Neither have we. Project meetings provide a forum for exchanging information, coming up with new ideas or alternatives, making decisions, validating work products, or just learning how to work better together. They can occur on a regular basis or on the spur of the moment. They may involve two people or thirty. But regardless, project meetings are intended to achieve results. And most times you, the project manager, are expected to make it happen—whether you've had facilitation experience or not. So in Section One, we'll give you some guidelines, insights, tool, and techniques to help you make any meeting you lead more productive.

Chapter One introduces you to the concept of the project meeting facilitator (PMF). The PMF is responsible for the end-to-end meeting process, including preparation for, facilitation of, and follow-up on the meeting and its deliverables. This chapter provides a checklist for helping you assess whether you're the right person to be the PMF and suggestions on what to do if

you're not. Last, it provides some insight on how to assess and improve your facilitation skills.

Chapter Two takes a look at meetings—specifically project meetings—and how to transform them from an unfortunate waste of resources into a productive way of accomplishing work. It explores the topic of when and when not to hold meetings and what a productive meeting looks like. It challenges you to a higher meeting standard—meetings as well-planned, well-managed journeys that engage participants in discussion, debate, and discovery to reach the desired goal.

But like a carpenter, every facilitator needs a set of tools that will aid in artfully transforming both good wood and knots into the desired product. Chapter Three looks at some familiar yet often underutilized tools to plan and manage meeting pace and momentum, keep discussions focused, and aid in mutual understanding. Rather than discussing how to create these common tools, we've focused on how to actually *use them* in meetings to achieve the desired result: an efficient, effective project meeting.

Chapter Four wraps up the section by looking at techniques for keeping people engaged in the meeting process. This involves both getting them prepared to contribute and managing their involvement during the meeting. To accomplish this, we share insights around such topics as effectively eliciting input, keeping participation balanced, and handling difficult situations.

Remember, a meeting without actionable results is simply a waste of valuable resources. So continue to assess and improve your facilitation skills, hold meetings only when necessary, and apply good meeting practices when you do. These steps alone will move your meetings from a waste to a productive use of time.

Chapter 1

What Is a Project Meeting Facilitator?

Coming together is a beginning. Keeping together is progress. Working together is success.

—HENRY FORD

LEADERSHIP. MANAGEMENT. DIRECTION. RESULTS. All of these words evoke images in our minds—positive images of businesses getting things done effectively.

Let's try another word: *meetings*. Now what images come to mind? Tedious? Tiring? Boring? Unproductive? Waste of time? If you can relate to any of these images, then be encouraged. Meetings need not be a waste of precious project resources. They can be the single most effective vehicle for project collaboration—whether they are used to exchange information, confirm progress, creatively develop deliverables or solutions, make decisions, or grow as a team or individual. You just need to know how to transform meetings in your organization from an unessential drain on resources to a vital means of accomplishing project work. How do you do that? Start by adding meeting facilitation skills to your project management inventory.

Profile of a Project Meeting Facilitator

Ever get to a meeting and sit around for the first five minutes trying to figure out who's leading it? As you wait to see who will step up and take the helm, the discomfort can be obvious. Then the project manager shows up. It seems to be an unwritten assumption that project managers know how to manage not only projects but project meetings. Unfortunately, meeting planning, group dynamics, and general facilitation skills are not typically included in the project manager training program. And whether you are a project manager or a project team member, you've probably already recognized the fact that a significant part of your project experience will revolve around meetings.

So what does it mean to facilitate a project meeting? It does not mean directing, dictating outcomes, or getting everyone to see things from your point of view. It is broader than hosting or being an emcee and more involved than just moderating the discussion or monitoring time. The role of the project meeting facilitator (which we'll refer to as the PMF from here on to make reading easier) is about enabling and guiding. Thinking of yourself as a meeting facilitator will help you start to form a new mental image of your role and its associated responsibilities.

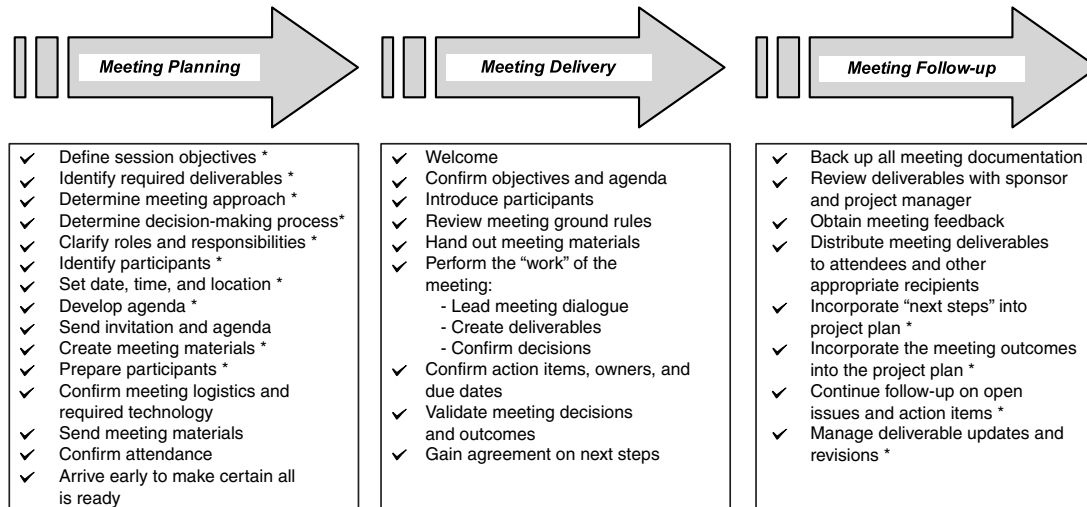
What is the role of a PMF? A meeting is often seen as the two-hour event scheduled this coming Tuesday afternoon at 1:00 PM. But a meeting is a process that requires preparation, delivery, and follow-up. And the PMF is responsible for the entire thing. See Figure 1.1 to get insight into the key activities involved in each of the three phases of the meeting process.

As this figure shows, the core responsibilities of a PMF span the scope of the end-to-end meeting process and include

- Establishing and confirming appropriate meeting objectives and desired outcomes
- Translating those meeting objectives into a productive plan for accomplishing them (that is, agenda design)

FIGURE 1.1

The Project Meeting Process (With Key Activities)



* Items noted with an asterisk are typically performed in conjunction with the project manager. If the project meeting facilitator is also the project manager, then the same person is playing two roles with respect to meeting facilitation.

- Communicating effectively prior to the meeting to encourage participant readiness
- Ensuring that the right people are in attendance to accomplish the objectives
- Creating an environment that encourages full participation of meeting attendees
- Getting people engaged and participating productively during the meeting to achieve meeting objectives
- Communicating meeting results and incorporating meeting outcomes and next steps to maintain project momentum
- Obtaining and incorporating meeting feedback to continually improve the meeting process

These eight responsibilities describe the role of a PMF, and your ability to carry them out will lay the groundwork for meeting success. We'll give you some tips for improving your skills in these areas in subsequent chapters, but for now start thinking about the change this may require in your typical meeting

scheduling and behavior. An effective PMF does not just show up at the meeting start time, out of breath from running between meetings. The PMF doesn't jump ship during the meeting when the going gets tough, or leave outcomes hanging after the meeting concludes. Instead, this person is in the room ahead of time, prepared to lead and guide the team in getting work done. And after the meeting, the PMF follows up effectively to ensure that outcomes are fully documented and used.

Are You the Right Facilitator for the Meeting?

All meetings are not the same; not only do they have different objectives, expectations, and deliverables, but they also vary in tone and complexity. Accordingly, you should not expect to be an effective facilitator for every sort of meeting. We each have meetings that we're more comfortable with based on our individual experiences and preferences. A meeting to facilitate senior management through project strategy and funding decisions is certainly different from a weekly team meeting to confirm project progress. And although you might be a master at status meetings, you may not be the best person to facilitate requirements development meetings. Understanding your personal strengths, preferences, and growth areas will help you determine which meetings best fit your current skills. Table 1.1 shows a range of meeting situations and the recommended level of skill needed for each.

You may ask: how do I assess my skill level? Let's look at three levels of facilitation ability: novice, skilled, and expert. As a general rule, *novice facilitators* are those who are fairly new to facilitation. They understand the basic mechanics of scheduling and agendas, but have little experience with or training in group dynamics or more advanced facilitation techniques.

Skilled facilitators have solid meeting capabilities and the competence to confidently lead when confronted with roadblocks or unexpected issues. They have probably received some