

The Effective Facilitator's Cheatsheet

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- Meet with Sponsor
- Identify Session Purpose
- Identify Session Objectives
- Identify Participants and Roles

- Schedule the Session
- Invite Participants
- Identify Resources
- Design the Agenda
- Prepare the Agenda
- Prepare the Supporting Docs
- Prepare Materials

- Facilitate the session and effectively guide the team through achieving the session purpose and session Performance Indicators
- Encourage Full Participation
 - Promote Self-understanding
 - Build Emotional Connections
 - Build Trust/Shared Responsibility
 - Control/Defer Issues

- Review the Goals and Agenda
- Analyze the Work
- Review Action Items
- Assign Responsibilities
- Assign Feedback After the Meeting
- Appreciate
- Follow Up

