

Meeting orchestration chart

The quick plan helps when there is little time for planning. When time is available, however, thorough planning is invaluable in leading to a successful meeting. Many frameworks or outlines are available that can be adapted by facilitators. MAD created the meeting orchestration chart as a comprehensive planning tool.

The following list helps explain the *meeting orchestration chart*. It begins with the meeting subject and date. This is as basic as you can get, yet critical: meeting designers often disagree about the real purpose of a meeting, and sometimes writing down the date is a planning team's first realization of how little time remains before the event.

Identify meeting purpose

Subject: Identify the meeting topic/subject.

Date: Date and time of meeting.

Rational and Experiential Objective: With the meeting sponsor, talk through and agree on the rational and experiential objectives for the meeting.

- Rational objective: goals and purpose of meeting
- Experiential objective: what experience do you want the group to have? How do you want the group to feel when the meeting is done?

Plan meeting components & create agenda

Opening: Decide how you will open the meeting and get on stage. This may include:

- Introductions
- Icebreaker
- Opening conversation
- Roles of the facilitator and other key participants such as convener, scribe, chart-writers, etc.
- "Invocation" (have a "higher up" such as the commissioner or director authorize the meeting's purpose)

I. Movement 1

Plan how you will unite the group. Typically, this can be done by reviewing the agenda and sharing basic contextual information. You may also ask the group a warm-up question to get people talking. Setting the context may also include:

- Discussing the format of the meeting
- Reviewing why the group is together (purpose, mandate, anticipated outcomes)
- Clarifying the expectations of the meeting or project
- Explaining how the results of the meeting will be used after the meeting
- Reviewing the “givens” of a situation
- Going over assumptions central to the work of the group (so the participants, facilitator or leadership will not be surprised)
- Identifying boundaries/parameters (time, space, deadlines, resources, etc.)
- Sharing ground rules (the group may create these, or the facilitator may suggest some initial ones)
- Talking about how decisions will be made within the discussion and how participants will know when a decision has been made

II. Movement 2

Plan the agenda items. This part of the meeting focuses the group by delivering the meeting content. Decide the appropriate order for the agenda items. For each content item, create process steps and potential timing within the meeting framework. Decide on the right process and medium to share the content. Ideas include:

- PowerPoint presentation
- Panel discussion
- Small break-out groups
- Lecture/presentation
- Handouts/discussion
- Brainstorm activity
- Workshop Method
- Group activity (Kaner Chapters 14-16 provide several examples of possible activities)

III. Movement 3

Plan a transition to the meeting resolution. Summarize what happened; discuss concluding points, review decisions made, next steps and assignments, etc.

Closing

Don't forget to thank the group for their participation and acknowledge everyone's time and commitment.

Self reflection

- Facilitator stance and style:
 - What attitude do you want to portray? What mind-set do you need to be in to facilitate this meeting? Examples include:
 - non-judgmental, supportive, fair, firm, professional, tolerant, patient, sympathetic/empathetic, strong, collegial, flexible, focused, consistent, enthusiastic, affirming, serious with a light touch, authentic, objective.
 - How do you want to dress for this particular audience?
- Drama or mood: plan transitions, timing, pacing, rituals, and overall mood of meeting.

Meeting logistics

Space:

- Find out the room layout before the meeting date (visit the room if possible). Check on space options for small group breakout sessions
- Plan seating arrangement (see page 45 for room arrangement details and examples)

Materials:

Pack all the materials you will need during the meeting. Items may include:

- Flipcharts and flipchart stands
- Markers
- Laptop/proxima/USB stick drive
- Sticky wall and adhesive spray
- Masking tape
- Sticky dots
- Half-sheets of paper
- Extra pens
- Posters
- Agendas, handouts
- Band-aids
- Push-pins, paperclips, rubber bands
- Name tents
- Extension cord
- Batteries

- Microphone (which can be helpful in assuring that only one person speaks at a time, and in allowing participants who are hard of hearing equal access to information)

Pre-meeting work:

- Print agendas and meeting handouts with appropriate instructions.
- Print name tents, sign-in sheet, posters, door signage, ground rules, etc.
- Spray sticky wall ahead of time to avoid spraying chemicals at the meeting.
- Conduct research on the topic you are facilitating to orient yourself to acronyms and specialized language that might be used during the meeting.
- Review the draft plan to think through possible variations of approaches chosen. For instance, how would the process differ between a small group and a very large group?
- Review the meeting plan with the meeting sponsor and appropriate stakeholders and make adjustments based on their suggestions/comments.
- Plan ahead potential back-up plans in the event technology fails or a presenter doesn't show. What will you do to fill-in that agenda item?
- Assess and address the need for any accommodations for participants with disabilities.

Meeting orchestration chart

Subject		Date		Location		Attendance			
RATIONAL OBJECTIVE				EXPERIENTIAL OBJECTIVE					
Opening: Get on stage		Movement I: Unite the group		Movement II: Focus the group		Movement III: Mobilize the group		Closing: Get off stage	
Time:		Time:		Time:		Time:		Time:	
Facilitator stance:			Space and materials:			Drama or mood:			
Pre-meeting activity, communication					Post-meeting activity, communication				

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