



# Working with a Facilitator

Planning a big meeting? Think you need a facilitator? Here are some tips for working with a facilitator.

## What is the process?

A professional facilitator starts every engagement with a thorough needs assessment that includes (and is not limited to) what is to be accomplished, the history and dynamics of the group, how work will carry forward and logistics such as how many participants, when the meeting is to happen and how much time is allocated.

When these factors are well understood, the facilitator assembles a proposal that outlines objectives, high level approach, costs and requirements. This step may iterate as objectives become more clear.

Once the contract is in place, then the facilitator will pull together detailed meeting design and supporting processes.

## What meeting organizers need to know:

- ❑ **Give the facilitator SUFFICIENT LEAD time.** Good facilitation needs preparation time. Ensure quality and availability by contacting your preferred facilitator early in your process.
- ❑ **Make time for the facilitator to conduct a thorough NEEDS ASSESSMENT.** If there isn't time for that conversation, consider changing the meeting date. A good discovery conversation, will ensure you get what you want from your meeting and includes with other participants.
- ❑ **Consult with the facilitator BEFORE you finalize dates and rooms.** Your facilitator will know room needs when they've considered the processes to be used and the number of participants involved.
- ❑ **Do NOT hand a professional facilitator an already baked agenda.** Facilitator are experts at designing an effective agenda that will accomplish your meeting goals.
- ❑ **TRUST your facilitator.** Facilitators know what works and what does not work.
- ❑ **Book a room with LOTS OF EMPTY WALL SPACE.** Wall space equals working space. While natural light is awesome, if it means that there are NO WALLS for posting the efforts of the day, then choose a different space.
- ❑ **Find a BIG, FLEXIBLE room.** We want two or three times more space than 'maximum occupancy' dictates. People NEED to move around during a long meeting.
- ❑ **Avoid rooms with a FIXED BOARDROOM table** in the middle of a long narrow room. These rooms aren't conducive to great workshop experiences.
- ❑ **SEPARATE lunch space from work space.** Move lunch to a different room. Food is messy and so are work spaces. Participants need a physical break during full day meetings.

Successful meetings are a result of good discovery, good process design and good physical environment. The role of a facilitator is to ensure all three elements are well addressed.

**Start your meeting organizing with a call to the facilitator!**