

Facilitating with Ease

Toronto, Edmonton, Regina

Attend our workshop in the city nearest you!

Learn to run more productive and collaborative meetings at our two-day core workshop.

What you'll receive:

- A thorough understanding of the meeting facilitator's role and best practices
- Templates to help you prepare a successful meeting structure
- Intervention techniques for meetings that get pulled off track
- A host of decision-making strategies and the insight to deploy them appropriately
- Practice sessions including feedback from a real-world meeting facilitator
- Excellent materials to deepen and sustain your learning, filled with practical tools and processes

Earn 14 **PDUs** as you hone your meeting facilitation skills!



For details or registration:

416-465-9494

Collaborative meetings.

Expert results.

Mid-Event Data Synthesis:

How to extract meaningful themes over a lunch break

We've all been there...

You've facilitated a successful idea generation session and will be moving on to decision-making or prioritization. Before you can move on, though, all the comments generated need to be synthesized into relevant themes or clusters so participants aren't faced with an overwhelming amount of data. What to do?

Before the Meeting:

1. Ask your client what matters most in terms of meeting outcomes and discuss how that will impact the sorting of ideas generated. For example, is your client only interested in strategic versus tactical input? Or only actionable items? This end goal will be very helpful in sorting out ideas or comments that need to versus that do not need to be included in the themes. This will ensure that any generated themes will be on the mark, and that all questions are sufficiently targeted.
2. Is the client interested in only the top three items being brought forward, or are all items required? This will impact the meeting process in terms of the amount of time required for running the meeting.
3. How much time is available for data synthesis? Limited time might mean you'll need to bite into non-discussion time often used to prepare flip charts for later activities, to take the pulse of the group informally, build rapport, or review the next meeting steps - but you won't have this option if you're collating the results of your idea generation session. Ensure the client is agreeable to sufficient time for synthesis. Build this into your meeting design.
4. Don't do it alone. If there are more than, say, 10 meeting participants it will be very challenging for one person to sort the data alone. With your client and group's approval, enlist help and write up explicit instructions to guide their synthesis. Feel free to use our notes below to do so.

During the Meeting:

What constitutes a theme? What gets included in the notes for prioritization or decision-making? We suggest that **two** separate factors be used to spot points to be included:

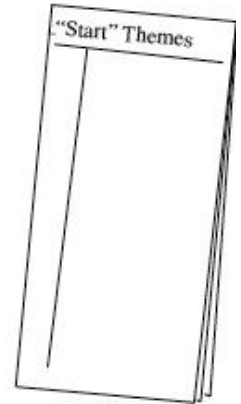
1. Frequency, or pure quantitative analysis. This includes those points that appear most frequently throughout the different groups' or individuals' notes, even if they are way down the list.

Mid-Event Data Synthesis, Cont'd

2. A visual marker that identifies a point as top-of-mind and/or crucial across at least a few groups, indicated by being in the top one or two ideas on a few lists, or that it was bolded, underlined, etc..

When Identifying and Recording Themes...

- Use the questions you asked during the idea generation session as the guide for how you'll group the data. What did people generate ideas, comments or solutions about? Take a fresh flip chart and draw T-Charts like the one shown here, adjusting the column header to reflect the content you are synthesizing, one chart for each question or issue. In the example to the right, the data collected under the question "what do we need to start doing" will be gathered.
- As also shown, remember to leave a blank column to the left of your list so that you can add tick marks indicating the frequency of each point listed by the separate groups participating.
- The first time you read through each group's rough notes, pick out the obvious recurring themes (usually a scan for repeated **keywords** is helpful here). Record each of these themes on your flip chart in the right column, and then cross off each occurrence of this theme on the original flip charts while you add a tick to your left column indicating each occurrence.
- The second time you read through the rough notes, look for points that may be **related** to the themes already scribed on to your flip chart. Even if different words are used to describe the same thing, or slightly different examples are used to illustrate the same point, include them as another tick in the left column next to the appropriate themes and cross them off the original flips.
- Finally, draw up a new flip chart labeled "**One-Offs**" and capture all the points that haven't been crossed off. Now, every point from the original flip charts should appear either on the "Themes" flip charts or on the "One-Offs" list.
- The resulting points are included as input for the decision-making or prioritizing session. The "One-Offs" may either be posted on the wall for full transparency and review, or given to the client to continue to mine for further insights depending on previous discussions with the client.



We've used this process at large group events with internal co-facilitators helping to collate the data with great success, and look forward to hearing any tools or steps you've used in the past.

Happy holidays,

The [Facilitation First](#) home office team

[Facilitating with Ease Workshop](#)

Call 416-465-9494 or 1-888-465-9494 to register today!

Edmonton: January 25-26, 2010

