

# FACILITATING

APMG has introduced a new qualification to help project managers get the most out of the meetings, workshops and events they lead. APM trustee **John Gordon** shares his top tips on the facilitation process.



**H**ow do you feel when you leave a meeting or workshop you have led? Was the session productive, or did your colleagues say their time could have been better spent?

APMG's new Certificate in Facilitation addresses how project managers can plan meetings to use time efficiently and achieve the maximum output possible to contribute to project success. Here I'll give a few of the top tips that will be covered in more detail by the course.

## BEFORE THE MEETING

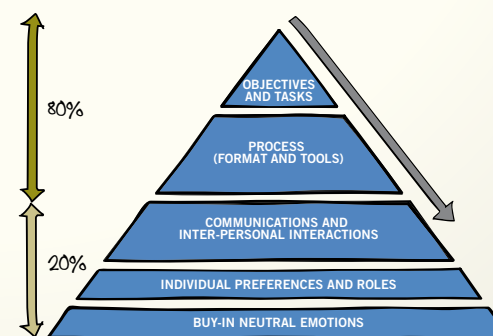
### YOUR ROLE WITH THE ICEBERG® MODEL

The Iceberg® model helps us understand how people and processes work together and provides an explanation of group dynamics in meetings.

The model is a pyramid showing the hierarchical, sequential, inter-dependent elements of planning and conducting a meeting.

On top of the pyramid is the objective of the meeting, or the tasks that need to be completed – these are the most important elements and are often not clearly identified. Next is the process, meaning the format, tools or techniques used, which must be tailored to the objective and each task.

The facilitator's primary role is to help the group define the objective/tasks by the use of appropriate process and provide feedback to steer the meeting forward. These key elements make up 80 per cent of the needs for a meeting, so if they're handled correctly you have gone a long way towards running a successful session.



### TAILOR FIT YOUR MEETING

Does the group of people that will be taking part in your meeting need strong leadership, or will they follow good process with just the occasional gentle nudge along the way? The facilitator needs to be aware of the type of group ahead of the meeting to plan appropriately and be flexible with their intervention to fit with the process awareness of the group. Be aware of these three

group types when planning your approach:

- **Dysfunctional** – generally require strong leadership and the agenda to be set. The group works best if there is a rigid procedure that everyone follows.
- **Transitional** – the group begins to use different formats and tools, procedures become more flexible, interactions improve and members begin to take an active interest in process.
- **Process aware** – the group recognises uncertainty and adapts the process appropriately. Individual members will take responsibility for the process.

### PICK THE RIGHT TOOL

Each meeting should be formulated around an agenda which fits 'task' (objective, tasks, degree of uncertainty) together with 'process' (tool, format, time, preparation) to deliver the outcome required. You should consider the type of group involved and the tool/technique to be used for each task when choosing the format to be used. This will help you ensure the meeting allows balanced input by engaging everyone in the room. There are four main formats:

- **All** – participants give individual contributions – used when there are dominant people in the group and you want people to work independently, free from others' influence, so you get each person's own thoughts and ideas.
- **All to One** – The group provides communication via one person – used when you want cross-fertilisation of ideas and there is no danger of domination by any individuals.
- **Group** – all work together – used when there are several constituencies in the room and you want to reflect their different perspectives.
- **One to All** – one person provides input to the rest of the group – used when there is an expert who can steer the group by giving their input first.

There are many process tools and techniques that can be used to stimulate thought, gather ideas and provide output during a meeting. Be prepared to intervene and change a tool or technique that is not working to improve the meeting. Choosing the correct tool and format for a given situation is the key to great facilitation.

### PLAN TIME EFFECTIVELY

Groups often run out of time in meetings as they fail to recognise that some objectives or tasks are less certain and more complex so will take longer to complete. As the meeting facilitator, plan the time necessary for each task using these three key markers:

- **Certainty** – the question is clear and the answer is easily obtained from the

people in the group.

- **Complexity** – the question/problem is relatively clear but the solution has to be developed.
- **Uncertainty** – even the nature of the question/problem/issue is unclear and has to be defined and clarified. Only then can a solution be explored.

When the question to be addressed is certain we are generally accurate with meeting time estimation (T). When things are complex we need 2.5T; when things are uncertain we need 4.5T.

Choice of meeting room is critical to efficient collaborative group work and should be 1.5 the normal size with plenty of wall space.

Ensure that you have equipped the room with flipcharts and have plenty of Post-it notes, marker pens etc. The meeting plan should be elegant, fit for purpose, and appropriate for the tasks and the group involved.

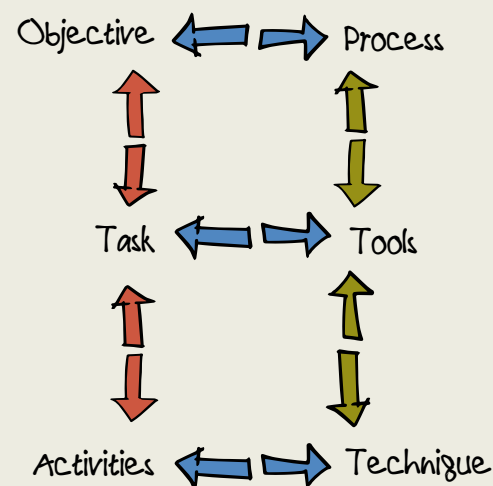
## DURING THE MEETING

### THINK RED AND GREEN

You may have to swap hats quickly as you switch from making contributions to the execution of the task as the project manager, to acting as the facilitator to guide the process and keep the meeting on track. The Red and Green model helps highlight occasions that require you to take

**Red**  
Task Think  
Task Leader

**Green**  
Process Think  
Facilitator



on these different roles during a meeting.

Where you place yourself in the meeting room and the language you use will help





you make the role you are currently playing clear. I tend to sit at the meeting table with team members and use 'we' while focusing on the task (red), and when facilitating the process (green) I stand to the side of the room and use 'you'. These techniques help make it clear when you are jumping between being engaged in the task and providing guidance on the process.

### PROMOTE GOOD COMMUNICATION

The Feedback model is a key tool to ensure good communication is taking place and all members of the group fully understand each other's points of view. It also helps to develop ideas, move away from uncertainty and translate between specialists. Use phrases like: 'so what you are saying is...', or 'my understanding is that...' to ensure you have understood group members' input. You could also use reverse feedback to make sure group members understand you, by asking 'I need to know I am making sense; what do you think I am saying?' In a transitional group you could encourage members to give feedback. A process aware group will do this instinctively.

### MOVE THE MEETING FORWARD

The SPO tool can be used to introduce process and tools to steer the meeting forward and may aid the group in reaching agreement. SPO stands for **summarise** – provide background and context; **propose** – suggest format and techniques; and **outcome** – what will result.

#### Here's an example of the tool in action:

**S** – 'I sense there are a number of views around the table that all appear to be valid but we can't decide how to take this forward.'

**P** – 'I propose that we use a relative importance grid as a tool to list then rate all the issues against each other.'

**O** – 'So that we can identify the most important and relevant issues for us.' You may add the use of feedback to ensure the group understands the SPO fully.

### AVOID DISTRACTIONS

When a group member's proposal goes 'outside of the box', but may be worth considering later, avoid it becoming a hindrance to the process and the timely execution of the meeting by

making a note of it on a Post-it note or flip chart. Make sure you let the group know that it will be followed up on.

### SCAN THE GROUP

Keep a constant awareness of how the room feels; are all the different personality types in the group engaged and usefully active? It is the facilitator's role to make a process change if required to improve the outcome. As the saying goes, 'there are no difficult people, only poor process.'

### SAY YES, AND...

A common tendency is to close down innovation and thinking by using phrases like 'we've tried that before'. Instead, say 'yes, and...' adding something new each time for a more positive response to enable the group to build on what has been said.

## AFTER THE MEETING

### REVIEW USING THE ICEBERG® MODEL

Work through each level of the Iceberg® model with the meeting participants and ask them how successful each element of the session was. Consider what helped or hindered at each level. By doing this we learn to improve each event by understanding what worked and what didn't. How will your next meeting be different?

### REFLECT ON YOUR FACILITATION INPUT

The attributes of a good facilitator are flexibility, quick to act, change and ideas oriented, extrovert, board business awareness, bold/brave/risk taker, calm with a low level of tension and process oriented. Reflect on where you felt most and least comfortable in the meeting. Prepare to handle this in your next session. □



**JOHN GORDON**  
PPM PROFESSIONAL  
APM TRUSTEE

I am a PPM professional with 25 years' experience leading projects and programmes in manufacturing, business change, life sciences and medical devices. I am a Fellow and non-executive director of APM.

### COMBINING THE USE OF TOOLS

The example was derived from a real session. Using 'All' format and the brainstorming tool – Using Post-it notes – symptoms were identified. Symptoms were then clustered using a format 'Group'. This was followed by a 'Group' format to analyse causes and actions. The vertical trace lines show common cause and actions which help to suggest the actions with the widest impact.

The actions – numbered – are then categorised using a four-box matrix tool shown at the top. This has a Y axis of likely action cost and an X axis of ease of action implementation.

## Actions

## Cause

## Symptoms

For further information, to provide feedback or contact the author, scan the QR code with your smartphone or go online to:  
[www.tinyurl.com/Project-facilitation](http://www.tinyurl.com/Project-facilitation)

