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## Facilitating with Ease

Toronto, Edmonton, Regina

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What you'll receive:

- A thorough understanding of the meeting facilitator's role and best practices
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**Toronto: Nov 4-5, 2010**

## Pre-Meeting Assessment Template:

All the key points you need to successfully design a meeting process and plan flawless logistics

I often tell new meeting facilitators that we contribute 80% of our value before the meeting even begins. Detailed, on-target meeting process notes and good logistics planning are two hallmarks of an experienced facilitator. While we don't always have the opportunity to plan and scope as much as we'd like, the template I'm sharing with you today will ensure that the basics are covered and that you've really heard your client's meeting needs.

In this edition of the Facilitator's Flipchart, we're sharing one of our key client scoping pieces with all of our readers, our Pre-Meeting Assessment Template (<http://www.facilitationfirst.com/newsletter/FFtemplate.xls>). This template allows you to capture valuable insights and details in one document that you'll be able to refer to throughout the meeting design and planning process.

This straightforward questionnaire - sent *before* your initial assessment interview - asks the client to complete in his/her own words:

- the meeting purpose and outcomes
- meeting logistics
- agenda topics
- content preparation
- pre-meeting communications
- next steps following the meeting
- possible challenges

I'm not a facilitator who has a set of pre-fabricated meeting designs, which I try to fit my client's needs into. Instead, I begin by actively listening to clients describe what they need to achieve during the meeting, and then help them refine and hone their meeting purpose and outcomes so that they are easily communicated and understood.

This template helps the client gain clarity and also ensures that our first lengthy discussion is framed by the client's own words, rather than any assumptions I may be bringing into the discussion.

Feel free to adapt the template and send us your thoughts on improvements or other client scoping tools you've used successfully. We'd be happy to share your tool or technique with our readers in the next edition of our newsletter.

The Facilitation First home office team