



Getting the best from a Facilitator – a user’s guide to great off-site meetings.

So you’re planning an off-site workshop, and someone says “we should get a facilitator”. There are many traps for young players – and some simple actions that will make your event more successful. So before you go any further, read this:

Don't	Do
<ul style="list-style-type: none">• Embark on an off-site meeting without knowing what will make it successful and who needs to be there. This leads to confusion, and at worst resentment, from participants if they're not clear about why they're there, why others aren't, and what they are trying to achieve.• Bring a facilitator in within a few days of the event and present them with a finished agenda. You won't get the best value from their experience and may well miss the trick that makes all the difference to achieving your outcome.• Delegate the venue booking as a minor task – the venue can make or break your event.• Rely on conference venue or hotel staff to understand your needs. Most venues have completely unrealistic ideas about how many people can work in a room, based on the assumption that people will sit around a board-room table.• Design an overcrowded agenda that leaves people with no time to engage, connect and reflect.• Leave it till the end of the meeting to think about next steps. A good ending is critical and the whole design of an effective workshop leads to action.	<ul style="list-style-type: none">• Be clear about the background and purpose of your event and the outcomes you want to achieve.• Understand why you want or need independent facilitation – is the issue complex or contested? Do you need an independent voice to steer the process? Do you want innovative approaches to reinvigorate a tired team?• Engage your facilitator early in the process. They can help you clarify your purpose and bring their skills to bear on the whole design process, how you communicate with participants, and even suggest suitable venues. There will also be time to talk with participants in advance, which is often necessary.• Think carefully and early about who needs to attend, give people plenty of notice and make sure you've got the people in the room with the right experience and authority to get to your outcomes.• Make sure the venue is accessible and is properly equipped with sufficient space, temperature control, access to natural light, ample refreshments, and flexible working spaces.• Remember that the right venue can do half your job for you (try an art gallery) or make your job impossible (an L-shaped room with pillars).• Make sure people will be talking, engaged and involved within the first 20 minutes – or you may never wake them up.• Be clear about who is responsible for capturing and communicating the decisions and output after your event