

Begin with the end in mind. Ask, "What do you want to achieve?"

PLACES, Please!

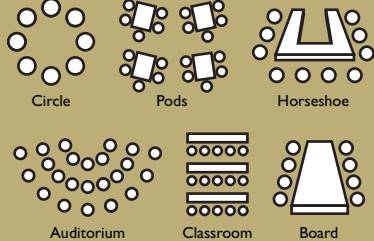
PARTICIPANTS

- How many participants are attending? Who are they, and what do they do?
- Will any have to travel? How many will be participating virtually vs. in the room?
- What's their relationship and history with each other? Intact team, strangers, in the same organization, across divisions, any reporting relationships.
- What sensitivities exist among them, and how can we best address them?

LOGISTICS

- When is it: date/s, start/end times, breaks/lunch, set up/tear down
- Will this event be: In-person? Virtual? A hybrid of both?

- Where is it: surrounding area, safety, concerns address, access restrictions, parking, unloading.
- Room: light, temperature, audio/visual, special accommodations, flipcharts/easels, food/snacks, breakout rooms, rest areas. Ask for a photo of the room/s. Common room layouts:



- Is the event interactive, or is the communication one-way? What level of interaction do you want? Ability to view, speak, unmute, vote, breakout, chat, collaborate, draw digitally.
- What do you currently use for virtual facilitation? Video, teleconference, screen sharing, collaboration.
- What hardware will the participants have access to? Phone, smart phone, microphone/headset, keyboard/mouse, webcam.
- How good is participants' bandwidth?
- Does your network restrict sites or loading software? When can we test?
- How do you want the event recorded and distributed?
- What content do you want to present? What format is it in? Deadline for final content.
- When can we do a tech check - a technology dry run?

ACHIEVE

- What is the event? What is its purpose? What do you want to achieve?
- What would a successful outcome look like?
- What do you already have planned; is there an existing agenda, and how flexible is it?

CONTEXT

- What does your organization do? Who are its customers/stakeholders? How does it define success?
- Why have this event? What in your organization/industry is driving it? What's the history?
- Appreciative inquiry: what's working well? What have you already tried?
- What are the barriers/enablers to success? Where do the sponsors/leaders stand with this effort?

EXPERIENCE

THIS EXPERIENCE:

- What kind of experience do you want participants to have? What feeling should they have when they leave the event? What expectations will they have coming in?

PAST EXPERIENCE:

- In the past, what's been your experience with a graphic facilitator? What have you seen? What have you liked? What haven't you liked?

SPECTRUM of PURPOSE

Adapted from *The Fifth Discipline* by Peter Senge

Events most often fail because leaders, organizers, and participants have different understandings about the purpose of an event and what is expected of them. Use this spectrum to clarify the event's purpose. Be clear on purpose: a hidden purpose that reveals itself midway through an event will destroy trust.

- **TELL:** Is the purpose to clearly transmit information, plans, or expectations?
- **SELL:** Is the purpose to explain benefits and the "why" of a decision and bring others along?
- **CONSULT:** Is the purpose to share a plan or idea and receive feedback and insight from others?
- **COCREATE:** Is the purpose to have participants cocreate a solution, plan or make a decision?

PLEASE

This is a reminder for you to be in partnership with your client and a servant of the process. "My purpose as a facilitator is to: _____."