



FacilitationPlus: More than Methods and Tools

The Nine P's of Preparing to Facilitate a Meeting

As the old saying goes, if you fail to plan, you plan to fail. Whether you are preparing for strategic planning, conflict resolution, or team building, the secret to preparation is the same: you must have a clear understanding of what is involved. The "Nine P's" cover everything that you will need to discover.

Concrete responses to these 9Ps will give you a clear understanding of what is to be done and how. It is important to consider the Nine Ps in order: Purpose, Problem, People, Product, Process, Parameters, Place Protocol and Pre-reading.

Why the meeting is being held is as important as how it will be handled. Creating an agenda without having agreement on the purpose or product, risks your session being unfocused and ineffective.

Gathering the Nine Ps: The Client or Sponsor Interview

Typically you will be facilitating a meeting for someone else, it is essential that the session sponsor provides answers to the Nine P's. It can also save you considerable headaches to get input from the participants themselves about Purpose, Products, Process and Parameters. Participants often have a different perception of what the meeting is all about.

Other stakeholders

In addition, be aware of all other stakeholders. At times there may be a secondary sponsor, e.g. a senior manager suggesting divisional or regional strategy meetings for some of his departments or teams, or an HR manager who is funding the meeting as part of an organisational approach or on behalf of a senior manager.

Other Questions

Not all of these questions are appropriate for every session - select those most relevant to the session you are facilitating. Along with the Nine Ps, there are several logistical questions that should be answered in your preparation, such as: What materials need to be distributed prior to the session? Who will distribute them? What materials will be needed during the session? Who will bring them? Who will document the session? This is important as it is impossible to facilitate well and minute the meeting. All key issues and decisions should be recorded on flip charts and hung for all to see, but plenary discussion resulting from these presentations need to be captured.

One of the keys to a successful facilitated session is thorough preparation. The Nine Ps and the questions listed above can guide you to successful interventions.





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The Nine Ps

Information you need

Purpose:

Explains why the session is being held and its overall aim.

- Political or personal reasons why the meeting is being scheduled now
- Any incidents that may have precipitated the meeting.

Problems :

Identify potential obstacles to be faced in tackling the overall issue.

- The problem might be presented as obvious; however, previous history in terms of meetings, agreements, decisions etc. Can be relevant and provide interesting insights. Many clients offer far more background than is necessary, your skill is to target the really useful bits of information.
- Anticipating problems helps choose the most appropriate process and will alert an effective facilitator about relevant interventions for addressing or mitigating them.

People:

Identify attendees – their names, titles, relationships etc.

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- Understand expectations perspectives or concerns.
- Be aware of the group's decision making ability.
- Level of familiarity; hierarchy – real and perceived!
- Previous experience with facilitation and any notions of what facilitation is. Most people are unfamiliar with the role and skills of a neutral facilitator; they confuse the role with moderator or chair
- Anything useful about other stakeholders not attending.

Product:

Describes the session deliverables- the items that will be produced to achieve the purpose.

- The precise outcome document required –action plan, strategy, vision formulation etc., and any constraints on its production or format and presentation.
- Form of report the client expects: a simple neutral report on what the group decided or a technically detailed report is required. Writing a technical report is a different piece of work.





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Process:

The approach and steps that will be taken to lead the group to a successful outcome.

Parameters:

The scope of the meeting that helps focus interventions on things the group can influence.

Place

The location for the meeting. Whether on-site or residential retreat the place will have an impact on the meeting.

Protocol:

Any organisational or cultural procedure that needs to be followed.

Pre reading

Information, data, questionnaires etc.

- Expectations from previous meetings,
- Time constraints or expectations. If they want you to facilitate organisational change in a half day session have the strength to say no!
- Objectives and expectations
- Preferred process or existing agenda: does it match the expected product or outcome
- Ground rules
- The scope of the discussion and proposed solution.
- Recognition of systemic influences -All problems exist in a system and it is often impossible to address an isolated problem without affecting everything else.
- Reality check on what is feasible given the participants, power, time frame etc.
- Where will the session be held?
- Is it sufficiently flexible for our needs?
- Does it have sufficient open space to allow movement? Wall space for displaying outcomes? Natural light? Break out rooms? Appropriate facilities?
- If on-site what tolerance is there for checking in with the office?
- Who has to open? What is the dress code? Who has to present? – what is truly non negotiable and what can be influenced. The regional pattern of every representative giving a 20 minute presentation on their virtues is often not helpful and can be satisfied in other ways that leave the meeting time to substantive issues.
- What information do people need to access before hand
- What briefing or access do they need for any questionnaire or instruments that might be used.