

HERDING CATS AND COUGARS

*How to Survive the Meeting You Are Running
While Mastering the Art of Facilitation*



William Keens

SPECIAL PREVIEW

for WolfBrown Clients and Friends

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Herding Cats and Cougars: How to Survive the Meeting You Are Running While Mastering the Art of Facilitation is a practical guide to planning, facilitating and managing meetings at any level of an organization. Described by one reviewer as a “small but mighty volume,” the guide takes the planner-facilitator from the earliest steps through an invaluable list of 20 inside tips and tricks for the novice as well as the experienced meeting organizer.

This special preview has been prepared specifically for colleagues and friends of WolfBrown, a consulting firm that works with nonprofit organizations, foundations, public agencies and other partners across the cultural and social spectrum. William Keens, the author, is a long-time Principal in the firm and has drawn on the lessons of 30 years spent designing and running meetings to create this guide.

The practical nature of *Herding Cats and Cougars* is evident in the table of contents. Altogether, nineteen topics add up to a highly useful survival guide, as the following excerpts illustrate:

From the Introduction

Remember how you got here. At the very least, some unresolved or insufficiently understood issue is probably costing those present in terms of missed opportunities and diminished effectiveness. Your job is to bring the group strides closer to informed consensus, so that participants leave with a sense of unity, of mutual understanding, of possibility, and of what their contribution may be to whatever comes next. A good facilitation experience will feel to the facilitator and participants like an engaging conversation among friends. By contrast, a poor experience can be aimless and frustrating, and usually means there was insufficient preparation, or that the facilitator stopped listening, became fixated on his or her performance, forgot the meeting’s purpose, and lost touch with the agenda.

From “Agree on the Meeting’s Purpose”

Leverage the process of developing a concise statement of purpose. Use it to engage others in thinking about why the meeting is important and, by extension, what outcomes will constitute

success. Like a politician who lines up the votes before the roll is called, you want to be able to start the meeting with momentum on your side.

From “Who and How Many”

Plan a time at least a month in advance, if possible, to run through the entire list of projected participants and to get a brief, candid and confidential reading of each. This level of preparation should also apply when considering the number of participants who should be invited – asking, in effect, who needs to be present in light of the meeting’s purpose, the space available, and the tone you seek.

From “Create a Discussion Paper”

As the facilitator, you can walk into a meeting in one of two ways: prepared or unprepared. Assuming that the former requires some effort and intentionality, one of the best ways to come up to speed quickly is to identify (with the help of others) a few people to interview in advance, and to use what you learn to write a discussion paper...Those interviewed for it invariably feel more ownership of the process and become more engaged participants as a result.

From “Setting Up the Room”

The ambiance, comfort and practicality of your on-site arrangement will influence what takes place from the moment the first participant walks into the room. If the setting is inviting, your meeting will benefit from the mood that you create.... Make sure the temperature is comfortable (cooler is better than warmer, especially as the day progresses), that no one has to compete with the ventilation system to be heard, and that there isn’t an incessant, irritating fluorescent buzz.

From “Seating”

To be avoided if possible: anchored, classroom-style seating in straight rows; banquet-style rounds; and traditional boardroom-style seating at a long table. The first suits only the lecturer who prefers a captive audience. The second ensures that everyone will have their backs turned to someone else and that it will be harder to locate the source of every comment. And the third conveys rank and hierarchy, and is particularly resistant to a more democratic give and take.

From “Don’t Take It Personally”

Your job is to fulfill the meeting’s purpose by helping participants think their way to a successful conclusion, ideally with the full support of the group. But it’s still their meeting, their issues and their responsibility to get it right. Don’t forget your own boundaries and limitations. You’re the facilitator, not the messiah.

From “Running the Meeting”

As you work your way through the agenda, trust the process and your preparations. Be assertive as needed. Do not allow the agenda to be hijacked by someone who thinks there shouldn't be breakouts, for example, or who wants to take the meeting down a path that is clearly tangential. The participants in your meeting expect you to be their proxy in such matters, so use that authority.

Just as valuable are the topics that **haven't** been covered in this special preview, including:

- “Visualize the Perfect Day”
- “Know Who Calls the Shots”
- “Cultural Traditions and Differences”
- “The Agenda”
- “High or Low Tech”
- “Establish the Tone”
- “Breakout Groups”
- “Reporting Out”
- “Naysayers and Responding to Them”
- “Tying Up Loose Ends”
- “Twenty Tricks and Tips”

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