



**Business  
Round  
Table**

**MODERATOR**

**SKILLS**

**MANUAL**

## TABLE OF CONTENTS

Preface and Introduction .....	1
Confidentiality.....	3
The Role of the Moderator.....	4
Moderator Duties.....	7
The Three Stages of Group Development.....	9
Leadership Styles .....	11
Guiding Your Round Table Group .....	14
Opening Round Table Sessions .....	15
Keys to Effective Meetings.....	17
Getting Good Presentation Topics .....	18
The Presentation of a Problem / Opportunity .....	19
Content Vs. Process .....	29
Handling Problems in Your Round Table Group .....	32
Business Round Table Moderator Training Program .....	42
Appendix A .....	45
Functional Behaviors in a Group .....	45
Group Dysfunction List.....	48
Member Behavior Problems and Solutions .....	49
Appendix B – Summary Action Plan.....	50
Appendix C – Meeting Action Plan.....	51
Appendix D – Ice-Breakers.....	52
Appendix E.....	55
Group Evaluation Questions .....	54
Members’ Needs and Wants Survey .....	56
Group Effectiveness Survey.....	57
Membership Effectiveness Survey.....	58
Trust Evaluation and Building Survey.....	60
Monthly Meeting Evaluation .....	61
Group Health Survey.....	62
Moderator Leadership Survey.....	64
Stongest / Weakest Link Survey .....	65
Appendix F – Gestalt Language Protocol.....	67

## **PREFACE**

The manual you are about to read is designed to provide you with an overview of basic ideas on group processes that will be useful to you as a Business Round Table Group member and moderator.

This manual is written in light of the insights that have been gained from participating in several YPO Presidents' Group Moderator Training Workshops and from consultations with the YPO moderators in attendance at those workshops.

Our objective in writing this manual was to distill the information from all these sources into a short and easy-to-follow description of the basic moderator skills you will need in order to provide an effective experience for the group you will lead.

## **INTRODUCTION**

### **OVERVIEW**

When you are chosen to moderate a Business Round Table Group you face a difficult, challenging and rewarding opportunity. Difficult because you are already busy and the position of moderator requires a certain amount of extra time and attention. Challenging because you will be developing skills that will enable you to organize and guide the group of professional peers. Rewarding because your skills and effort will create a deep feeling of satisfaction and accomplishment in your Round Table Group members, and that will reflect on you. In addition, the skills that you develop or refine will have a direct application to your own business, family and friendship situations.

### **USING THIS MANUAL**

Those of you with past leadership experience may already be familiar with the basic principles of leading groups and you will find this review helpful, while moderators new to this role will be concerned with absorbing a vast amount of information.

However, whatever your past experience, your key to success in moderating a Round Table Group will not be based upon what you know, but rather upon what you do with what you know. The key to this manual's success is also dependent upon the degree to which you actually apply its principles and ideas in your Group.

The following suggestions for its use may be of some help to you:

1. Read through the manual initially to gain an understanding its organization and content.
2. Re-read it carefully, spending time thinking about how to apply any of the suggestions and principles to your Group. Quickly note any ideas for action in the space in the margin of each page before you lose them. Take time to complete the ACTION STEPS included in each chapter.
3. Organize the actions you want to take in the Round Table SUMMARY ACTION PLAN sheet provided in Appendix B. This sheet should be an indication of the degree to which you have assimilated the information and related it directly to your Group.
4. Use the manual often. Make it a point to pull it out and review it before or after Group sessions. Your Group is dynamic and is constantly changing. The manual will offer new insights and perspectives as your Group grows in experience.

#### **ADDITIONAL RESOURCES**

In addition to this manual, you have a number of other resources available to you for conducting an effective Business Round Table Group. They are:

- the Business Round Table staff,
- the Business Round Table Members' Guide,
- the Business Round Table Moderators' Training Program,
- other experienced Round Table moderators,
- and last, but not least, your Group members.

If you use these resources, the combination can result in a highly successful Round Table experience for you and your Group members.

As you are reading the manual, keep clearly in front of you the two basic responsibilities of a Round Table moderator. Ask . . .

1. How will these ideas help my Round Table members receive an unbiased source of advice and counsel?
2. How will these ideas help my Round Table provide this advice in a confidential, trusting, honest and supportive manner?

## **CONFIDENTIALTY**

**Confidentiality is the most basic and most important aspect of a BRT group's success. In order for BRT to work, members must share openly and honestly which requires the confidence that everything is treated as confidential information.**

1. **Rule of Thumb: "Everything that is said in the room, stays in the room." If you remember nothing else this rule will carry you and you won't have to worry about the other rules.**
2. **"No pillow talk". No one is to share anything that occurred in the group with anyone including spouses or significant others. Even if all you say is "I can't tell you what was presented but I can tell who presented." Someone else may have said, "I can't tell you who presented but I can tell you what happened." As you can imagine it's easy to piece the facts together by speaking to various members of the group or by speaking with other spouses or significant others.**
3. **"No dissension." Remember that the purpose of the group is to build a cohesive group that will last for years to come. If two, or more, of the group members talk about another group member, or group member's situation, in his/her absence it is not healthy and it can be destructive.**
4. **"Walls have ears." If John Doe presents knowledge that his secretary was stealing from the company and he is in the process of setting up a trap to catch her, and members of the group are talking about it, they may be overheard by the wrong person and it can be destructive.**

## **REMEDIES FOR BREACH OF CONFIDENTIALITY**

1. **If the breach is considered to be accidental, then it is brought to the attention of the moderator and the person whose confidentiality was breached. Further action is assessed.**
2. **If the breach is considered to be deliberate, then it is brought to the attention of the entire group and the member who breached is asked to resign.**

## **THE ROLE OF THE MODERATOR**

### **A ROLE DIFFERENT FROM MOST**

Your responsibility when moderating the Round Table will be to provide leadership in creating a Group in which the members can:

- ▶ air problems and opportunities that are of concern to them so they can,
- ▶ receive the benefit of members' experienced advice and counsel, even though solutions may not be reached,
- ▶ in an atmosphere that is confidential, trusting, honest and supportive.

These are heavy expectations and unusual in most groups. As a result, the Round Table you will be leading offers you an extended opportunity to develop and apply your group leadership skills. Understanding the nature of this group and how it differs from others will be helpful in defining the role of the Round Table Moderator.

### **DIFFERENCE IN GROUPS**

A group is commonly defined as a number of people cooperating to attain some objective. Although all of us have substantial experience in groups -- work groups, family groups, social groups, community groups, sport teams -- not all groups are alike.

Because groups are different, the expectations and definition of a leader's role will vary depending on the type of the group that is being led. For example, the amount of control executed from the leader may vary from group to group.

In some groups, such as Rotary and trade associations, the role of the leader is clearly defined and is backed up by some very clear expectations from the membership. Here the formal leaders are directly appointed and given prescribed authority.

In some groups, the leader is expected to take very strong control, as in groups of peer professional researchers, all experts in their own right working to solve a common problem.

### **PEER PROFESSIONALS**

The Business Round Table is more like a group of peer professional researchers. The members are experts in their own right, working together to identify and solve problems. Strong dominant control, however, is seldom effective.

The Business Round Table, by definition, is also different from other peer professional groups. During the Group meetings, members will be asked to talk about matters inappropriate in more public groups, to discuss problems and opportunities at a depth and with a sensitivity unlikely to be available to them in any other setting (often including their Board of Directors), and to receive counsel from peers committed to objectively and supportively helping them.

In a peer professional group like the Business Round Table there will be a number of expectations of you from the members. They will -

- ▶ expect to have some control in the Group meetings themselves since they are leaders in their own companies,
- ▶ expect the moderator to have an understanding of what the Round Table can accomplish and to provide overall direction,
- ▶ expect that time be extremely productive,
- ▶ expect that conversations move quickly beyond the superficial level, and
- ▶ expect that when problems occur, they will be handled.

These expectations mean that you will be more successful as a Group moderator if you -

- ▶ get to know your members and their needs well,
- ▶ guide firmly rather than demand,
- ▶ act as a facilitator rather than an expert, and plan to use time effectively.

The primary role of the moderator is to facilitate the meetings and to provide structure and leadership in group effectiveness and solving group problems. The moderator must try to help the group accomplish its mission. The moderator doesn't have to know everything and do everything for the group. The wise moderator uses the unique capabilities of the various members of the group to develop and implement an effective system for helping each member obtain as much value from the BRT experience as possible.

The moderator is a full member of the group and has equal opportunity to participate in the discussions. The moderator is a coach and facilitator for the group. The moderator may delegate all group tasks or jobs.

Some of the tasks that could be delegated are:

Scribe/Secretary	Presentation Coach
Treasurer / Fines Master	Goal Keeper
Communications' Officer	Time Keeper
Record Keeper / Meeting Evaluator	New Member Coordinator
Retreat Organizer	Assistant Moderator

### SUCCESSFUL MODERATOR CHARACTERISTICS

When choosing a moderator for your group, look for members who have the following characteristics:

- 1 **Organized** - They make sure that things get done.
- 2 **Delegators** - They do not try to do everything themselves.
- 3 **Respect** - They have the respect of their peers.
- 4 **Sensitive** - They can sense others' feelings and anticipate their thoughts.
- 5 **Bossy** - They can conduct a good meeting, keeping it focused, on schedule and on topic and follow the agenda.
- 6 **Natural Born Leader** - People look to them for leadership when necessary.

### THE 7 HABITS OF HIGHLY EFFECTIVE MODERATORS

- 1 Plans and prepares for the meetings.
- 2 Believes in the process and acts as though the group is greater than the sum of its parts.
- 3 Works from an agenda balancing tasks and group maintenance.
- 4 Keeps the group focused
- 5 Looks for non-verbal communications and reacts to them.
- 6 Solves group dynamics' problems.
- 7 Seeks full involvement and participation from all members



## MODERATOR DUTIES

The duties of a BRT Moderator fall into two basic categories:

**Meeting Management** - The Moderator should see that the following things are done consistently. They may be delegated or done by the Moderator.

- 1 Prepare a written agenda and provide copies for all members.
- 2 Create and manage the atmosphere (safety, comfort)
- 3 Ensure that each meeting has a presentation and that the presenter follows the BRT Presentation Format.
- 4 Keep the meeting on the topic and on schedule.
- 5 Ensure that there are no interruptions when members are speaking during Updates, Parking Lot and Presentations.
- 6 Encourage open minds
- 7 Manage the participation.
- 8 Listen and observe.
- 9 Resolve conflict and seek consensus.
- 10 Summarize the discussions.
- 11 Try new things that can keep the meeting fresh. For example, use the 10-Minute Discussion Topics occasionally.
- 12 Ensure that each member's needs are being met.
- 13 Start and stop the meeting on time.

### Strategies

#### *Norms -*

- 1 Have the group review the norms two or three times per year. Write this in your day-timer to remind you to do this.
- 2 Evaluate how well the group is following them.
- 3 Change any that aren't working.
- 4 Make sure that everyone understands the Norms and that there is good consensus.

#### *Confidentiality -*

- 1 Don't forget to talk about confidentiality at each meeting.
- 2 You don't have to belabor the topic but keep the concept of confidentiality in everyone's mind.

#### *Sensitivity -*

- 1 Try to be sensitive to the individual member's needs.
- 2 If you sense that someone needs time to talk about a particularly stressful or difficult situation, find the time for them.
- 3 Bring out the quiet members of your group.
- 4 Don't let your group "Should On" people. Remember that the group is not there to make decisions.

### **NOTING GROUP DIFFERENCES**

Being aware of the differences between the Business Round Table and other groups can be very helpful to you as a Group moderator because it gives you an opportunity to assess:

1. how the responsibilities of the Round Table moderator are similar or different from the other group experiences you have had,
2. which leadership skills will transfer those other experiences to your Round Table moderator responsibilities, and
3. some of the expectations and resistance you can expect as a moderator using certain leadership styles.

### **ACTION STEPS**

1. Develop a list of other groups you have led and note how they are alike or different from the Round Table.
2. List the expectations that you think your Round Table members have of you as their moderator.

### **A CHANGING ROLE**

You will find the group to be a dynamic one -- one that, if handled appropriately, will grow and develop over time. It will move from an introductory phase, through a growth phase and into a more mature phase.

### **USE OF GROUP MEMBER SKILLS AND MODERATOR SKILLS**

Business Round Table Groups typically go through three stages of development, each of which requires the application of different skills and techniques. It is important for the Moderator to know about the three stages and act accordingly as the group advances from Level 1 through Level 2 to Level 3.

As the group goes through these stages you will find that your role as moderator will tend to -

- change as your Group changes over time,
- move from more actively guiding the group to more passively guiding it, and
- move from being in the spotlight to being more behind-the-scenes.

And yet, there may be occasions where the needs of the group or of individual members will pull you back into a more active role. One thing a good moderator is not is static.

## **THREE LEVELS OF GROUP DEVELOPMENT**

### **LEVEL 1 – MEETING STAGE**

Just as it sounds, the meeting phase is a somewhat formal gathering. It is the first meetings of people who may not even know each other. Certainly the members are not as intimately acquainted as is necessary to have a successful Round Table experience.

This phase will be characterized by a fear and avoidance of confrontation. The meeting stage will tend to be superficial and self-protective, not venturing beyond intellectual or scientific levels. Members will present numbers and documentation to prove that their latest handling of a particular problem or opportunity was accomplished not only in the best manner possible but also with a dash of brilliance. It is "show and tell" time. Academic topics will surface such as financing problems, management compensation and other impersonal issues.

On one hand, there will be high expectations in the group, a lot of enthusiasm and a positive attitude. Underneath, however, members will be skeptical, cautious and tentative. In short, there will be a low emotional investment by the group in the Meeting phase.

### **Level 2 – Group Stage**

The Round Table Group should move quickly to the Group stage. This phase can be characterized as one where there is substantial development of mutual trust among the members. They begin to gain a great deal of personal knowledge about each other, their business practices, and their personal lives. Members begin sharing and caring through openness toward other members. The Group phase is a very comfortable one and all Round Table groups achieve this level quite soon. Members will like the Group at this phase and will be proud and happy to have attained this level.

### **Level 3 – Round Table Stage**

The Round Table Stage is both the end of the road and the beginning of the journey. It is characterized by a high acceptance among the members, interdependence and the absence of constraints. Members will begin to believe in each other and what the Round Table experience can do for them. The Group members will no longer be rigid. They will be relaxed physically, mentally, emotionally, confident of themselves within the group and respectful of the other members. There will also be a degree of vulnerability at this stage as each member opens up with full and complete expression of his emotional makeup. At times the participant may feel uncomfortable, however the interdependence of the group and the confidence that the members have in each other and themselves will allow significant and meaningful interaction.

Many internal and external organizations to which the member belongs can reach the second phase from the first phase but the transition to Round Table phase from the Group phase is of a different nature. The transition has often been characterized as "crossing the threshold". The threshold theory is that on one side there are superficial exchanges, show-and-tell presentations and relatively trivial business problems. On the other side of the threshold there are the real dilemmas and aspirations that the members have and for which they wish to seek resolution. It is in this Round Table phase that the latter can be regularly explored and openly discussed. It is where the group can find itself "over the threshold".

### **A ROLE REQUIRING STYLE FLEX**

Because the needs of the group and the individuals will vary, you will need to adjust your own leadership style to respond to those needs. For example, when you first begin the Group it will most probably be necessary that you be more active and directive as a leader. Even though you are leading a group of peers they will need some advice and counsel from you in developing the initial format, structure and discussion principles for your Group.

As time moves on, however, you will need to change your leadership style to fit the new situation you face. You will probably need to be less directive and use the group more to handle issues as they occur. Failure to move responsibility to the members can prevent the group from reaching its full potential.

This is probably the most difficult challenge you face in moderating your Group. You will need to work at using a leadership style that fits the particular Group members you are dealing with and the specific situations they are facing at a given time. You will need to flex your leadership style.

But flexing your leadership style is not a precise science nor is it easy to accomplish. It requires a great deal of sensitivity on your part to the need for change and a willingness to take appropriate action. Many moderators will not find this easy because they will have developed a style of leadership that they are comfortable with and appears to them to be working well. As a result, they may not attempt to change their style and reject any feedback from members that they should do so.

To help avoid so rigid a position, it is helpful that you develop an awareness of your leadership style as your Group progresses. To do this, it is helpful to have some options of leader behavior available to think about.

## **LEADERSHIP STYLES**

Let's assume there are four basic leadership styles open to you as a moderator--controlling, delegating, involving and quoting. The following paragraphs will give a short description of each style. See how comfortable (or not) each style feels to you. None is better than the others, but often people feel more comfortable with one or another. As you read them, determine in which Group situations you plan to use or avoid each style.

### **STYLE I -- CONTROLLING**

Moderators who use the controlling style will like to be in charge of the group, set the agenda, decide the schedule, determine the meeting place, set the format, appoint the presenter and let the other group members know when they should talk and when they shouldn't. When a problem arises in the Group, they will feel most comfortable telling others what the problem is and what to do about it. They will feel inadequate if they don't have all the answers and feel that, because they were appointed as moderator, they should take the lead.

#### **ACTION STEPS**

1. Describe some situations in the Round Table where you would use this style.
2. Describe some situations in the Round Table where you would not use this style.

### **STYLE II -- DELEGATING**

Moderators who use the delegating style will want others to decide what should be done. When a problem arises they will ask someone else to solve it. They will rely on experts in the group to handle problems and use those experts as often as possible. When issues like agenda and schedule are raised, they will let the group decide and work very hard not to tell them what should be done. When presenters have problems, they will ask other members to give their opinion even though they have a definite opinion on the solution themselves. When a particular member doesn't participate enough, they will ask what he feels is the solution versus telling him what he needs to do.

#### **ACTION STEPS**

1. Describe some situations in the Group where you would use this style.
2. Describe some situations in the Group where you would not use this style.

### **STYLE III -- INVOLVING**

Moderators who use the involving style will want to have the group involved in decision-making. When decisions on any issue are needed, they will want the entire group to discuss them so they can arrive at a group consensus on what needs to be done. They will avoid any unilateral decisions. When a presenter receives feedback, they will want everyone to discuss the advice that is given and work to reach agreement on the advice. They will see the Round Table as a group-oriented decision-making process where all the members need to have input into the decision-making so they won't feel left out.

#### **ACTION STEPS**

1. Describe some situations in the Group where you would use this style.
2. Describe some situations in the Group where you would not use this style.

### **STYLE IV -- QUOTING**

Moderators who use the quoting style will work to design structure into the group and establish clear sets of norms, guidelines and rules for how the group will function. They will use the quoting style by quoting manuals or policies to enforce the rules whenever they are not followed. They will keep the group clearly aware of the rules and the extent to which they are following them.

#### **ACTION STEPS**

1. Describe some situations in the Group where you would use this style.
2. Describe some situations in the Group where you would not use this style.

### **NOTING WHICH STYLE TO USE WHEN**

You have already begun to note when you feel you should use a particular style. If you also review the material in the Business Round Table Manual on stages of the Group's development and the levels of experiences in a Group, you can develop additional food for thought on the various complexities facing you in the choice of a particular leadership style. There are no fixed rules for exactly what style to use but it is important to note that if you choose the wrong style often enough you can have a definitely negative, if not fatal, effect on your Group. For example, using the quoting style when key norms of commitment and confidentiality are broken, can easily spell the end of your Group.

**DELEGATE**

**INVOLVE**

**QUOTE**

**CONTROL**

If you use the controlling instead of the involving style to set norms of openness, you may find that your Group members may close down instead of opening up. If you do not use the delegating style to handle certain problem members, you may either become too overloaded with problems or handle the problems ineffectively. If you do not use the controlling style for unimportant and non-controversial issues, you could easily waste your group's time and effort on trivial issues that should have been quickly decided. On the other hand, use of the controlling style on issues that you feel are trivial and unimportant, but the group feels are complex and high priority, could easily lose the group's respect and commitment.

Awareness of your present style, then, will allow you to assess its appropriateness to specific situations as you encounter them. Awareness of other style options and style flexibility will allow you to change your style when the situation calls for it.

You can receive specific feedback on your style from other Group members, your Business Round Table Advisor and at the Round Table Moderators Training Program. The style awareness and style flexibility that you develop in this moderator role will not only help you have a more productive Group but also can serve you well in developing more flexibility in your business and family situations.

#### **ACTION STEPS**

Now take a minute to reflect on this material and decide what it is that it tells you about the task you face in moderating your Group.

1. Indicate the style you are most comfortable using with the Group.
2. List some major issues you feel your Group will be dealing with in the next two meetings. Next to the issues indicate the style that you feel would be most appropriate for you to use in helping the Group handle them.
3. Note some of the key Group members that you have and describe what you feel would be their preferences for your style.
4. Develop a set of action steps related to your style choice that you feel you would consider taking.
5. Do this exercise again after a few more Group sessions.

## **SUMMARY**

Your role as a Business Round Table Group Moderator is one that is different from most, one that is dynamic and changing, and one that requires a flexible leader style. As a Group moderator, you will be asked to operate as a peer among peers and, yet, to guide and direct your peers toward the objectives of creating a Group for obtaining unbiased advice and counsel in a confidential, trusting, honest, and supportive manner.

Your natural style is not necessarily the most effective all the time. Developing a sensitivity to the style that best fits your Group and its stage of development or level of experience, will be one of the most difficult and rewarding challenges you face as Group moderator. Once you have mastered this challenge you can apply your skills not only to your Group, but also to your business and family leadership challenges.

## **GUIDING YOUR ROUND TABLE GROUP**

### **OVERVIEW**

To create an effective Business Round Table Group, your basic task will be to guide the group in reaching its objective. A major complaint on the part of the busy business people who attend innumerable meetings is that so many of them are a waste of time, or, at the more positive end, could have been so much more productive. The expectation among Group members especially is very high that attendance at the Group will be "worth it". It is your responsibility as moderator to see to it that a worthwhile experience is provided for each of the Group sessions. Key to fulfilling that responsibility is overall planning for the year as a whole and guiding your members in each session.

There are a number of actions you can take to help yourself succeed in creating an effective Group.

1. Be sure each session's opening captures the group's attention and involvement immediately.
2. Ensure that presentations of problems/opportunities are handled well when they occur.
3. Create a sense of closure at the end of each session as well as anticipation of the next session.
4. Differentiate between what the group is talking about and how the group is relating.

Let's take a look at each of these ideas in turn.



## OPENING ROUND TABLE SESSIONS

### GUIDING YOUR GROUP

#### Plan a good opening.

The effective opening of each Round Table session is an important moderator skill. The opening of a Round Table session can have a strong impact on the ultimate success or failure of each meeting. The opening can set a tone that gets the group moving quickly and efficiently, or slowly and inefficiently, and the rest of the meeting is likely to follow. As a result, the development of an effective opening requires careful planning and creativity and should not be left to chance or routine.

The objective of the opening should be to bring the members more clearly together in mood and readiness to take on the work of the day. As moderator, your objective is to choose the opening that best enables your Group to reach this objective.

The choice of any particular opening will depend upon many factors. The real key will be the degree to which you can judge the mood of the majority of the Group members. Sometimes the group will be willing to start to work immediately on a serious issue. At other times they may be reluctant about getting down to serious work. Following are some ideas for handling each of these moods. You may want to add some ideas of your own.

When the group has not had a history of serious and trusting discussion of issues, these openings may help.

1. Discuss with the Group members the basic objectives of a Round Table and ask them how they feel they are progressing toward achieving these objectives.
2. Discuss the benefits of the Round Table process and discuss how well the group feels these benefits are being achieved.
3. Ask each group member to do a short presentation of ideas on what could be done to improve the Group.
4. Develop an exercise to describe what each member has heard can happen in a Round Table Group. Then ask them to compare what is happening in their Group with that list.

When the group is already trusting and prepared to move into a serious discussion, you might consider one of these:

1. Do a round robin check-in process for all prior presenters to update members on the progress each member has made or not.

2. Ask the members to describe two business or personal problems/opportunities they hope to present to the Group.
3. Ask the members to describe their major business goals for next year.
4. Start right in with the presentation of the problem/opportunity.

Sometimes a group seems to be in the middle, between these extremes, and needs some bridging to more serious issues. If so, some of these openings may be helpful.

1. Ask the group members to start with a one-line description of what they thought of the last Round Table meeting.
2. Have members note some particular personal growth they have experienced from the Round Table.
3. Ask each member to review the major positive actions they have seen happen in the Round Table thus far.

Often Groups will use the same type of opening for each meeting. The old adage, "If it works, don't fix it!" applies here. You don't need change for change's sake, but only if you detect a need to get the group moving again.

If the options presented here do not seem appropriate, there are many different options you can consider. Consult with other Group moderators and your Business Round Table Advisor for additional ideas. Also see Appendix D -- Ice Breakers.

#### **ACTION STEPS**

1. Develop a list of openings you have used or are planning to use with your Group for the three types of situations described.
2. Note the amount of time each would take and describe the impact each would have on the Group.

Once you've completed your opening, it is time to move on to whatever you have chosen as the major business of that meeting. If it's the presentation of the problem/opportunity, the section on page 19 may be helpful.

## **KEYS TO EFFECTIVE MEETINGS**

1. Book the dates two to three months in advance. A formula such as the 2<sup>nd</sup> Tuesday of the month is best.
2. A written agenda needs to be circulated to the members about four to six days prior to the meeting. It may be necessary for the Communication Officer to call everyone a couple of days before the meeting as a final reminder.
3. Start meetings on time.
4. Use the Update Form.
5. Keep Updates brief and uninterrupted.
6. Use the Parking Lot system for any issues that require more time.
7. Make sure that everyone has adequate "air time".
8. Each presenter should have a coach to help prepare the Presentation.
9. Make sure that each presenter uses the BRT Presentation format (in Members' Guide).
10. Have a specific place in the agenda for follow-up on previous Presentation and Parking Lot topics.
11. Evaluate and rate each meeting to look for ways to improve them. Forms are available to record meeting ratings.
12. All members must use questioning protocol by using "I" statements, speaking from their personal experiences, not just voicing opinions and not sitting in judgment.

## GETTING GOOD PRESENTATION TOPICS

One of the most difficult but most important duties of the Moderator is arranging good member Presentations. Often the group will get into the position where it seems that there is nothing more to talk about. If the Presentations are not interesting and helpful to the members the meetings tend to be of less value. Your role as Moderator is to make sure they are done and done well. Topics may come from -

**Goals** – Each member has goals. Get a flip chart or a white board and write each person's goals on it. Have the group review the list looking for topics that could use a good discussion -- a presentation. Ask, "What do I need to do to accomplish that goal?"

**Parking Lot** – Review the Parking Lot list. The Parking Lot Attendant should be keeping a written record for each meeting. Look for topics that need more than just a few minutes for exploration. Remember that Parking Lot discussions are best if the Presentation rules about interruptions, etc. are followed.

**Problems / Challenges** – From members' Updates, many problems or challenges make good presentation topics. When Updates are being done, the Moderator or Parking Lot Attendant could make a list of those issues mentioned that might make a good topic for the Parking Lot or Presentation.

**Opportunities** – When members are talking about opportunities that they are looking into, those could be a Presentation.

**Non-business Issues** – Your will, financial and retirement planning, relationships with a spouse and children (and their behavior) may be other topics which need discussing.

Take about 45 minutes at a meeting or retreat to do this exercise, usually about twice a year. Give the group about three minutes to individually make a list of at least two (possibly three) things that they want to fix or make decisions about during the next six months or so. Each person's list should be numbered in order of their priority.

On a flip chart or white board record them as each member reads their list. Have the Presentation Coach write them down on paper so they can be reviewed later. From this list the group selects topics for presentation and sets priorities as to which ones are the most significant and most time sensitive. They then become the Presentation topics for the next few months.

Remember that it is possible to have more than one presentation during a regular meeting if time allows. Also remember that it is possible to have special or emergency meetings.

In subsequent months, when looking for a Presentation for the next meeting, get the list out and see what needs to be presented next.

## **THE PRESENTATION OF A PROBLEM/OPPORTUNITY**

### **GUIDING YOUR ROUND TABLE**

1. Plan a good opening.
2. Handle the presentation of a problem/opportunity.

### **THE PURPOSE OF THE PRESENTATION**

The goal of the Round Table is not to produce a competent business person but to allow an already competent business person to develop other areas of competence. One of the most formidable formats for helping him to do this is the presentation of a problem/opportunity he is grappling with to the group. Though the person may not get a solution to his dilemma, the ability to air the subject, to discuss it among peers, and to get some other perspectives on it can be a very rewarding experience.

Sometimes such a "presentation" will occur quite spontaneously, and the moderator will want to be quick to use the opportunity to respond to a member's need appropriately. At other times, however, especially earlier in the group's development, members may need some guidance on "what to do and how to do it." whenever the presentation of a problem/opportunity is considered complex enough to take the major portion of a meeting, the following suggestions may be worth considering.

### **PREPARING THE GROUP FOR THE PRESENTATION**

Because each group member will probably, at some time during the year, become a presenter, it is important to cover early on with the entire Group what is expected of a presenter. Discussing with them -

- the definition of the presentation,
- its purpose,
- the beneficial outcomes to be expected, and
- how they are to be attained

can be very helpful before any presentation is given. Such a discussion clarifies for the whole group what is considered a worthwhile presentation and how it is to be accomplished.

An important area to stress in this discussion is that the Round Table Group's success depends on the degree to which presenters are willing to open up and share with each other even painful subjects so that they can get additional perspectives from the group. Telling honestly is the price for honest feedback and help. Though they may not get a solution to their problem, Group members need to appreciate that it is a rare privilege for them to have this unusual opportunity to share their problems and receive the kinds of advice and experience available from Group members.

Let your Round Table also know that you are there to set up the dates and times, to be available to the presenters for any questions they may have, and to monitor the presentation itself. Every one should know up front that the presentation is the major part of that Round Table meeting and that everyone should be serious about having members' time used well.

### **ACTION STEPS**

Develop an outline of the steps you plan to take to introduce the presentation of a problem/opportunity to your Group.

### **SELECTING A PRESENTER**

As a moderator you can ask your Group members to spontaneously come up with a problem/opportunity, or you can plan ahead who the presenter will be at each session. If your group is open and communicative and fairly trusting to begin with, the spontaneous approach may work beautifully and you may be fortunate in getting a first presenter who presents a truly significant topic for the members to consider.

There is a risk, however, when busy business people are asked on the spot for a problem to present. They may not have had time to think through which problem they'd like to discuss, how they might like to present it to get the most out of their peers, and whether they trust the group enough to lay bare any problem, especially spontaneously. In addition, they may not know whether this group can handle the real problem they'd like to share.

As a result, they may say they have no problem, or decide, under pressure, to "go ahead" and deal with a superficial issue. You can avoid either of these embarrassing situations by working with your Group members to assign a specific presentation time to each so they can prepare their presentations.

When selecting a presenter, you might ask for a set of early volunteers from which to make assignments. This allows the shyer people to wait until later when they will have had a chance to see how the presentation operates. This group of volunteers allows you to place the presenters in a more productive order. For the first presentation, select a presenter that is more likely to deal with a meaningful topic so he can set a good example for the rest to follow.

On occasion, however, you may find that a member mentions during the opening or somewhere in the sessions that he has a serious issue to discuss. You and the members will want to be sensitive to his suggestion/request. Exploring quickly the depth and immediacy of the issue with the requesting members and the impact of changing plans with the group brings everyone in on the decision to work on it immediately, or after the ongoing format, or at the next session.

### **HELPING THE PRESENTER TO PREPARE**

If the presenter is selected in advance, you need to ensure that he knows how to prepare the presentation and does it. It would be helpful to provide the presenter with guidelines in two basic areas:

1. selection of the problem/opportunity, and
2. handling the presentation.

When selecting the problem/opportunity, you might urge the presenter to consider the value of the issue himself, his willingness to hear additional ideas from others, the interest of other members in the issue, the type of advice he can receive from the Group, and the likelihood that he cannot get help elsewhere. These considerations are guidelines that are meant to be helpful to the presenter, not used as rigid rules.

When preparing to handle the presentation, the presenter will want to plan how to clearly define the problem/opportunity (what is the problem/opportunity, what information/advice is he looking for) without offering the solution, how to listen to the information/advice without being defensive, and what questions to ask of the Group members to ensure he gets what he came for. The presenter will also need to know the approximate time frame for his presentation so that enough time can be allowed for member questions and advice-giving, as well as for the summary. As moderator, you can assist him by making him aware of these planning steps and be willing to serve as sounding board ahead of time if they would help the presenter.

### **ACTION STEPS**

1. Review these ideas with your first or next presenter.
2. After the presentation, ask him if there is anything further he would suggest.
3. Use these ideas to prepare the presenter. You may want to discuss them with the whole group.

## **MONITORING THE PRESENTATION**

When the presenter begins his presentation, it may help the group if you or he wrote on a flip chart or chalkboard.

- the issue as he defines it,
- the help he hopes to get from the group,
- the types of information he will share with the group and,
- the time expected to be spent on the discussion.

This small amount of discipline allows the presenter and members to focus what little time they have on the right issue. (Also, when preparing himself for this outline, the presenter may re-define the issues and hoped-for outcome to something more meaningful or realistic.)

As the presenter does his presentation, you need to be aware of the time frames agreed upon and monitor them. In addition, you need to be aware of the impact the presentation is having on the members who are listening. Is the presenter going too slowly or too fast? Are his meanings clear? Is he getting mixed up? Is he spending a lot of time defending himself versus describing the problem/opportunity? Is he already "solving" the problem before the members have had a chance to reflect on it?

In the first few Group sessions you may need to intervene tactfully (without undue interruptions) to remind the presenter to stay on course. Later the members, and hopefully the presenters themselves, will be more able to help keep things on track.

It might be useful, also, to remind the Round Table members to listen carefully, not only to the issue the presenter is describing but also to the feelings he has about the nature of his decision. This will help the members to be more sensitive later in their responses to the presenter as a whole person.

## **MODERATING THE MEMBER RESPONSE**

Once the presenter has made his basic presentation, it is important that the next role you play is that of moderating member responses to the presenter.

1. **Asking Clarification Questions.** One of the first ways you can help your members respond to the presentation is to have them ask non-loaded clarification questions to help the presenter finish telling his story. You can help set the stage for this with a comment like, "Are you finished, Bob? (Bob nods.) Now let's see if there are any clarification questions we can ask to round out the information we have."



Members might then ask such questions as--

- "How many people got involved?"
- "How did you feel about Mr. X?"
- "What are your plans at present?"
- "When you said X, what did you mean?"
- "Is there anything else we should know?"

These questions help the presenter to finish telling his story. It is likely he passed over any number of details in order to summarize, and some of these details may be useful to the discussion that follows. These clarification questions also assure him that the group has really heard what he has said and that the members are really interested in what he/she has to say, in understanding him/her. Asking these clarifying questions may take only a few minutes but will be much appreciated by the presenter.

2. **Expressing Care and Concern.** Once the problem seems to be understood, it is helpful for Group members to make comments of appreciation or empathy and brief statements of "having been there also." These assure the presenter that he is not as odd as he might feel and that others have been there, too, and survived. Lengthy statements or stories, however, may give the presenter the impression members are more interested in their own stories than in helping him.

In brief, caring comments do not come spontaneously from the members. You may need to set an example to help members express verbally or non-verbally their caring from the person presenting. A small comment like, "That's a toughie--but that's what we're here for," can at the same time bolster the presenter and adroitly move into the next step of discussion.

It is important that the presenter, and all members for that matter, never feel challenged to defend their position or their actions. Round Table is not a place for anyone to sit in judgment of anyone else. One technique used to ensure this is to make sure that questioning is done in a non-threatening way. Questions should always be prefaced by the questioner stating his position and asking "How" or "What" rather than "Why". When you ask "Why" about a matter it usually means that you are challenging the person to defend themselves, their actions or their position. Watch for the "Why" word and try to teach your group members not to challenge or sit in judgment of others.

## **ACTION STEPS**

1. Outline a format for the principles that you will follow in your Group for understanding and clarifying the presenter's problem/opportunity.
2. Plan how you will introduce the principles to your Group.
3. **Providing Suggestions to the Presenter.** The presenter now becomes the "target" for suggestions, advice, new ideas, and as such faces a task even more difficult than the initial presentation. He needs to hear the suggestions, understand their meaning, deal with the motivation and methodology of the advice given, apply the concepts to his own situation unemotionally (or rationally), decide their appropriateness and respond to the member advising. This is a lot to ask him to do at once. If the problem presented is a particularly heavy one, or has existed many years, it is not likely to be solved in a short discussion period. Also, if he has been struggling with it for some time, there are reasons. It will take time for him to disengage from these reasons and to discover a new rationale that will allow him to change the situation.

Unless this is understood, a group of well-intentioned but over enthusiastic member advisors can almost drown the presenter with their multiple suggestions, offering too much too soon. As a result, the presenter may feel overwhelmed, misunderstood or not accepted. "You just don't understand what I'm dealing with here," can often be heard when the group has moved too fast. If the group moves too quickly, the presenter probably will ignore the advice or be "too busy" to act on it. Understanding this will enable you to help avoid these problems.

4. **Pacing the Suggestions.** As a moderator it is important for you to be sensitive to such a situation when it occurs, so you can intervene appropriately if the members don't monitor themselves. For example, to slow down the pace of the suggestions you can ask the members to elaborate a bit on their suggestions as they give them.

"Can you give us a little more information on that, Jim?"

This can help not only the presenter but other members as well understand more fully the meaning of the suggestion given.

You can also slow the pace and manage the discussion by questions like -

- "How do you see that applying to the X part of Bob's issue, Marge?"
- "What consequences would you envision if Bob were to do that, Bill?"
- "Would you make the same recommendation Gary? Why (not)?"

5. **Reminders on Advice Giving.** It may be useful for you to remind the members that before they can give advice or information they need to be able to think outside their own boxes or frames of reference. The advice given should be relevant to the presenter's situation, not just their own. So in addition to seeing how their past experiences are similar to the presenter's, they need to recall how the presenter differentiated his business problem from theirs.

You may also need to clarify for the presenter and everyone else that the advice offered is not the only advice he should take, the best advice he can get, nor the correct advice for his problem. It only ensures that the presenter gets more advice than he might have otherwise, a broader scope of advice, unbiased advice that is intended to be supportive of the decision-maker and his company. The implication, which may need to be clearly stated, is that the decision-maker makes his own decision after receiving and reviewing whatever advice he can get. Though he may not have solved the problem, he certainly has far more information to consider while handling it.

6. **Reminding Members of Discussion Principles.** It may be useful, on occasion, to remind the members of some principles of discussion that are appropriate for Round Table presentations. If the Group is new, these principles should be clearly stated in the initial sessions. They may be repeated when new members join the Group. Some examples of these principles are the following. You may want to add others of your own.

- Listen attentively to the person speaking to the group.
- Speak one at a time so all can hear.
- Give equal time to others.
- Be open to hear both sides of any controversial topic.
- Be open about your real reactions to what the presenter has said.
- Don't present yourself as having the only answer.
- Don't beat a point to death.

Principles like these can help members become more conscious of monitoring their own behavior when they are introduced. (See Appendix A for other ideas.) These principles may need to be reiterated or discussed occasionally, especially if you observe that they are being violated. Any principles of discussion used in the Round Table Sessions should be obviously beneficial to the Group members in some way, and should not be used so rigidly that they prevent good things from happening in the group.

7. **Providing Presenter Checkpoints.** At some point (or at multiple points, depending on the format used in your Group), it may be helpful to check with the presenter to see whether the members are actually addressing his needs.

- "Are you getting what you need out of this, Bob?"
- "Do you have any questions you need answered, Bob?"
- "Is there any other information you want?"

The responding comments or suggestions by the presenter can alert you to present or potential problems and be used to improve the experience for future presenters.

### **PRESENTATION TOOLS**

There may be a number of tools that can also help the presenter get more out of the session. You may wish to discuss these options with your members and allow each presenter to choose the one most beneficial to him.

- Audio tape the discussion, so he can play it at leisure, alone or with others, to ensure that he had heard what was said. He can clarify his thoughts with members later.
- Use a flip chart to list some key phrases that represent the meaning of the suggestions offered. The criterion for writing it is NOT that the presenter accept it (too early for that) but just that he will have the information to use in his decision later.
- Treat the problem/opportunity as a case study discussion. Members can discuss the case presented while the presenter serves as an observer, being called on only to clarify facts. His/her job may be to list the concepts (without defending, accepting or rejecting them for the time being). This allows the presenter to hear what is being said more clearly and dispassionately.

### **ACTION STEPS**

1. Outline the steps you would like your Group to consider when responding to a member's problem/opportunity.
2. Plan how you will work with your Group to develop an understanding of the rationale behind the steps.
3. Monitor your Group closely on following the steps in the first several sessions.

## **CLOSING THE PRESENTATION**

When the discussion portion of the presentation is over, it is important to carefully close this section so the presenter and other members clearly know it is over. One closing device is to thank the presenter for his presentation, mentioning any striking things you may wish to reinforce, and thanking the members for the part they have played in helping the presenter.

Another type of closing is to ask for a summary of the session. If asked, the presenter himself may be able to present a bird's-eye view of what he has heard and experienced. This is relatively easy if the subject matter has been light, quite simple, objective, and requires little change in the person. On the other hand, it can be very difficult for the presenter to summarize if the issues discussed are complex, emotionally involving, or require a great deal of change.

In this case it may be useful for a particularly sensitive member to do the summary. If no such member has emerged as yet, you may have to fill in. However, over time, allowing different people to summarize will -

- help presenters feel that more than one person is listening,
- develop member responsibility for attentiveness on a broad scale as well as to details, and
- allow you to more clearly guide the group toward its next step.

### **ACTION STEPS**

1. Outline several ways in which you can close the presentation section of meeting.
2. Choose one to use at your next session.

## **CLOSING THE ROUND TABLE SESSION**

### **GUIDING YOUR GROUP**

1. Plan a good opening
2. Handle the presentation of a problem/opportunity well.
3. Create a successful closure.

Frequently a moderator spends a great deal of time planning the opening or presentation of a Round Table meeting but gives little thought to how to close it. As a result, the end of the Round Table often just happens. It's suddenly over and members leave in a rush and flurry, with a feeling that something was left unfinished or undone. This is obviously not the best way to close a Round Table Session. A good closing can substantially increase the relevance of a Round Table and the ability to start the next meeting with interest and excitement.

Good closings should be short, but relevant. They need not be done by the moderator but can be done by one or more members. The moderator might only facilitate the closing and handle the housekeeping details for the next meeting.

In creating a structure for a closing a moderator can -

- ask for one-line summaries of what each member learned in this Group session and what they hope happens as a result,
- ask for the action steps members are taking on their problem/opportunity situations, and/or
- describe what will be done next time, for example, who will be present, meeting time, date and place.

Multiple member summaries should only be done when time permits. If time is short, the members will appreciate a single person summary.

The closing can also include written comments from the members to you on suggestions they have for improving the format of the meeting or on suggestions for the next meeting. Be careful not to make this an oral discussion if time is short. Discussion may go on beyond the ending time and have to be ended too abruptly.

Again there are no hard and fast rules on what an ending should look like. The key is that there will be a clear sense of closure on the part of the members at the meeting and that, if possible, they leave on a high note, excited about what has happened and looking forward to the next Group session.

#### **ACTION STEPS**

Develop a specific format plan to use for closing your Group. You may want to discuss this with a Business Round Table Advisor or other Round Table moderators to see if they have any suggestions for improvement.

## CONTENT VS. PROCESS

### GUIDING YOUR ROUND TABLE GROUP

1. Plan a good opening.
2. Handle the presentation of a problem/opportunity well.
3. Create a closure.
4. Differentiate between what the group is talking about and how the group is relating.

To this point we have examined what you do when guiding your Round Table Group, providing suggestions for openings, closings, and presentations. These are actions that are visible, easy to see. Now it's time to look beneath the surface of these actions and understand more deeply what is happening.

As you plan for each Round Table you will want to be conscious of two ways of looking at the materials that make up your openings, closings, and presentations -- as content (what the group is talking about) and as a set of processes (how the group is relating). Being aware of these and applying the knowledge in your Group can have more impact on moving your Group to achievement of its objective than perhaps any other group skill you will exercise as a moderator.

### CONTENT

The formal content of the Round Table that needs to be decided is usually referred to as the agenda -- what it is that group is to discuss. The content of the Round Table is usually formalized in an agenda -- a listing of topics -- and can range in importance from the statement of the time and place of the next meeting to a problem of takeover of one's business by another family member.

The content of any part of the Round Table may be business oriented or people oriented. Business content deals with issues that are considered the work of the Group or the work, goal, objective of a given session. People content deals with how people in the group are feeling about what is happening. Business content is relatively objective -- should the member hire, fire, change salaries, make a decision, grow or decline. People content is relatively subjective -- does a member feel accepted, informed, included or excluded, bored, close, distant, happy.

Choosing a predominance of one kind of content over the other will make significant difference in the quality of the program for each session.

You can see how these two types of content areas, those dealing with business objectives and those dealing with people objectives, come into play when we look at the openings used to get the Round Table Group started. Opening exercises that bring out business content start with a sharing of financials, a short description of the business, a description of business goals, and so on.

On the other hand, openings that deal with people areas of content (often called "ice-breakers") are statements like, "I am happiest when . . ." "The areas where I find the most disappointment in my life are . . .," or, "I feel . . . when . . . happens." As you can see, these latter openers deal with people values and feelings content, thus allowing people to relate to each other more as humans (people) than as CEO's (business). See Appendix D for some examples of additional "ice-breaker" exercises.

During the presentation of a problem or opportunity, most of the content will probably be business related but it's not unusual for the presenter and members to have feelings about whatever is being said. Anytime the presenter himself feels or has felt, his wishes or dislikes, the content has moved to the people side. Advising the presenter on his business problem is business oriented content; a comment on how he is personally handling that problem contains people related content. Neither the business nor the people side of content are particularly right or wrong but being aware of this difference allows you to choose to use them at appropriate times to set the stage for the main thrust of the day or to fill in the needs of the group.

Groups, in their early stages, will lean toward the business side of content because that is who and what they are used to -- it is already acceptable. As time moves on and they get to know each other, they will probably move in the direction of people content. Round Table Groups that concentrate only on the business content are unlikely to develop a strong sense of confidence and trust in each other. Cold objective advice can be bought and paid for. But Groups that handle the objective advice with care, and show concern for the personal values and feelings of the executive involved, can make a significant difference in the life of that member.

Though you have the responsibility to see that both business and people content are covered, you need not feel responsible to do it all alone. A number of your members may already possess some natural skills in these areas and you will be able to simply note their practice and reinforce them.

You may need to check occasionally, though, with the other group members to be sure that proper and accurate business and people content are being covered and that no major areas are being ignored. This is especially important when monitoring the content of a discussion that deals with advice-giving to the presenter.



## **ACTION STEPS**

1. Develop a list of business content areas you dealt with in the last Round Table you moderated or attended.
2. Develop a list of people content areas you dealt with in the last Round Table you moderated or attended.
3. Determine if there are any changes in business or people content needed in the next Round Table you moderate.

## **PROCESS**

The formal process of the Round Table refers to how the content is handled, in general, by round-robin, open discussion, presentations of alternatives or questions and answers.

Processes can also be determined at a very specific level -- how long a time the content is discussed, who makes the presentation, how decisions are made or the roles of the group members during a discussion. All of these, as you can see, deal with ways of getting down to the business of that session and methods for getting the work of the Group done.

But processes, like content, can also help orient Round Table members to the human side of member needs -- giving a quiet member a chance to speak, encouraging someone through a rough spot, injecting a bit of humor to relieve tension or nodding to let someone know you understand what he is saying.

Researchers studying small group discussions have developed names for processes that relate to getting business done (task) and dealing with people issues (maintenance). We need both kinds of processes to develop a smoothly functioning Group. When problems arise in a Group, they will often occur because some of the processes are missing, so your skill in noting the missing processes and in getting the members or you to start injecting these processes into the group will be critical to keeping the Group functioning smoothly. See Appendix A for example.

Specific practice in doing this is provided at the Business Round Table Group Moderator Training Program. You can also practice this by working to name these processes in your Group meetings and adding the processes that are missing when you see process difficulties arise.

These same processes will occur in the business meetings you hold and attend. These meetings, too, will function well or poorly depending upon the degree to which these processes are handled well by the members and/or the meeting leader.

## **ACTION STEPS**

To help you identify specific processes to observe and practice, we have included in this manual a list of typical processes -- Appendix A.

These are referred to as functional and dysfunctional behaviors in a group. Read over the list and, as you do, think of a typical Group meeting and work to recall who in your Group is best at carrying out each of these processes. Also rank yourself on your own skills at contributing each of these processes to your group.

When the Group is first forming, you may be largely responsible for most of the content and the process. Over time, as the groups develops, the members will begin to assume more and more responsibility for assuring that both content and processes are handled well.

Because many people are likely to feel more comfortable with the content rather than the process side and with the business rather than the people side of the Group, you may have to pay special attention to the process and people sides to ensure growth and development of the Group.

## **SUMMARY**

Four major actions you can take to guide your Round Table well are -

- ▶ to select an appropriate opening for each session,
- ▶ handle the presentation of a problem/opportunity well when it occurs,
- ▶ close the session effectively and
- ▶ differentiate between what the group is talking about (content) and how they are relating (process).

## **HANDLING PROBLEMS IN YOUR ROUND TABLE GROUP**

### **OVERVIEW**

Your ability to keep problems to a minimum and handle them quickly and deftly when they occur will have a major impact on the success of your Group. A key to handling problems is to expect them and not to overreact when they occur. Any group of people will experience problems when they try to work together. Recalling this will help you to see that the occurrence of problems is not a necessary indication of a failure in your structure or a flaw in your leadership style. It is, however, a real opportunity for stretching.

## **ANTICIPATING PROBLEMS**

So that the problems you need to handle on the spot are kept to a minimum, you may need to develop skills in anticipating and planning for problems before they occur. When planning for a meeting, help yourself anticipate problems by asking yourself a few questions like -

- What/who could be a problem?
- How can I best identify or define the problem?
- What can I do to help prevent the problem?
- What can I do to handle the problem when it arises?
- How can others in the Group help me to handle the problem?
- How can I get them to help me?
- At what point do I take care of that?

For example, when you know that a long-winded member is scheduled to make a presentation, you might realistically anticipate problems. The presenter could take too long and bore the group, or upset the timetable because of a lack of timing and pace. By answering the above questions, you can plan specific action steps to help both the presenter and Round Table members make the best of it. Some examples of specific action steps you might decide on before the meeting are the following:

- Clearly establish time parameters.
- Remind the presenter to plan within the agreed upon time frame.
- Establish a signal with him to indicate when the time is half over and almost over.
- Have the presenter give the members (or you) an outline to enable them (or you) to pick up the pace if needed.

You can put your planning to work during the meeting by -

- using the signals agreed upon,
- interjecting a question to move the presenter along to the next point, and
- getting the assistance of other members to ask bridging questions to keep the presentation going.

Note that all of these actions allow the presenter to continue to make decisions on content and flow but help him to fit his comments to the needs of the group (time frame for meeting, time to ask questions and make comments).

### **PRINCIPLES FOR HANDLING PROBLEMS**

Having done the planning, your next job is to handle the problems as they occur in the meeting. As a general rule of thumb, you will be successful in handling most of these problems if two basic principles are kept in mind.

1. Most members will be easier to manage if they feel they are making a contribution to the Group, that what they have to say is being listened to and appreciated. Regardless of individual shortcomings, each person offers a potential benefit (education, experience, expertise) for other Group members. A moderator who can find and focus on these benefits will usually encounter fewer people problems.
2. The Round Table member who feels that the Group is meeting his expectations, that he is getting a positive return on his investment of time and energy, is more likely to be a cooperative, contributing member of the Group. Since individual expectations and needs vary, it is helpful for you to periodically ask your members how they think things are going. You may think things are going well, but they may not. When planning, take everyone's expectations into account.

Despite careful adherence to these principles, certain types of member behaviors will present even the most skilled Moderator with special problems.

### **PROBLEM BEHAVIORS**

You already know that certain types of Group members may exhibit behaviors that are especially disruptive, annoying or disconcerting. The following section is a brief description of some of the more common "problem behaviors" and how to deal with them. As you read it, note, in the space provided on the right, problem behaviors you may have to deal with and some methods you may want to use.

1. **Side Conversations**: Though an occasional side conversation may be helpful to two members of the group, repeated interruptive side conversations can be disruptive to the flow of the session. A very effective way to control side conversations, when needed, is to stop your remarks or those of the person on the floor until the side conversation ends.

Then go right on. Avoid disparaging looks or comments for first offenses.