



# How to facilitate better collaborative results

Presented by Ann Thorpe  
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**Facilitation brings structure &  
processes for collaboration**

**so meetings get you faster  
results, decisions & solutions.**



We've all been in meetings that don't seem to go anywhere . . . then end with a need for more meetings!

If you're a team leader, you may be thinking, 'yeah, but my meetings are *better*.' Sorry to say, evidence suggests that's probably not true.

The Harvard Business Review (HBR) reports that 'leaders consistently rate their own meetings very favourably—and much more positively than attendees do.'

And in some ways, remote meetings have aggravated this situation.

So facilitating meetings for better collaboration might mean that attendees rate the meeting as highly as you do!

But as important – it means you get the results you need and everyone is engaged and feels positive about it.

Note: HBR, Steven G. Rogelberg, Jan–Feb 2019 and Leslie A. Perlow et al, Jul-Aug 2017

## Bad Meetings

- 71% of senior managers say meetings are unproductive
- people experience an overload of meetings
- employees describe meetings as 'a time suck'
- many employees admit that they use meeting time to do other work
- effects of a bad meeting can linger for hours and require 'meeting recovery'

# Overcoming frustrations



Some of the frustrations you might be feeling include meetings where you're:

- trying to launch a new product, but going around in circles
- trying to create a strategy but can't seem to get enough clarity
- wanting to improve user engagement, but unable to agree on how
- trying to refresh and renew your team's collaborative culture, post pandemic, but everyone's out of practice
- trying to come up with objectives and key results in the leadership team, but getting stuck in disagreements

Whether you've set aside a few hours or a few days, a facilitator can make these types of meetings more productive by applying some specific tools, including ways of working and a range of exercises to get people collaborating better. These tools give you a way to get started, a process to engage and decide, and a method to create a plan of action to take your project forward.

A facilitator brings other benefits, including:

- letting you participate more fully than if you're running the meeting
- intervening and keeping things on track more neutrally
- removing the burden from the team of worrying about the meeting's 'process,' leaving them free to do the work they're meant to do

## **What about remote or hybrid meetings?**

These tools work for in-person or remote meetings, or in hybrid meetings if you have the right technical setup.

# Facilitation Tools

1. Ways of working
2. Framework
3. Exercises

# Ways of working

- sequence
- visualise
- silent and solo
- decide

## Sequence topics and tasks

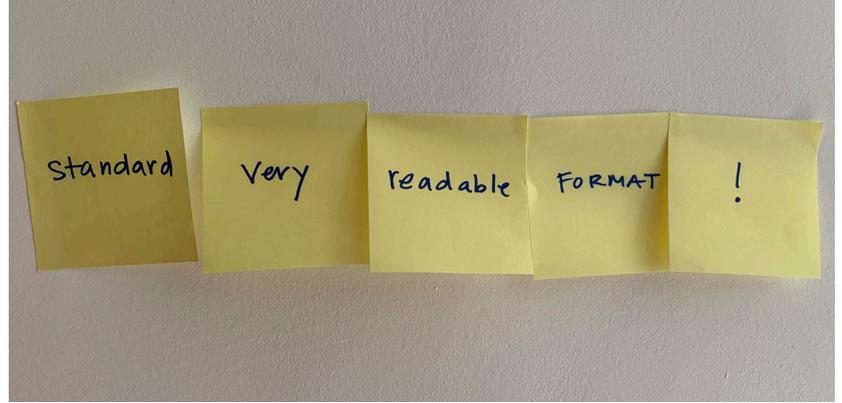
The facilitator keeps your group on topic and on task, making sure that topics come up in the right order and last for a useful amount of time. A lot of that happens through 'time boxing' of activities. The tool for this is an actual timer.

For in-person meetings you can use a special 'time remaining' clock or a phone. Online collaboration boards have built-in timers.



## Visualise discussions

Visualising the ideas helps minimize the burden of what you have to hold in your mind all at once. It increases your ability to engage with a wider range of ideas because they are all there in front of you. Otherwise, we as humans are prone to remember the most recent things we've heard or to remember the first thing, rather than things that come later.



For that reason the facilitator will work to get everyone noting down and sharing ideas in a standard format, a format that is also easy to shape for different purposes. You may not be surprised to learn that sticky notes and pens (or the on-line counterparts, such as Mural or Miro) are key tools here. They're perfect for capturing one idea per note, and they enable re-organisation of ideas as the group clusters, prioritises and develops ideas further.

### **Silent and solo**

Some of the time in facilitated meetings, we work in silent and solo mode. This compliments working as a group. In silent and solo mode, you collect your ideas on sticky notes by yourself, without any conversation or discussion. Then you share your notes later.

This approach differs from open discussion, where the person with the most forceful presentation style, or the one who has the most decision-making authority, influences everybody else. Silent and solo mode, combined with a standard visualisation technique, mean that sharing can be anonymised, which can reduce bias and open the group up to new contributions.

### **Decide**

The facilitator should work alongside a decider, or someone who is 'project responsible' and has the last say on certain decisions that are getting made in the workshop. That way the session ends with clear next steps and clear responsibilities.

# Framework

- **collect**
- **choose**
- **create**
- **commit**

A good facilitator will use these four phases to shape your meeting. In the **collect** phase, the group finds challenges and opportunities. This phase can range from deciding which of many challenges to pursue, through to narrowing down a specific challenge category, for example, 'improving user engagement.'

In the **choose** phase, you'll decide on the focus for the rest of the meeting. Choosing often happens through some form of voting, for example with adhesive (or digital) dots that participants place on their preferred ideas.

The next phase, **create**, is where you come up with ideas for solving the challenge and test it out with some simple, even text-based, prototypes. Finally, in the **commit** phase, you create a plan of action for making your project happen.

You want your facilitator to have each of these components in mind for your session, whether it runs for a few hours or a few days. Sometimes these phases don't occur in this exact order, depending on your project, and you'll go through collect- and choosing several times, but these are the basic steps in the framework.

If you're familiar with design thinking, you might recognize the similarity to the design thinking approach of: discover, define, develop, deliver.

# Starting ..... Finishing

One thing a facilitator keeps in mind is that how you start and finish your session can make a difference. You want to start strong and finish stronger.

A typical way to start strong is by setting the right expectations. The facilitator explains how this session is different than a normal meeting, describing how the techniques, such as silent and solo and time boxing, may feel different and slightly uncomfortable, but they work.

It's also very helpful to create an opportunity for people to share something to begin developing group trust. Keeping in mind that many people dread the notion of 'ice breakers,' it may be better to suggest a 'warm up' where the participants try out a few of the 'ways of working' to get a feel for them.

Finishing strong usually involves drawing out the insights, breakthroughs and surprises from the session, and recognizing what's been achieved.

(More later on activities for starting and finishing.)

# Exercises

Now let's look at how the facilitator makes the four phases (collect, choose, create, commit) happen. In short, the facilitator draws from a whole lot of available exercises to bring out the results you need.

Although there are many, many exercises, about a dozen or so form the backbone of most sessions. Let's look at one exercise for each of the four phases and get some ideas for starting and finishing the session.

## Collect – Sailboat

In the sailboat exercise, we use the image of a boat in the water to collect ideas about things that are moving us forward (filling the sails). Below the water line we're collecting ideas on what's holding us back.

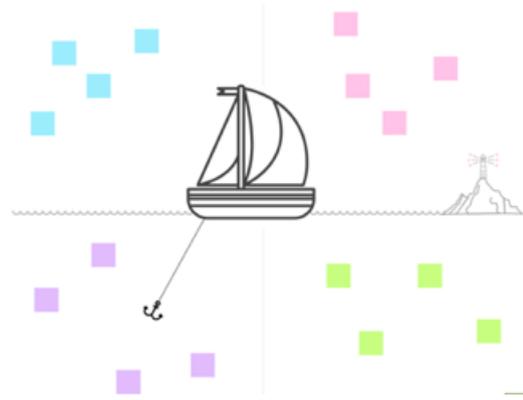
Let's say the challenge is improving user engagement. Each participant works in silent and solo mode for 5 minutes to come up with 3 things that are moving us forward.

Then one-by-one, individuals place the sticky notes on the top part of the drawing and read each out loud, without explanation. Participants might write things like 'users love the logo' or 'the mapping feature is very popular.'

Next, each participant works in silent and solo mode for 5-7 minutes to come up with ideas for what's holding us back. It's anonymous this time, without presenting. When time's up, everyone puts their notes quickly on the lower part of the drawing.

The facilitator removes the duplicates and the group creates themes and clusters the notes. The clustering process can be started by the facilitator but the participants jump in to identify themes and cluster notes. The group can create a vertical stack of the challenges in each theme. But these are not prioritized, they're just organized.

Other techniques you can use to collect challenges include expert interviews, a user journey map, or the business model canvas.



## Chose – Voting

Now that you've collected ideas for what to work on within your challenge, it is time to choose what to focus on in this session.

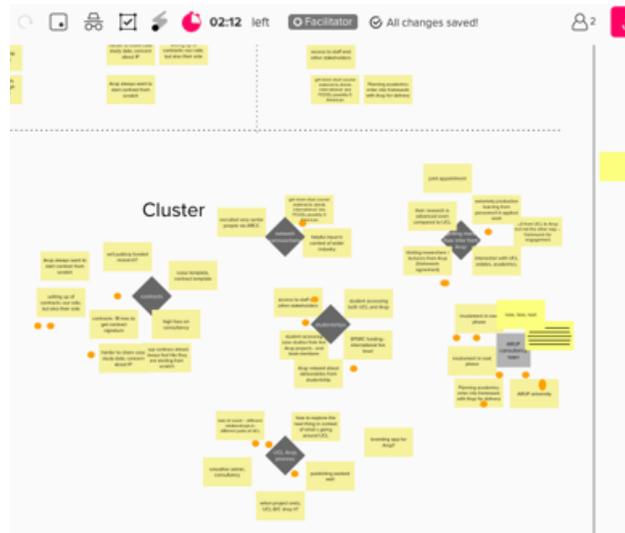
The facilitator can assure participants that it doesn't mean other ideas won't be addressed if they're not voted 'up,' they just won't be the focus of this session.

A common way to conduct voting is to give participants dots—either real adhesive dots or digital dots—and let them place the dots on the ideas they think are the most pressing or most promising.

If you give participants 10 or more votes each, you'll get a heat map that shows where interest is 'flaring up'. Whereas if you give them 2 or 3 votes each you get more of a staw poll, with clearer winners.

In the image here, from a Mural board, you can see the orange dots used to determine the one area that would be explored in the 'create' phase. That cluster had 7 votes, whereas most others had only 2 or 3. Your session might explore more than one area, depending on how much time you have. Or you might have 2 or 3 groups, where each can explore one of the top-voted ideas.

There are other techniques if you want to avoid open voting, for example you can use consensus building from smaller to larger groups, or hold secret ballots. They're effective but more time consuming.





Next ask participants to pick their own best 10 ideas to put up on the board, but not grouped, just random and mixed up. After looking at all the ideas, each person gets 10 dots to pick their favorite 10 ideas (hence the name '10 for 10').

Once voting is complete, the facilitator arranges the ideas with votes into a stack, the one with the most votes on the top and the rest in descending order.

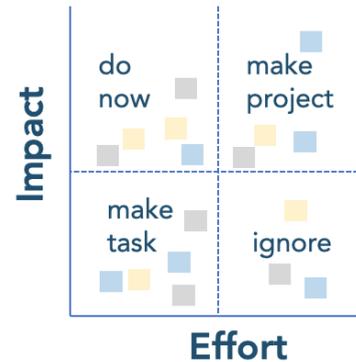
You now have a stack or prioritized ideas and you can move on to plans for putting ideas into action

Ideation can be a really fun part of the workshop process and there are so many great techniques to help people develop out-of-the-box ideas. It's worth devoting time to this in your session if you can

## Commit – Action Board

You can take the action board in two steps, particularly if a number of the top ideas have similar numbers of votes.

The first step is the impact-effort scale. The facilitator takes the top ideas from the 'create' phase and asks participants to help locate the top ideas on the scale.



This scale is actually another version of 'choose' where the top two quadrants get more focus. The second step is to make the action board. As a group you are going to turn several 'do now' ideas into actionable experiments.

Take five minutes and, starting with the idea on a sticky note, come up with 3-5 steps to put an experiment in place. Also consider what the success criteria would be for the experiment. These actions then become tasks you can track using your organisations own task-tracking techniques. Participants leave knowing something will happen and you'll learn from the experiment.



# Starting ..... Finishing

## **Start strong**

Rather than starting with ‘icebreakers,’ start with an exercise that helps people test out the ways of working. One exercise is to ask people to note down (silent and solo) on a sticky note what their first job was and what they learned from it. Then give each person a minute to share with the group what they’ve written.

Alternatively you can ask for people to note down (silent and solo) on a sticky note something they are wearing or carrying with them and what it means to them, or tells people about them. Then give each person a minute to share with the group what they’ve written.

## **Finish stonger**

You can consider ending the session with a celebration of what has been accomplished, perhaps with refreshments. In pointing out what’s been accomplished, it’s easy to gesture to the sticky notes and results on the walls/boards all around you.

In addition, you can ask each person to note down on a sticky note one thing that impressed them—an insight, surprise, or changed perspective. Then give each person a minute to share what they’ve written with the group.

## **Write it down first**

In many settings throughout a facilitated session, before sharing ideas it’s useful to ask people to write something down first. Having something prepared keeps people focused and avoids freeform conversation that may not meet the purpose of the session. Also, for people who aren’t used to contributing, it provides confidence in knowing what they plan to say.

‘talking out loud is dangerous... time disappears.’

-Jake Knapp in ‘Sprint’



**The facilitator is the guide  
on the side, not the sage on  
the stage.**



# Versatility of facilitation tools



Using these tools—ways of working, a framework, and well-chosen exercises—a facilitator can help you tackle all kinds of challenges. These work for in-person meetings, remote meetings, and even hybrid meetings.

A facilitator with these tools will help you find the right starting point and work through ideas to get to some plan for action.

Facilitation is great for sessions to:

- Develop strategies to identify and recruit valuable partners, or tackle challenges of improving user engagement, reaching corporate sustainability goals, or improving hiring and retention
- Design new programmes or design a product or product feature (for example in design sprints), or your new home page
- Design away days (off sites) or multi-day retreats that might involve retrospectives, setting objectives and key results, or refreshing company vision
- Help groups of stakeholders collaborate on pieces of thought leadership or help teams work better together, with other teams or external stakeholders

# All new to you? Here's how to get started

If the idea of running structured, facilitated sessions is very new to you, try just one phase of the framework. For example, if you've got a meeting coming up to talk about how to improve an existing product to create a new strategy, try running just the sailboat exercise.

Or if you've got a defined problem, like 'how might we improve user engagement?' try just running the 10 for 10 brainstorming exercise.

Be sure to appoint a facilitator to explain and run the exercise. Do the exercise as an experiment to see how it transforms the way people participate and interact and the results you get.



## Get in touch

Or, have us help you test it out or run a full session for you. Either way, let's talk about how facilitation can help you, your team, and your stakeholders get better results, faster.

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