



# **Tools for Productive Meetings**

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## Group Memory - Flip Chart, Butcher Paper and Markers

### *What:*

Recording ideas and points on large sheets of paper posted in front of the participants. Everything significant that occurs during the meeting is posted where all can see.

### *When:*

Use group memory to:

- Build and/or present the agenda.
- Display information collected before the meeting.
- Record ideas or issues that occur during the meeting.
- Present facts, data or concepts.
- List actions and plans.
- Illustrate graphically.
- Brainstorm.

### *How:*

To use group memory:

- Write large and legibly with markers.
- Capture main thoughts. Write quickly. Abbreviate.
- Title the chart with the topic or question under discussion.
- Record what is said as close to the speaker's words as possible.
- Post charts so entire group can view and reference.

### *Result:*

The group memory provides:

- A focus for the meeting and discussion.
- A visual reminder of the flow of the meeting.
- Discipline without the need to give orders.
- A reference for follow-up activities.



## *What:*

The generation of ideas in an uninhibited atmosphere. These ideas are listed on a flip chart and the process is followed by review and discussion of the list.

## *When:*

Use brainstorming to:

- Collect initial thoughts and ideas.
- Generate and evaluate options, situations or processes.
- Resolve problems.
- Encourage creativity.

## *How:*

To use brainstorming:

- Remind participants that the purpose of brainstorming is to collect lots of ideas quickly from all participants without criticism or judgement.
- Choose a recorder who does not contribute suggestions, but will write all ideas on a flip chart.
- Set a time limit.
- Encourage building on others' ideas.
- Challenge the group to think of as many ideas as possible and accept all ideas.
- Discourage criticism or discussion of ideas during brainstorming.
- When brainstorming is completed, review the list to ensure understanding and take the list to the next level of discussion, prioritization or consensus decision making.

## *Result:*

Brainstorming provides:

- Lists of ideas that can be critiqued and edited, prioritized and rank ordered.
- Creative solutions based upon everyone's input.



# 3 Prioritizing

## *What:*

Applying an evaluation measurement to a list of information generated by the group. One or more criteria are used to screen and sort items to arrive at a ranking.

## *When:*

Use prioritizing to:

- ▶ Determine which ideas are the best.
- ▶ Sort information for importance or significance.
- ▶ Find out where participants agree.
- ▶ Narrow the list of options or actions available.
- ▶ Evaluate on multiple factors.

## *How:*

Prioritizing can be accomplished by:

- ▶ Multi-voting or giving each member a number of "votes" (roughly one-third) to individually distribute to their highest priority items. These are totaled. The facilitator checks with the group to see if they are willing to set the priorities reflected by the scores. Sometimes this can be accomplished using sticky dots.
- ▶ Speaking up or asking the group to say whether they see the items as high, medium or low. If there is disagreement, ask participants to give reasons for their evaluation so the group can rethink. Sometimes this can be accomplished nonverbally with hand or arm signals.
- ▶ Setting up a priority matrix where one item can be compared against another item. Items are listed on the horizontal and vertical axes and compared with each other one at a time. Points are totaled and those items ranking higher more often are set as the priority.
- ▶ Using technology to crunch the numbers. Several meeting software programs allow participants to assign values, submit their opinion and display the data easily and anonymously for the group. Some provide multi-criteria analysis that can also be weighted.

## *Result:*

Prioritizing provides:

- ▶ A logical assessment or analysis of ideas and options.
- ▶ A way for the group to select items for action.



## Polling - Going Around the Room

### *What:*

Each person responding to a question or stating their opinion about the topic.

### *When:*

Use polling to:

- ▶ Collect all the views about a topic.
- ▶ Involve everyone in the discussion.
- ▶ Read where the group is at key points in a meeting.
- ▶ Evaluate the meeting or situation quickly.
- ▶ Ensure everyone is heard.

### *How:*

To use polling:

- ▶ Ask a clear question that everyone in the room can answer.
- ▶ Go around the room in sequence and ask each person to respond or to state his/her position as of that moment.

### *Result:*

Polling provides:

- ▶ A way for everyone to be heard, especially when a few participants dominate the conversation.
- ▶ Increased participation.
- ▶ Energy to get a group that has run out of solutions started again.



## Subgrouping - Breakout Discussion Groups

### *What:*

A temporary division into subgroups of two to ten people to discuss or plan on specific topics. Each subgroup summarizes its discussion to the reassembled total group.

### *When:*

Use subgrouping to:

- Provide meaningful discussion and include everyone, when the group is large.
- Discuss various topics in depth.
- Encourage participation.
- Collect information.
- Compare brainstorm lists.

### *How:*

To use subgrouping:

- Clarify the assignment. Write the discussion questions and topics on a flip chart in front of the room or on a discussion guide prepared in advance.
- Set the time to reassemble as a large group.
- Split the group and assign locations to meet. Depending on the topic, groups can be split by expertise, topic interest, randomly, counting off, etc.
- Provide a method for each group to record their ideas (recording sheet, flip chart, computer, etc.).
- Rotate to each group to clarify tasks and provide support if needed.
- Let the group know in advance about reporting responsibilities.

### *Result:*

Subgrouping provides:

- An efficient way for various topics to be discussed at the same time and to focus expertise.
- A small group consensus that can be presented to the larger group for adoption.
- Consolidation of duplicate ideas.
- A place to test ideas for recommendation.



## Ground Rules - Cornerstones of Group Process

### *What:*

Guidelines or norms for the group that increase the safety of all group members and allow for a productive exchange of information.

### *When:*

Use ground rules to:

- ▶ Introduce the expectations for participant interaction.
- ▶ Refer to when correcting individual or group behavior that violates the group norms.

### *How:*

To use ground rules:

- ▶ Develop a list of ground rules in advance of the meeting. Examples of ground rules may include non-judgement, clarity, high perspective, confidentiality, honesty and proxy.
- ▶ Ask each participant to list his/her expectations of themselves or other members of the group.
- ▶ Each person records their request on cards.
- ▶ Ask the total group if they can agree with and follow the ground rules.

### *Result:*

Ground rules provide:

- ▶ A "standard of conduct" during the meeting.
- ▶ Research indicates that groups using ground rules have a more productive meeting.



## Sticky Wall - Clustering, Posting and Calendaring

### *What:*

Paper or material mounted on a wall that has been treated with repositioning spray to create a tack surface.

### *When:*

Use sticky walls to:

- ▶ Post information and data.
- ▶ Cluster ideas in affinity groups.
- ▶ Document process flows.
- ▶ Create calendars for projects.

### *How:*

To use sticky walls:

- ▶ Spray surface with photo mount prior to meeting.
- ▶ Tack cards, symbols and charts as needed.
- ▶ Roll and reuse for the next meeting. Touch up spray as needed.

### *Result:*

The sticky wall provides:

- ▶ A focus for the meeting and discussion.
- ▶ A way to group similar ideas.



## *What:*

A method to take ideas and turn them into group consensus. This method is described in greater detail in the book entitled, *The Workshop Book from Individual Creativity to Group Action* by R. Brian Stanfield. This method is also taught in the course, ToP® Group Facilitation Methods by the Kolbe Company.

## *When:*

Use cardstorming to:

- Brainstorm big questions with large groups.
- Funnel many ideas for a group consensus.
- Create consensus for visions, problems and strategies.

## *How:*

To cardstorm:

- Prepare the focus questions ahead of time.
- Set a short context for the groups, indicating why it is particularly relevant to deal with these questions at this time.
- After posing the questions, give people time to do their own thinking. This provides a way for both the quick and the careful thinkers to have ample time to organize their thoughts.
- Suggest that a team of two, three or four (depending on the size of your whole group) talk through some of their ideas. This gives people "air time" in small groups, permitting some early feedback to their ideas and relieving some of the need to use whole-group time to air their ideas.
- In the small teams, have people write their ideas on the 5 x 8 cards, one idea per card, using just three to four words per card. Suggest a total number of cards needed from each team.
- Ask each team to pass up one or two cards; e.g., "Pass up your most clear card first." Post these on the wall at random. A sticky wall is helpful for this.
- To get a sense of the breadth of the group's thinking, ask them to pass up a card that is most different from anything on the wall so far.

- Ask the group if they see connections among the cards. Cluster only the cards the group suggests are connected.
- When clusters begin to emerge, ask the group to come up with a temporary title for the cluster. For example, if you have cards that say "meeting more organized," "shorter meetings," and "clearer memos," the group may cluster those and assign the title, "Communication."
- Label the clusters with a number, letter or symbol.
- Call for the remaining cards, suggesting that people write the number, letter, or symbol on the card if it naturally fits a cluster already up front.
- Cards can be shifted and moved from cluster to cluster as you get greater clarity with more and more cards coming to the front.
- Once all the cards have been clustered, go back and clarify and polish the title for each cluster.

## *Result:*

Cardstorming provides:

- A visual way to see the content of deliberations or brainstorming.
- A focus on data, and not on particular personalities.
- Authentic dialogue with the data.
- Greater flexibility for organizing the data later on.



## *What:*

A free-form way of capturing ideas. Developed in the 1970s by Tony Buzan.

## *When:*

Use mind mapping to:

- ▶ Assist the group with a complicated issue.
- ▶ Make new connections about a topic.
- ▶ Generate creativity.
- ▶ Increase understanding of complex issues.
- ▶ Share perspectives.

## *How:*

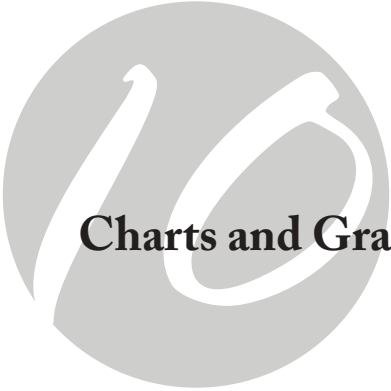
To use mind mapping:

- ▶ Place a central idea or topic in the center of a blank page.
- ▶ Let other ideas branch off from the center.
- ▶ Label the lines using one word per line.
- ▶ Connect lines and print clearly.
- ▶ Use arrows, circles, lines to relate ideas.
- ▶ Add pictures or symbols to help anchor ideas.

## *Result:*

The mind mapping provides:

- ▶ Idea generation and thought expansion.
- ▶ Diagnosis of a complex issue.
- ▶ Visual depiction.



# Charts and Graphs

## *What:*

Pictorial images that are useful for summarizing, organizing and displaying data. These include line graphs, bar graphs, pie charts and pictorial graphs.

## *When:*

Use charts and graphs to:

- Summarize the results of data collection efforts.
- Organize your data into an understandable and compelling form.
- Illustrate the results of data collection exercises.
- Analyze the current process.
- Design and improve processes.
- Measure and manage performance.

## *How:*

To use charts and graphs:

- Determine which charts and graphs to use.
- Line graphs plot information using two axes with two variables for displaying pairs of related data, such as time and percentage of increase in production.
- Bar graphs demonstrate the quantities of given values and show relationships among those amounts.
- Pie charts are used to show value measured in relation to the whole.
- Pictorial graphs are used to depict, at fixed intervals, amounts of a variables in symbolic form. These graphs function like bar graphs, except that pictures or symbols are used to fill the space.

## *Result:*

The mind mapping provides:

- A mechanism for presenting data in a form that can be widely communicated.
- More information and greater effectiveness than words alone can deliver.



## *What:*

A depiction of opposing forces that affect an issue or problem such as driving and retraining forces, pros and cons, assets and liabilities, benefits and dangers, strengths and weaknesses, etc.

## *When:*

Use force field analysis to:

- ▶ Explore all factors before deciding on a course of action.
- ▶ Educate the group about a topic or issue.

## *How:*

To use force field analysis:

- ▶ Decide the topic for analysis.
- ▶ Draw a line down the flip chart and label each column with the force; for example, strengths and weaknesses.
- ▶ Begin with brainstorming one force, listing all of the elements participants contribute.
- ▶ Move to the other force and repeat.
- ▶ Review the data for future analysis, discussion or decision making.

## *Result:*

The force field analysis provides:

- ▶ Rational template to filter decisions.
- ▶ A way for all participants to express their views about a topic.



## *What:*

Feedback is a way of making a person or group aware of a behavior you see and how that behavior is affecting you.

## *When:*

Use feedback to:

- ▶ Share observations with group members about positive or negative aspects of their behavior.
- ▶ Ask for correction in behavior.
- ▶ Learn, grow and develop.

## *How:*

To use feedback:

- ▶ Make the feedback descriptive rather than evaluative, describing the behavior you see and its effect on you.
- ▶ Make feedback specific rather than general.
- ▶ Time the feedback as soon after the specific situation so that the behaviors are still fresh in the participant's mind.
- ▶ State the feedback in positive terms and collaborate on how you can support the participant.
- ▶ Make sure feedback is directed toward a behavior that the person can do something about.
- ▶ Do not bombard a person with more than he or she can handle at a given time.
- ▶ Talk to and look at the person to whom you are giving feedback. Do not talk around a person or behind their back.
- ▶ Own your feedback by saying "I", not "we."

## *Result:*

Feedback provides:

- ▶ Information about a situation that allows the person or group to choose whether or not to continue the behavior.
- ▶ Help to another person or group in order to be more effective.
- ▶ An effective mechanism for change.



## *What:*

Being an active listener means learning to identify and reflect the speaker's content and feelings.

## *When:*

Use active listening to:

- Deal with verbal or nonverbal cues that a group member has an unmet need.
- Help clarify an issue or problem.
- Diffuse conflict or mediate a difficult situation between one or more participants.

## *How:*

To use active listening:

- Suspend judgment and do not make assumptions about what the speaker is going to say.  
Keep an open mind.
- Maintain friendly eye contact. This shows interest and encourages the speaker to continue.
- Periodically re-phrase what the speaker has said so he/she knows you understand.
- Make sure the time and place is convenient for all parties. If you do not have time to listen, tell the person and reschedule a mutually acceptable time.
- Be attentive. Focus on what the person is saying.

## *Result:*

The process of active listening:

- Lets people know that you have been paying attention and are interested in their thoughts and opinions.
- Creates an honest exchange of information.



## *What:*

A journey of questions that takes the participants from surface-level knowledge to a depth resolve. This method is described in greater detail in the books entitled, *The Art of Focused Conversation* by R. Brian Stanfield, and *The Art of Focused Conversation for Schools* by Jo Nelson. This method is also taught in the course, ToP® Group Facilitation Methods by the Kolbe Company.

## *When:*

Use focused conversation to:

- Explore topics in depth.
- Test for consensus.
- Educate the group about a subject.

## *How:*

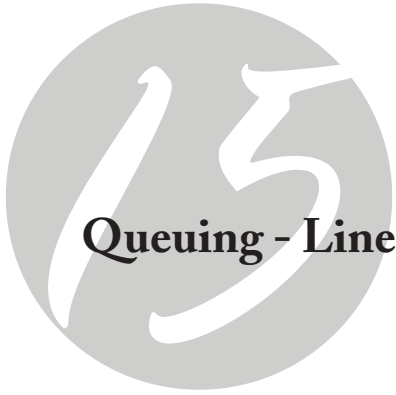
To use the focused conversation:

- Prepare questions in advance using all four levels.
  - Facts and information.
  - Personal reactions, internal responses, feelings and associations about the facts.
  - Meaning, values, significance and implications.
  - Resolution, consensus, decisions and action.
- Facilitate the conversation in a relaxed way to encourage discussion.
- Start with easy questions and build to more complex.

## *Result:*

The focused conversation provides:

- A free exchange of information and mutual sharing of opinions and ideas.



## Queuing - Line Up the Talkers

### *What:*

An established order for discussion and sharing of opinions.

### *When:*

Use queuing:

- ▶ When many participants want to talk at the same time.
- ▶ To line up those that want to share their perspectives.

### *How:*

To use queuing:

- ▶ Ask for a show of hands of those who want to share their views.
- ▶ Determine an order for presenting and announce the order to the group.
- ▶ If necessary, list names on a flip chart to indicate the order of the queue.

### *Result:*

Queuing provides:

- ▶ An orderly discussion.
- ▶ Decreased anxiety for those who are unsure how to get their voice heard.



### *What:*

A listing of ideas that are held for later discussion.

### *When:*

Use the parking lot to:

- Handle ideas that are not appropriate at the time for discussion.
- Capture ideas for future group work.

### *How:*

To use the parking lot:

- Title a separate flip chart "Parking Lot."
- When someone introduces concepts that are not appropriate for immediate discussion, record the item on the flip chart.
- Explain that you are putting the ideas in the parking lot so they won't be lost and so the group can come back to them later and decide what to do.

### *Result:*

The parking lot provides:

- Acknowledgement for the presenter or ideas that are not on topic.
- A way for the facilitator to keep the group on track.



## Consensus Decision Making

### *What:*

A participatory process in which a group thinks together en route to their decision, and selects the option that everyone "can live with".

### *When:*

Use consensus decision making to:

- ▶ Obtain acceptance, ownership and commitment.
- ▶ Choose from various alternatives.
- ▶ Get participation from all group members.
- ▶ Obtain a diversity of opinions.

### *How:*

To use consensus decision making:

- ▶ Give the same initial status to every contribution. Write all suggestions down to stimulate more ideas.
- ▶ Don't allow anyone to criticize an idea, whether their own or someone else's, no matter how silly the idea may seem, until all ideas have been put forward.
- ▶ Once the supply of ideas has been exhausted, begin to evaluate and compare them.
- ▶ Commence evaluation by looking at the positive elements in every idea and make an idea as strong as possible before looking for its weaknesses and pitfalls.
- ▶ Build up several practicable alternatives before you start to choose between them.
- ▶ View differences of opinion as natural and helpful in solving problems. Generally, the more ideas expressed, the greater the likelihood that conflict will occur, but a rich array of resources will be developed as well.
- ▶ Add together as many positive bits as possible, form as many different suggestions as needed. This will help you build a decision to which all can be committed.

- Use "gradients of agreement" to help sort-out where people are on a proposed solution.  
Typical ranges of support may be enthusiastic, lukewarm, and meager.
- Ask for specifics when one or two people find it difficult to accept the position of the majority.  
Find ways to support and bring the person into the consensus. Call on the creativity of the group.

### *Result:*

Consensus decision making provides:

- An effective way for small groups to move forward when decision makers are in the room.
- Increased commitment to the decision by all members to avoid creating winners and losers.