Meeting Tactics & Questioning Patterns

Keeping people focused
- Use an agenda, and bring people back to it as a point of focus
- Use meeting objectives, and bring people back to them as a point of focus
- Use ground rules for the meetings, and enforce them

Staying Neutral to content
- When acting as a subject matter expert or change manager rather than a "neutral meeting leader" – if you do need to contribute, announce that you are stepping away from the Facilitator-role, participate in the meeting by contributing your expertise. Ask the group to give their opinion on the thoughts that you offered… then announce that you are stepping back into the Facilitator-role.

To deal with "dead-zone" or "quiet"
- State "we have some silence here… does that indicate <phrase>?" (such as "does that indicate that we're all in agreement?"
  "does that indicate that we're not prepared to come to decision on this?"
  "does that indicate that …"
- Call out the name of a specific participant that you know needs to weigh in on the subject – e.g., "Sue, we haven't heard from you on this topic – what are your thoughts?"
- Take the time to recap with the group – summarize progress and suggest where to go next… or summarize progress and ask "So, are we done with this topic? Can we move forward or do we need to action item something to do outside of this meeting?"

To move team toward decision/conclusion:
- Use force field technique, 9-block, 4-block, impact matrix, etc. to help clarify information and make the decision more objective
- Don't just push for decisions… but come at it from another direction, stating "what's preventing us from making this decision?" "what is not clear?" "What do we still need to understand so that we can make a decision?"
- Do we have enough information to complete the decision on this item?
- I've heard several in support of <decision-X>, are there any objections from our voting participants to moving in that direction?
- I hear us leaning toward <decision-X>, is that correct? Or do we need further discussion?
- We have been discussing <X> for n-minutes… can we make a decision within the next 5 minutes so that we can move to the next item on the agenda? Or do we need to action item this one and continue outside of this meeting? (If they choose to talk for another 5 minutes as suggested in the first question – then follow-up in 5 minutes and either close the discussion with a decision or table it with an action item.)
- Poll the voting participants one-by-one.
- If the team has agreed "not to poll", and that silence means consent, then simply question – "I'm hearing several suggest <decision-X>, are there any objections?"
- Don't just take one "yes or no" answer as final – don't fall into the trap of "group-think" based on one vocal opinion. Ask for other opinions… at least from your key participants.

Someone not paying attention

- o Can they be co-located in a conference room in their city with other participants?
- o Talk to them in advance of the meeting and let them know that you need their full participation - especially at critical times. Agree on a phrase that you as a facilitator can say to call their attention back to the meeting. (e.g., Craig, we really need your full attention on this topic.)
- o Speaking to the boss (or whoever the interrupters of the participant's time might be)
- o Call by name
- o Call by name with a pre-warning that you're going to come back to them in a minute
- o Use of meeting technology to keep people on track

Domineering or overactive participant
- o Interrupt, and pull someone else into the conversation
- o Thank the person for their contribution and call on another person to contribute
- o If 2 or 3 participants are dominating the conversation about something that is not entirely relevant to the meeting (e.g., too much detail), ask them to "take it offline".
- o If too much detail, interrupt the person and let them know that the level of detail is not appropriate for this audience or purpose… ask them to summarize so that we can move on with the decisioning.

Meeting Startup
- o Introductions / roll
- o Review meeting objectives, ground rules and agenda
- o Set the context for "why we're here"

Meeting Closure
- o Review action items and ensure ownership
- o Summarize progress and recap key decisions
- o Lay out the "next steps"
- o Thank the participants and close with a tag line (e.g., …. And thank you for your participation in today's meeting – your participation is key to providing stability in the production environment)
- o To improve your processes, ask attendees to share "What Worked Well / What Could Be Improved?"