

Meeting Design Template

Meetings are complex activities that always need to be carefully designed. Facilitators need to conduct careful assessments and write detailed meeting design notes before they facilitate complex interactions.

Experienced facilitators typically create several different design options before deciding on the one to use. By considering different approaches, facilitators build in options and flexibility in case the initial approach proves to be ineffective.

Steps in meeting design

- The facilitator reviews data collected from site visits, background reading, interviews, surveys, focus groups and process observation
- the facilitator identifies key meeting elements and prepares a final draft of the proposed agenda.
- Group members are invited to comment on the design and recommend changes.
- A final design is created and sent to members for ratification.
- A meeting agenda is prepared and circulated to members before the meeting.

Challenges of this step:

- making an accurate assessment of the data
- identifying the appropriate goal, objectives and outcomes
- identifying effective process elements
- correctly sequencing the activities
- helping members overcome their resistance to specific elements of the design
- being open to accommodating changes suggested by group members
- creating a flexible design that can be adjusted to match meeting dynamics.

Potential pitfalls of meeting design:

- hasty, inadequate data review
- underestimating the blocks and barriers
- deliberately ignoring difficult aspects
- failing to build in activities to overcome blocks or create needed norms
- planning activities that are inappropriate to the group
- not planning alternative activities in case an element in the original design proves to be ineffective.

Meeting Design Considerations

Use the following series of questions to help you in the design process.

1) What is the overall goal of the facilitation activity?

2) What are the objectives and expected outcomes of the session?

Objectives		Expected Outcomes
i.	□ □ →
ii.	□ □ →
iii.	□ □ →
iv.	□ □ →
v.	□ □ →

3) What's the nature of the conversations that need to be part of this meeting?
Assign a percentage to each of the following:

- ___ % of the meeting that will be information sharing
- ___ % of the meeting that will be planning discussions
- ___ % of the meeting that will be problem solving activities
- ___ % of the meeting that will be relationship building conversations

4) What are the actual decisions that need to be made? How difficult is each decision? What level of empowerment is appropriate for each decision item?

Describe the decisions that need to be made	Difficulty level? (1=low, 5=high)	Empowerment level? (I II III IV)

5) Who should ideally attend?

6) What homework do participants need to do in advance?

7) Does the group need a warm-up exercise to build familiarity or break the ice? If so, what should be its purpose and length?

8) Is there a likely to be resistance? If so, what buy-in question(s) or targeted Norming question(s) should be asked to overcome that resistance?

8) What else might go wrong during the facilitation? What challenges should you anticipate?

9) What will you say to clarify your role? Who else needs to have their role clarified?

10) What specific Norming questions need to be asked in order to create the most effective climate for the session?

11) What questions will you ask during a mid-point check?

12) What questions will you post on the exit survey at the end of the meeting?

Meeting Components at a Glance

Activity	Process Elements
Welcome and Overview	Welcome by leaders Feedback of survey data Review of goal, objectives and outcomes Agenda overview
Warm-up Activities	Small group or partner discussions Personal introductions Structured group games
Needs Assessment	Entrance surveys Wandering Flipcharts Posing key questions
Presentations	Briefings about new developments Briefings about new products Training sessions
Information Sharing	Round Robin sharing of updates
Planning	Visioning/ Goal Setting Environmental Scans SWOT Analysis Stakeholder Focus Groups Benchmarking Strategy development Implementation planning
Problem Solving	Data collection and analysis Process Mapping Forcefield Analysis Root Cause Analysis Idea generation/Brainstorming Decision Grids/Multi-voting Action Planning
Relationship Building	Personal Goal Setting Sharing personal information Building a team profile Team Goal Setting Team work planning Needs and Offers Dialogues Interpersonal mediations Peer feedback Celebrating success
Evaluation	Establishing expected outcomes Verbal Process Checks Written Exit Surveys Exit Surveys Post meeting evaluation form