

Facilitation Guidelines for Planning Sessions/Retreats

1. Events should contain each of the following:
 - Ice-breaker/team building (happy to offer suggestions/share ideas on these)
 - Vision of the future from leadership
 - Workshop and brain-storming
 - Decisions and action plans
2. Limit time spent on reporting and sharing data – do this before the session and use your time together to uncover and solve problems, make decisions, and plan for the future.
3. Develop a clear, detailed agenda, and send pre-work to participants in advance (even if it's just to give some thought to the proposed topics).
4. Consider ground rules for collaboration, including:
 - Be ready to contribute on each topic
 - Share what you know and your ideas
 - Learn more than you share
 - Be open, honest, direct – no monologues
 - Respectful conflict is welcome to get to best decisions
 - Consensus is not mandatory, but commitment is
5. Use a facilitator (internal or outsourced). Leaders aren't the best choice for this. Let leaders focus on delivering vision and being an active participant in workshop and brain-storming. Select an internal facilitator with good communication skills and no direct reports involved.
6. Facilitators should participate as well as facilitate, and should 'switch hats' when making a contribution versus collecting ideas and directing the discussion. "I'll add my ideas now..."
7. Facilitators should call on leaders last to share thoughts or ideas. They should also be ready to redirect someone who gets off point and rope in anyone who is taking too much time.
8. For groups over 8 people, break up into smaller groups for discussion. Mix the groups with a balance of administrative, sales and operational leaders in each group. Make smaller group discussions more effective for team-building by connecting people who don't work closely. An easy way to mix it up is allow attendees to choose their own seats or sort them by department, then break them up into groups with a count. For three groups, ask them to count to three and start again; then have them move to join their numbered group. Aim for 3-5 in a group and ask them to develop then present their top ideas. Small flip charts for each group work great for this. The facilitator can then consolidate ideas and lead to an overall discussion and selection.
9. Try to keep segments to 60 to 90 minutes, then offer an opportunity for a break. Consider breaking up the presentations and discussions with short, on-point videos. Please mine for ideas on handouts and videos at www.teamstrength.com.
10. **Aim – Align – Action.** Begin with the end in mind. What are the goals and what decisions will we make? Be sure to directly align the discussion to Mission, Vision, Values, Goals and Strategy. Conclude with Action plans and commitment - Who does what by when? And agree as a group on the message to the rest of the team.