

Team Facilitation Skills: A Step Beyond Running a Good Meeting

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by Deb Bennett-Woods, MA, ART

Corporate downsizing and restructuring continue to reduce the number of managers and increase their scopes of authority. As a result of organizational flattening, healthcare organizations increasingly turn to self-directed teams (teams within a department) and cross-functional teams (teams across departments) to plan, problem solve, and manage projects.

In many industries, successful teams have reduced operating costs and product development time and increased quality and customer satisfaction. Teams are often cited as the source of increased employee satisfaction. Many organizations, however, have failed to successfully implement team structures. Although there may be a variety of reasons for either failure or success, effective team facilitators are critical to all team-based efforts. For this reason, developing your own ability to assume a team leadership role is one of the smartest career moves you can make in today's rapidly changing environment.

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Opportunities to lead or participate in team facilitation abound for health information managers. As a member of the line staff, you may find yourself assigned to a self-directed team or a process improvement team. Department managers and directors frequently participate in or lead multi-departmental teams for clinical pathway development, information systems selection, or service planning. As a consultant, one of your primary tasks may be to facilitate the project team for your client. Strong team facilitation skills are important for successful project management in any circumstances.

But I Already Run a Great Meeting

Team facilitation skills are often presented as synonymous with effective meeting skills. While running a good meeting is important, team facilitation extends beyond this single skill set. In fact, the ability to organize and lead an effective meeting may be one of the least important skills in the larger picture of team success. Successful team facilitation requires ability in these five broad areas: leadership, organizational politics, technical processes, interpersonal relations, and team administration. The larger, more important, or more complex the project, the more critical these five areas become.

Leadership

Leaders possess vision and a sense of purpose. Not only do they communicate the vision clearly, but they do it in a way that excites and energizes people. Good team leaders create an atmosphere of challenge, commitment, and determination. Participants see the team as an opportunity rather than a burden-not just another pointless meeting. This ability to excite and inspire performance is the single greatest team facilitation skill.

Think back on the committees and task forces you have participated in over the years. Does one stand out in your memory? If so, chances are it is because you enjoyed what you were doing. There was clear purpose, goals, and objectives. Projects may start out with very specific goals or they may be very vague and general. In either situation, it is important for the team to explore the parameters and possibilities of the project. It is then equally critical for the team to develop and agree on a formal, written statement of purpose as well as goals that reflect the team's vision. It is impossible to build cohesiveness, trust, or commitment without a clear and shared vision.

Common mistakes in team leadership include neglecting to develop a shared vision, failing to establish clear goals that everyone agrees on, and not fostering a collaborative and respectful environment.

The successful team facilitator provides leadership by

- Creating a purpose and general framework for the project prior to the first meeting
- Encouraging the team to fully discuss the opportunities and potential pitfalls of the task
- Ensuring that all members of the team participate and reach consensus on the purpose
- Establishing specific goals and measurable objectives around which planning can occur and progress can be measured
- Making sure all decisions and plans are consistent with the purpose and goals
- Building trust among team members by emphasizing the unique role and importance of each member
- Functioning as a cheerleader, reminding team members of the purpose and goals, celebrating achievements, and recognizing the efforts of individual team members

Organizational Politics

In the complex and rapidly changing healthcare industry, one of the most serious challenges faced by teams is obtaining and maintaining visibility, organizational support, and resources. Few things are as discouraging to a team as low visibility and loss of commitment by executive administration. Conflicting demands on department heads may result in conflicting demands for team members. All of this adds up to less time and energy available to achieve the goals of the team. The effective team facilitator is able to support the team by maintaining organizational focus on the team's goals and activities.

Common mistakes in managing organizational politics include failing to identify important stakeholders and their concerns, failing to communicate with stakeholders, and underestimating the power of organizational politics.

The successful team facilitator manages organizational politics by

- Identifying any competing issues, projects, or other demands within the organization. What issues are getting the most attention? How might this project support those issues? How might this project interfere with or draw attention away from them? How will this affect my ability to obtain resources and commitment for my own team?
- Identifying the primary stakeholders. Who will be affected by this project? What will they want to see happen? Whose support do we need to be successful? Do I know these people? Do we work well together? How can I develop or improve my relationship with each of these persons now? How can I work with them during the process? What will be the best communication tools for each stakeholder-phone calls, brief meetings, memos, e-mail, formal reports?
- Being constantly aware of political issues that may interfere with decision making or priorities both within the team and outside the team
- Protecting team members from conflicting demands. One way to do this is to provide positive feedback to the supervisors of team members emphasizing their contributions and encouraging their continued participation

Technical Processes

One of the important benefits of teams, both self-directed and cross-functional, is having people with different technical skills and expertise to design, redesign, or problem solve areas of operation that cross department or cost center boundaries. The team leader is unlikely to have all of the detailed technical knowledge of each team member or complete knowledge of the entire system. However, the team leader can best facilitate the team if he or she has a good general understanding of the processes involved, the purpose of each process, and how each process interfaces with other processes. This broad understanding will help the team leader keep meetings on track, evaluate the need for additional expertise on the team, design effective subcommittees, and integrate subcommittee recommendations for presentation back to the full team. The team leader should also communicate detailed progress reports and technical recommendations to higher levels of management in the

organization and must be able to respond confidently and accurately to questions and concerns or be able to effectively communicate those questions back to the team for its response.

Common mistakes in the technical area include underestimating the complexity of a system or process, ignoring the observations and suggestions of line staff, and allowing one or two "experts" to take over the design and decision-making activities.

The successful team facilitator develops the necessary technical understanding by

- Evaluating personal technical knowledge of the processes and systems on which the team will be working
- Preparing a general flow chart of the process or system with as many technical functions as possible in each area
- Identifying areas that are not familiar and considering how this might hamper support to representatives from these areas
- Observing and speaking with managers and line staff
- Recognizing the expertise of various team members and effectively ensuring that all team members are able to fully contribute their unique knowledge and skills

Interpersonal Relations

Team facilitation relies heavily on a good mix of interpersonal skills. Often, the interpersonal style of the team leader determines the eventual style and effectiveness of the team. The best facilitators are deeply aware of the culture of the organization and the departments represented on the team. They consider how this might help or hinder the efforts of the team. They make a point of getting to know team members and their personal styles of communication. They are good listeners and astute observers of group dynamics. They ask the right questions at the right times. They know when to coach, when to intervene, when to redirect, and when to stand back and let the team struggle through issues on its own. They can provide both constructive criticism and encouragement. They are perceived as honest, trustworthy, and genuinely concerned about the success of the team and each individual member.

Successful teams develop their own methods of dialogue, decision making, and conflict resolution. This can be a difficult process, but a good facilitator guides this process by looking for opportunities to develop the interpersonal skills of team members. This means that the facilitator listens and reflects, and applies basic techniques in discussion, negotiation, conflict resolution, and decision making by consensus.

Common mistakes in managing the interpersonal relations of the team include avoiding or delaying difficult discussions, minimizing or ignoring conflict, forcing decisions prematurely, ignoring members who disagree with their own position, or allowing senior or higher ranking members to monopolize planning and decision-making processes.

The successful team facilitator builds the culture and interpersonal skills of the team by

- Evaluating his or her own interpersonal skills for areas of strength and weakness. Am I sensitive to other people's style and needs? Do I encourage participation in discussions? Am I a good listener? Am I comfortable dealing with conflict? Can I lead a group decision-making process? Can I be patient when the group needs more time to process issues and decisions?
- Seeking help from other team members or external resources to assist in areas where you are weak or uncomfortable
- Getting to know each team member personally and helping members get to know each other
- Encouraging communication and collaboration among team members between meetings

- Identifying issues with unequal levels of authority, seniority, or experience and assuring that lower-ranking or less experienced members are not intimidated or left out of important discussions
- Building trust by establishing team norms such as confidentiality, honesty, and respectful disagreement
- Using a variety of communication techniques to gain participation from all members
- Listening
- Helping the team achieve effective discussion and decision-making processes
- Encouraging the team to make suggestions and agree on how they will handle conflict
- Setting a good example by modeling positive team behaviors and attitudes at all times

Team Administration

Last, but certainly not least, are the administrative activities that allow the team to accomplish its mission. The facilitator handles the team's logistics including scheduling and preparing meetings, maintaining minutes and other documentation, preparing reports, plans, and formal communications, obtaining resources, and communicating information between the team and interested stakeholders.

It is important to run well-timed and well-organized meetings. Team members should never walk out of a meeting feeling like they wasted their time. Concise written plans and meeting minutes help team members keep current and focused, as well as keep stakeholders informed about team activities. Project plans and task lists help members organize their time and encourage completion of assignments. Well-conceived written plans also justify necessary resources and establish time lines for organizational support. Good administrative support systems give the entire team process a sense of forward momentum and stability.

Common mistakes in team administration include conducting meetings that are too long, disorganized, or unproductive; and failing to keep minutes, document key decisions, or create written plans. The flip side of those mistakes is running overly controlled meetings with limited interaction; and using lengthy, narrative formats for minutes and reports. Another critical mistake is the failure to formally and informally communicate progress and actions to key stakeholders.

The successful team facilitator administers the team by

- Establishing a system of formal but concise documentation including meeting minutes, recommendations, plans, and progress reports. Minutes should be in table rather than narrative form with a list of each agenda item; summarize key discussion points, decisions, actions, and recommendations; and include a schedule of target dates for all tasks assigned to members. Plans should also be concise with each action tied directly back to the project purpose, goals, and objectives. Plans can also be prepared in table format with a column titled "status." This same plan can then be used to track activity and quickly produce progress reports.
- Organizing and conducting effective meetings; distributing well-planned agendas in advance of meetings
- Helping team members manage their time by providing written task lists and time lines
- Providing frequent and concise communication to stakeholders
- Looking for opportunities to make formal presentations on team activities and encouraging the participation of team members in these presentations

Is That All, I Hope?

Does such a person with all these abilities really exist? Is it possible to be an effective team facilitator? Of course it is. There is nothing here that you cannot learn and practice every day. You don't have to be good at everything all at once. Use the guidelines above to evaluate your own experience, strengths, and weaknesses in each of the five areas. Select one or two skills you would like to work on and develop a plan.

- Read a book
- Take a course
- Observe others
- Find a mentor
- Practice with peers
- Volunteer for a small project or simple activity
- Build confidence in yourself and a reputation among others

In flattened and rapidly evolving organizations, collaboration and team work are fast becoming highly valued skills at all levels of the organization. These are not skills that are commonly shared by most people. Whether you use them as a team member or as a team leader, effective team skills can quickly distinguish you from other employees and open doors to new opportunities. Team skills can also come in handy in areas of your life beyond the doors of your workplace. Consider it an investment in both personal and professional growth.

Recommended Reading

Buchholz, Steve, and Thomas Roth. *Creating the High-Performance Team*. New York: John Wiley & Sons, Inc., 1987.

DuBrin, Andrew J. *The Breakthrough Team Player: Becoming the M.V.P. on Your Workplace Team*. New York: American Management Association, 1995.

Parker, Glenn M. *Cross-Functional Teams: Working with Allies, Enemies and Other Strangers*. San Francisco: Jossey-Bass Publishers, 1994.

Deb Bennett-Woods is director of the Health Services Administration and Management program at Regis University, Denver, CO. She is a member of AHIMA's Career Management Task Force.

Article citation:

Bennett-Woods, Deb. "Team Facilitation Skills: a Step Beyond Running a Good Meeting." *Journal of AHIMA* 68, no.1 (1997): 20-23.

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