

## Getting Clear on Objectives

By Sylvie Lapointe – August 2004

“If you don’t know where you are going then any road will take you there.”  
Cheshire Cat to Alice (Alice in Wonderland)

**If you are the facilitator read the following:**

**Let’s start with the beginning...**

If there is one thing that I have learned over my many years of facilitation is that to finish right you have to start right...you have to be crystal clear about the **objective of the meeting** you are facilitating. Not only do you need to be clear about the objective as the *facilitator* but you also have to ensure that your *client* (and the organizing committee) is clear. Seems pretty basic huh? But don’t be mistaken; more often than not requests for facilitation are pretty nebulous.

**What is the request?**

Here are some very common requests:

“We need to get our group together and do some team building”

“We need to do some information sharing”

“We need to get together and do some planning.”

“We have not done a retreat in over year so we are due for one”

At first glance, there seems to be a clear purpose for the meeting but when you dig a bit deeper you may find that what the group needs is something quite different. For example, what does the client mean by “team building”? Is he planning a social gathering with some fun and games to give people an opportunity to decompress and build relationships? Or, has there been a conflict brewing and people have taken sides? Or, has there been a re-organization and new people have joined the group? Maybe the group’s mandate has changed? Or, does the client simply want to revisit the team’s mission and vision to make sure that everyone is on board?

In this first stage of contracting with your client, you need to adopt the persona of an investigative news reporter. You want to look at all the facts and maybe uncover some new leads. You want to *find the story behind the story*. So you need to ask many questions, listen attentively and take notes. There are many ways to ask the question:

- Why are you holding this event?
- What is the objective of this meeting?
- What are you hoping to achieve during this day?

- What are *your* objectives as the client? What is the decision-makers objective? What do you think the *participants* want to get out of this meeting? What should be my objective as a *facilitator*?
- What would you like to leave with at the end of the day? What do you think the participants would want to leave with at the end of the day?
- What would success look like?
- Project yourself forward and imagine that you are leaving the event feeling happy and satisfied. What happened?

**You are clear. The client is clear. Now what?**

Now you can go to the drawing board and start your planning. The objective will dictate the design for the meeting. The objective will help you choose the appropriate thinking and decision-making processes. There is sometimes more than one objective for a meeting. Different combinations and permutations of tools and processes can help you achieve the results you are looking for. That's the fun part...when you can become creative. Here is a chart with some suggestions to get you started: (See Facile pp. 39-43 for a description of many these tools)

Objective	Tools / Processes
Large group consultation – (Systems Thinking)	Open Space Courtyard Café Interview Matrix Appreciative Inquiry
Team Building	Ice breakers Team Charter Visioning exercise (e.g. Dreaming Phase of Appreciative Inquiry) Temperament Type Assessments (e.g. MBTI, Personality Dimensions, Six Thinking Hats, *add copyright symbol) Simulation Games Reward and Recognition Ceremonies with a creative and lighthearted twist Coat of Arms exercise
Conflict Resolution	Challenge Wall Issue Analysis One on One Interviews followed by

	group meeting for feedback and action
Planning	Action Research S.W.O.T. Force Field Analysis Gap Analysis Workouts The Five Why's Interview Matrix
Information Sharing	<i>Traditional:</i> Key Note Addresses Power Point Presentations Workshops <i>Less Traditional:</i> Info Fair with kiosks and passports Storytelling Circles "Push" Courtyard Cafes

### The Next Step

You may want to propose a few design options to your client and organizing committee. One option may be a more traditional approach and the other option might push the envelope a bit, sitting slightly outside their comfort zone.

Together you can decide the right course of action for the group. Remind the client that in the end, he and the group will own the outcomes. Clarify your role: you are there as a guide on the group's journey. Ultimately the group determines the destination.

### If you are a manager read the following:

If there is one thing that I have learned over my many years of facilitation is that to finish right you have to start right...you have to be crystal clear about the **objective of the meeting** you are holding. As the client, you need to take some time to reflect on the objective of the meeting so that you can communicate clearly to your *facilitator* the desired outcomes. The facilitator is your partner – his job is to help you get what you need out of this meeting so, in a sense, your objective is his objective.

### What is the request?

The first step is to ask yourself what you want to achieve at this meeting or session. Here are some good questions to ponder to help you get clear:

- What are *your* objectives as the client? What is the decision-makers objective? What do you think the *participants* want to get out of this meeting?
- What would you like to leave with at the end of the day? What do you think the participants would want to leave with at the end of the day?
- What would success look like?
- Project yourself forward and imagine that you are leaving the event feeling happy and satisfied. What happened?

Now that you are clear on the “**what**”, the purpose of the meeting and your objective(s), write them down on a piece of paper and have it handy when you phone your facilitator.

### **How to make the request?**

Making clear requests and promises is not a natural ability for many of us. We sometimes don’t realize that if we did not get what we wanted it may be because we did not ask directly and clearly. The first challenge of making clear requests is to actually observe how we make requests. Are we usually precise and forthright? “I would request that you give me the first draft report on phase one of this project by next Friday please” Or, are our requests kind of fuzzy, indirect or even unspoken. “I would like to hear more about this project when you have a chance...”

One good rule of thumb is to follow the S.M.A.R.T. rule:

**S**pecific  
**M**easurable  
**A**ttainable  
**R**ealistic  
**T**ime-driven

For example saying “At the end of the day, I would like to have determined three key strategic priorities for the next quarter and have identified who will be responsible to deliver on each of them.” Is more likely to generate the concrete desired outcomes than saying “we need to do some planning”. It takes a little practice to make a request that is “SMART” and as you become more skilled at asking for what you want specifically and with assurance, you may be pleasantly surprised with the results...

### **Next Steps**

Now that you are clear and that the facilitator understands what you expect from the meeting and from him, the next step is to design a process to help the group

achieve the projected outcomes. Your facilitator will suggest processes and approaches and you can work with him to shape the agenda to reflect your needs and the groups' needs. The chart below is a sampling of options to consider. This is the fun part – so dare to be creative and push the “cultural” envelope of your organization.