



ANTHROPOLOGY  
CAREER READINESS  
NETWORK

# Facilitating Successful Meetings and Events

Facilitation is the art of making things easier, often used in the context of an event or meeting. Facilitation is a skill that you can learn, which will become easier the more practice you get.

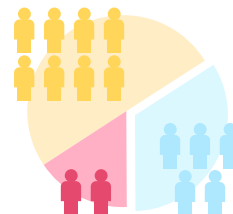
Use this timeline to prepare for facilitating a meeting or an event.



## Plan

One key to success is allowing yourself time and space to plan ahead is the key to success. Here are steps to take as your plan:

- **Ask** - Gather the requirements for the event or meeting. Use your anthropology interview skills to find out the following:
  - Purpose/Goal
  - Date/Time (confirm time zone)
  - Group Size
  - Audience makeup
  - Event format
  - Tools available
  - Expected outcomes - essential vs. desired
  - Additional context
- **Brainstorm** - Imagine the many ways you could do what you want to do
  - Consider what tools you have at your disposal, what feels realistic, and what you need to prepare
- **Audience** - Know your audience.
  - Include key stakeholders in planning if you can
  - Build in accessibility
  - Plan for personalities
  - Visualize yourself in the audience's place
  - Be ready to be surprised
- **Agenda** - Prepare your agenda and share in advance
  - Outline the event timeline, recognizing that in-person events may last longer than virtual events (where the optimal time frame is one hour).
    - Note expected start and end times for each step
    - Include purpose, goals, time & time zone, location or link, agenda items, etc.



- Remember to include breaks, particularly for in-person meetings. Since virtual meetings are shorter, including a break typically reduces the number of attendees
- Plan your pivots
  - Add cushion time
  - Remember what is essential vs. desired
- Share the agenda
  - Be ready for feedback or changes
- **Tools** - Think through all the tools and supports you will need for the event.
  - *In-person*: Pens, paper, easel, projector, etc.
  - *Virtual*: Video conferencing software, collaboration software, etc.
  - Recruit backup
    - Test out your setup with someone else
    - Make sure any helpers know their role
  - Practice
    - Familiarize yourself with any software you plan on using



## Do

The day is here, and you are facilitating the event. Keep the following tips in mind:

- **Orient the attendees as they arrive**
  - Remind people to mute themselves before starting (and explain how) if virtual
  - Introduce yourself and review your agenda, make other introductions along the way
  - Instruct virtual attendees to share their comments and questions in the chat
- **Remember the show must go on, unless it doesn't**
  - Be ready to let go if the needs in the room shift as the context allows
- **If something is out of scope, send it to the parking lot**
  - Include parking lot items in your follow up or on the next agenda
- **Be assertive and remember your role**
  - Project confidence as you are in charge
  - Direct attendees back to the agenda
  - Focus on getting others to participate
  - Handle your wild cards with a combination of tact, patience, and humor
- **Use your backup**
  - Delegate tasks so you can keep your focus, such as note-taking or watching the chat
    - Increase engagement by asking for volunteers verbally or in chat



## Reflect

Celebrate the completion of the event, however it went.

- Reflect on these questions:
  - What went well?
  - What could have gone better?
  - How would you do things differently if you did it again?



## Follow Up

- Provide some kind of follow up communication for your attendees, such as:
  - Action Items & Next Steps
  - Summary, Notes, or Recording
  - Resources
- Connect with key stakeholders and share your reflections.