# “Be Prepared” for Facilitating Discovery Meetings

*by Richard Lannon — “Be SET – Structured, Engaged, Trained”*

When I was a Boy Scout we had a simple motto; “be prepared”. The same motto applies to facilitating discovery sessions with your stakeholders. In general, people are tired of attending meetings and discovery sessions. In the business world, business analysts, project managers, senior managers and all other stakeholders are busy people who deserve to have their time leveraged wisely. Here are some of the techniques you can use to get participation, gain consensus and leverage your stakeholders in discovery sessions and meetings.

1. Get your introductions established with **key takeaways** from the participants. This helps the facilitator align the session objectives with stakeholders expectations.
2. Establish the “**rules of engagement**” and “**who they are as a team**”. The rules of engagement provide a context for the session structure and acceptable behaviours. The team question helps establish how the participants see themselves.
3. Be clear on the “**business problems**” being addressed and the “solution context”. Clear business problem definition should be created in partnership with the sponsors and senior stakeholders prior to the session. The solution context provides a framework for the participants to frame their thinking in addressing issues. It does not mean the facilitator is providing solutions.
4. Use a variety of people and group dynamic tools and techniques. For example,

   *a)* **Brainstorming** in a non-judgemental way to capture the thinking of individuals and teams. Make sure that you follow brainstorming rules.

   *b)* **Buzz Groups** to buzz on an assigned topics for 10 to 20 minutes that have been established by the facilitator.

   *c)* **Team Pods** to group people into working units at common tables facing one-another so they get engaged.

   *d)* Do not be afraid to **play games**. Games provide a means of getting participation engaged and the information you need to have a successful session. This is where your creativity comes in. Have fun!

   *e)* **66 Technique** - where six people discuss a topic for six minutes. Give the group structure by assigning a chair, a scribe and an auditor to provide feedback on the groups’ efforts.

   *f)* Get the **POPs** (points of pain) and align them with the organizations maturity (chaotic, reactive, pro-active, service and value) to gauge the environment.

*continued on page 2...*

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*...continued from page 1*

*g)* Use the **Nominal Group Technique** to have team members identify their best solution to business problems through a process of rating and elimination.

*h)* Use **Cost, Ease, Benefit** analysis to have participants clearly define and understand the impact of their recommendations.

*i)* Get the **SWOT**, that is strengths, weaknesses, opportunities and threats, and identify those things external and internal that the team needs to focus on.

*j)* Throw them a **Fish Bone** (diagram) to stimulate ideas and thinking as to the root cause of a business problem.

*k)* Create **Debate** Teams and have the groups discuss all sides of an issue. Ensure that there is structure and everything is timed and scribed.

*l)* Have the groups make objectives **SMART** through ensuring they are specific, measurable, attainable, relevant and timely.

*m)* Build an “**implementation plan**” with assigned tasks, core responsibilities and timelines. Ensure there is a follow up mechanism.

5. At the end of the session there are a few other things the facilitator should do. Consider these items:

*a)* Summaries and **review** all that has been said to ensure clarity and alignment with the sessions key objectives.

*b)* Get the **FUDs** (fears, uncertainties and doubts). Have the stakeholders confidentially write these down and hand them in at the end of the session. There is nothing better than knowing the stakeholders concerns.

*c)* Establish a follow up plan. **Communication** is key! Understanding what the participants expect. Be clear on expectations and follow through.

*d)* Request the **positives and the deltas** regarding the session. Review these as they will provide the facilitator insight into areas for improvements.

*e)* **Scale it** 1 to 5 and ask how the stakeholders feel about the decisions, recommendations and the overall initiative. You might find that they see things as just another shade of what they did last year. Be prepared to leverage the information gathered.

*f)* Get yourself **evaluated**. You need to grow.

There are lots of approaches and tools and techniques that you can apply to creating successful discovery sessions and meetings that provide value to the participants and stakeholders. **Your job, be prepared!**

*__Richard Lannon__ aligns the enterprise and technical skills to common business objectives. Working with professionals, he identifies what is important, establishes direction and builds skills that positively impact the bottom-line. He provides the blueprint for clients to be __structured__, __engaged__ and __trained__. That is why his clients call him the __setability expert__.*

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