

RODNEY NAPIER  
AND  
ELI SHARP

*Not Just  
Another*

MEETING

CREATIVE  
STRATEGIES  
FOR  
FACILITATION



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# INTRODUCTION

After decades as consultants, teachers, and facilitators, we continue to see the need to provide leaders with tools, skills, and strategies for building more effective teams and organizations. Twenty years ago, Rod wrote the first of four books dedicated to translating strategic “designs” into a language accessible to leaders, managers, and particularly facilitators. These simple yet in-depth solution models were designed to help solve a problem, resolve a conflict, make a decision, or address anything else that might block the team, meeting, or organization from reaching a goal.

It should have been a no-brainer: proven ways to improve either team or meeting effectiveness, almost as easy as painting by numbers. However, it took years to discover a certain fallacy in this thinking: Leaders and facilitators would not even attempt our easy step-by-step approach if they had not had the opportunity to experience it firsthand. They had to see the strategic designs being implemented successfully before they would risk trying virtually any of them. The potential for failure or loss of face in front of their direct reports or, heaven forbid, their boss or client would never occur. Rather than chance success, they chose to continue with mediocrity. The keys to victory lay on the table, yet the risk-adverse leader or facilitator would not pick them up.

Suddenly we were faced with huge evidence of the need for a new and innovative way to teach facilitators—and through them, leaders—how to improve their team and meeting effectiveness. So during the latter part of this book, after some brief foundational work, we will bring the experience—the demonstration of our ideas—to you. Learning some accessible new skills should prove to be both

interesting and enjoyable as you expand your facilitator repertoire. It will be like shining a new light on situations you've taken for granted for many years; suddenly, you'll have new choices to excite you and your stakeholders. Our job is to make the facilitation process both interesting and fun—yes, fun.

## **The Extraordinary Dollar Cost of Mediocrity**

Over the years, we have conducted several analyses of meeting costs for large businesses that have implications for anyone who has ever attended a less-than-satisfactory meeting. Each time, our rather conservative estimates proved to be mind boggling.

For example, the average executive spends at least 10 hours a week in meetings with an average of five people at each meeting. Each of those individuals would be priced out at no less than \$100 an hour, which adds up to \$5,000 a week in meeting costs. For larger companies, multiply that \$5,000 times 50 weeks, then times the 50 top executives, and the cost is more than \$12 million. Yet, of all these executives, only 10 percent said they'd received training in anything more than how to build a meeting agenda. One organization we studied had 300 facilitators at an executive level, and many of the meetings had well over 10 people involved. The associated cost ballooned to more than \$100 million a year, with few of the meetings being evaluated, and rarely were the facilitators provided any feedback.

Even more challenging is the admission by a majority of these facilitators that they spend no more than 15 minutes preparing, such as by creating an agenda, for the average one- or two-hour meeting. The reason? They have a limited repertoire of strategies for such meetings other than PowerPoint presentations, or habitually defined approaches that make every meeting seem just like the last one: predictably boring. If you're smiling or grimacing, join the thousands who would agree.

The need, we discovered, is a foundational one—the strategic development of trust and creativity across teams and organizations, through not only design but also the trusted facilitators upon whom organizational leaders depend. Without this strategic development, there are few high-performing teams or truly successful meetings. “Same old, same old” rules, and productivity and innovation suffer with little being done to alter the equation.

For 30 years, we have presented our consulting clients with strategies to facilitate differently, and now we are bringing these tools and skills to you with a new approach that enables you to witness our strategies as if you are in the room. Anyone who reads these pages and studies the accompanying animations will expand their

repertoire of facilitation solutions. They'll gain a new understanding of how to work effectively with highly diverse groups of individuals, begin to think diagnostically, and enhance their creativity as facilitators in support of moving teams, meetings, conferences, and gatherings of all kinds to new levels of effectiveness. And the benefits will continue to increase as they become more comfortable with these ways of thinking and acting.

## **Different Uses of Facilitation**

During the past decade, the number of different roles and functions in organizations of all kinds has diminished dramatically, partly because of the economic collapse. The result is an emphasis on the bottom line, staff reductions, and the persistent theme of doing more with less. All three factors have conspired to raise levels of fear and urgency in a crisis-reactive work climate. "Just do it, damn it!" is increasingly the leadership mantra.

Command and control management has returned with a vengeance. More and more leaders have adopted a militaristic, "take the hill" approach. The last thing they want is to be questioned. Community-enhancing behaviors like engagement, collaboration, and open communication, while often discussed, have been shelved because they require precious time both to build the necessary skills and to execute. And there is the lingering fear that working in groups itself requires more time. It is confusing when people still use the words—the cooperative jargon—while doing the opposite. Simply getting people into a room with a demanding topic that shouts out for collaboration and deep discussion will not have a good result, no matter what the boss says. More often than not, the goal of the participants is to finish as soon as possible with a minimum of boredom or pain. A bit cynical, but often true.

Further, leaders are often lulled into believing that facilitation is a simplistic process of formulaic strategies. There are innumerable books pushing their wares on harassed managers, leaders, and their erstwhile facilitators. The "quick and dirty" prescriptive advice promises easy success if basic rules are followed. The *60-Second Leader*, or *6 Tips to Success*, or *Eight Lessons From Genghis Kahn* prey on the confusion in leadership today, while also placing greater emphasis on the marketing potential of a concept over its actual content.

Our view is that leadership and facilitation have never demanded so much or been under such challenging conditions. At the same time, never has there been such an array of tools and skills available to improve leadership effectiveness. And

facilitators are in the crosshairs of that reality. It is for them to make a silk purse out of a sow's ear. Their leaders tell them what to do and what they expect, but they haven't a clue how to deal with the contradictions and demands thrown at them.

For example, we observed a two-hour meeting with nine executives who were to identify obstacles to their organization's operational efficiency. The meeting facilitator had each of the leaders write down their three greatest priorities and then opened the floor for discussion, dutifully going around the circle of leaders so each would feel involved. Of course, all hell broke loose as the executives argued for the issues that would cause the least disruption to their part of the organization. At the end of two hours, confusion reigned and little knowledge had been transferred, nor was there a commitment to further action.

In our debrief with the frustrated boss and facilitator, we suggested an alternative design that had each of the nine leaders go into one of the areas other than their own and interview 10 floor leaders about what they believed were the greatest operational deficiencies in the organization (not only in their area). The interviewing executive would return with critical issues that blocked organizational efficiencies and that the floor leaders thought needed to be addressed. Then, working in clusters of three, the leaders would identify the five most salient issues drawn from their three groups. Finally, the three groups would come together, making it relatively easy to identify the most critical issues as well as a few salient additional areas that caught their interest.

The design was diagnostic in nature, and it reduced the inherent competitiveness that had corrupted the initial meeting and reinforced the silos that had plagued the organization for years. The facilitator was used to going around the group to ensure that everyone had an opportunity to speak, but the same few leaders tended to dominate every meeting. Thus, the design used at the following session mitigated several deficiencies in the team's working process.

The leader of the executive team hadn't understood the value of the executives listening to the floor leaders, nor the value of the executives working for the good of the whole rather than their own interests. The interview design prepared leadership for eventually doing the heavy lifting necessary to solve the problems the floor leaders raised. Then, even better, the facilitator could engage some of these floor leaders in the problem-solving process. And that, in turn, would increase the probability that solutions would be owned by the floor leaders responsible for enacting them.

For the facilitator, improvement of such a dire situation begins with an

awareness of your limitations. So, before digging into the opportunities found in the art of design, it is critical for any facilitator to know how they will affect the group. This means developing the philosophy of “intentional facilitation,” the principles of which we’ll be exploring. So, in this book, we promise to:

- Provide you with a greater awareness of your impact in your critical facilitation role.
- Add greater rigor and discipline to your role as a facilitator.
- Offer a new way of thinking about the teams and meetings for which you are responsible. We’ll also show how even a little additional time designing can enhance the productivity of a group and the individuals who comprise it.

## **The Purpose of Intentional Facilitation**

The role of facilitators in the organizational leadership equation has two equally important sides. The first is being conscious of your own behavioral impact versus your intention. The second is extending your repertoire of what to do and how to do it so that you can respond strategically to any situation with calm, certainty, and creativity. This will forge the necessary trust between you and your leaders. They have handed you the reins for dealing with the widely differing challenges they face every day. As you become more skilled, so will they in their demands and expectations as well as their knowledge of what is possible in any given meeting.

This ability to respond with calm certainty is where the art of design becomes important.

An effective design is not, as you will see, some magical formula. It is a learned set of skills that can change your way of being a facilitator and a leader. Put simply, it demands that you are willing to be both a learner and an experimenter.

As a way of thinking, it’s fairly easy to understand. It’s based on the belief that virtually every situation demands something to move the team, group, or meeting forward in a positive manner so that those involved feel productive, and, hopefully, well utilized. Now, how many people leave meetings feeling successful, productive, and well utilized? In observing and evaluating meetings for nearly five decades, we’ve found that the answer is usually very few.

And yet, people do not intentionally create mediocre, boring, unproductive meetings or cultivate combative or passive members of their organization. The truth is that most people facilitating these meetings simply do not ask the right questions as part of the diagnostic narrative we will explore. Nor do they choose the

designed activity that will best work for the group. After all, few of their colleagues model what we are suggesting. But our demonstration, through the use of avatars, of the successful designs that could strengthen their limited repertoires can help fill the gap experienced in most organizations.

Successful facilitation is one critical aspect of leadership, just like hiring, creating a compelling vision, or goal setting. It's one way of thinking about yourself in relation to those you lead—it's not as if you can turn off your leadership self at any given time. Intentionality is at the core of successful facilitation. It implies that everything you do is under scrutiny—by yourself and others—and makes a difference in how easily people accept your efforts to lead them through a particular designed activity. Living that simple definition can immediately improve your facilitation effectiveness. It requires no expensive books or seminars, no training program. It demands only a new rigor, a new discipline in how you see yourself and what you do as a facilitator at any moment.

It's like the story of the young father who came to Rod after they'd been working together for a while and asked, "Rod, I have a personal question. My eight-year-old son seems to be afraid of me, gets emotional easily, and feels increasingly distant."

Rod's response, cutting to the chase, was, "Well, what do you do when you're angry with him? After all, you are 6'2" and weigh around 200 pounds."

He paused, as if trying to remember, and said, "We have a good relationship. In fact, I rarely get angry and I can only remember one time when I really lost it. He was five years old and did something stupid and I remember getting in his face and screaming at him. He ended up running out of the room." He added, "I can't imagine he's still carrying that around."

Rod reminded him that at that time, his son weighed, perhaps, 50 pounds, and after watching his seriously angry father fly off the handle, he would never want to see him get that angry again. He added, "Consequently, he has become watchful and cautious and a bit fearful whenever he sees you get red—which you do—and when that telltale vein in your neck starts to pound—which it does—he vacates the premises, emotionally, physically, or both."

Just like the father, most facilitators or bosses become unconscious of their impact and of the signals they emit that say "watch out" or "danger" to others. Other employees, direct reports, or even peers become cautious, especially when they're stressed, and, predictably, defensive. Under duress, pressed, and sometimes unsure of themselves, people become impatient or angry, or perhaps don't feel

understood. And, of course, all those little and not-so-little indiscretions are then noted by the individuals who are increasingly fearful of pissing the person off, or potentially losing their jobs. Such caution and fear are cumulative and, over time, can negatively alter a facilitator's effectiveness. And you or other facilitators will likely never be told about your impact. How different is that from the dynamic between the father and his son? He hadn't a clue and he loved his son dearly.

To be a facilitator today is like walking in a minefield, cautious of what you say and how you say it. But, by choosing to be the facilitator, it is your job to be intentional. *What could I do differently to improve the situation the next time?* This becomes your mantra. And, there will be a next time—count on it.

Yes, you can be angry and tell people how you feel. And yes, you can still be spontaneous. Nonetheless, who is to blame for the consequences of your actions? Only yourself, if you believe this way of thinking. That is the challenge. In the complex roles of today's facilitators, these questions are key: *What is your goal in the moment? What is the desired impact for those you lead or facilitate? How do you want people to feel when they leave your presence? Are you up to the level of effort this demands—becoming conscious of both your impact and your intentions?* For many, this is a big order, but an essential one to be the most effective facilitator possible.

## **Doing Something New as a Facilitator**

There are books on fearless facilitation, on facilitating to lead, and on ways of making it easier. Most talk about the *what* of facilitation more than the *how*, and few provide the tools to take you to the next level in your practice. Ours is devoted to the how of facilitation.

In doing so, this book offers leaders 13 classic design modules used effectively by our organization over and over for decades. Each is described in this book, and accompanied by a corresponding animated video (which you can find at [www.TD.org/NotJustAnotherMeeting](http://www.TD.org/NotJustAnotherMeeting)) to visually model the design for facilitators and team members. We believe that seeing leads to doing.

We encourage facilitators to read about the modules, watch the videos, and take notes. With these in hand, the intentional facilitator comes to the conference room ready to inspire increased productivity and creativity within the team and, over time, across the organization.

Following is a table with brief descriptions of the 13 designs. They are provided here to whet your appetite, before their full description (and accompanying illustrations) toward the end of the book.

<b>Solving Problems and Setting Priorities</b>	
Future Search	Each person interviews a group in a method similar to speed dating, with critical findings presented to the whole group in memorable ways.
The Carousel	Small groups rotate through four to six work centers until everyone has responded. Then, the data from each work center are summarized and shared with the larger community.
Collapsing Consensus	Small groups list all the factors causing a problem or ways of solving an issue. Then they join forces with another group with the same problem and negotiate the best solutions (or issues) from the two different group efforts.
Executives and the Common Person	Creates an interview process where deep listening on the part of the leaders provides important information about their team and builds greater trust among those interviewed.
6-Step Problem Solving	This is a stepwise tool for solving problems collaboratively. This problem-solving design is both efficient and interesting, and has wide-ranging applications.
<b>Building Trust and Engagement</b>	
Kings, Queens, and Fairy Tales	By having small groups describe the current reality in the language of Arthurian times, candor and openness are enhanced with doses of needed humor.
Genie in the Bottle	Provides a unique, productive means of teaching and practicing feedback skills.
The 7 in 7	People are asked to share the seven most powerful influences in their lives that have helped make them who they are. This design can have a profoundly positive impact on the trust in a group or team.
The News Conference	Provides a means of overcoming the natural fear many team members have of speaking truth to power. With the leaders also responding to the truth they hear, this can result in positive results at all levels.
<b>Dealing With Conflict</b>	
The 8 and 6	This is used primarily with two members of a team in conflict. It develops a climate where risk taking is shared and relatively equal, resulting in insights for the two parties.
Paradox	Provides participants with new ways of considering conflict, especially when it deals with difficult people. It looks at how the problem solver can unintentionally become the perpetrator.
Questions, Only Questions	Can help move a "stuck" team, group, or committee forward by resolving what ails them in real time.
Speak Out	Legitimizes strong feelings (such as issues around race, ethnicity, or gender) through deep listening, with a goal of understanding differences rather than striving for specific answers.

Understanding the why and how of each design results in confidence that can be felt by those being led. It's like the satisfaction gained when the last pieces of a complex puzzle fall into place. In the process, you as the facilitator will begin to feel

more confident in creating your own designs based on the needs confronting you. By accurately assessing the need of the group in the moment and understanding design, you will find choices materializing almost instantly. Seeing a design as a creative act opens possibilities that may never have been considered. Witnessing the design unfold before your eyes transforms this learning process from one of telling you about facilitation to the exploration of new possibilities that will stimulate both you and those you facilitate.

The marriage of intentional facilitation and design should, at this point, be easy to understand. It is the specificity of intention, based on an incisive diagnosis, that drives design. It is for us to put the necessary meat on the bone of that principle that, in turn, provides the lessons of this book.

Most facilitators run their meetings and efforts to engage groups on the fumes of old habits and routines that have lost their meaning and zest. They reflect the remnants of boring teaching translated into boring meetings. Who, for example, has not gone to a weekly meeting that is completely predictable in how it begins, how it ends, how any discussion is conducted, and who talks and who doesn't, along with the knowledge that there won't be sufficient time to complete the agenda? Equally predictable is that those participating in the meeting will leave frustrated at best and angry at worst. To compound the problem, the facilitator, predictably, will virtually never seek or receive feedback about the perceived waste of time many people feel. It reminds me of those who have sat through a horrendously boring sermon in church and proceed to congratulate the minister on their way out on the wonderful service. The same thing often happens to meeting participants who survive a similar experience and then commend the boss or the facilitator for a job well done. One thing's for certain: When we talk about engagement and a stimulating meeting, we will rarely find the answer in a presentation slide deck.

As a result, the first few chapters of this book will equip you with a new way of thinking and acting intentionally when facilitating meetings and working with teams. The second half of the book provides the following:

- It introduces you to 13 creative designs, using animation to demonstrate how to successfully implement the strategies.
- It allows you to experience each design on a visceral level in a risk-free environment, which will increase your confidence and motivation to use the new approach.
- It reminds you how adult learners learn, so you can enhance engagement and encourage them in your efforts to create your own inventive designs.

By using new animated technology to illustrate these designs, along with new communication strategies, we hope to spread the word among those inspired to bring creativity to their workplace and to groups of all kinds.

We expect to help all our readers bring interest, creativity, and effective outcomes to the workplace. To this end, the concepts of personal impact, intention, and design are highly correlated. The good news is that it begins with your willingness to break some old, habitual ways of acting. This book will help you expand your own possibilities every time you are faced with a group, team, or individual that demands something more than same old, same old and, as a result, will bring out the best in you. If you truly understand and use these concepts, you will never be boringly predictable or run out of possibilities.

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I want to thank Amma, Laura, and Tori—my three beautiful daughters—for the extraordinary support I have felt over these many years. They’ve given me loving space to do my work, sometimes at their expense. I hope they have felt my sincere efforts to live the values and skills about which I have written.

—Rodney Napier

To my love, Vincent. Thank you for your never-ending support and true partnership on our journey together.

—Eli Sharp

# PART I

## DESIGN AND PREPARATION



The first section of this book introduces the concepts of intervention, intentionality, and meeting design both in facilitation and in everyday life. It will help you organize your thoughts with respect to what you actually want from your team, how you want them to feel during your initiative, and where they are starting from.

There are a series of diagnostic questions to help you assess the current situation, and another to help you understand your facilitation behaviors. The concepts are introduced with stories from our experiences that will give you a solid grasp of how facilitation works both in real time and over time. We assume you are starting from the beginning, and ours will be a developmental approach to the notion of design.

# 1

## THE ART OF DESIGN

For 35 years, we conducted a leadership development program in the wilds of Ontario, Canada, on Lake Temagami. People would fly in on a bush plane and stay between 10 and 15 days to learn how to be more effective leaders and facilitators as they attempted to create a high-performing community. The 16-20 participants took pseudonyms and shared none of their back-home realities, such as the nature of their work role, authority, or background. In addition, we used many Native American rituals to encourage participants to step out of their habitual and predictable back-home cultures and ways. For example, participants spent hours sitting alone in deep woods, listening to and observing the transition between day and night. There were team-based problems to solve and decisions to make that demonstrated how individuals coped with time-driven stress. Participation in Native American sweat lodges tested their courage and ability to be vulnerable. And community meetings provided the stage on which individuals shared some of their challenges—how they were stuck or needed to be different when they returned home. Thus, risking became the norm, with more curiosity and openness expected with each new day and experience.

As the program unfolded, the growing trust among team members allowed them to try on new behaviors and eventually receive critical feedback. The participants hailed from a wide range of white- and blue-collar professions, including physicians, teachers, business executives, managers, therapists, electricians, and

carpenters. People came expecting to be challenged physically, emotionally, and spiritually, with many concerned about the “Who am I now?” question that people need to ask periodically throughout their lives, but seldom have the time to do in our 24/7 world. The sweat lodges, vision quests, and other designs created an environment as challenging as it was inspiring.

By the end of the first week, after sharing some powerful experiences, participants fell into the expected pattern of emphasizing victories and minimizing discord, quickly bonding into a seemingly tight-knit community in what many would call the honeymoon phase of the group’s development. As leaders, it was our role to introduce an event or experience that would compel the community to deal with real conflict, much of which, if you knew where to look for it, simmered under the surface. Being averse to conflict had become the norm, as it often does in many business communities. For example, normally, several cliques would have emerged in such a temporal community, and some individuals would feel left out, or personality issues among the participants would be magnified as differences in power and authority within the developing community.

But politeness continued to rule, and being authentic often took a back seat to members wanting to appear both open and together. When the desire to be “members” begins to trump honesty, mistrust begins to creep into the group just as it does in an office, club, or even church community. The result is that conversations can become contrived and superficial as unspoken feelings and issues are not dealt with. In a community that outwardly prided itself for creating trust, spontaneity, and authenticity, caution, doubt, and suspicion were evolving—none of which result in a climate where deep personal learning is really valued. And that was the reason most said they came to this wilderness setting in the first place. Put bluntly, hypocrisy and insincerity were on the rise.

With this in mind, during the sixth afternoon at lunch, we asked how many vegetarians there were who would not eat chicken. We asked early because the group would be involved in intense activities leading up to dinner, and the leaders were responsible for meeting the dietary needs of the group. Three people, including one of our facilitators, were strict vegetarians, with two others saying they had been experimenting with not eating chicken or beef during the program.

By 6 p.m., having engaged in several physically challenging and rather emotional activities, the group had come together in an opening in the forest prior to dinner, to process the day’s events. The 18 participants were spread out in a large, irregular circle.

Inside the circle were two crates, which contained four squawking chickens. Next to the cages were a sharpened ax and a 10-inch knife. The group was told that the chickens were to be part of a chicken stew and that a pot of vegetables had been set aside for the two vegetarians so they could be part of the experience.

The incredulous momentary silence did not last long. One person said they would never eat chicken again if they were going to have to kill the “little beasts.” Someone else shouted that it was hypocritical to eat poultry from sanitized cellophane packaging but not be willing to undertake the deed itself. However, nobody was volunteering to actually kill them. Things rapidly deteriorated: Some individuals invoked religious beliefs concerning killing, and one recalled the childhood trauma relating to the “murder” of a favorite pig that led him to a life as a vegetarian. It was not a pretty sight as brewing interpersonal differences bled into the chicken conversation and people stood firmly by positions that had never before been challenged. Snickers, tears, and insensitive words were tossed out. The program leaders, predictably, were criticized by several of the group members for placing them in such an uncomfortable position—as if comfort was one of our goals.

As a result of this quite intentional design, the group’s aversion to conflict was breached, and the value in the event identified. Even though many still resented the activity, this essential design demonstrated the difference between nice and polite assertions versus authentic expressions that revealed who people really were. It was both fascinating and rewarding to have the group own up to how many of them had chosen to be less authentic since coming together for the program. Before the chicken challenge, they had carefully monitored unspoken pacts so that budding friendships were not disturbed and their membership in the group could be preserved. It sounded to us like most organizations and “teams” with whom we often consult.

The community members also agreed that unresolved conflicts exist in nearly every group, which opened up a discussion about how these pent-up frictions could, inevitably, result in dysfunctional norms and attitudes that, over time, can diminish trust and candor. The intervening chicken design uncovered secrets and unmet needs that were waiting to escape. In the aftermath of the first explosion, the community resolved their differences, began to discuss previously unmentioned tensions, and designed solutions acceptable to the group in relation to killing, dressing, cooking, and, yes, celebrating the chickens. There was little doubt that the group would never be the same—and they would most likely never approach leading their own teams in the same light again. As facilitators, we completed a

natural cycle of diagnosis (what did the group need at this time), risk in committing to a design to move the group forward, and evaluation of our effectiveness in that process, which would set the table for our next designed activity based on where the group appeared to be in terms of their needs and our goals.

## Essential Factors of Successful Design

A successful design, of course, is a planned design. Without planning, it can quickly devolve into a mess, which is *not* what the intentional facilitator desires. Let's dive into the anatomy of the Great Chicken Challenge to understand the important factors to consider when approaching your own design, whether the design component is for a single-agenda meeting or one part of a multistage event.

The specific goal of the Great Chicken Challenge was to generate authentic, candid behavior within the budding team's dynamic, whether or not they were pretty and polite. All designs share a common goal, however: to better utilize people during any meeting. To achieve that critical goal—our intention—we have learned to pay attention to seven factors that are essential in any successful design and guide our actions. Table 1-1 lists these factors, along with key questions to consider. We discuss them in detail in following pages.

**Table 1-1. Seven Factors Critical for Design Creation**

1	2	3	4	5	6	7
Task	Process	Variables	Benefits	Challenges	Accountability	Follow-Up
What is the need?	What is the desired level of engagement?	How much time is needed?	What are the positive outcomes desired?	What could go wrong?	Who is accountable (and for what)?	How will the outcomes of the design be monitored?
What is the desired product?	How should individuals feel during the design?	Who will be present?	What is the value added?	Could there be any unanticipated consequences?	What are the measures of success?	How will we evaluate the design itself?
What is the problem to solve?	What is the physical setting?	What is the time of day?				
What decisions need to be made?	Is there any conflict or unfinished business?					

## Task

When people come together to work, there are both task and process dimensions. Task has to do with the achievable goal and the actions necessary to reach that end. Often this is a problem to solve, a position to be argued, or a set of choices to make. The actions emanating from this task—the process—should result in satisfying the identified need. This need is the “what” or goal of the work equation: the desired outcome. In the Great Chicken Challenge, our desired outcome was to crack the egg of conflict aversion still holding the group captive and making them unwilling to be open and authentic. We didn’t know exactly how the scene in the forest would play out, because the group would have to fend for itself: Deal or not deal with the new dilemma that was rocking their reality. However, we predicted the group would leave the honeymoon stage of their group development and, hopefully, become more productive, honest, and authentic with one another. These, in turn, are the keys to real trust.

## Process

Process is the sibling of task; however, since the global recession of 2008, bottom-line tasks have been the corporate mantra. The “what” of work—task—has continually trumped process—the “how” of work. This is true even though morale, productivity, and turnover are tied at the hip to process and, ultimately, to profits. Fear is the driver of this short-term, reactive management.

Balancing the what with the how is why people need conscious facilitators—and it’s the focus of a lot of design work. It is central to the notion of “engagement,” which is spoken and championed much more than it is lived or understood. Prior to the chicken exercise, what was not being said was debilitating to the cohesion and trust of the group, allowing superficiality to rule like it does in most relationships. In this instance, the program leaders decided to deal with this uncomfortable reality by utilizing the chicken design. This meant breaking the superficial, unspoken goals (or norms) of niceness and politeness with a challenging task that would force the group to look at the “how” of the task, the killing and dressing of the chickens. Once that task was accomplished, the group could use the successful experience to access the “how” of the group’s relationships, discussions, and decision making in other areas. Thus, we designed a laboratory for looking at such issues, a crucible of our making for the group’s learning and development. Our intention was to force such engagement, which we hoped would lead to greater honesty and trust. Such opportunities to learn from each other rarely occur in the rushed and time-bound

world of most organizations. The result are cultures where planning and conflict resolution are often avoided and crisis reaction thrives.

As facilitators, you also know many groups where superficiality rules. In these groups, conflict goes underground, and risk taking is, at the very least, limited. As a result, people often do not hear what they need to hear, especially if the speaker fears such messages will end up being criticized. Carefully planned intentional designs seek to upset any dynamic that compromises trust. Therein lies the creativity of design and the challenge to the facilitator to move the group forward. The chicken activity was a risk for us because we could not control the response of the group and knew it would alienate some in the process. We also knew that talking to the group intellectually about their rising aversion to conflict would not change that reality. One can begin to see how we needed both task and process to be aligned if the design was to be successful.

## **Variables**

While never ideal, the givens or variables often define a situation and have a large impact on what is possible from a design perspective. An available budget, a limiting timeline, unresolved conflict in a team, past failures or successes, and strong personalities in the mix are typical variables at work that influence a situation. These factors need, at minimum, to be considered with their consequences anticipated. This fact prompts increased complexity in the facilitator's thinking and eventual acting. In the chicken situation, we were limited by the time of day and time available to do our design. We were limited by the nature of the physical space, although we intentionally moved the group away from the comfort of the camp itself. We were also limited by our fear that the group would not see the relationship between the extreme design and the dysfunctions within their group. The consequence might be the alienation of the group with one another and us. There is a certain comfort that comes from living in ignorance, and denial is the easiest way to maintain such comfort. After all, it requires courage, honesty, vulnerability, and work to overcome the natural deceptions and dishonesty that are perpetuated, often for years, within some teams, committees, and even families. As facilitators, we took the risk in favor of candor, openness, and trust in the service of authenticity.

## **Benefits**

Like in any venture, if the benefits of the desired outcome don't outweigh the

risks, it would be a good idea to run. But this requires a certain hard-nosed scrutiny of reality and the willingness to diagnose both the benefits and challenges to the team. Normally, benefits are translated into profits, increased morale, continued work opportunities, or measured trust. In theory, every time a facilitator takes an hour of their team's collective time, the outcome should increase some of these factors, which perhaps stimulate curiosity, lead to a success of some kind, or generate useful information or the solution to a problem. But, instead, often meetings are predictably boring, proving to be of little value to the participants. Imagine the influence this has on morale and participation, as members bide their time until the end. Then they leave with the less-than-ideal feeling of relief. And that is what they bring to the next meeting. With all the stress our chicken design created for the group, we thought the benefits would push the group to a new and necessary level of both trust and effectiveness.

## **Challenges**

For every action there is a reaction. Your job as facilitator is to presuppose the reaction to everything you do. If there are potential negative consequences to a design, what are they? Can they be overcome? Do the benefits outweigh the challenges? How do you overcome skepticism or fear among the team, and turn their uncertainty into confidence? How is a recent failure translated into a learning opportunity instead of guilt or shame? Motivating the unmotivated is a challenge, as is learning from a failure or just considering unanticipated consequences for any action the team takes. Was the band of participants gathered in Temagami with us ready to handle their own dysfunctions and leave behind the unrealistic norms guiding their group and limiting their progress? Would the small window of time between 6 and 9 p.m., when darkness takes over, be sufficient to bring the necessary closure and healing to the predictable stress we created? Could we find the necessary chickens in an area where few exist because of the cold winters? Had we provided the group with the skills to pull off their own recovery once the lid was blown off the tight container of conflict aversion? All these issues needed to be addressed.

## **Accountability**

In your experience, how often have meeting participants promised to accomplish certain tasks by a certain date or by the next meeting? And how often are apparently good ideas discussed during a meeting, then later dismissed by participants

after they've promised action? There is nothing more demoralizing than promises not being kept by some, and this influences the work of others who did keep theirs. Not only are promises often not kept, but rarely are there any consequences as excuses and blame come to the rescue of those who have not been held accountable. Any good design needs to have built in accountability. When teams don't trust each other, aren't open to feedback, or fear alienating their peers or their bosses, a lack of accountability will surely follow.

This was such a risky and pivotal design for the life of this group, we had to have contingency plans in case the group imploded and recovery was not happening as we had hoped. As the planning team, we were accountable; we had to be prepared and on the same page, recognizing plenty of room for failure. Trust had to be absolute. Thus, accountability among us was critical in both the real-time application of the design and the follow-up. Follow-up is important enough to have its own category.

## **Follow-Up**

Didn't we agree to that before? Wasn't that Jim's to undertake? Didn't we lay out that plan in October? The failure of accountability will undermine any effort. Without agreed-upon, specific follow-up—and without identified, measured outcomes—success will be short lived. That said, people often live with unfulfilled commitments with no consequences. The result can be a slow degrading of trust. Thus, we have to ensure accountability to the measured outcomes, creating follow-up and monitoring activities that include tracking commitments. This is a critical part of any team or design. Assessing consequences and addressing them, if necessary, is key to any facilitation. Hard-nosed critiquing is essential to this and what occurs next.

Our chicken design was not a “one and done” event. The results would reverberate for the next nine days of the group's life. It provided us with rich information that would drive us as well as the group forward. Obviously, it was tied closely to accountability. It was also a perfect example of how an intervention in one area can influence the rest of the “system” as it moves ahead and develops. Thus, personal relationships within the group would be influenced, as would the trust toward us and among the rest of the participants. And, if other unanticipated consequences of the design arose, we had to be prepared to deal with them. For example, once the group decided that it wanted to be more open and forthcoming, committed to dealing with conflict as it arose, it was essential not to let the group go back to sleep.

The facilitators could not permit them to revert to ignoring conflict as it raised its head, which it surely would. As suggested previously, good intentions will not drive change by themselves. New rigor and discipline among the group must be cultivated consciously, probably alongside new ground rules and built-in guidelines regarding feedback. All that demands more work, more courage, and more commitment among the members. It would be just plain easier to return to the old patterns of denial, avoidance, and superficially nice relationships—which is exactly why facilitators are needed and, among other reasons, we wrote this book.

## **Facilitation and Design**

If you keep these seven factors in mind as you create designs to build team cohesion and productivity, they will soon become as natural as any habitual aspect of leadership or management. Each step will flow easily into the next. And, as you commit yourself to utilizing interesting and creative designs, your repertoire, along with your courage, will expand. That is the challenge: to internalize the steps until they change the way you see the team or the meeting, while gaining the confidence to risk even more creatively.

As facilitators increase their diagnostic skills and extend their repertoire of tools, they realize that designing ways to move a team or system forward is a creative act. There are no boilerplates, no predesigned formulas for what to do. Instead, facilitators ask, “What can I create that will benefit the group, overcome resistance, or accelerate the work as a team?” And, at the same time, “Can I make the activity more fun or interesting—or both?”

To set you securely on that path, as promised, 13 classic designs are provided in the second part of this book. Through them, you will learn how to develop carefully designed activities and strategies that are meant to elicit specific constructive behaviors from people: to legitimize their sharing of emotions and feelings, confront hard realities, solve difficult problems, and better understand the complexities of groups, teams, and entire organizations.

Designing will often feel like plotting an expedition. It's serious work that demands meticulous attention. In the extreme, it's like Ernest Shackleton and the crew of the *Endeavor*, stranded for two years with temperatures often below  $-40$  degrees, hopelessly lost without sufficient food or clothing on the Antarctic ice floe, their ship having been crushed by the relentless ice. But, in the end, and because of the crew's courage and Captain Shackleton's leadership, not a single man was lost. Captain Shackleton had most of the skills we have identified. His men loved him,

yet he was incredibly rigorous and meticulous in everything he did. And, everything he did had consequences for which he was accountable, whether doling out grog for a party to lift the crew's failing spirits or bringing ordinary seamen into the decision-making process. He patiently and strategically "designed" their survival and their escape from certain death. Virtually everything he did was intentional and visible to his crew.

In today's business world, the thinking is the same, albeit the consequences less severe. It's a disciplined way of both thinking and acting about every action you take as a facilitator.

# 2

## INTENTIONAL FACILITATION IN ACTION

The rigor and commitment underlying the notion of intentional design did not begin with the chicken design in the Temagami wilderness. It occurred as a result of several disconnected experiences that, together, at the end of many years, revealed themselves to be foundational to the very notion of being a facilitator. They had powerful implications for us as facilitators, teachers, and consultants, and remain central to most of our work. The brief stories that follow spell out the critical dimensions of intention and design. They were unforgettable to us and, hopefully, they will work their way into your psyche as well.

### **The Terrifying Sergeant Hatchel**

*The seeds of intentional facilitation, unbeknownst to Rod, were planted deep within his soul nearly 50 years ago by Sergeant Hatchel, a man known by many of Rod's equally fearful fellow recruits at the time as the nastiest, meanest drill instructor in the entire United States Marine Corps.*

Sergeant Hatchel took no prisoners. A machine gunner, he had fought in two wars and was looking for a third—with us. His permanent scowl said, *Never make a mistake and we can live together—but, even then, I won't like it and I will never*

*like you.* When he was around, we lived in perpetual terror. He was bound to find imperfection.

It was a sweaty, torrid day in July in the last place anyone would want to be: Parris Island, South Carolina. As a wet-behind-the-ears recruit, I had somehow been anointed a squad leader whose main job in life was not to piss off Sergeant Hatchel. Even worse, any mistakes of the small band I led became my mistakes and oh, how I would pay. As a result, I was always on full alert—that is, almost always.

On that particular July day, I was ushering my 12 privates back to the barracks after a grueling two hours of physical training under an unforgiving, broiling sun. Stopping perhaps 25 yards from the barracks, I casually looked back over my shoulder at my weary group. Without even a wave, I shouted, “Group, dismissed.”

From a second-floor window came a screaming tirade: “Private, you get your sorry ass up here or I’ll come down there and break your miserable neck.” It was Sergeant Hatchel looking for blood. My blood.

Needless to say, I ran to the small porch in front of the barracks to receive his rage and the punishment to come. He was just warming up. “What do you think you are doing—taking a walk on the beach? That kind of slovenly, undisciplined behavior is what gets people killed, and you’d be the cause of it.”

Not pivoting smartly and saluting while giving my order was my sin.

His rant continued as he proceeded to insult me, several of my favorite body parts, and my closest relatives, all the while asking me why I had the nerve to insult the entire Marine Corps by joining in the first place.

Between gritted teeth he shouted, “I want 200 squat thrusts, 200 sit-ups, and 200 push-ups, 25 at a time, and then we’ll see what else. And they had better be perfect!” A rush of adrenaline drove me through the first six rounds of 25, in spite of my exhaustion. And then, there was nothing left to give. Meanwhile, he was screaming something about me being a spineless chickenshit. He had me stagger to my feet, stand up, heels angled against the wall, body pressed straight against it. From there I was to slowly lower my body and hold it halfway down. Well, my entire body was shaking in a matter of minutes. I caught a glimpse of his sneering smile.

Sometime later—I had lost all sense of time and my body—he screamed, “Private, when I count three, I want your sickening self out of my sight!” When three came, I couldn’t move. I didn’t even feel pain, just fitful humiliation and a commitment to pay full attention in the future. All these years later, it’s still there—that huge gift from Sergeant Hatchel: Pay attention. Be fully present. Own your own mistakes.

The lesson, in my words: Be intentional in everything you do as a facilitator, because there are real consequences for yourself and others. There are few shortcuts and no six-easy-steps to success.

Somewhere in most of our lives we've all been blessed with our personal Sergeant Hatchel. It might have been a teacher, a coach, a ballet instructor, a librarian, or even a Zen master; someone who was there and who cared enough to demand the best from you because it makes a difference.

While Sergeant Hatchel was a terror to any young recruit, he knew his role and, thankfully, was unforgettable in it. In fact, he facilitated our hellish journey through boot camp so we would survive and become the marines he hoped we would be.

Although I believe the “how” can differ (it doesn't demand actual suffering), the message is clear. Facilitation demands a meticulous and rigorous approach to “what” is expected of us in any given moment. And, how many facilitators do you know who act like this and are fully committed to it? I am sure that my three daughters could have done with a little less of the Sergeant Hatchel in me, but I believe the benefits of such an attitude far outweighed my occasional fatherly outbursts.

## **Disinterested, Reluctant Students**

*As a novice assistant professor at Temple University 40 years ago, Rod was part of a new department exploring an entirely new field of study: group dynamics. One of his duties was to teach learning theory at the university's Tyler School of Art, to arts students who were decidedly uninterested in anything he had to say. It was a requirement few desired.*

Originally trained as a therapist, it took me until the end of my training to discover that I was not meant to work with depressed people for the rest of my career. So, with a newly minted PhD and nowhere to go, quite by accident, I stumbled upon the world of group dynamics. Luckily, I loved what they did and had a knack for it. That said, I had embarrassingly little knowledge of the department's ins and outs, although it was only their second year of operation and they were learning as well.

As a department (one of only three such departments in the United States), we had certain institutional obligations. One was to instruct students at Temple's famous Tyler School of Art—a social science requirement—in this case, in learning theory. It was a distraction for any student studying art, and it demanded of me a 10-mile ride from the main Philadelphia campus to face students who were no

more interested in learning theory than in the man in the moon. As the newest, least-tenured faculty member, I was handed the assignment and told to make the experience as painless as possible for both them and me. Some of my colleagues laughed out loud at the “opportunity” I was being given to test my limited teaching skills. I had no idea what they meant. One of my colleagues even said, “Think of yourself as a facilitator and you’ll be fine.” In those days, facilitator was not in my limited repertoire.

It couldn’t have been worse. The classroom was six rows across and 15 rows deep, with 30 students scattered throughout the 90 seats in a variety of slouching repose that said, *This is going to be a stupid waste of time, and there is nothing I can possibly learn from you that could be of any interest to me. I want to be in the art studio, working on something meaningful.* To make matters worse, the assigned text had been written by a scholar attempting to be scholarly, with no interest in applying the learning theories he espoused in his own book about learning. If toast is dry, this was with sand as butter. It was a disaster waiting to happen.

The 12-week course met for three consecutive hours once a week, at 1:30 in the afternoon—known as the teacher’s dead zone. What could be worse for all of us? They were reluctant students, right after lunch, full of food and disinterest.

I did what I knew (certainly not much about learning theory). I lectured about learning. University art students have amazing ways of expressing themselves when something is not only dysfunctional, but also boring and unrelated to anything that might resemble their interests. They came late, left early, slept, ate, drew in their notebooks, and did other homework as I droned on. After the first six hours, witnessing the continued deterioration of morale, I was embarrassed for them and myself. It was pathetic. It reminded me of my worst classes in college, times 10. Now, I was the perpetrator. I wanted to blame them for their disrespectful behavior, but I couldn’t.

Then, brilliantly, I thought, *What’s more interesting for 19-year-olds than themselves?* How we learn could be related to almost everything we do, whether it’s managing change, relationships, or in their case, their own unsettled views of themselves. Moreover, they knew far more about themselves at 19 than I did. Getting them talking about things of interest to them was the key.

I used the text as a reference, used another simpler applied text for myself, and began asking questions about everything. Instead of being stuck, I revived myself. Instead of drowning in self-pity, I explored ideas that fascinated me, assuming that

if I found a topic compelling, I would be better able to excite them. The result was that I began to hear laughter first from the small discussion groups and later from the larger class and, then, even from myself. I engaged them in their own learning and in their exploration of themselves as young adults with young adult problems that could then be related to theory and research.

I used the absurdity of our own situation and how I had begun, breaking every rule of learning theory, when teaching learning theory. We learned and we had fun. I asked them in groups of three to think of the best and worst learning experiences they'd had (other than mine) in the past year and the advice they would give the teachers of the latter course if they had the opportunity. It was humbling how much they actually knew about learning. Then I asked them to write a two-page paper blending their insights and those of some other classmates and relate them to some of the theory outlined in the text. Instead of the text making them feel ignorant, they felt smart and authoritative as a result of their own observations. Toward the end of the course, in new groups of four, they had to create a David Letterman-style *Top Ten List of Dos and Don'ts for Anyone With the Nerve to Teach Learning Theory to 19-Year-Olds*. Each item had to be supported by either theory or research. I then blended their insights into a small booklet called *Truths From the Mountain* that I related to key learning concepts—and that I used the second time I taught the course.

Without knowing it, I had, by asking myself hard questions about every aspect of this “teaching nightmare,” introduced myself to a diagnostic mentality and then to the art of design. I had to create the answers to my own diagnosis—they certainly were not in the text. If they were tired after lunch, do something to enliven the class. If they were bored, engage them in a topic like behavioral psychology and conditioning, which was then translated into how to break behavioral habits that they knew they “should” change but, for some reason, couldn't. Each student brought examples of two of these habits to class, and they designed what they might do to change themselves using learning theory and without having to go to a therapist. Talk about capturing their interest.

I fed off them and they off me. I took the pulse of the class through my observations; conversations with them before, during, and after class; and brief assessments, and I adjusted my work based on the data. As success came, I took more risks and they responded. They began to arrive early and stay late with questions and ideas I couldn't have imagined. They even sat closer to the front. At least 10 of these formerly reluctant students made appointments to talk about themselves, and

in the course of these conversations, I established allies within the class, along with deep insights about their issues and concerns.

By the end of the course, I had created innumerable designs that woke the class up, made their learning relevant, and kept me from feeling totally incompetent. That was the ultimate win-win. The text didn't matter. What did matter was their intellectual curiosity about things that did. My job was to take the indecipherable language of the text and extract what should, at the very least, be memorable for them. By me becoming a better teacher and facilitator, they became better students. By becoming rigorous with my observations, ideas came. I realized, for instance, that most of the students would rather paint, draw, carve—most anything, really—than sit and read a text of any kind. This led to a discussion of poor study habits and how learning was tied to the ability to internalize information so it was retained over time and retrievable later, whether they liked it or not. That, in turn, led to a series of discussions in class about bad study habits ranging from family of origin issues (again, conditioning) and the role that sleep, drinking, food, and exercise had on the learning process.

I never really understood the turnaround until I critiqued the entire experience with a colleague, along with the hard-earned feedback from my former adversaries, the students. Feedback is, perhaps, the single most valuable tool a facilitator can use and, more than likely, the most threatening. It remains challenging all these years later, because I too want to hear what I want to hear; I want to be liked and appreciated and valued. The result is that self-justification and defensiveness are often close at hand. When I opened myself to the obvious nonverbal feedback available to me and, later, to the information my students were ready to share, I was on the road to becoming a good teacher and better facilitator.

It was my first taste of getting out of my own way, recognizing the negative impact I was creating as a leader, facilitator, and teacher. I was beginning to believe that I as the teacher and facilitator could learn from these totally curious young men and women. It was critical to my further growth—as a person first, and a teacher and facilitator second.

## **Life or Death in the Jungle**

*In contrast to his limited understanding of the Tyler art students, this next experience reveals how far Rod had come in understanding intentional facilitation and the creation of well-crafted designs based on a careful, emerging assessment.*

This experience is the kind of affirmation we all need to suggest that we are still growing and on track. It was a spontaneous event that I was not prepared to face. Had I not internalized a diagnostic approach and been committed to an intentional way of acting, I would have failed the challenge miserably.

A good friend of mine, George Lakey, is the quintessential advocate for worthy social and political causes. He is a master at confronting perceived hypocrisy and injustice with creative strategies that induce change. You may not believe in all his causes, but you have to respect his combination of personal values, courage, and creativity. An antiwar activist during the Vietnam War, he and a small crew once drove a sampan through the entire Fifth Fleet to bring first aid to wounded North Vietnam troops and civilians. By following his Quaker principles, he confronted a divisive issue with a bold and creative strategy that made a statement and drew the eyes of the world to his efforts. He was antiwar, but mostly, he was attempting to solve, for him, a humanitarian problem. And what were they going to do? Blow the small boat out of the water with the entire world watching? Now that was a “design.”

More recently, George was in Thailand, helping to train “human shields”—individuals who voluntarily insert themselves as unarmed neutrals when dealing with two hostile forces, usually prior to a civil war, when citizens are potentially in the crossfire of the two combatants. The shields would move into the breach in an effort to bring the world’s attention to the warring parties, with the hope of bringing them to the negotiation table, thus saving human lives. These individuals are not combatants. They strive for dialogue in the midst of high tension. It is hoped that the militants will not shoot or harm them because of the negative press that would result. In this case, the training was in preparation for moving into a Sri Lanka conflict between the rebel Tamil Tigers and the government.

I was brought into George’s program to act as a retrospective evaluator of the training course, to be a recorder of the program’s history and, perhaps, a source of feedback to my friend and his co-leader once the training was completed. On my arrival, with the training well under way, it became clear that there was a high degree of tension between the leadership and the participant human shields. Not surprisingly, anyone willing to put their life on the line wouldn’t hesitate to push back at a leader. In this instance, my friend had miscalculated. He’d not engaged the participants as he would normally have done, and in the absence of this trust, his behavior was perceived as increasingly authoritarian and arrogant. To add fuel to that fire, my friend grew resistant to their feedback. He was, however, even in the

midst of his own defensiveness, experienced enough to see that he was losing the confidence of the group, which could jeopardize their training mission. Truth be told, as he'd become older, increasingly honored, and well known as an activist and facilitator, his tolerance for resistance to his ideas had decreased perceptibly. Yet, in other groups, his reputation would carry the day and he would not be faced with the possible rebellion that was mounting in the shields' training camp in Thailand.

While not hired to be a critic of George or of his real-time training, I nevertheless addressed the subject of the group's obvious frustration and resistance. He realized that I had fresh eyes and immediately saw one of his errors. Applying the principles of intentional facilitation and the art of design, I provided my friend with a high-risk but calculated design that shone a light directly on his facilitator role. There, in the middle of the jungle, we took a day out of training for me to interview small clusters of the participants and gather what would be compelling data. He trusted me, and they as well, by the end of that day. The key was when I reported back my boldly honest feedback in a public forum of the entire camp. George knew it wouldn't be pretty.

To some of them, he seemed autocratic and insensitive to their situation. To others, he seemed disconnected from the community, an outsider. But, remarkably, he owned it, first with me, and then with the participants. He'd known he was in trouble and this was the first step essential to reviving his credibility. They knew he had made himself vulnerable and this was his way of apologizing. He knew that he and I were not competing and my intention was to help him and his remarkable program get back on track. Humility is a powerful antidote. And it wasn't a performance to win back the group. He did it because he recognized that he had, on some level, lost his way with this group, and perhaps even more with himself.

Still, it's one thing to hear information from me, and quite another to hear it from the participants, which in this case (and in most cases) needed to be acknowledged through nondefensive responses. So, he agreed to the second part of the design: to take the hour after I presented my findings to give individuals the opportunity to tell him how the situation itself made them feel, from the frustration of the leader's actions to the fears and realities of their training as human shields, how they had lost their sense of empowerment in the community just prior to going to Sri Lanka and putting their lives on the line. It was a chilling, compelling, and heartfelt hour. He listened carefully, nondefensively. And then he responded humbly, admitting he had been insensitive to their process, something he believed in deeply. He did what a truly skilled facilitator would do—took responsibility for his part of the problem.

Clearly, the second part of the design was just as important as the first. Yet, many facilitators would not have had the courage to do what he did—speak from his heart—while being so exposed. His authentic acceptance of his mistakes was the perfect remedy to the mounting negative feelings in the camp. Imagine if most facilitators were willing, on occasion, to admit their failing or some limitation in a public forum? In this instance, some levity was added to the scene because of George's openness.

Facilitation often demands being both humble and vulnerable. This is tricky territory, because people can see, almost instantly, if it's authentic. I knew he could be authentically vulnerable, because he felt so deeply remorseful. Had I not thought he was ready to take that critical step back, the design would have failed. And that is a very different level of diagnosis, one much more challenging than having him only listen to the feelings of the participants.

Such real-time assessment and the willingness to be wrong is, to me, an essential part of facilitation. It takes years of practice, and I'm happy to say that I'm still learning. You can't script it, and you won't see it on any agenda. Yet here is where trust is built, where openness is modeled. While things may not be as dramatic as this for you, there are many opportunities when facilitators can own their mistakes, hear feedback publicly, and then act differently. Some participants later said that because my friend did what he did, he actually gained strength and credibility, and they trusted him much more than when they entered the program based on his reputation. He had earned it.

## **Courageous Facilitation in the Face of Leadership Denial**

*As you can see, the role of a facilitator can be broad. There is always the need for a creative event, feedback, or skill in cultivating rich conversations among parties who are reluctant or even antagonistic. Perhaps most important is the facilitator's role as a keen observer and truth teller. It's what has been missing from the following situation for years—at a huge cost.*

During the past decade, the Gallup organization has had a huge impact on leadership and the supervisory process. Through a set of simple questions, the organization developed an incisive way to assess a team's or an organization's strengths and limitations in the critical arena of employee satisfaction. They learned that the single most important influence on productivity, turnover, and profits is how the supervisor treats employees, supports them, and shows them that they are important.

One large organization known to pride itself on its family-like culture had its employees—30,000 strong—take the Gallup assessment. The top leadership team was confident the results would place them in the top quartile of comparable companies. To their shocked disbelief, the company was in the lower 30th percentile.

The shock turned to anger. First, the top team blamed Gallup and its instrument. Second, they blamed those reporting to them. A month into the rationalizations and excuses, the president suggested courageously and candidly that the data didn't lie. While he stopped short of taking a hard look at the top team's role in the problem, he helped to stop the finger pointing and blaming. What happened next could have been predicted. He and other leaders pointed down into the still-reeling organization and said to those at the first- and second-line supervisory levels with the lowest scores, "Fix it."

There was no training, no effort to understand the underlying issues that had altered the culture so dramatically over many years, no turning the mirror onto the organization and, more important, onto themselves. The culture of blame—the real problem—was in full bloom.

The unwillingness of the top leaders to own their part of the problem, which is what they modeled, reinforced the climate of secrecy, fear, and denial that permeated all levels of the organization—beginning at the very top. Two years later, expecting large-scale improvement, the assessment was given again. The results, predictably, were worse, because the climate of fear that permeated upward had not changed, and the top leaders had done nothing to change themselves. Success over the years had bred a sense of arrogance and entitlement at the top. Although the company's success continued, the original foundation of trust and openness had diminished. This mistrust was now mirrored in greater turnover, lower morale, and questions about the organization's survivability in an increasingly lean marketplace.

Deteriorating leadership—the movement from collaboration to command and control—had not happened all at once. It had been insidious and cumulative as leaders stopped leading, stopped engaging, stopped being open to criticism and change. The flags and placards on the walls attesting to values of openness and candor had become easily observed hypocrisy that undermined the credibility of leadership. But who would tell them? The cost to morale, company loyalty, and productivity is hard to estimate—but it was more than management was willing to own. Imagine the impact this had every time there was a meeting, every time a serious problem had to be solved. And imagine the influence this had on any

facilitator attempting to open such a meeting to a more honest, direct, and open conversation, where the goal would be to ensure greater truth telling and real collaboration. But if not a courageous facilitator, then whom?

As with many organizations, the downturn of 2008 forced some deep, often searing introspection at the top of this and many organizations. Within this organization, some restructuring, an effort at introspection, and a few mergers created some of the changes essential to winning back part of the lost trust. It had taken decades for the company to become inured to its leadership failures, and it would take several years to regain employees' trust and confidence, which they had once taken for granted. But although the jury is still out, the trend is positive.

An acknowledged fear is that buying other organizations will be a temporary fix to the issues of trust and morale. More essential is that trust and candor among the senior leadership team is restored first, which can then flow down into the larger organization. That will require a further owning of problems and modeling of changes in visible ways. As with most challenging situations, it begins with the top team and demands the design mentality discussed in the rest of this book. Facilitators often find themselves in a catalyst role, where they can open the door to new designs that are meant to encourage greater candor, feedback, and honesty, while at the same time protecting members who still carry fear from years of intimidation and conflict avoidance. But a culture where criticism does not move upward demands facilitators who can risk the consequence of telling the truth and are encouraged to do so by those at the top.

The following chapters contain considerations for facilitators and their organizations who are ready to expand both the facilitator role and the array of choices open to them as they creatively seek new approaches to traditional activities.



# 3

## CREATIVITY, STRUCTURE, AND DESIGN

Regardless of how distasteful most meetings are, we live increasingly in a world full of them: one on one, four, eight, 20, or more. Every day we run from one to the next, breathless, frequently feeling ill-prepared as a member or leader. A meeting is where we are led, informed, criticized, and delegated to. It is the place where most traditional leadership occurs—at least in terms of strategy execution. And unfortunately, it's where participants often feel disengaged, uninvolved, and impotent. Facilitators have more opportunity than most others to change the often-unsettling equation. But, they too frequently settle for mediocrity, not willing to risk the creative act that might breathe both meaning and life into same old, same old.

We are painting a boldly unflattering picture of most meetings only because it is true. They have become the bane of leaders and participants alike and can wear negatively on both productivity and morale—the cultural psyche of teams and organizations. After all, when was the last time you felt disappointed that a meeting was canceled?

The art of design is meant to provide new skills and ways of doing things that will turn the tide. This often depends, of course, on facilitators' willingness to lead, to take a risk and challenge themselves.

*Oh, come on*, you say. Typically, as the facilitator, you have a limited amount of time, an agenda or set of agendas (some hidden), and a group of people who just want you to get on with it so they can rush off to their next meeting. There is little time for niceties, and besides, most people's heads are still in their last meeting or in the important one that lies ahead. Now, make something meaningful out of that.

And as for the beleaguered leader whose meeting it theoretically is, there has been little time to design anything, so they unceremoniously hand the responsibility to you, the facilitator, with little real authority and the goal of getting on with it, whatever that may mean. So, without a high bar to drive your own interest, you cobble together an agenda (probably not getting it out to the participants in advance) and you begin with the mantra borrowed from most leaders: "Well, we have a lot to cover and not much time, so let's start." The air is somber at best or resentful at worst. You begin.

Consider this: Any time you have the audacity to call a meeting to take people's time and energy, it's an opportunity to bring a modicum of success into the participants' day. You either make something positive of the opportunity, or you don't. Are you willing to embody that? Most are not, and they will make excuses that the outcome of the meeting is supposedly out of their control. But, here are no excuses. What you do as facilitator is defined as your leadership.

## **Having a Diagnostic Mentality**

As a facilitator with a diagnostic mentality, whenever you walk into a room, ask yourself, "What's needed? What value can I add? How can I contribute to the goals—either task or process?" It doesn't matter if you're in charge. What matters is that you are continually assessing the needs as they change. It's a very opportunistic attitude with the assumption that if you can help, you will. You are always assessing the possibilities. And, when you leave, you have to ask, "How could I have contributed more, and why didn't I?" That's why you call yourself a facilitator.

It is an attitude that you carry wherever you are in the world. It's active, not passive. It is the expectation of providing service to the group whenever the opportunity avails itself. It is driven by an ongoing assessment of the ever-changing reality of a given business or plan—not by ego. It's an assumption that says you are an active player in the game whether labeled that or not; that you have certain skills and behaviors that may be helpful, whether acknowledged by anyone or not. Thus, it is your knowing and preparedness that changes your role from the beginning, and you will be wary of who has the real authority and their ego invested in what's happening. But, if you can be of value, that should always be your intention.

Now, shifting to a meeting (one on one, three or four, a team meeting, or other gatherings) where you have responsibility for accomplishing work, it is up to you to know the climate of the group, the expected deliverables now and later, where potential trouble lies that might sabotage success, and what level of contribution is needed. And ultimately, this includes what the other participants think about the outcomes that result and how much they might want to engage in the process.

All this is woven into a consideration of the time available. There are other more pointed questions that will be considered, but for now, it is this attitude that is foundational for everything that follows.

Consider this definition of meeting design: Using diagnostic information to develop activities to help a group or organization systematically move toward the completion of both task and process goals. With this in mind, the design and structure of a meeting can have a huge influence on its potential success. Facilitators can often control planned meeting activities, the location, the layout, and timing, all of which will influence the outcomes. For example, it is not wise to jump into the most contentious, urgent, or critical part of an agenda first thing in a meeting, as participants need time to get psychologically present and settle in. Facilitators need to understand the urgency of the tasks and adjust their approach by continuously asking, “What are the initial needs of the group?” Are they serving their own needs or that of the group? For many, this kind of rigorous questioning is seen as a bother rather than a critical aspect of any gathering.

This chapter describes how creative meeting design and choices relating to meeting structure can greatly contribute to successful outcomes.

## **The Task and Process Equation**

As discussed in chapter 1, you can think of every meeting as a balance between task goals and process goals (Figure 3-1). The task goals—the “what” of work (measured deliverables) is commonly the exclusive focus of meetings. Yet, how the work is accomplished and how people feel both during and after the experience can have a significant impact on the team or organization involved. How facilitators treat the participants can leave them feeling either engaged and energized or frustrated and depleted, and this has nothing to do with the “what” or the goals of the meeting itself. Additionally, your attitude will influence your willingness to take action and participate in the necessary follow-up, homework, or commitments that will directly influence the next meeting.

**Figure 3-1. Every Meeting Has Task and Process Goals**

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Facilitators are often much more comfortable dealing with the task side of this equation, because it is easier to define and more comfortable than dealing with the process side. For example, a team of leaders has 40 minutes on an agenda to make a marketing decision. What to do is a no-brainer. With limited time and a specific decision to be made, the facilitator does what is almost always done: goes around the table hearing from each member, and then looks to the leader to make the decision. And, because it is likely that the decision has been debated by key leaders prior to the meeting, the discussion is simply a means of making the participants feel included. There is no time for a penetrating discussion among all those present.

However, most morale problems stem from indiscretions in the “how” domain of process rather than the “what” domain of the task. The “how” side deals with how the work of the task is going to be accomplished. It includes how people will be involved, how the facilitator wants them to feel as participants, what kind of emotional baggage everyone brings to the group, and what needs addressing if the task is to be successfully completed. In the previous example, there is little interest in the process. Everyone just wants to complete the task and get it off the agenda. Habit runs the meeting’s process rather than a more creative and interesting process worthy of the decision that is about to be made.

Think about the tensions in your own team or organization. Do you think they stem from the task side of this balance, or the process side?

Thus, to produce a well-crafted meeting design, facilitators need to first identify both the task and process goals. Doing this will ensure that they are prompted to consider which designs are required to achieve all the goals—not just the task ones. The result will be increased productivity in achieving the task and increased morale due to the process the participants used to get there. It’s not that a good outcome cannot be produced without considering how morale is being influenced. However, if morale is not actively considered, there is a good chance that dysfunctional norms such as talking over others, interrupting, and not listening

will become part of the process. We are usually in too much of a hurry to address these kinds of process issues when they occur, and they are rarely discussed at the end of a session, when everyone is eager to leave. By not addressing these insensitive behaviors that turn a group off, they are actually reinforced. This is further exacerbated in many cases because the norms of the team or organization reflect aversion and denial of most conflict. Speaking the truth about process is bound to raise some ire because somebody has dropped the ball.

Along with being mindful of both task and process goals, other design considerations include whether to stand or sit; use PowerPoint, multimedia tools, or a flip chart; and whether to speak with objectivity or with passion in attempting to sell a point. All these make a difference. Similarly, providing materials in advance, breaking the team into large or small groups, the time of day, the physical setting of the room, and the facilitator's dress, tone of voice, eye contact, and use of humor can all influence success. The devil is most certainly in these details.

As the complexity of the meeting or project increases, so does the complexity of the variables that need to be considered. For example, a systemwide change initiative would also involve factors such as the history of previous changes, the political realities that exist, the powerful cliques that drive most solutions, the triggers that may create dissent, the strength and attitudes within various silos, and the trust that exists throughout the organization. The facilitator also needs to know if there is any unfinished business needing to be addressed before progress can be made on a larger initiative. Again, it's all in the details. If the facilitator does not have this detailed knowledge of the group or organization, they, and ultimately the participants, will be limited in what they can accomplish. It also demands courage, skill, and patience to address the underlying factors that can influence success. For facilitators, as in the case of the human shields, it is often easier to remain in the backwaters of denial and avoidance than to rock the proverbial boat with unvarnished truth.

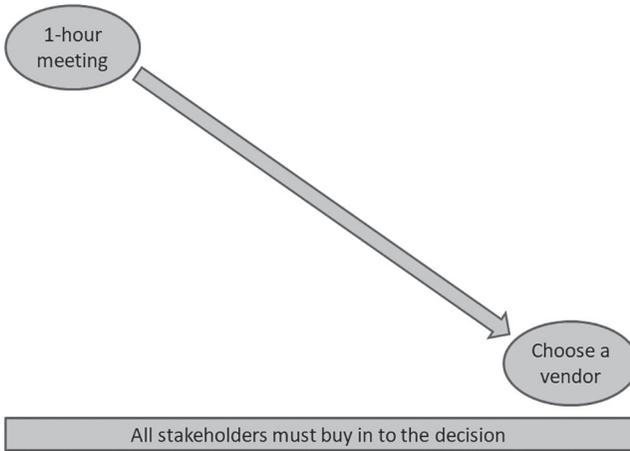
## **Breaking Down an Example of a Complex Design**

The following is an example of some of the thinking that goes into meeting structure and design. The need in this particular case is for a meeting to decide which of three virtual learning providers will be selected to produce custom content for a company's e-learning suite. The key stakeholders who are to attend the meeting have been identified by the meeting sponsor, who has engaged us to facilitate the discussion on their behalf. We have been given one hour to achieve the final decision on provider selection—that all stakeholders are expected to buy into

(Figure 3-2). While the task is challenging, we believe it's manageable if we are rigorous with our process, using a design that reflects crucial aspects of both task and process goals and the consequences of each.

**Figure 3-2. Sample Meeting Factors**

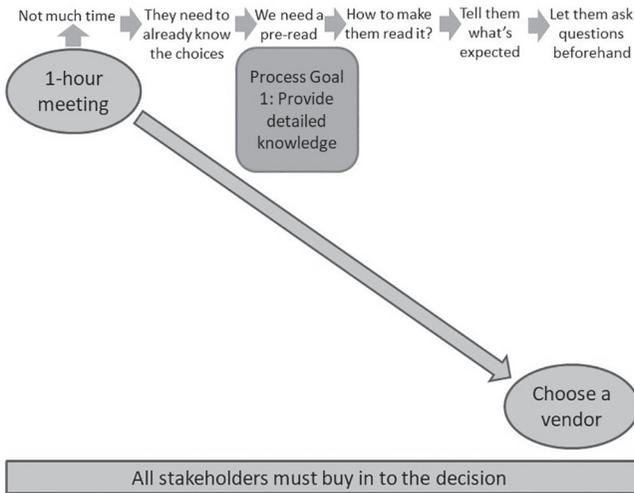
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The first thing to think about is the amount of knowledge that the stakeholders will need to have prior to walking into the meeting. We have only 60 minutes, so this means that there will be no time for the stakeholders to review the detailed bids during the meeting. This leads us to the first process goal: Provide the participants with detailed knowledge of the three bids beforehand (Figure 3-3). The problem, of course, will be motivating them to read and understand the materials. Meeting success can be diminished when only half the group has completed the assignment. Thus, the players must know what is expected of them coming into the meeting.

The second process goal—ensure 100 percent buy-in—comes from the sponsor's direction that all stakeholders must buy into the ultimate decision. This will need to be reflected in every piece of the meeting design, starting with the circulation of the bids before the meeting. These will be provided via a pre-read, to be circulated one week ahead of the scheduled meeting time. We will also give the stakeholders a chance to ask any questions they might have concerning the pre-read before attending the session.

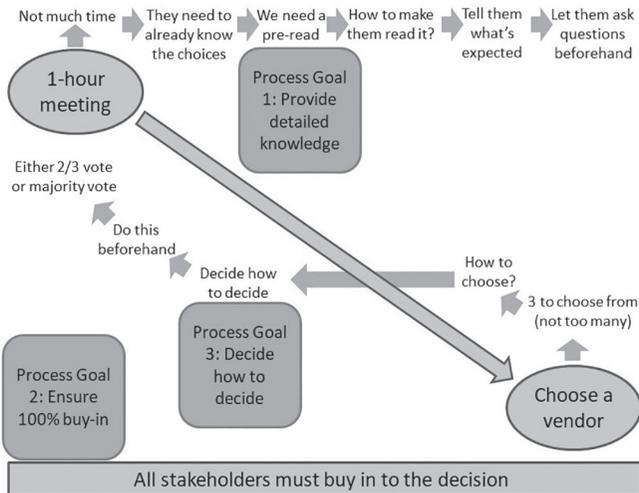
**Figure 3-3. First Process Goal**

Prompting for questions can have several functions: It makes sure participants know the reading is required, it gives them a chance to digest the content, and it makes sure nobody is holding questions until the meeting. Don't just assume that people will ask questions, because they probably won't. Create the expectation of questions by setting up a brief call with each stakeholder, or a conference call in which each stakeholder has five minutes to present their questions. By getting questions out beforehand, we can avoid wasting time with them in the meeting. It's this kind of detail that can undermine the meeting's success if it's not planned for.

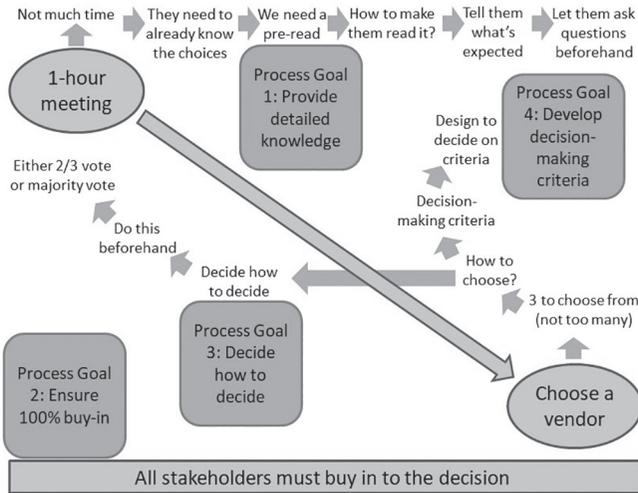
The next consideration is the third process goal: Decide how to decide at the start of the meeting by spending a few minutes facilitating this decision. Without this structure, there will not be time during the 60-minute meeting to decide how to decide. Failure to do so can sabotage the entire effort. For every participant to buy into the final decision, it is best to let them have input into how the decision will be made—and to do this before the decision actually needs to be made. An open discussion will probably not work unless the participants are well versed in different decision-making methods and their strengths and limitations. As the facilitator, providing two suitable choices would be a good option; then, let the group vote on a two-thirds or majority vote to decide. People like having a choice.

Setting the meeting up in this way is also serving process goal 2—both letting the group feel ownership of the meeting process and giving them a quick win right off the bat (Figure 3-4). They have already made their first, albeit easy, decision. Waiting to decide how to decide until the moment of truth can lead to manipulation and resistance by those in the group who see that the probable outcome will go against them. For example, people could force a discussion to increase the two-thirds vote to, say, a 75 percent majority requirement if they perceive the vote as not going their way. By doing this in advance, we can cast a sense of inevitability that the participants will generally accept. They'll likely play by the rules they've agreed to.

**Figure 3-4. Second and Third Process Goals**



The next challenge is the fourth process goal: Develop the criteria used to determine the best decision (Figure 3-5). In this case, we need to design a meeting process for achieving this goal that will be explained to the group. Some example criteria might be cost to deliver the custom content, time to develop it, how intuitive the user interface is, or the quality of styling and graphics. This helps remove some irrational thinking from the discussion and from the ultimate decision.

**Figure 3-5. Fourth Process Goal**

An option for the design would be to divide the group into pairs or threes (depending on the group size), with each subgroup developing a list of their top five criteria, in order of importance. We will need to do the math so that we end up with four even subgroups.

We'll give the subgroups 10 minutes to construct their lists, and tell them that they can present only criteria that every member agrees to. This might mean some subgroups may have only two or three criteria—perfectly acceptable. These instructions will result in people being able to agree more easily. Our experience is that people are more willing to compromise when their voice in the final decision making will be lost if they don't. Most subgroups get stuck when individual egos get in the way and consequently they have no way of influencing the final decision.

Following this, we'll combine the four subgroups into two larger groups, and give these two new groups 10 minutes to negotiate a combined prioritized list of their top five to seven criteria. It is likely that there will already some overlap within the various subgroups. If not, they still need to agree, if they wish to influence the final vote.

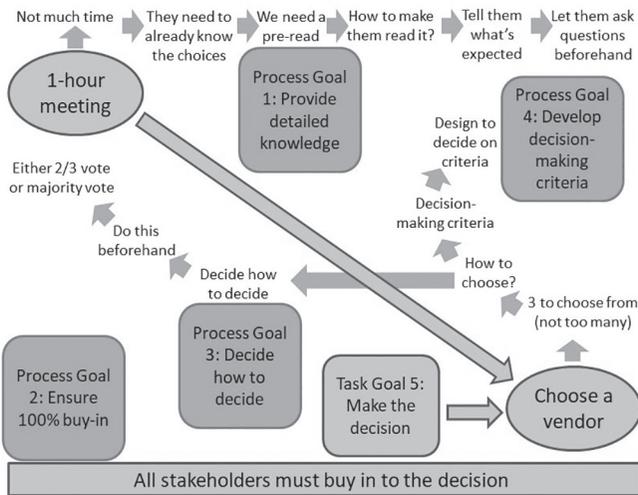
Finally, both half-groups will come together and share their ideas. Inevitably there will again be some overlap between the two groups as they look to find the five to seven best criteria. If the two half-groups generate only four agreed-upon

criteria between them, we'll give them another 10 minutes to agree on any additional criteria.

This design will both satisfy process goal 4 and contribute to process goal 2 by rapidly building consensus among the group on what is important, without having to lobby for any particular solution. By using clear rules to govern discussion and structuring time, success is almost guaranteed. Called collapsing consensus, the design assumes that such consensus building is a negotiation, and most individuals will be able to live with the final list of criteria. Done well, this aspect of the overall design will make the final selection of the provider considerably easier. Leaving the process open without such designed structure invites the chaotic, ego-driven discussion that we often experience, with many individuals becoming passive and a few (usually the same) individuals dominating the discussion and the eventual decision. That approach is certainly easier for the facilitator and ensures the kind of dysfunction we so often experience.

Finally, the task goal is this: Choose a provider (Figure 3-6). Instead of facilitating a contentious and unstructured discussion, we'll employ a very rigorous process of scoring each bid against the prioritized criteria, then use the method identified in process goal 3 (two-thirds or majority vote) to settle any

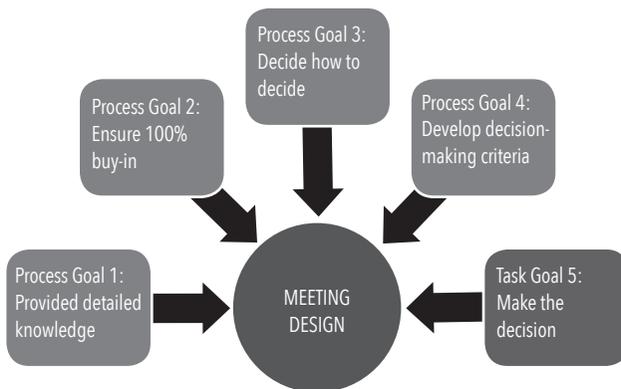
**Figure 3-6. The Task Goal**



ties. Imagine how easy the decision making will be using this meeting design, versus a more traditional approach of going around the table and having a few powerful individuals dominate the discussion and the eventual decision. In this example, participants could decide in 10 minutes because using weighted criteria makes it easy to determine the best choice. In another scenario, egos would likely rule.

You may have noticed that there are four process goals and only one task goal in this particular meeting design (Figure 3-7). You might imagine that so much focus on the process would extend the time spent on the design. Not so; structure and the carefully monitored use of time results in a product that would take longer with a more open and unfettered process.

**Figure 3-7. Four Process Goals, One Task Goal**



## Design as a Creative Act

Designing meetings to move a team or system forward is definitely a creative act. There are no boilerplates, no predesigned formulas for what to do, no one-size-fits-all approach for meeting types. Instead, facilitators must ask themselves, “What can I create that will benefit this group, overcome resistance, or accelerate the work these people do as a team?” Choosing which of the designs in your toolbox to use in any given moment, deciding which combinations would work well together, or modifying the tools to better suit a particular situation are all creative acts. Our effort here is to provide additional ideas to expand your thinking while you read this book.

You can also use creative thinking when holding a single meeting with multiple agenda items. Each agenda item can be thought of as a mini meeting, having a beginning, a middle, and an end, in addition to having both task and process goals. The only limits to the creative process are in your mind. Asking questions concerning time availability, desired engagement levels, and task and process goals can improve both participant satisfaction and the quality of the eventual outcomes. Will this approach by the facilitator require more planning time and creative thinking? Yes. And the result will be greater productivity and satisfaction at the end.

It helps to have a design buddy, someone who can help you think about your designs in a diagnostic way—offering “what if?” questions or testing your design assumptions. This is not always possible, so we have developed the following 15 diagnostic questions that help facilitators decide on the nature and flow of their activities, the kinds of involvement desired, and the layout of the room. All are important creative considerations to achieve the greatest success. These can provide facilitators with a certain rigor often not present by the owner of the particular meeting or event.

## **Essential Questions to Diagnose the Group Need**

Breaking bad habits or adding new, more positive actions to the facilitator repertoire usually requires practice with lots of repetition, along with a deep belief that the new behavior is a better replacement for old actions. When at all possible, facilitators need to practice the new behavior in a safe environment so they can actually experience the advantages. Our use of animation in the videos that accompany this book is meant to provide confidence in this process. Still, the following 15 questions are intended to be foundational for any design the facilitator should want to experience. Some of these are similar to a pilot’s checklist; others may seem like the task or process thinking we touched on before. Still, they are present in any good design.

### **Are the task- or outcome-based goals clear, well articulated, and agreed to by those participating? Is the meeting itself necessary?**

It is extraordinary how rarely these commonsense conditions are all present and how often the meeting adds little value. People often act out of habit, and many meetings are, in fact, acts of habit and unnecessary. Having the courage not to have a meeting can test your mettle.

# ABOUT THE AUTHORS



## **Rodney Napier**

For more than 40 years, Rod has had the privilege and challenge to work with teams and organizations on four continents, in more than 20 countries, and in every conceivable kind of institution, from convents, hospitals, and corporations to the Army Corps of Engineers, the government of Nicaragua, and Outward Bound. He is currently in his 10th year teaching graduate courses at the University of Pennsylvania in conflict manage-

ment, executive coaching, and planned change. Along the way, he has authored or co-authored a dozen books, including seven editions of *Groups: Theory and Experience*, the seminal text for 20 years in the field of group dynamics; *Measuring What Matters*; *The Courage to Act*; and the upcoming *The Seduction of the Leader*. His books are theoretically sound, research based, and directed at providing applied, actionable responses to the kinds of problems that regularly face most teams and organizations.

Over the past dozen years, Rod has focused on the skills needed for effective meeting design, along with the strategies that differentiate successful leaders and facilitators from those stuck in the world of predictably boring lectures and PowerPoint presentations. Through the use of videos and animation, Rod and his partner, Eli Sharp, are opening the door for many leaders to a new world of

exciting and highly relevant designs and, consequently, meetings of all kinds. In the process they bring years of understanding that almost anyone can now access. All that is required is a willingness to learn, and the courage to risk using new designs and some behaviors that have often lain dormant for many years.



## **Eli Sharp**

Eli Sharp is a recognized expert in Japanese Lean and Six Sigma methodologies. She travels extensively analyzing and improving business, manufacturing, and transactional processes; helping groups work more effectively together; teaching and facilitating teams; and providing coaching to senior leadership.

Integrating process and systems optimization, group and leadership development, and individual executive coaching, Eli provides a holistic strategy to her clients and various techniques to help individuals, teams, and organizations. Her approach is tailored to meet clients' hard and soft needs.

Everything Eli does is grounded in theory. She draws from engineering, business management, continuous improvement, organizational dynamics, and coaching, and works with the practical application of theory, teaching the tools, analyzing complex issues, and making people's lives easier. Her home is at the Gemba—the Japanese term for “real place” or where the work gets done, with the people who do it. She does not preach solutions that lack a real-world context.

Eli has built and led many incredible teams over the past 25 years. She works hard to provide her clients with tools and skills throughout her engagement, so they continue to grow and succeed independently.

Eli has worked in many manufacturing organizations, including hydraulics, food packaging machinery, and medical devices, and has consulted internationally in organizations as diverse as financial services and healthcare provision. She is adept at tailoring her approach to suit different national, organizational, and industry cultures. Her philosophy is to enter the clients' systems with respect and humility, gather data to fully understand the situation and issues from multiple angles, strategize and plan for specific improvements, then help execute the plan, monitor results, and support sustainability.

Eli holds a master's degree in mechanical engineering from the University of Exeter, and is a Chartered Mechanical Engineer. She has an MBA, specializing in operations management, from the University of Plymouth, and a master's degree in organization dynamics (organizational consulting and executive coaching) from the University of Pennsylvania.

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