

# **MANAGING THE 7 DEADLY SINS OF MEETING FACILITATION**

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# OBJECTIVES

## 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

# AGENDA

Topic	Purpose/Objective	Time
Orientation to Topic	1 <sup>st</sup> Objective	5 min
Review of Sins & Management Strategies	2 <sup>nd</sup> & 3 <sup>rd</sup> Objectives	45 min
Conduct Personal Assessment	4 <sup>th</sup> Objective	5 min
Q & A/Wrap-Up		5 min

# DEFINITION OF A “SIN”

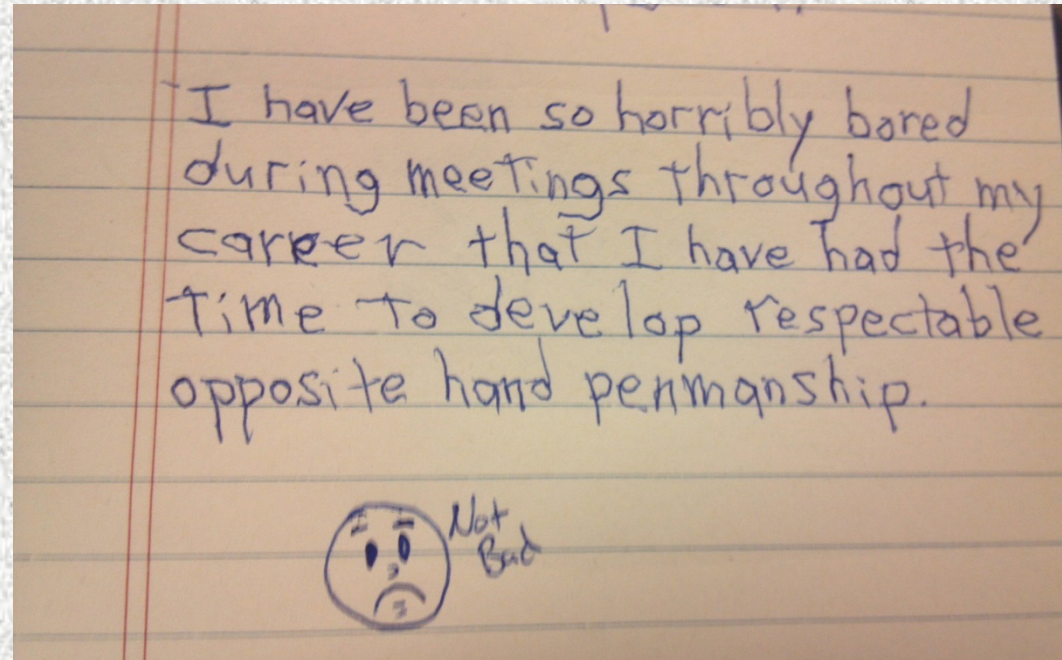
**What is a meeting  
facilitation “sin?”**

# MEETING FACILITATION SINS “KILL”

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“The last thing I remember, I was sitting in a staff meeting. Apparently, I died from boredom.”



**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

**YOUR  
CHALLENGE:  
LIMIT YOUR  
SINNING**



Therefore, we will all commit meeting facilitation sins

# **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**

# Project/Committee Scoping Tool

## 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 1<sup>st</sup>

Start date: January 1<sup>st</sup>

## Team:

Decision Makers:

Consultants:

## Key Milestone

## Start Date

## Completion Date

**Committee Formation & Scoping document completion**

September 30<sup>th</sup>

October 15<sup>th</sup>

**Identification of initial 5 practices**

October 15<sup>th</sup>

October 30<sup>th</sup>

**Meeting with initial 5 practices**

November 1<sup>st</sup>

November 15<sup>th</sup>

**Selection and finalization of contracts**

November 15<sup>th</sup>

December 1<sup>st</sup> (Selection)

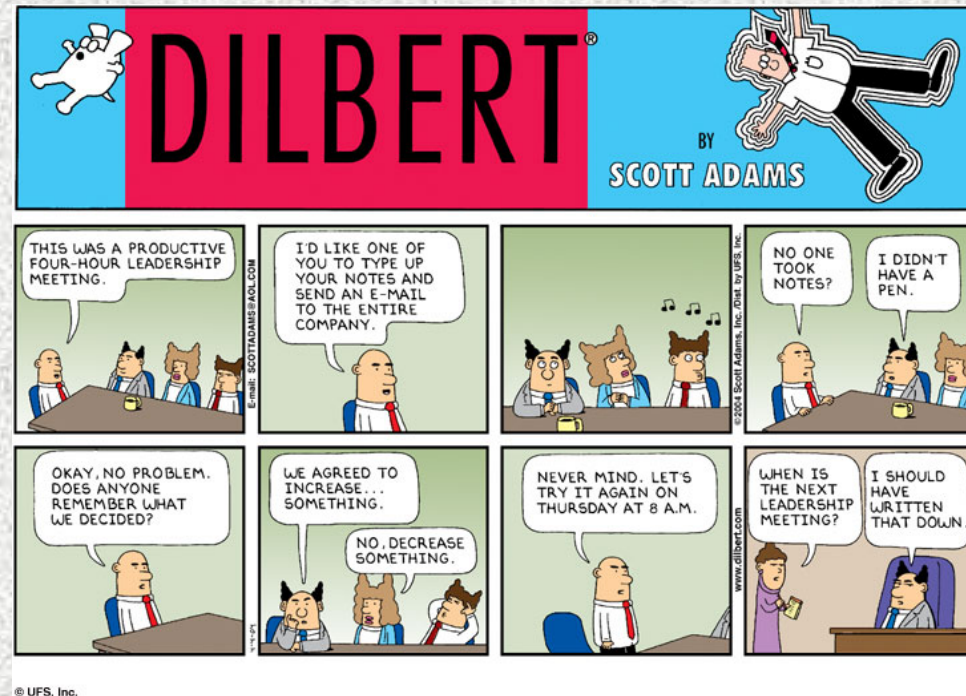
# SIN #4:

## 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

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“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

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

# **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"***



# TACTIC TO PREVENT SIN # 5: CLARIFY DECISION-MAKING PROCESS & RESPONSIBILITY CHARTING

Issue	Department Chair	Division Chief	Exec Director	Division Clinical Administrator	Division MDs	Other (HR, Support Staff)
IT Capital Expense of \$25,000 for Division	A	C	R	C	C/I	I
Hiring New Clinic Nurse						

# Responsibility Charting

Decision Category	Responsibility		Associate	Program	Dept		Support
		Director	Director	Director	Manager	PhDs	Staff
HR	Hiring: PhDs	A/R	C	C	C	C	I
HR	Performance Review: PhDs	A/R			C	I	C
HR	Hiring: Support Staff	C	C	C	A/R	C	C
HR	Performance Review: Support Staff	C			A/R	C	I
Personnel Development	Mgr, Prg Leads, Coord	A/R to facilitate	C	C	C		
Personnel Development	PhDs--Dept-wide	C	A/R to facilitate	C		C	
Personnel Development	PhDs--Program specific competencies	C		A/R to facilitate		C	
Personnel Development	Postdoctoral Training	I	C	C	C	A/R- Postdoc Dir.	I
Operations	Annual Goal Setting: Dept Level	A/R	C	C	C	I	I
Financial	Budget & Variance Approval	A	C	C	R		
Financial	Budget Generation & Monitoring	C	C	I	A/R	I	I
Program Development	Hospital-Wide & WUSM Development	A/R	C	C	C	C	I

# **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

Brasserie

Wildflower Cafe

Drunken Fish

Tony's

Tom's

Pros: Close by, good prices

Cons: Not healthy, can be tough to talk

Scottish Arms

Tom's

Pros: Many options, some healthy, close by, can talk  
Cons: Menu can get pricey

Where to go for lunch?

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

Boathouse

Wildflower Cafe

Successful Solution does...

- Offers broad options
- Menu between \$6-\$10
- Healthy options
- Easy to get to from SLCH
- Place you can talk

Drunken Fish

Razoi

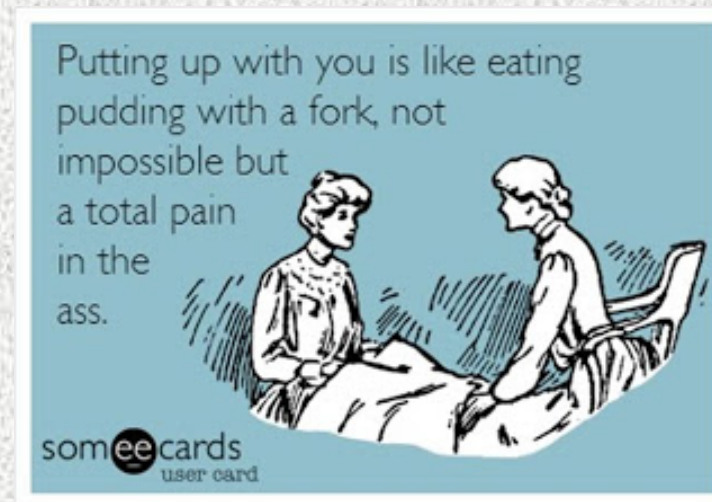


# SIN # 7:

## 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	<b>Address in 1:1—appreciate their engagement in meeting and point out impact of dominating conversation. Then:</b> <ul style="list-style-type: none"><li>• Level set expectations and ask for support</li><li>• Inform them how you will let them know if they are over-talking</li></ul>

# **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: <ul style="list-style-type: none"><li>• “Dave, what do you think about Kim’s idea”</li><li>• “Abbey, you are a sharp thinker, I’d like to hear your thoughts on this matter”</li></ul>
Chronic	Ask for 1:1 <ul style="list-style-type: none"><li>• Share observation, solicit explanation, re-set expectation</li><li>• If disengagement persists: Determine if person is needed in meeting<ul style="list-style-type: none"><li>• If needed, clarify consequences for disengagement: expected to support decision</li></ul></li></ul>



# **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: <ul style="list-style-type: none"><li>• “I am unclear that more discussion is needed on this.” Then poll the team for need for further discussion</li></ul>
Severe	If additional time needed, set and maintain tight time limit <ul style="list-style-type: none"><li>• Focus additional time on hearing from others on matter</li></ul>
Chronic	Move to vote as follows: <ul style="list-style-type: none"><li>• If “Debater” is not critical for moving issue forward, go to vote</li><li>• Otherwise, table vote and manage 1:1. Set firm boundaries for next steps in process. Consider soliciting external facilitator for next meeting</li></ul>

# 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

# LOOKING FOR FEEDBACK?

## **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?