

# THE SEVEN STEP MEETING PROCESS

## PURPOSE

A defined meeting process standardizes the method of conducting a meeting and assists in the effective execution of critical meeting tasks.

## STEPS

1. Clarify objectives.

*Ensure that all understand and are in agreement with the meeting objectives.*

2. Review roles.

*Review who will be timekeeper, recorder, leader, and facilitator. Decide at what intervals feedback on time will be given.*

3. Review agenda.

*Review details of agenda items listed under step 4. Ensure that all team members understand and are in agreement with the agenda items.*

4. Work through agenda items.

5. Review meeting record.

*Review the flip chart record on the walls but do not read all charts. Look for changes and additions. Decide which charts should be kept and which can be discarded.*

6. Plan next steps and next meeting agenda.

*Decide who will do what before the next meeting. Decide what the objective and agenda items will be for the next meeting.*

7. Evaluate meeting.

*What did the team do well that it should continue doing? What could the team do differently to improve the meeting, group and continual improvement processes?*

# **TEAM ROLES AND RESPONSIBILITIES**

An effective team clearly defines and shares responsibilities. One way to support the division of responsibility is to clearly define roles. Listed below are descriptions of roles for process improvement teams. Note that some of these roles apply to the project in general and some are roles assigned for team meetings only.

## **MEMBER**

Quality improvement teams are made up of approximately 6 to 10 members. Members are chosen because they work in, own, supply have knowledge of, or receive benefit from the work process under study.

Team members all share responsibility for the work of the team on improvement projects, both in meetings and outside of meetings. In addition to these responsibilities, some members will have the additional roles outlined below.

## **LEADER**

The leader of a team is generally the person who is recognized as the owner of the work process under study. The leader coordinates and directs the work of the team as it studies the process and implements improvements. The leader often meets individually with the facilitator to plan for the work of the team.

The leader is also a member and contributes ideas, interprets data, and participates with other members in making team decisions.

## **RECORDER**

Recorder is a rotated meeting role assigned to help the team maintain a record of its work. The recorder logs significant content on a flip chart in front of the team. When the meeting is moving rapidly, two recorders may be used.

## **TIMEKEEPER**

Timekeeper is a rotated meeting role assigned to help the team manage time. The timekeeper calls out the time remaining on each agenda item at intervals determined by the team. It is the team's responsibility to manage time, and the timekeeper simply assists the team in this process.

## **FACILITATOR**

The facilitator is a team advisor or consultant who has expertise in the quality improvement process. The facilitator teaches process improvement methods and provides feedback to the team members on the progress of their work. The goal of the facilitator is to help the team develop self-sufficiency in working as a team and in applying the technical tools of process improvement.

The involvement of the facilitator with an inexperienced leader or team may be extremely high. However, in line with the goal of encouraging the team's self-sufficiency, the involvement of the facilitator decreases over time as the team and leader gain more knowledge and skill.

## BRAINSTORMING STRATEGIES FOR SMALL GROUP DISCUSSION

### Stage 1

Facilitator solicits "bullet" ideas going around group order; disallows critical comments or explanation of idea. Continues around group until all ideas are exhausted.

Individual group members must come up with a suggestion or pass until the next round. Each individual must have the opportunity to participate. Individuals should not comment or critique other's ideas at this stage.

Recorder lists all suggestions as presented so they can be seen by all.

### Stage 2

Facilitator asks for a brief explanation of idea from the person making the suggestion: disallows any criticism.

### Stage 3

Facilitator narrows choices by taking vote on each idea; tries to narrow choices to 3-5. Asks for more detailed explanation from the initial presenter; solicits pros & cons from group members; makes sure each person is heard. Votes again to select 1st choice of group.

Timekeeper keeps group aware of time elapsed & remaining at regular intervals throughout entire session.

Recorder gets in writing the final proposal.

Reporter creates list during stage (1) and uses recorder's notes to report to larger group at conclusion of session.

**PROUT LEADERSHIP CONFERENCE**

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**ROUNDTABLE STRATEGIES FOR SMALL GROUP DISCUSSION**

Each group should appoint:

**FACILITATOR** - Keeps the group on track; makes sure each person is heard; clarifies any questions.

**RECORDER** - Keeps notes on group's ideas & exchanges; assists reporter with details for presentation.

**TIMEKEEPER** - Keeps track of time; announces time remaining at regular intervals.

**REPORTER** - Presents group's decision/solutions/ position to larger group.

# BRAINSTORMING

## PURPOSE

A group decision making technique designed to generate a large number of ideas through interaction among team members.

## STEPS

1. Clarify the brainstorming objective.
2. Call out ideas in turn around the group.

*After several rounds of the group, the team may break out of this structure and simply call out ideas as they occur to members.*

*Don't discuss, criticize, or compliment ideas as they are presented.*

3. Record each idea on a flip chart.

*Record all ideas exactly as presented on a flip chart, possibly using two recorders and two flip charts.*

4. Build on and expand the ideas of others.

Encourage creative thinking, including far-out ideas.

5. Pass when an idea does not come quickly to mind.
6. To generate as long a list as possible, resist stopping when ideas slow down.
7. After all ideas are listed, clarify each idea and eliminate exact duplicates.

# NOMINAL GROUP TECHNIQUE

## PURPOSE

A group decision making technique designed to generate a large number of ideas through contributions of members working individually.

## STEPS

1. Clarify the nominal group objective.

2. Individually list as many ideas as possible

*Eliminate distractions as members individually list ideas and allow adequate time for members to generate as many ideas as possible.*

3. Call out ideas from the lists in turn around the group.

*Don't discuss, criticize, or compliment ideas as they are presented.*

4. Record each idea on a flip chart.

*Use two recorders and two flip charts to speed the process if necessary.*

5. Pass when all ideas on a list have been presented.

*To generate even more ideas, the team may move into brainstorming after all ideas from the nominal group session have been recorded.*

6. After all ideas are listed, clarify each idea and eliminate exact duplicates.

# CLARIFICATION

## PURPOSE

Clarification, the last step in both brainstorming and nominal group technique, is performed so that each team member can gain understanding of what the author meant by each idea. During clarification, ideas are not defended or supported, merely explained for understanding. Two methods for clarification are outlined below

## STEPS IN METHOD 1:

1. The recorder reads each idea.
2. The author says a few words about what was meant by each idea.
3. The recorder captures the additional comments on the flip chart.

*This method is time consuming but it ensures that the team has gained common understanding of each idea.*

## STEPS IN METHOD 2:

1. The recorder reads each idea
2. If the idea is clear to everyone the recorder moves to the next idea.
3. For any ideas that team members do not understand, clarification is requested from the author
4. The recorder captures the additional comments on the flip chart.

*This method, though faster than method 1, does not always ensure that every idea will be understood in the same way by all group members.*

# **CRITERIA FOR DECISION MAKING**

## **PURPOSE**

Criteria are the explicit guidelines or standards against which ideas are evaluated when making decisions.

## **STEPS**

1. Generate a few potential criteria and list them on a flip chart.

*Criteria may be objective or subjective.*

2. Through discussion, reach agreement on the criteria that all team members will use to evaluate ideas.

*There may be one or more criteria for any particular decision.*

3. Post the agreed upon criteria in an observable location during the meeting.

# MULTIPLE VOTING

## PURPOSE

A group decision making technique designed to reduce a list of more than ten ideas to a manageable number.

## STEPS

1. Agree on the criteria for selecting ideas.

*When making a particular decision, a team may use one or more criteria.*

2. Identify each idea on the list with a letter of the alphabet.

3. Agree on the number of ideas for which each member will vote.

*A general guideline is 20 percent to 25 percent of the ideas listed.*

4. Vote individually on paper, listing the letter of each selected idea.

*Members can give only one vote to an individual idea and should use all of the votes agreed upon by the team.*

5. Take turns calling out the letters of selected ideas.

*Record and add the votes on a flip chart.*

7. Decide which ideas should receive further consideration.

*Ideas that receive no votes may be eliminated. Ideas kept on the list include those that receive the most votes and any others about which any member feels strongly.*

A relatively long list of ideas remains, a second multiple vote may be taken.

# RANK ORDERING

## PURPOSE

A group decision making technique designed to provide a visual display of the degree of agreement on a list of ten or fewer ideas.

## STEPS

1. Agree on the criteria for ranking ideas.
2. Identify each idea on the list with a letter of the alphabet.
3. Individually list the letters on paper and indicate the rank of each idea, with "1" being the first choice.

*Members must rank all of the ideas on the list.*

4. Take turns calling out the ranking of ideas.
5. Record and add the rankings on a flip chart.

*When recorded on the flip chart, the individual rankings visually display the extent of agreement among members on the ranking of ideas.*

6. Analyze the results, looking at both the total for each idea, as well as individual rankings.

*If rank ordering reveals considerable disagreement among members, a second ranking may be carried out after discussion and debate of the ideas.*

# **STRUCTURED DISCUSSION**

## **PURPOSE**

A group decision making technique designed to lead a group to consensus on a list of five or fewer ideas.

## **STEPS**

1. Agree on the criteria for the decision.
2. Take turns expressing points of view without interactive discussion or debate.
3. Summarize points of agreement after all members have had an opportunity to speak uninterrupted.
4. Debate and discuss conflicting ideas.
5. Periodically check for agreement by asking each member to state his or her point of view.
6. Continue to discuss and debate the ideas until a decision is reached.

# ~~AFFINITY~~ ~~DIAGRAM~~

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## PURPOSE

An affinity diagram is a tool used to group a large number of ideas into clusters such that patterns or natural groupings of the ideas emerge. It is used after ideas are gathered from surveys, brainstorming, nominal group technique, or other idea generating methods.

## STEPS:

1. Write each idea on an index card or self-stick adhesive notes.

*If the ideas are being generated by the group just prior to the affinity session, it will save time to record the ideas on cards or notes as the ideas are being created.*

2. Randomly place the cards on a table, flip chart, or wall

*Make sure the cards are placed such that there is space for all group members to see and move the cards.*

3. Working in silence, group like or related ideas together.

*Note that some ideas may end up alone, with no other related ideas.*

*Ideas may be moved several times as disagreement surfaces about how ideas are related and as alternative groupings emerge .*

4. Once members have stopped moving cards, read each group of ideas aloud to assure that all ideas belong in the group.

5. Create a descriptive title for each group of ideas and write it on a header card.

*Headers should communicate what the idea cluster is about in a few words.*