

# Meeting Facilitation — Workbook

This workbook gives you hands-on tools to apply every concept from the course immediately in your real meetings. Work through each section alongside the corresponding module, and use the templates to replace your current ad-hoc meeting habits with repeatable, effective systems. By the time you finish, you will have a complete facilitation toolkit you can deploy in your next meeting.

## The Meeting Problem and the Decision Mandate

Audit your current meeting load and reframe each meeting by its decision mandate.

### Exercise: Meeting Cost Audit

List your five most frequently attended recurring meetings. For each one, estimate the total cost in person-hours per week (attendees x duration in hours). Then answer the reflection prompts below.

- Which of your five meetings has the highest person-hour cost, and does the value produced justify it?  
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- For each meeting, can you name the specific decision or output it is designed to produce? If not, what does that tell you?  
\_\_\_\_\_
- Identify one meeting on your list that could be replaced with an async document or video — what would you send instead?  
\_\_\_\_\_
- Which meeting would benefit most from reducing its attendee list, and who could be moved to receive only the decision record?  
\_\_\_\_\_

### Worksheet: Meeting Type Classifier

For each of your current recurring meetings, classify it by type (decision, alignment, problem-solving, information-sharing) and note the ideal format and whether it should remain synchronous.

Meeting name  
\_\_\_\_\_

Current duration (minutes)  
\_\_\_\_\_

Meeting type (decision / alignment / problem-solving / information-sharing)  
\_\_\_\_\_

Should this be async? (yes / no / partial)  
\_\_\_\_\_

Ideal new format (sync meeting / document + comment / recorded video / eliminate)  
\_\_\_\_\_

Owner of format change  
\_\_\_\_\_  
\_\_\_\_\_

## Checklist: Pre-Meeting OARR Checklist

- I have written a one-sentence closing statement naming the specific decision this meeting will produce
- Each agenda item is written as a question, not a topic noun
- Time allocations are assigned to each agenda item and sum to the meeting duration minus 10% buffer
- The Facilitator, Timekeeper, Note-taker, and Decision-owner roles are assigned and named in the invite
- A pre-read has been circulated at least 24 hours before the meeting (or explicitly noted as not required)
- I have verified that every invited participant needs to be present for the decision — those who only need the output are on the distribution list, not the invite

## Agenda Design That Drives Decisions

Build a backward-designed agenda and a one-page pre-read for an upcoming real meeting.

### Exercise: Backward Agenda Design Practice

Choose an upcoming meeting you are responsible for organizing. Use the backward design method to build the agenda from the decision backward. Write it out step by step below.

- Write the closing statement for your meeting: "By the end of this meeting, the group will have decided or produced..."

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- What is the last discussion item the group needs to complete immediately before making that decision? Write it as a question.

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- What context, data, or analysis must be shared or reviewed before that discussion? List two to three items as questions.

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- How many total minutes are available? Allocate time to each item and confirm the total fits with a 10% buffer.

### Worksheet: One-Page Pre-Read Builder

Draft a one-page pre-read for the same meeting using the five-section structure from the course. Fill in each field with real content from your upcoming meeting.

Meeting name and date

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Decision or outcome (one sentence)

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Background bullet 1

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Background bullet 2

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Background bullet 3

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Option A (with trade-offs)

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Option B (with trade-offs)

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Option C (with trade-offs, if applicable)

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Key data point 1

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Key data point 2

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What participants should prepare or have a position on before attending

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### Checklist: Agenda Quality Review

- ] The closing statement names a specific decision or deliverable, not a general topic
- ] Every agenda item is a question with a clear answer condition
- ] Time allocations are realistic (status items under 10 min, contested discussions 15–20 min)
- ] The pre-read covers background, options, and key data without making a recommendation the group hasn't yet discussed
- ] The pre-read was sent at least 24 hours before the meeting
- ] The agenda includes a 2–3 minute close item for the decision record and parking lot review
- ] The recurring meeting has been reviewed in the last 90 days for purpose, frequency, and attendance relevance

## Real-Time Facilitation Moves

Practice facilitation interventions for the most common in-meeting challenges.

### Exercise: Facilitation Scenario Rehearsal

Read each scenario below and write your specific verbal response — the exact words you would use as the facilitator. Avoid generic descriptions; write the sentence you would say out loud.

- Scenario: One participant has spoken for 4 of the last 6 minutes. Two others have not spoken at all. What do you say to redirect without embarrassing anyone?

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- Scenario: The group has been discussing a tangent about a related project for 8 minutes. The agenda item has 3 minutes left. What do you say to park the tangent and return to the agenda item?

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- Scenario: The time-box for the main decision item has expired and the group has not reached consensus. What are the three options you name, and what words do you use?

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- Scenario: Two participants seem to be in a low-grade conflict — brief dismissive comments, interrupting each other. You need to de-escalate without making it worse. What is your move?

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### Worksheet: Decision Method Selector

For each of the following decision types, choose the appropriate decision method (authority, consensus, consent, or vote) and write a one-sentence rationale. Then apply this to three real decisions you are currently facing.

Decision description

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Stakes (low / medium / high)

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Time available (minutes)

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Number of stakeholders affected

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Recommended decision method (authority / consensus / consent / vote)

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Rationale for method choice

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Gradient of agreement range expected (1–6 scale)

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### Checklist: In-Meeting Facilitation Checklist

- I opened the meeting by stating the outcome we need to produce today
- I used silent brainstorm or a round-robin at least once to equalize participation
- I gave a 5-minute and 1-minute warning for each time-boxed item
- I maintained a visible parking lot and captured at least one off-agenda item without dismissing it
- I named the decision method before each decision item
- I read back each decision in plain language and confirmed the owner and deadline
- I closed the meeting with the decision record visible on screen and reviewed the action items table aloud

## Follow-Through and Meeting Culture

Build your personal facilitation assessment habit and design one team meeting norm to introduce this month.

### Exercise: Facilitator Self-Assessment Practice

After your next two facilitated meetings, complete the self-assessment scoring below. Use the results to identify your single highest-leverage improvement area.

- Score yourself 1–5 on each dimension after your first facilitated session: outcomes achieved, participation balance, time discipline, decision record quality, dynamic management. What was your lowest score?

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- Describe one specific moment from the meeting where you handled a facilitation challenge well. What made it work?

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- Describe one moment where you could have intervened but did not. What held you back, and what would you do differently?

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- After your second session, compare your scores. What improved? What pattern is emerging across both sessions?

### Worksheet: Team Meeting Norm Design

Design one new meeting norm to introduce to your team this month. Use the fields below to make it specific, credible, and easy to adopt.

Norm name (one short phrase, e.g. 'No agenda, no attend')

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Current behavior this norm replaces

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Specific behavior the norm requires (what will people do differently?)

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How the norm will be introduced (team retro, standing agenda item, written agreement?)

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Owner of norm adoption (who will model and reinforce it?)

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How compliance will be measured or observed

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Review date (when will the team assess whether the norm is working?)

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## Checklist: 30-Day Meeting Culture Improvement Checklist

- I have applied OARR to every meeting I organized in the last two weeks
- I have sent a decision record within 24 hours of every meeting that made a decision
- I have run at least one two-minute meeting retrospective with my team
- I have identified and proposed cancelling or reformatting one recurring meeting that was not delivering value
- I have rotated the facilitator role at least once in a recurring team meeting
- I have protected at least one two-hour meeting-free window per day for the last two weeks
- I have reviewed my facilitation self-assessment scores and named one specific improvement to focus on next month
- I have introduced at least one new team meeting norm and observed its first two weeks of adoption

## Your Action Plan

1. Apply the async-first test to every meeting you are invited to this week — decline or convert one meeting to a document
2. Rewrite the agenda for your next scheduled meeting using backward design and question-form items
3. Assign OARR roles (Facilitator, Timekeeper, Note-taker, Decision-owner) explicitly in the calendar invite for your next meeting
4. Create and send a one-page pre-read at least 24 hours before a meeting where you are the organizer
5. Use the shared-screen live note-taking method in your next facilitated meeting and capture the decision record before the meeting ends
6. Run the gradient of agreement (1–6 scale) instead of a binary vote in the next group decision you facilitate
7. Complete the facilitator self-assessment scorecard after each of your next three facilitated meetings
8. Audit your five most-attended recurring meetings using the meeting type classifier and propose one change
9. Introduce one new team meeting norm using the norm design worksheet and review it after two weeks
10. Schedule a 90-day meeting audit for your team's recurring meetings and add it to the calendar today









