

# TEAM FACILITATION GUIDELINES 11/9/11

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## NEWEST TRG LEADERSHIP TOOL

"Practical Means for Dealing with Difficult Times"

This section of our site features business tools and planning considerations designed to assist leaders for whom "just keeping up" is not good enough. These notes focus on sequences of thought and action intended to enhance the positioning of your group, both on a long and short-term basis.

Each week additional sets of Tools on a wide array of business subjects will appear. Your input is requested as to which Tools might be of interest to you. Requests will NOT create any form of obligation on the Reader who makes the suggestion, but will help us understand which subjects are of general interest.

Please check back weekly to review the next tool. Visit our [LEADERSHIP TOOLS ARCHIVE](#) for previous tools.

## TEAM FACILITATION GUIDELINES

### BACKGROUND

The ability to lead complex "Groups of Groups" through planning or the resolution of issues is a valuable skill not to be confused with basic meeting management. Laying out and sorting prospects and options for joint action calls for a distinct set of protocols that go far beyond maintaining order in discussion.

The following lays out both the nature of and the methods called for in taking multiple groups through a simultaneous decision-making process.

### CRITERIA FOR NEUTRAL FACILITATION

- Expert in group management
- NOT part of the group being facilitated
- Responsive to but independent from the Group's Leadership
- Disciplined in approach (does not cut corners)
- Not directly engaged in the business or industry being facilitated
- Broad knowledge of multiple solutions that cut across industries

### SET UP

Establish that each session/room/table setup is correct:

- Each Participant has similar documentation (Agenda, Guidelines, et. al.)
- Each Participant has pad and pen
- Flipcharts and markers (or electronic board version) set and ready

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- Ability to hang flipchart sheets, once filled
- Each Participant can see Flipcharts / electronic board and/or hung sheets clearly **Note:** Strongly preferred, but not critical for participants to see each other
- Restroom facilities are identified and readily available (for activity of more than 3 hours)

### STARTING

- Opening Explanations by Team Facilitator:
  - Statement of purpose of team activity
    - To develop weighted OPTIONS to share with full group and leadership
    - Not leading to "directed" answers from the team to the full group
  - Role of the facilitator
    - Neutral leader
    - Commitment to remain neutral - No opinion (Will not give any hint of preference... period)
    - Tasked with IMMEDIATELY STOP interruptions / over-talking / side discussions / rude behavior
    - Keeping discussion contained (Limiting debate)
- Introduction by EACH participant of Self (in groups of reasonable size)
  - Must be brief!
  - State Name/Role Org/Duration with Org
  - Preferred, but not essential: One unusual or humorous fact not known to team
- Describe the team process and reason for it

Explain need for common process to create balanced outcome between the teams **Note:** In a Breakout Session, this may be a compressed repetition of what was said in the general session

  - There is a strong need for common answer FORM (NOT identical answers)
  - YES there Might be a million other ways for each team to proceed but then the team's answers will not harmonize
    - In which case we run risk of both distraction and a perceived lesser value of that team's input to the full group
- Describe No Wrong Answers list
  - ALL participants will be able to (and expected to) contribute
  - It will be made easy for them to participate
  - All answers are valuable
    - Humor ok... Keep it friendly... **Note:** voting generally will sort humor out
  - To be voted by full team as to relative agreement
- Describe Polling process
  - Way to capture relative range of perceptions of all items on the list
  - Simple mechanism will assure balanced input from ALL
- Each listed prospective answer will be weighted by each team member as to whether the item is:

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- Critical (Must)/Significant(Should)/Of Value(Might)/Not for this(No) Best way is to try it
- ALL MUST VOTE (go with gut/perception if necessary)

### POTENTIAL ANSWER-LIST DEVELOPMENT

- Initiate the process
  - Statement of the specific question to be answered
  - State intention to Write Small
    - Explain that flipchart page is an Answer Capturing Mechanism and NOT a display mechanism
  - Post a Single example of a potential answer/item NOTE: LEADERSHIP SHOULD have this ready in advance
- Explanation of Methods
  - Before starting to hear and post general answers each of the team member should write down their short list of the best answers they personally like **NOT** what they think others want to hear
  - Select a "Title" for each answer and BRIEF description
    - Ideal to do so but NOT critical
    - Facilitator will propose if necessary
  - Select starting point around table for naming individual answers by asking for a random number in the range of 1 to the number that is the full team
- Build the List
  - First participant names the first item on their list
    - If the item is the same as the next member's answer, that next person states their NEXT answer
  - Proceed around the room building the list until all participants' answers they been posted
  - When ALL answers are posted, combine like items on the list
    - As long as ALL agree with the combination
    - Linking joined answers with lines
  - Friendly amendments also accepted at the end of the initial listing process
    - If ok with all... If not becomes alternative answer

### VOTING SEQUENCE

- Once there is a full list, for Each listed item ask the relative correctness of each answer
  - Ask whether the listing is:
    - Critical (Must)/Significant(Should)/Of Value(Might)/Not for this (No) NOTE: Best way is to try it

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- Ask for the count of each of the potential values for each item to develop the full picture of the item so that the answers look like this:
  - 2/5/1/0 = 2 Critical / 5 Significant / 1 Somewhat / 0 Not
  - 0/9/5/3 = 0 Critical / 9 Significant / 5 Somewhat / 3 Not
- SLOW DOWN to allow time for all to answer and WATCH the group; REMEMBER that some will vote late
- Combined items to be voted as 1
- Confirm that all answers have been voted and that all votes are in

### PRIORITIZE THE ANSWERS

- Status of what we will Characterize/Number the key answers
  - Looking for top 3 - 6
  - Tie breaker methods
    - Explain WHY votes cannot be equal (list will survive ability to explain equal answers)
    - If two then 'Which is Best?'
    - If 3 -6? vote number by fingers
      - ALL must vote
      - Lowest count highest
      - Re-vote next level ties

### RECAP THE ANSWERS FOR THE TEAM

- Be as FACTUAL as possible
- Present answer in the order of the votes
- Correct an errors on the Charts/Sheets
- REWRITE the top 3 - 6 (approx.) answers on clean page!!!

### PRESENTATION OF RESULTS

- SELECT Volunteer Presenter(s)

For additional information regarding TEAM FACILITATION GUIDELINES, please visit our [Contact Page](#) and send us an Email or simply call us directly during East Coast business hours on our toll free number 1.800.97-REGIS (1.800.977.3447).