MANAGING THE 7 DEADLY SINS OF MEETING FACILITATION

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Objectives:
• Clarify why meeting facilitation skills are critical
• Identify typical meeting facilitation errors
• Describe/discuss tactics to prevent/mitigate such errors
• Conduct personal assessment of meeting facilitation errors and select intervention tactic
<table>
<thead>
<tr>
<th>Topic</th>
<th>Purpose/Objective</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orientation to Topic</td>
<td>1&lt;sup&gt;st&lt;/sup&gt; Objective</td>
<td>5 min</td>
</tr>
<tr>
<td>Review of Sins &amp; Management Strategies</td>
<td>2&lt;sup&gt;nd&lt;/sup&gt; &amp; 3&lt;sup&gt;rd&lt;/sup&gt; Objectives</td>
<td>45 min</td>
</tr>
<tr>
<td>Conduct Personal Assessment</td>
<td>4&lt;sup&gt;th&lt;/sup&gt; Objective</td>
<td>5 min</td>
</tr>
<tr>
<td>Q &amp; A/Wrap-Up</td>
<td></td>
<td>5 min</td>
</tr>
</tbody>
</table>
What is a meeting facilitation “sin?”
What is “killed” when a meeting is sub-optimally facilitated?
All Facilitators are Sinners

As a leader, you will facilitate meetings.

Facilitators are human, and humans sin.

Therefore, we will all commit meeting facilitation sins.

Your Challenge: Limit Your Sinning.
Sin #1: Lack of Meeting Focus/Purpose/objectives

What does it look like?
• No agenda---Just sit down and talk
• Unclear what are parameters of a “successful outcome”
• Discussion omnidirectional

Why is it a problem?
Sin #2: Poor Time Management

What does it look like?:
• Prior to meeting, Time is...
  • Not allocated by topic
  • If allocated, it is not
    • Realistic for topics to be covered
    • Prioritized by topic
• During meeting, time is not purposefully attended to/tracked against agenda

Why is it a problem?

We need to have a meeting to discuss how productivity is suffering because we are always attending meetings.
Tactic to Prevent Sins #1 & 2
Well Planned & Managed Agenda

Purpose:
• Pre-planned agenda with clear focus and purpose

Process:
• Complete before meeting
• Keep “Tells” to minimum
• Review at start to orient to purpose
• Define a time keeper

Payoff:
• Now you have a chance of being successful
Sin #3: Right meeting & issue, Unclear Scope and/or wrong/missing people

What does this look like:
• Most likely to occur when purpose of meeting is to facilitate a decision
• Jump into issue and decision options without scoping issue
• Failing to appreciate upstream/downstream impact of decision on others
• Myopic in appreciating who needs to be involved in the decision

Why is it a problem?
**Tactic to Prevent Sin #3**

**Scope work**

**Purpose:**
- Thoughtfully consider what is in/out of scope
- Define what success looks like
- Define key decision makers & stakeholders

**Process:**
- Complete either prior to starting committee or very early in process

**Payoff:**
- Efficiency of process; higher likelihood of success
**Problem Statement:**
Identify 5 additional pediatric practices with whom to partner as part of WU PAARC expansion

**Project Leader:**
Jane Garbutt

**Success Factors:**
- Strong partnership
- Minimum of 2 physician practice
- Evidence of compliance with protocols
- Population cared for adds demographically to network

**In Scope:**
- Practices within 100 miles

**Out of Scope:**
- Sub-specialty practices
- FQHC practices
- Solo practices

**Key Considerations:**
Selection by December 1st
Start date: January 1st

**Team:**
Decision Makers:
Consultants:

<table>
<thead>
<tr>
<th>Key Milestone</th>
<th>Start Date</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Committee Formation &amp; Scoping document completion</td>
<td>September 30th</td>
<td>October 15th</td>
</tr>
<tr>
<td>Identification of initial 5 practices</td>
<td>October 15th</td>
<td>October 30th</td>
</tr>
<tr>
<td>Meeting with initial 5 practices</td>
<td>November 1st</td>
<td>November 15th</td>
</tr>
<tr>
<td>Selection and finalization of contracts</td>
<td>November 15th</td>
<td>December 1st (Selection)</td>
</tr>
</tbody>
</table>
Sin #4:
Failing to capture discussion, decision & action items

What does it look like:
• No meeting minutes
• No decision document
• No action items captured or assigned

Why is it a problem?
Tactic to prevent Sin #4: Meeting Minutes & Action Items

Purpose:
• Capture discussion, decisions and actions to advance work

Process:
• Define person to take “minutes” in advance
• Preserve time at end of meeting to clarify decisions and next steps, actions and Action owners

Payoff:
• Efficiency; higher likelihood of success

"Here are the minutes from our last meeting: Marty wasted 12 minutes, Janice wasted 7 minutes, Carl wasted 27 minutes, Eileen wasted 9 minutes..."
Sin # 5:
Lacking role clarity for attendees

What does it look like:
• Facilitator is challenged to manage attendees
  • Some members may assume “they” are making a decision when the intention is for consultation
  • Some members may be disengaged due to lack of clarity

Why is it a problem?
Tactic to prevent Sin # 5: Clarify decision-making process & responsibility charting

Purpose:
• **Decision Authority Tool**: Define the decision making process relative to level of authority and the role of the audience
• **Responsibility Charting**: Provide specific roles in order to enable teamwork

Process:
• Decision-Making process set apriori, as is assignment of responsibility

Payoff:
• Decreases confusion & Disengagement
## Decision Authority Tool

<table>
<thead>
<tr>
<th>Authority Level</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>I: Executive</td>
<td>Leader makes decision without input from others</td>
<td>Comp &amp; Benefits</td>
</tr>
<tr>
<td>II: Consultative</td>
<td>Leader asks for input, then makes decision independent from team</td>
<td>Hiring decision, Change in responsibilities</td>
</tr>
<tr>
<td>III: Democratic</td>
<td>Leader is equal to team members in decision authority—majority rules</td>
<td>Deciding between two comparable options for conference location</td>
</tr>
<tr>
<td>IV: Self-Directed—Full Decision</td>
<td>Leader delegates authority to team to generate and implement decision</td>
<td>Minor modification of training process: no cost involved</td>
</tr>
<tr>
<td>V: Self-Directed—Recommendation Only</td>
<td>Leader delegates authority to team to generate a recommendation only</td>
<td>Policy or Process Improvement</td>
</tr>
</tbody>
</table>
Tactic to prevent Sin # 5: responsibility charting

Roles and responsibilities: charting definitions

Responsible.....”R”: “The Doer”

Accountable.....”A”: “The Buck Stops Here”

Consult......”C”: “In the Loop Thought Partner”

Inform.....”I”: “Keep in the Picture”
<table>
<thead>
<tr>
<th>Issue</th>
<th>Department Chair</th>
<th>Division Chief</th>
<th>Exec Director</th>
<th>Division Clinical Administrator</th>
<th>Division MDs</th>
<th>Other (HR, Support Staff)</th>
</tr>
</thead>
<tbody>
<tr>
<td>IT Capital Expense of $25,000 for Division</td>
<td>A</td>
<td>C</td>
<td>R</td>
<td>C</td>
<td>C/I</td>
<td>I</td>
</tr>
<tr>
<td>Hiring New Clinic Nurse</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
# Responsibility Charting

<table>
<thead>
<tr>
<th>Decision Category</th>
<th>Responsibility</th>
<th>Associate</th>
<th>Program</th>
<th>Dept</th>
<th>PhDs</th>
<th>Support</th>
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</thead>
<tbody>
<tr>
<td>HR</td>
<td>Hiring: PhDs</td>
<td>A/R</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>C</td>
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<tr>
<td>HR</td>
<td>Performance Review: PhDs</td>
<td>A/R</td>
<td>C</td>
<td></td>
<td>C</td>
<td>I</td>
</tr>
<tr>
<td>HR</td>
<td>Hiring: Support Staff</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>A/R</td>
<td>C</td>
</tr>
<tr>
<td>HR</td>
<td>Performance Review: Support Staff</td>
<td>C</td>
<td></td>
<td>A/R</td>
<td>C</td>
<td>I</td>
</tr>
<tr>
<td>Personnel Development</td>
<td>Mgr, Prg Leads, Coord</td>
<td>A/R to facilitate</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td></td>
</tr>
<tr>
<td>Personnel Development</td>
<td>PhDs--Dept-wide</td>
<td>C</td>
<td>A/R to facilitate</td>
<td>C</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel Development</td>
<td>PhDs--Program specific competencies</td>
<td>C</td>
<td>A/R to facilitate</td>
<td></td>
<td>C</td>
<td></td>
</tr>
<tr>
<td>Personnel Development</td>
<td>Postdoctoral Training</td>
<td>I</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>A/R-Postdoc Dir.</td>
</tr>
<tr>
<td>Operations</td>
<td>Annual Goal Setting: Dept Level</td>
<td>A/R</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>I</td>
</tr>
<tr>
<td>Financial</td>
<td>Budget &amp; Variance Approval</td>
<td>A</td>
<td>C</td>
<td>C</td>
<td>R</td>
<td></td>
</tr>
<tr>
<td>Financial</td>
<td>Budget Generation &amp; Monitoring</td>
<td>C</td>
<td>C</td>
<td>I</td>
<td>A/R</td>
<td>I</td>
</tr>
<tr>
<td>Program Development</td>
<td>Hospital-Wide &amp; WUSM Development</td>
<td>A/R</td>
<td>C</td>
<td>C</td>
<td>C</td>
<td>I</td>
</tr>
</tbody>
</table>
Sin # 6:
Failing to Manage Meeting Process

What does it look like:
• Discussion without direction
• Expressives/Extroverts dominate input
• Analytics/Introverts “not heard”
• Artificial consensus
• Meeting ends abruptly without much closure

Why is it a problem?
Tactic to prevent Sin # 6: Funnel technique

Collaborative Problem Solving Model:

**Step 1:** Start with defining the problem for which you are trying to solve

**Step 2:** Capture characteristics of a successful solution

**Step 3:** Brainstorm potential solutions (5-10 min)
  - Target 8-12

**Step 4:** Get to 1/3 of options through voting
  - Each person gets 1 vote for every 3 options

**Step 5:** Weigh pros and cons of remaining options

**Step 6:** Vote again to get to final solution

**Step 7:** Assess for overall support for final solution (can you live with this solution?)
  - If concern raised, listen to concern, then re-vote if needed
Collaborative Problem Solving

Where to go for lunch?

Pros: Close by, good prices
Cons: Not healthy, can be tough to talk

Pros: Broad options,--many healthy, can talk
Cons: Need to drive, a bit pricey

Successful Solution does...
- Offers broad options
- Menu between $6-$10
- Healthy options
- Easy to get to from SLCH
- Place you can talk
Sin # 7:
Under-managing meeting engagement

Four Horsemen of the Apocalyptic meeting

- **The Dominator**
  - Highly engaged, over-contributes
- **The Disengager**
  - Uninvolved, distracted, apathetic
- **The Disrupter**
  - Provocative, jokes around to a fault
- **The Debater**
  - Remains stuck on issue, “yes but’s” moving forward
**Sin # 7:**

**Under-managing meeting engagement**

The Dominator

- First to respond each time, every time
- Talks over others
- Whether for or against issue, monopolizes conversation
- Beyond initial comments, commentary often times has limited value and/or gets team off track
Tactic to prevent Sin #7: Active Management of Meeting Attendees

Managing The Dominator

**Mild**
Thank person for comments, visually and verbally seek out others. Consider assigning them a “task” such as scribe

**Moderate**
Assertively interrupt, thank person, then summarize their comments/contributions. Ask others to build on comments or provide new perspective

**Severe**
Explicitly state: “Before you comment, I’d like to hear from others and call on someone else

**Chronic**
Address in 1:1—appreciate their engagement in meeting and point out impact of dominating conversation. Then:
- Level set expectations and ask for support
- Inform them how you will let them know if they are over-talking
Sin # 7: Under-managing meeting engagement

The Disengager

- May or may not appear to be tracking conversation
- Body language conveys message: “waste of time”
- May engage in distracting behaviors (on cell, doodling)
- Awkwardly silent

- NOT to be confused with analytic, pensive or introverted style who contribute good quality, less quantity
Tactic to prevent Sin # 7: Active Management of Meeting Attendees

Managing The Disengager

**Mild**
Set/Re-Set expectations for participation in order to have the best outcome of meeting

**Moderate**
Purposefully ask to hear from each meeting attendee

**Severe**
Call them out:
- “Dave, what do you think about Kim’s idea”
- “Abbey, you are a sharp thinker, I’d like to hear your thoughts on this matter”

**Chronic**
Ask for 1:1
- Share observation, solicit explanation, re-set expectation
- If disengagement persists: Determine if person is needed in meeting
  - If needed, clarify consequences for disengagement: expected to support decision
Sin # 7: Under-managing meeting engagement

The Disrupter

• Makes several jokes, sometimes at the expense of others, primarily the presenter
• May take on “Devil’s Advocate” role, challenging whatever is said
• Tend to draw attention to themselves
• Typical comments have an edge
• When more severe, actions appear to be passive-aggressive

• Not to be confused with curiosity & good critical thinking
Tactic to prevent Sin # 7: Active Management of Meeting Attendees

Managing The Disrupter

**Mild**
- Initially tolerate, then label the behavior
  - “Tom is quite the ______ jokester, contrarian, etc...

**Moderate**
- Provide person with a task in the meeting:
  - “Given your comments today, Sue, how about if you serve as our ‘Devil’s Advocate’ to point out holes in our approach.”

**Severe**
- Call them out:
  - “Jennifer, what is it about this topic that has you on edge”
  - “Ken, what should we make of your frequent sarcastic comments?”

**Chronic**
- Call for a break in the meeting and ask for 1:1
  - Share observation, solicit explanation, re-set expectation and consequence for continued behavior that disrupts meeting
Sin # 7:
Under-managing Meeting Engagement

The Debater

• Initially presents position appropriately
• Maintains stance despite group movement
• Delays “vote” by filibustering
• Even after “vote” tries to pull group back to reconsider issue and “re-vote”
• Likely to escalate in level of agitation as level of support for position diminishes
Tactic to prevent Sin #7: Active Management of Meeting Attendees

Managing The Debater

- **Mild**: Limit the extent to which you get locked into a power struggle as played out through a debate.

- **Moderate**: When discussion no longer appears productive, state:
  - “I am unclear that more discussion is needed on this.” Then poll the team for need for further discussion.

- **Severe**: If additional time needed, set and maintain tight time limit
  - Focus additional time on hearing from others on matter.

- **Chronic**: Move to vote as follows:
  - If “Debater” is not critical for moving issue forward, go to vote.
  - Otherwise, table vote and manage 1:1. Set firm boundaries for next steps in process. Consider soliciting external facilitator for next meeting.
What is your most problematic sin... as a Facilitator?

- Identify which type of sin that you most frequently commit and/or find most disruptive to the meetings that you facilitate.

- How motivated are you to reduce this specific facilitation error?
  - 0 = Not at all
  - 5 = Moderately motivated
  - 10 = Highly motivated

- If motivation is sufficiently high, then:
  - Ask peer/attendee to:
    - Hold you accountable to using the identified tactic
    - Provide you with feedback on your meeting facilitation
Options for feedback on your facilitation skills:
• Ask a peer to observe and provide feedback
• Ask for feedback from attendees through a structured survey
• I welcome the opportunity to observe and provide feedback
Thank you!!

Questions?