

Facilitation Essentials: Preparing to facilitate a meeting? Make the most of your dry run



This quick reference tool is intended for employees at all levels who are preparing for a meeting where the group is large, the topic is complex or new activities or technologies will be used. It offers a detailed list of items to consider as part of a dry run.

Meeting plans are great on paper, but until you go for a test drive, it's hard to know what will work. The purpose of this checklist is to itemize areas where a dry run can offer a glimpse as to how things might go and hopefully also reduce pre-session nerves and questions. Not all elements are needed for all situations. These tips apply to both virtual and in-person contexts.

Clarify your intentions and plan your rehearsal

- Determine what you, and others, need to get from the dry run.
- For larger events, consider doing at least two dry runs. Schedule a more in-depth run at least a week before the event, and a series of mini tests early on the day of your session.
- If your event is virtual, consider doing two separate dry runs, one to test the technology to be used and the other focusing on the content that will be addressed, and then another session to combine them.
- Consider doing a pre-mortem: imagine your meeting has failed and the failures that caused it, and then work backward to determine how to avoid those mistakes.

Organizing your dry run

- Visualize what a successful session will look like.
- Gather an audience with whom you can test your session. Include as many diverse voices and perspectives as possible. Prepare and share an agenda for the dry run in advance. If your event is virtual, consider doing two separate dry runs.
- Plan to dry run the **whole** thing; don't spend a lot of time on the first half and then rush through the second half. Build time into the dry run to check in on what is and isn't working.
- Ask different people to watch for and evaluate different things, such as instructions, exercises, what technical adjustments may be needed. This helps them frame their feedback.
- Think of it as a choreography: the more you practise, the better you can deal with missteps.
- Ready? Pack your sense of humour and get ready to roll.

1. Test your design, content and delivery

You've designed your session and created a detailed facilitation plan. Now is the time to make sure you have thought through the details and assess your back-up plans.

Test your design and content

- Is your session design logical and do the various elements flow well?
- Have you allocated enough time to each activity?
- Do the activities you have planned align with your overall objectives?
- Are the instructions clear to everyone?
- Consider testing the interactive components repeatedly and with different people.
- Ask your dry-run audience for feedback on their levels of engagement, particularly in a virtual context. Note that in virtual contexts, participants need to interact every few minutes in order to maintain their focus.
- Seek feedback on any back-up plans you may have developed. Thinking through back-up plans ahead of time can be helpful in case you need to pivot to address the needs of a given group or in the event technology or other issues necessitate a change in plans.



Test your delivery

- Make your remarks out loud and check whether they're clear and concise and whether they resonate with the audience.
- Seek feedback on your voice and body language. Practise varying your tone, inflection, pitch and volume to create a sense of excitement and urgency. Ask guest speakers to do the same. Do the activities you have planned align with your overall objectives?
- Practise being comfortable with silence in order to offer people enough space to step into the dialogue. In a virtual context, it's worth explaining what you're doing. For example, you can say, "I'm going to take a sip of my coffee while I wait for the first person who is ready to speak."

2. Test your physical/virtual set-up and your meeting flow

Test your space (physical or virtual)

- Use the actual physical or virtual setting where your meeting will take place for your dry run.
- If your meeting is virtual and larger or more complex, you may wish to work with a producer to oversee the technology and troubleshoot.
- If you can arrange for help at the dry run and the event, assign two additional troubleshooters, one for your technology and another for your content.
- Provide your producer and troubleshooters with your detailed facilitation plan (including auditory and visual cues and any passwords and relevant details) in advance.

Test your meeting flow

- Test your content with your tools. Then test again, so your delivery appears seamless.
- If your meeting is in person, test with the actual supplies (e.g., sticky notes) you will be using.
- If your meeting is virtual, make sure you and your producer are very comfortable with every function of your virtual meeting software and how to troubleshoot any issues.

3. Tech your technology—then test it again

Test your devices and any related audiovisual equipment

- Check possible camera views and angles and remove any background distractions.
- Do any of your devices require passwords and do you have access?
- Consider making a packing list and include back-up devices, cables and cords (HDMI extension, battery packs and chargers), battery packs or chargers.
- If you will have information technology (IT) or audiovisual technicians on site, note their contact information in a few places.

4. Check in with yourself and any others on the facilitation team

Give some thought to what you'll need to be on top of your game

- Are you rested? Hydrated? In a good mental space?
- Consider visualizing your outcomes and making mental models of what kinds of progress you'll want to see along the way, so you can assess whether you're off track.

You've tested all the key elements of your meeting and made back-up plans for them. You've got this!



The day of

- Prepare your physical environment ahead of time by removing distractions, grabbing a pen and paper and a glass of water, and making sure you're comfortable.
- Plan to arrive or log in early enough to check your materials, test your audio and video connections, and check in with your producer. We recommend planning to arrive a few minutes ahead of your participants for smaller or more informal meetings, and up to 15 minutes in advance for larger or more complex sessions.
- Make sure you know what's in your facilitation plan and in your back-up plan. Then take a deep breath and get started.

