

The Stealth Facilitator Field Guide

How to Facilitate when you're NOT the Facilitator

Remember back to the last lousy meeting you had to sit through? Your time was being wasted, and it felt like there was nothing you could do – YOU weren't the Facilitator!

- No Session Objective – Why are we here?
- No Agenda – What are we doing?
- People dominating, off track, ideas not being captured, eye rolling, texting, inappropriate remarks, frustration... - UGH!

The STEALTH FACILITATOR FIELD GUIDE is for YOU!

Tactfully using The Stealth Facilitator's Field Guide, you can get your meeting moving and help keep it on track in a respectful, professional way.

Even when you're **NOT** the Facilitator.

- **Part 1** is your **SET UP for Success!**
- **Part 2:** The **6 GO STEALTH Interventions** to bring your meetings back on track fast!

PART 1: Set Up for SUCCESS!

Step 1: PRACTICE, PRACTICE, PRACTICE!

- **PRACTICE** the **6 Go Stealth** scripts in front of a mirror; pretend you are in your meeting, who is at the table? Listen to your tone, watch for your neutral, nonverbal communication.
When Emotions go UP, Intelligence goes DOWN!
Adopt a **Stealth Mindset**: Calm and Curious. This will serve you well when you GO STEALTH in your meeting.
- **Stick to the Scripts** – In the “**6 GO STEALTH Interventions**” below - Anything written in ***ITALICS*** is a **script**. The words are selected purposefully to set a neutral tone and maintain respect.

Step 2: PREPARE – SET YOUR INTENTION.

- **Intention:** The **STEALTH FACILITATOR’S intention is to serve the group**, knowing you may be taking a risk, and being willing to do so. This is done without ego or wanting to take over the meeting.
- **Breathe:** Before you raise your hand and “GO STEALTH” take a deep breath in and let it out. Calm and Curious (Breathe) Calm and Curious (Breathe)...
- **Calm:** Check your emotions. If you are feeling frustrated by what’s going on in the meeting – it may not be the time to go STEALTH.
WAIT – there will be another opportunity – I guarantee it!
- **Curious:** Adopt a **CURIOUS TONE**. It won’t matter how good the scripts below are, if your tone is frustrated, critical or demeaning.

Step 3: PERFORM – Maintaining Respect

- It's vital that the designated Facilitator saves face.
- GOING STEALTH does NOT mean you are taking over!
- In fact, you are SO STEALTH – no one knows what you just did.
- Check in with the designated Facilitator.
 - **As** you apply your STEALTH tools – see scripts below.
 - **After** the meeting ask the Facilitator ***“How was that for you when I suggested we ...?”*** Focus and LISTEN to what they say.
 - **GOOD NEWS:** In most cases the Facilitator is **SO** glad you helped out! This can be the beginning of collaborating on how the Facilitator can use the STEALTH tools when they lead the meeting.
 - If the Facilitator did **NOT** like what happened, and begins to vent, LISTEN, then sincerely say:
“I’m sorry”, (NOT “I’m sorry, I was trying to help...” Just “I’m sorry.”) And, I’ve got to go now; I’d like to follow up with you. I’ll book us some time” Turn and go. Now is not the optimum time to either explain, or defend, what you did. Remember: Emotions up – Intelligence will go down. WAIT.
 - Follow up with the designated Facilitator, LATER – in a couple of days. Face-to-face is best. Keep it simple.
“Thanks for meeting with me; I know it’s not an easy job being the Facilitator. My intention is to help AND make our meetings faster and even more efficient. I know we are all SO busy... How can I help?” Focus and Listen.

PART 2: 6 GO STEALTH Interventions:

The STEALTH Secret: ASKING QUESTIONS!
WHEN to ask, WHAT to ask, and HOW to ask.

1. No Session Objective

The OBJECTIVE is NOT the same thing as the AGENDA

If your team doesn't know the overall Session Objective, it's almost impossible to know if you're going in the right direction, when you're making progress, when you're off track **AND** when you're done!

IMPORTANT: Clarifying the Session Objective can be a foreign idea for some teams.

This conversation may be better executed 1:1 with the Facilitator, Department Lead, etc. before or after a meeting and not in the meeting itself.

Knowing the Session Objective is critical to a team's success.

Use this script for a private 1:1 meeting: ***"Thanks for meeting with me, I'd like to make sure I'm clear about our overall objective for the upcoming meeting (or – for our project) - What do we want to have accomplished when we are done with this meeting (or project)?"***

The Session Objective = Big Picture - What are we here to accomplish?

- Are we here to make a decision?
- Hear new data/information to help us make a decision?
- Hear new data/information to update us on new policy and procedure?
(If yes, do we really need a meeting for this, or could we use email, read it over and THEN come prepared to discuss?)
- Get status updates from the team, and find out how we can help them?
- Examine a process or procedure? Why?

If you come into the meeting and there is no SESSION OBJECTIVE posted:

ASK: (directing your question to the whole group, add a little “confused” tone)

“Excuse me everybody, I may have (or “think I”) missed it, Could we please take a minute to go over our overall objective here today - What do we want to have accomplished when we are done with this meeting?”

A decision? Info share? Thanks – this helps me get focused.”

If someone remarks: ***“Well here’s the agenda...”***

You say: ***“Yes, thanks, AND (not BUT) I see that’s WHAT we’ll cover today.***

“I’m wondering, when we complete this agenda, what will we have accomplished?”

“A decision needs to get made; we will be updated on something...?”

If needed, add: ***“I’ve been reading some cool stuff about making meetings even better and the idea of having a Session Objective, and how it helps teams ...”***

SMILE. ***“So I was curious about that for us – I hadn’t really thought about it before.”***

(NOTE: STEALTH SCRIPTING: ***“reading about making meetings even better...”*** you don’t say ***“making OUR meetings even better”***, which could imply, our meetings are NOT good.)

2. No Agenda

If you come into the meeting and there is no AGENDA:

ASK: (directing your question to the whole group, add a little “confused” tone)

“Excuse me everybody, I may have (or “think I”) missed it, Could we please take a minute to go over our AGENDA for today? What are we going to cover? I’d be

happy to, (OR: I'll volunteer to) write down what we want to talk about. How would that be everybody?"

(Shaking your head YES and SMILING.)

Make eye contact with Facilitator, get verbal &/or non-verbal confirmation about this being okay?

If it looks/feels like it's NOT okay, say: **"Hey I want to check in, my intention is to help, not to overstep."**

If someone says: **"Sounds like YOU want to be the facilitator..."**

If there is already a facilitator, say: **"I KNOW that is a big job, and I'm not looking to take over."**

"My intention is to help. And thanks (insert Facilitator's name) for being willing to lead. I don't want to take up any more of our meeting time." (See how the group decides to move. They may want to create an agenda, they may not – if no, let it go for now).

If there is NOT a designated facilitator, say: **"Well, I can step up, if you all agree that's best..."**

Then be ready to jump in! Have your Facilitator toolbox ready:

See SUPER MEETINGS Leadership & Facilitation Intensive Information at the end of this field guide!

3. Discussions Going Off Track

Raise your hand, jump in: **"Checking in here, feels like some important points are being made AND (not BUT) at the same time we have a lot to cover."**

"I'm wondering about putting these ideas on the Parking Lot and talk about what to do with them before the meeting is over? How's that sound?" (Look at team for agreement)

(Looking at whole group, refocus) ***“Great, so the agenda item we are on is () and what we were talking about was...?”***

If someone says: ***“NO, I think we need to talk about this now!”***

Say to group – ***“What do you all think?”***

If they all want to talk about it now - let it go.

4. Did We Just DECIDE Something?

A discussion has happened and it feels like a decision has been made, the facilitator moves to the next topic without working with the group to clarify and confirm what was agreed upon and create an ACTION PLAN.

Say: ***“Hey team, feels like we just decided something.***

I’m not absolutely clear on the details.

Could we take a minute and clarify WHAT we decided, and NEXT STEPS to take action – who will do what, when... Thanks.”

If there is not a facilitator, say ***“I’ll volunteer to write down the details...”***

See # 6 for format.

5. The Dominator, the Nay Sayer, the Story Teller, or a general lack of participation and energy, ask:

“I appreciate the ideas we are hearing so far, and I’d really like to hear from others,” (Look around the table as you say:) ***“What are you all thinking and hearing, from your perspective as subject matter experts. What are your thoughts?”***

6. No Review and Action Plan

The meeting is ending; decisions and actions were assigned and it looks like an overall meeting review is not going to happen.

Say: ***“Wow, good/great meeting! (if that feels true)
Could we please take a minute and review WHAT we decided, and WHO is doing
WHAT by WHEN? Thanks.”***

You may be the one writing this down.

ACTION PLAN

- **What** – is the Action?
- **Who** – is taking Action?
- **When**- are they meeting?
(If they don't know yet – WHEN can they update the team and let us know WHEN & WHERE they will be meeting?)
- **Where** – location – so everyone knows where to show up
- **Updates** – will they update the whole team before the next meeting if needed? (Via Email? What's the Subject line- so we don't delete it?)
- **Resources** – what do they need to take action, maybe an email/phone list before the meeting is over...

Offer to send the ACTION PLAN out to the whole team - THIS TIME. Next meeting, ask for a new volunteer for this task! Take turns and share the load. Get their emails.

NOTE: This Action Plan can become part of the agenda for subsequent meetings – tracking who did what, how are things moving forward, challenges, help needed, etc.

NOW GET READY!

Begin at Part 1 – Start Practicing and get ready - People will start to notice! Don't be surprised when you get asked to facilitate more meetings!

Visit www.SUPER MEETINGS.com and **sign up NOW** for the training you'll need to become an expert Facilitator! Join us for:

SUPER MEETINGS **Facilitation and Leadership Intensive.**

*97% of our participants rate this training as **THE BEST**, or **One of the BEST** trainings they have ever attended in their **LIFE!***

You will learn the following skills, tools and techniques, with multiple practice sessions and expert coaching and feedback to:

- Keep your team on track, focused and involved in the process
- Effectively gather information - including What, When, Why and How to Ask
- Manage Dysfunctional Behavior respectfully, while keeping the group moving forward
- Build and maintain Consensus on the team - Make Decisions faster!
- Create ENERGY, engagement and buy-in within the team.
- Set up, start and close a meeting to accelerate momentum and achieve team goals
- Increase your confidence and professional development as a team leader and effective communicator