

Facilitator Checklist

Before the meeting:

- Define Goal**
Why do you want to meet? What do you want to get out of the meeting?
- Make sure meeting is necessary**
Is there a way to reach the goal more efficiently?
- Create Agenda or plan**
What topics should be discussed? How? What techniques are you planning to use?
- Invite right people**
Make sure that all necessary people and only them are in the room
- Get required data**
If it can be collected before the meeting
- Set up the logistic**
Make sure everything is ready for the meeting before it happen, not when you start it.

During the meeting

- Have Facilitator and Scribe**
It's usually useful to split these two roles
- Set Working Agreement and Timeboxes**
How are we going to work with each other? For how long? Any breaks?
- Keep Timeboxes**
Limit the duration of the whole meeting and each section. Keep them short, make breaks, start and finish on time, don't wait for latecomers
- Stay Neutral**
Your role is to facilitate, not to make decisions or influence others.
- Make work visual**
Use whiteboards, flipcharts and sticky-notes. Create mind maps, graphs and pictures.
- Diverge and Merge**
Split into small groups working in parallel and combine the results
- Use rich communication channels**
If group is distributed use video, shared documents that you can edit simultaneously
- Make decisions fast**
Use different techniques: dot voting, fist of five, thumb voting...
- Make meeting interactive**
Get rid of conference tables. Do not sit, Walk and talk, make exercises, experiment,
- Limit unnecessary discussions**
But don't make meeting too formal or boring. Create parking lot for questions. Ask to follow up on longer or side topics after meeting with appropriate group.
- Make sure everyone is involved and heard**
Are people fully participating? Is there anyone taking over the meeting?
- Observe people's behavior**
How people react? What is not being said? Are people sarcastic or aggressive?
- Validate that people has common understanding of meeting output**
What we've agreed upon? What are the actions? Is that clear who do what?

After the meeting

- Distribute notes, decisions and actions**
Do not create lengthy documents. Photos are usually good enough.