





Facilitation in Crisis

An IIBA chapter presentation by Lee Spears
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The Exercise

- **Selecting the Roles:** Seven participants are needed; six will play project team members and one will step in as the facilitator of a requirements-gathering meeting.
- **Reading Up:** Each of the actors will be presented with a background story on their particular character. Participants are to read their narrative, *but not share it with any of the other actors.*
- **Mind How You Go:** Actors, things can get heated on our hostile project team, even if the interactions are entirely staged. Please refrain from swearing, name calling and using any kind of slur (e.g., racial, religious, regarding orientation).
- **The Audience is Listening:** At random points in the facilitation demonstration, the guide will pause the acting and ask for audience input. This is your opportunity to ask questions and make suggestions to help the facilitator successfully gather requirements.
- **Go Live:** The demonstration begins with the facilitator opening the meeting and the actors step into their roles. *At any point, when the facilitator is stuck, frustrated, tired of being up front, or wanting to watch, they may step out of their role and pick anyone in the audience to take over for them at that point in the “meeting”.*
- **In Review:** After thirty minutes or so, the guide will end the demonstration. Afterwards, we'll discuss what worked and didn't work in managing the meeting to elicit requirements. **(NOTE: this is not a critique of our volunteer facilitators, but an examination of what options we have as meeting leaders to achieve our aims.)**

What Lies Beneath

Topics that may come up during this exercise:

- Behind the scenes (preparing for the meeting, knowing your audience)
- Establishing neutrality
- Stating purpose, expectations, and goals
- Identifying decision-makers
- Going with the flow ... and directing it ... and re-directing it
- Conflict management vs. conflict resolution
- Eliciting requirements (and drilling up and down) in chaos
- Purpose of and use of a Parking Lot
- Setting next steps (in general and in a hostile environment)
- Soliciting feedback
- Using the “chain of command” for protection, support, and direction

Let's Begin

Tips & Tricks



- **Personality Prep**
 - Profiling (especially if new to project)
 - Think through possible interactions
 - Be aware of hot spots
- **Unless it's a web meeting, bring paper copies of documents for everyone**
- **If nervous or fidgety...**
 - Hold a marker in front of you with both hands to steady yourself
- **U-shaped table configuration is best**
 - Facilitator standing at the opening
- **If meeting loses its focus**
 - Walk to center table grouping (breaks up participants' line of sight)
 - If tables are in another formation, stand up and walk as you talk; most if not all of the eyes will want to follow you

Tips & Tricks



- Recapturing attention
 - Touch the table gently near the participant; it's a natural "pause button"
 - **DO NOT** bring fist down on the table, point, or touch them to get their attention
- Touching
 - Informal /familiar/friendly touch is inappropriate (even if your best friend is attending), because it may be seen as bias or alliance to the rest of the group
 - Remain a neutral party respecting of rank
- Refrain from verbal equivalent of familiar touch
 - No "Wassup!?!"
 - **DO NOT** use idioms or nicknames
- Absolutely no swearing

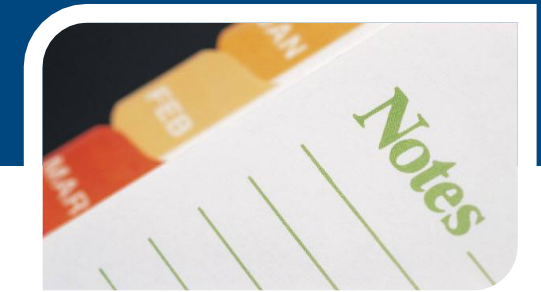
What's Parked on the Lot

Be careful with parking lot items



- Excellent tool for capturing questions, issues, and items
- Remain neutral in recording for public consumption
 - Example: Business Owner and Director of Customer Service cannot sit in the same room together without coming to blows
 - This is a private discussion with project manager/sponsor and/or possible entry in the risk log
 - Example: Tech Lead does not get back to you with the requested architectural diagrams
 - What goes on the parking lot is “technical architecture diagrams” not that the person failed to deliver

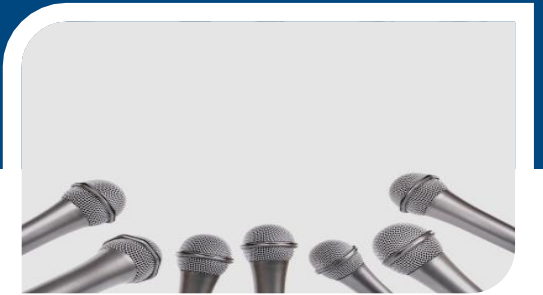
After the Show



- Send out meeting notes
 - Within 24 hours
 - Note who attended and who did not
 - It does not matter if anyone reads them; what matters is that you send them out

Questions?

- Thank you for your time
- Any questions or feedback?





turn results on