



Hugh Culver

"You cannot make progress without making decisions." - Jim Rohn

At some point, every business, team, and not-for-profit need to resolve complicated issues, renew plans and made pivotal decisions. A facilitated planning session helps participants focus, prioritize, stay on track and reach consensus.

A half-day problem identification session might be enough to resolve a product design issue. Whereas a carefully orchestrated two-day off-site session might be needed to reach a consensus on next year's strategic business plan.

The art of facilitation is to design an inclusive process that brings participants to conclusions they wouldn't reach on their own. And to make it a positive experience.

The framework below can be modified to best suit each opportunity.



Scope

The first goal of any facilitation opportunity is to help stakeholders agree on outcomes and specific objectives from the process. Important considerations include the scope of the initiative, critical decisions to be reached, and deciding who to include.

Some of the questions to ask:

Q: Following our session, what do want to be different or better at work?

Q: What do you want to avoid happening?

Q: At the end of the session, how do you want your team to feel?

Goals

Planning a facilitation session is a fluid process. Through the planning process new information, history, concerns - even new objectives will often surface. It is important to repeatedly revisit the scope of the conversation (what to include, what can wait for a future session) and key objectives.

The goal is for participants to inform the conversation *within an agenda* while also ensuring that the end goals are reached.

Design

Good facilitation session design is a balance of following a tight agenda while allowing participants to guide the conversation. Design needs to include all participants (even the most reluctant), invite ideas, address concerns, and prioritize content while also staying on time and on task.

Flow

Every facilitation session uncovers new topics, old patterns, and unrelated topics that need to be addressed. Successful sessions flow between what is new, what is important, and what can wait. The goal is to remove barriers and invite ideas, while also moving toward the session goals.

The best compliment of a successful session is *"I can't believe we got this much done and it didn't feel like work!"*

Facilitation tools:

- Dyads
- Plus/Delta prioritizing
- Ranking exercises
- Blind voting
- Small group discussions
- World Cafe round tables
- Creative thinking exercises

Next

The ultimate value of a facilitated planning session is consensus on what happens *after* the session. Summarizing tasks and accountability happens throughout the session (not just at the end). The goal is to show progress towards session goals while building confidence that the progress is possible.

Hugh Culver, MBA, CFP, CSP

For over 20 years I have designed and led corporate and not-for-profit planning sessions. These included team development, strategic planning, leadership team retreats, and creative planning sessions.

The goal is always to engage participants in creating tangible, innovative action plans (without it feeling like work.)

My facilitation clients have included: PepsiCo, Telus, Suncor, BC Lotteries, BC Cancer, RBC, Western Union, and UBC.

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"Hugh helped my efforts to move the team's attitude to one of being accountable rather than blaming. I was so happy I hired him again at our next retreat!" - **Lesley Brown, VP, Corporate Canada, Western Union Business Solutions**

"The team felt it was a great addition for us to bring someone in from the outside to offer perspective on how we can drive our personal effectiveness" - **Paul Gardner, VP Human Resources, SUNCOR Energy**