

Other members can also be very useful in controlling ongoing side conversations. By calling members' attention to the behavior in a way that causes them to disapprove, tremendous pressure can be exerted on the conversationalists. You can gently make a comment such as, "Carol, that was a very important point but Harry and Steve missed it. Would you mind repeating what you said?" If the behavior continues, the members' needs can be appealed to again. "You know, when you two are talking, it's very distracting for the rest of us." Like the man eating the peanuts at a Bach concert, group pressure is usually strong enough to correct the situation -- if the leader shows the group some tactful, but firm, direction.

Another important point for you to keep in mind is that someone may be behaving in this manner because he feels left out or believes his contributions are not valued.

2. **Off Track Ideas**: On occasion, a member may offer ideas that are really off track. His ideas may be great but they seem to come from left field. You don't want to discourage his creativity, but if he isn't muzzled, nothing gets done.

Here is an excellent time to try the "Parking Lot" concept. Note his ideas on a flip chart or chalkboard labeled PARKING LOT for the members to consider at a later time. If possible, name the time. Your "idea man" is recognized and the members are kept on track. If the ideas are good, they won't get lost.

3. **Complete Agreement**: Occasionally, you may find a person who seems to be constantly in agreement with whatever is done. This constant agreement can be a real problem because you never know where he really stands. Like the willow in the wind, he changes with the breeze. Whatever the majority seems to favor is okay.

For the leader, it's often difficult to identify the cause of this behavior. Is he unsure or uninformed? Try to find out if the member has ideas or questions that he is most expressing and encourage him to volunteer at least one at each session. As an incentive you might point out that others would like to hear his comments and could benefit from his perspective.

On the other hand, if the member is uninformed, then forcing him to contribute may be counterproductive. Members may occasionally (or often) need to be simple absorbers. This is, after all, a learning group. If a number of members are suffering from a similar problem, then pre-readings of changes in the content or process may be in order. A pre-planned reference to the agenda for the next meeting can also help members bone up ahead of time.

4. **Disagreement**: Sometimes a member just knows that the new proposal can't possibly work -- "No way that can fly!" -- and gives you a thousand reasons why. When he begins to talk, your first reaction is, "Oh, no! Not again. How can I shut him up?"

The skill in handling this person is to control his behavior when it's harmful to the members and recognize when it can be helpful. For example, this kind of behavior would be deadly at a brainstorming session. If you can't avoid asking him for his ideas, you should be prepared to limit his influence. Immediately shut off a negative monologue with a statement such as, "John, right now we're collecting all the ideas we can. We'll do that later, so hang onto your idea." He will.

On the other hand, this negative behavior can be a real asset when you start to evaluate the ideas of the group. Then you will want to anticipate everything that could possibly go wrong. John is just the man you need. He'll be delighted to supply you with a complete list, covering all possible contingencies. John can be made a productive contributor if the leader knows when to use him.

5. **Quietness**: You may find that one person is probably quiet most of the time and the Round Table is no exception. Interviewing the person in depth outside the discussion will allow you to uncover education, experiences and perspectives that can be of value to the other members. Then you can feel more comfortable calling on him directly in the group about some specific matter he can contribute. Often a mere "Jack, you have experience in this area. What do you think?" or "Any comment, Barbara?" may be enough to get the member to participate.

Be sure from your preceding discussion with him that the member can contribute and phrase your question so he knows what to contribute.

6. **Coming Late**: A member tends to arrive after the meeting has started and as a result is somewhat disruptive to the members.

If the Round Table has not been starting on time, the latecomer may have a good rationale for arriving late. So be sure to start on time and have something on the agenda he won't want to miss.

If a member persists in being late, you may want to have some discussion of several Group rules you have agreed to as a group, among which is arriving on time and review the benefits of each rule to the Group members. Included, of course, is a discussion of what would happen if the rules didn't exist.

Avoid adding to the latecomer's disruptiveness by focusing the group's attention on him. If necessary, ask someone to quietly give him materials and update him when he arrives.

If most members are coming late, call it to their attention and suggest that the session time be changed by one half hour. Either the idea will fly or the members will exert pressure for getting there on time. Be aware, however, that lateness and non-attendance are often symptoms of lack of commitment. The reason for this may need to be explored with the member or with the group.

7. **Disinterest**: On occasion, there may be a member who seems to be disinterested in what is going on. The impact he has on the members may be minimal or heavy, but it is important for you to check into the fact that he is mentally dropping out.

Ask him, privately, how he thinks the group is going. If the member thinks the topics are inappropriate or dull, ask what he thinks is more appropriate and try to fit his ideas (or at least one of them) into the program soon. Others may also have similar feelings but may not be as honest at communicating them.

If the member has home or business problems, he may have been temporarily distracted, and knowing that somebody noticed and/or cared may be enough to change his behavior. His problem might also become the focus of a Round Table session.

8. **Dominance**: Sometimes a certain member tends to assume a position of leading the members, directing others, and having strong opinions on what should be done and how. Hopefully, he is not the moderator -- or the group may suffer from arrested development before it's begun.

If a dominant person takes over frequently, try something like this just after he speaks: "Anyone with another viewpoint?" "Let's see if we can get a few more ideas out for Bob," or "Jan, you look like you're dying to say something."

Usually, if this occurs enough, a moderately dominant person will catch on. If he doesn't, talk to him personally, outside the meeting, and enlist his help to encourage the others to speak up and contribute their views.

"John, we already know you are a good thinker and contributor, but some of these other guys need a little more encouragement. We need to get a little more balanced participation. Lots of times, we don't know what they are thinking or how they feel."

This will work, if John likes to help or likes the moderator and the norms have been mentioned already.

9. **Long-Windedness**: An occasional group member may like to talk and talk and talk. He often loses his sense of time and sometimes even his sense of subject matter.

One way to help him (and the members) is to set a time frame for his comments before he begins. "We are only going to have a half hour for all comments, so we'll have to be brief

enough to let everyone get a chance." Sometimes it is helpful to call on him later, when the time is almost out, saying, "Let's see if we can keep our comments down to one minute each in the time we have left. You're next, Ron, only 60 seconds."

If the member continues to be long-winded, you can, after he finishes, say politely, "Dan seems to have made three points -- a. \_\_, b. \_\_, and c. \_\_." You have obviously listened to and heard him -- the ultimate compliment B but in your summary also demonstrate how the message could have been delivered more succinctly.

### **EMOTIONAL EXPRESSION**

Handling emotional expression is a challenge that, if successfully met, deepens the members' commitment to the group and enhances the experience for all involved. Emotions are natural, normal feelings that all of us have at one time or another. They can run the gamut from anger to guilt to curiosity to love to joy to depression.

Emotions are good as long as they are not destructive -- of the person, of others, of the group's purpose. They are not for banishing, nor should they be denied and hidden. The pain of separation from a part of the business that was exciting to develop, but unprofitable or from the death of a loved one is not easily forgotten and, when shared, can deeply enrich the understanding and caring of one Group member for another.

### **EMOTION OFFERS OPPORTUNITIES**

Sharing emotional experiences offers each Round Table member great opportunities for growth. Most of us tend to feel more comfortable dealing with other people's emotions when they are like our own. We feel more uncomfortable, the farther that person's emotions are from our daily experience. Recognizing this, you, as moderator, have a great opportunity to help the group (which has varying appreciations for the emotion expressed) understand that emotion more clearly and live through it vicariously with the expressing member (supporting him and enriching them). With your help, the Group can explore the multiple ways of responding to the emotion and learn from this diversity of emotional expressions and responses.

### **DEALING WITH EMOTIONAL EXPRESSION**

When Round Table members express emotions, rule one for you, as moderator, is not to be shocked (or at least not to act shocked). Treat the emotions as normal and natural because they are. This is especially important if any group members are shocked and act it.

Two of the most frequently expressed emotions are anger and sadness. If you are unprepared, these expressions during a Round Table can present you with an uncomfortable problem. They often express themselves as arguments and crying.

### **ARGUMENTS BETWEEN MEMBERS**

Your members are bound not to agree on occasion. When the inevitable happens, here are some pointers that can help.

- Don't join in, especially when it's a topic dear to your heart. Your role is one of neutral guide.
- As soon as you hear the voice tones start to rise, simply ask the members to keep their tones to a "business level". As each position starts to emerge, have someone start to make a list of short descriptive phrases for each side on a chart or chalkboard.
- When the arguing members start to repeat themselves, refer to the lists, tactfully.
- Ask, as quickly as possible, for additional information from other members. Add these items to either list or start a third, or fourth, position list.
- Try not to give your own opinion.
- Move on as soon as you get ahead. Don't go back and resurrect the argument. If others try to resurrect it, cut them off at the pass by referring to the lists on the chart and tactfully ask what their contribution is.

### **WHAT IF SOMEBODY CRIES?**

Because of our cultural upbringing, one of the most difficult expressions of emotion to handle is crying. Moderators most frequently ask, "What if somebody cries? What should I do?" First, recognize that he trusted the group enough to share with them his true feeling. This is a deep compliment to the group.

Then, let him feel it. Give him time to bring himself around. Be quiet, but not stiff. Move a little closer, touch his arm or shoulder to demonstrate empathy and support. Try to see the crying as an emotional release and not as an embarrassment.

As he begins to feel better, do some ordinary things -- pass him a tissue, give him a cup of coffee. If you must stand to relieve stress, stay near him. Don't abandon him physically or psychologically. A brief story, emphatically shared, can temporarily relieve him of the spotlight and allow him a little time to recover.

When it looks like he is feeling better, ask, "Are you feeling okay?" When he answers, "Yeah," then in a soft tone remind him of what he was talking about. Bring him back into the context of the discussion so he can continue to deal with the problem that caused all that pain. If he is having difficulty expressing himself, gently ask him open-ended exploratory questions to help.

- How long did that last?
- Where many people involved?
- Did you ever feel anyone cared?

### **WHAT NOT TO DO**

Above all, do not start to tell, or let members tell, long war stories about their own painful past that will change the direction of the flow. The presenter is not interested in their concerns. It's his time to work on his problem and describe it in his terms. Later, when he is open to hearing other ways of looking at it, the war stories may be appropriate, but not until he had a chance to get it all out. Avoid, like the plague, loaded questions and statements like,

- Do you feel guilty now?
- Wasn't that a kind of stupid assumption?
- That sure was a dumb decision.

He already knows. That's what hurts.

### **ACTION STEPS**

1. Plan to anticipate problems.
2. Select a problem person (a repeated disruptive behavior) and reread this manual keeping that person in mind to get some additional ideas.
3. Ask for help from your Round Table members or from your Business Round Table Advisor.

### **SUMMARY**

As moderator you must prod and guide your Round Table Group. Your Group membership is comprised of people with differing backgrounds, needs, attitudes and goals. The more you, as moderator, know about yourself and your Group members, the better you will be able to choose the appropriate leadership style for each session, understand member differences in order to motivate, get the best from each member and deal effectively with problem people or emotional explosions.

## **OVERVIEW**

When you start to define the job of a Business Round Table Group Moderator, you begin to get a feel for the size of the job and its tremendous potential for personal growth. As moderator, you are the person who can help structure a group of highly independent and successful business people into a well functioning group that provides invaluable advice and support to each other within the short time frame of a normal four to six hour meeting. You are able to note when the group is functioning well and when it needs help. You can get these independent people to cooperate with each other and discuss freely ideas and problems they may not have shared with any other people.

In this role you help the group move from the superficial to an honest, trusting, and confidential discussion. You keep the talkative and dominant group members in control and the quiet and low profile members strongly involved. You handle highly emotional discussions on personal difficulties as well as highly rational problems on technical business issues. Constantly you are checking on and adjusting your leadership style to fit the people in your Group and their stage of development.

As a Round Table Group moderator, you become skilled at giving feedback to members in a variety of situations, from the member who needs to be constructively informed that he is not helping the Group to grow, to the presenter who needs the feedback from his presentation monitored. You can structure a presenter's session in a way that ensures that the feedback fits the situation.

When you examine all the skills needed, it's almost mind-boggling. You may be asking, "Who could ever do all those things?" The answer is, "Many a successful Moderator does all those things and more." That's why the Round Table process has worked so well. Now comes the real challenge for you, the reader of this manual. It is the challenge of applying this material in the upcoming Group sessions you moderate.

## **DEVELOPMENT OF ACTION PLANS**

Having had an opportunity to read the manual, you have an overview of some basic skills that are needed to be an effective Round Table Group Moderator. The task is obviously not an easy one. No moderator, not even you, will be adept in handling all of the challenges presented by a Group, but it is possible to continue to increase and develop your skills for handling them.

The most important results from this manual, of course, come from your application of the skills described here in your own Group. You have already made some substantial progress toward development by jotting down ideas for action steps at various sections in the manual. Your task now is to take your ideas and summarize them on the SUMMARY ACTION PLAN – Appendix B. This sheet can serve to coordinate what needs to be done. Then you can assign the action steps to specific Group sessions on copies of the Round Table MEETING ACTION PLAN. These planning sheets help make sure that the effort you've put into reviewing this manual shows up in the Group that you moderate.

## **BUSINESS ROUND TABLE MODERATOR TRAINING PROGRAM**

One of your action steps should be to attend the Round Table Moderator Training Program (or to review your notes, if you have already attended). Among the many resources you have to help you perform well in your responsibility as a Round Table Moderator is this workshop designed to provide you with -

- some basic principles for moderating peer groups,
- greater awareness of your current skills for moderating a Round Table Group,
- practice in applying group principles to Round Table situations, and
- a self-designed action plan for putting the principles and skills into practice with your Group.

The group is purposely kept to a small size (8-12) to allow each Round Table moderator to get to know the consultants and other moderators, to discuss applications in depth, and to raise any questions of problems. The use of video-feedback also provides an unusual opportunity to see yourself in action and to practice behavior naming skills that can be immediately applied to the Group and other group functions.

### **FURTHER APPLICATIONS OF MODERATOR SKILLS**

In addition to helping you conduct a more successful Round Table, mastering the skills of a Round Table moderator can provide you with many other benefits. The understanding and skills you develop for handling groups can spill over into your personal and professional life.

### **PERSONAL BENEFITS**

In your personal life you can easily begin to apply the more non-directive, listening-oriented approach of a Round Table moderator to dealing with your spouse, your children and other family members. As is clear, this approach can give you a much more in-depth understanding of their view of life and the problems and opportunities they face.

Working hard not to give the right answer to your family members but providing a different perspective on how they may handle their problems can easily increase their listening to you and your ideas on how they can improve.



Watching carefully the leadership style you use in the Round Table can also help you select appropriate leadership styles for use in your family. It is easy in the family situation to become overwhelmed with the number of questions and problems that occur and to respond too rigidly with the tell or quote style, and to forget that share and ask styles might be more productive in the long run. On the other hand, the desire to be seen as open and flexible can often cause the overuse of the share and ask styles and not enough use of the tell and quote. Because of your Round Table moderating experience, you are much more likely to be sensitive to the situational needs of each family member and more conscious of the style choices involved.

Building an awareness of the functional and dysfunctional behaviors in a group can help you and your family members conduct family meetings more productively. Emotional outbursts in the family, for example, can become a little easier to handle after moderating the Round Table Group. All human beings experience strong emotions about certain areas of their life. Learning how to openly discuss and deal with these in a family situation can be an invaluable tool that can add immeasurable joy and happiness to your family experience.

### **PROFESSIONAL BENEFITS**

Round Table moderator skills not only provide benefits in your personal life but can also help you greatly in becoming a better and more skillful president. The awareness you build in the Round Table moderator role of what can and does happen in a group and the sensitivities you develop for handling group problems can be very valuable in the many group activities you're involved in as president, both inside and outside the company.

Although the group role you take as a business manager is often far more dominant and active than the role you take as Round Table moderator, learning how to use a lower profile role appropriately can help greatly in building your style flex as a leader.

Again, the awareness you build of your leadership style and the types of understanding you develop for the functional and dysfunctional behaviors that occur in groups can be directly applied to your presidential duties. It can be very valuable to watch for these behaviors in your Business meetings, staff meetings and key client meetings. You can become even more adept at keeping the group moving and reducing or eliminating the dysfunctional behaviors that waste time or prevent the group from achieving its objectives.

Finally, the sensitivity you develop for the problems experienced by other executives in the Round Table can be of enormous help to you as an executive in giving yourself the freedom to be an imperfect human being with cares and concerns, a person with feelings and emotions. The experience of the Round Table can help you come to grips with another part of your humanity and build even more your confidence and skills for handling the multiple problems and opportunities you face.

## **BENEFIT APPLICATIONS**

We have scratched the surface of the many personal and professional benefits that you can achieve from being a Group Moderator. You will define many more of your own.

Clearly there is a great deal of work and effort involved in building and developing your moderator skills but, there are also many additional benefits you can receive from extending yourself to do so.

## **ACTION STEPS**

1. Develop a list of the benefits you can receive from being a Round Table moderator.
2. Develop a specific plan for insuring that you achieve those benefits in your personal and professional responsibilities.

## **IMPLEMENTATION**

Once your initial action plans are developed, you will want to work to implement them. After moderating three or four Round Table sessions, you may wish to review this manual for additional ideas on steps you can take to improve the results you and your Group members are experiencing in the Group. The manual works best when it is reviewed often for these additional reflections.

## **CONCLUSION**

We wish you all the best in meeting the challenge of being an effective Business Round Table moderator. You have a very unique opportunity and responsibility, and you are to be congratulated on being chosen for such an unusual and rewarding task.

## APPENDIX A

### FUNCTIONAL BEHAVIORS IN A GROUP

What members do to serve group needs may be called functional behaviors. These are statements and behaviors that tend to make the group efficient and effective. This is a partial list of the kinds of contributions or services that are performed by one or many individuals in the group. The Round Table Moderator's role is to understand these behaviors, recognizing them when they occur and encouraging them when and where appropriate.

#### A. TASK BEHAVIORS (functions required to select and carry out a group task)

1. **INITIATING ACTIVITY:** Suggesting a goal or new ideas, new definitions of the problem, new attack on the problem or new organization of material, proposing solutions.
2. **SEEKING INFORMATION:** Asking for clarification or suggestions, requesting additional information, facts opinions.
3. **SEEKING OPINION:** Looking for an expression of feeling about something from the members, seeking clarification of values, suggestions or idea.
4. **GIVING INFORMATION:** Offering facts or generalizations, describing one's own experience to illustrate points.
5. **GIVING OPINION:** Stating an opinion or belief concerning a suggestion or one of several suggestions, particularly concerning its value rather than its factual basis.
6. **ELABORATING:** Clarifying, giving examples or developing meanings, trying to envision how a proposal might work if adopted.
7. **SUMMARIZING:** Pulling together related ideas or suggestions after the group has discussed them.

#### B. GROUP BUILDING AND MAINTENANCE BEHAVIORS (functions required to strengthen and maintain a positive atmosphere in the group)

1. **ENCOURAGING:** Being friendly, warm, and responsive to others and their ideas, agreeing with and accepting contributions of others.
2. **GATEKEEPING:** Trying to make it possible for another member to make a contribution to the group, commenting on time limits.

3. **STANDARD SETTING:** Expressing standards for the group to use in choosing its content or procedures or in evaluating its decision, reminding the group to avoid decisions which conflict with the group standards.
4. **ACCEPTING:** Recognizing in another human being strong needs, feelings, and purposes, being willing to understand him so that effective relations can be established.
5. **LISTENING:** Listening with the concentration necessary to try to perceive the messages being communicated by the speaker, hearing the various feelings and needs within the individual.
6. **FOLLOWING:** Going along with decision of the group, thoughtfully accepting ideas of others, serving as audience during group discussion.
7. **EXPRESSING OWN FEELING:** Describing own reaction to ideas or solutions.
8. **CONFRONTING:** Honestly stating one's differing opinion, respectfully calling attention to variation in facts, offering a different experience to balance the picture.
9. **RELIEVING TENSION:** Draining off negative feedback by appropriate testing, pouring oil on troubled waters, putting a tense situation into a wider context.

#### **C. BOTH GROUP TASK AND MAINTENANCE BEHAVIORS**

1. **GOAL SETTING:** Establishing a target, aim or long-range task for the group that serves to give direction to interaction of members.
2. **EVALUATING:** Comparing group decisions or accomplishments with group standards, measuring accomplishments against group goals or objectives.
3. **DIAGNOSING:** Determining sources of difficulties and appropriate steps to take next, analyzing the main blocks to progress, assessing the nature of the conflict and its potential in terms of growth for those involved and determining the best deployment of resources for helping to actualize the growth potential.
4. **TESTING FOR CONSENSUS:** Tentatively seeking group opinions in order to find out whether the group is nearing consensus on a decision, sending up differences in points of view, making compromises.
5. **EXPRESSING GROUP FEELING:** Stating how the group seems to feel about an issue, describing reactions of the group to ideas or solutions, seeking the group reaction.
6. **SUPPORTING:** Giving support to an individual or to the group, occasional or frequent reassurance.

**D. DYSFUNCTIONAL BEHAVIORS IN A GROUP** From time to time, more often perhaps than anyone likes to admit, people behave in dysfunctional ways that do not help, and sometimes actually harm the group and hinder it from the work it is trying to do. Some of the more common types of such dysfunctional behaviors are described below:

1. **BELABORING:** Over-discussing a point, focusing on the same thing over and over again without progress.
2. **BLOCKING:** Interfering with the process of the group by going off on a tangent, citing personal experiences unrelated to the problem, arguing too much on a point, rejecting ideas without consideration.
3. **COMPETING:** Vying with others to produce the best idea, talking the most, playing the most roles, working to gain favor with the leader, winning at others' expense.
4. **DISCOUNTING:** Working for status by criticizing or blaming others, deflating the ego or status of others.
5. **FIGHTING:** Debating heatedly and unproductively, destructive strategizing and counter-strategizing.
6. **FLIGHT:** Introducing a new topic to avoid dealing with the real problems confronting the person or group, mentally or physically deserting the person or group.
7. **HORSING AROUND:** Clowning, joking, mimicking, disrupting the work of the group, humor that hurts or hinders.
8. **INTELLECTUALIZING:** Discussing points from a theoretical level, focusing at length on definitions, principles, concepts, talking in a very intellectual and academic manner.
9. **SEEKING RECOGNITION:** Attempting to call attention to oneself by loud or excessive talking, extreme ideas, or unusual behavior.
10. **SEEKING SYMPATHY:** Trying to induce other group members to be sympathetic to one's problems or misfortunes, deploring one's own situation or disparaging one's own ideas to gain support.
11. **SPECIAL PLEADING:** Inappropriately introducing or supporting suggestions related to one's own pet concerns or philosophies, lobbying for selfish reasons.
12. **TAKING CONTROL:** Taking control from the leader and later blaming the leader for loss of control.

## **GROUP DYSFUNCTION LIST**

### **Indicators**

**Low attendance**

**Little or no structure**

**Inconvenient time or place**

**No problems to discuss**

**Lack of continuity**

**No logistical planning**

**Individual lack of sharing**

**One only takes and not gives**

**Use of outside resources**

**Lack of diversity**

**Low meeting ratings**

### **Potential Violations**

Attendance norms not followed  
Communication about meeting  
Constantly changing dates  
Ineffective meetings

Moderator's style  
No written agenda  
Agenda not followed  
No time restrictions

Consensus not reached  
Leadership

Lack of planning  
Low trust level  
Inadequate time to identify issues  
Improper use of Parking Lot

No Assistant Moderator  
No or weak Retreat

Moderator not doing job  
Norms not followed

Trust is low  
Perceived conflict of interest  
Lack of use of Gestalt

Lack of interaction

Lack of commitment  
Leadership problem

Low trust level

Group function problems

### **Fixes**

## MEMBER BEHAVIOR PROBLEMS AND SOLUTIONS

### Problem

### Solution(s)

Side Conversations

Off Track Ideas (distracters)

Disagreement (closed mind / negativity)

Constant Complete Agreement (indecisiveness)

Quietness

Lateness

Disinterest

Dominance (gun slinger)

Monopolizers

Long-windedness

## APPENDIX B

### BUSINESS ROUND TABLE GROUP -- SUMMARY ACTION PLAN

The purpose of this sheet is to provide you with a format for organizing the key action plans you have developed as a result of reading this manual. Review the action items you noted in the right hand margins and in the exercises at the end of the key sections of the manual. List those that you would definitely like to use in your group on this sheet.

Once you have the items listed, prioritize the order in which you want to use them by noting the **approximate** Group meeting at which you feel they would be best used. Then transfer the items to copies of the individual GROUP MEETING ACTION PLAN.

**ACTION ITEM**

**FOR USE IN GROUP MEETING**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.
- 16.
- 17.
- 18.
- 19.
- 20.



## APPENDIX C

### BUSINESS ROUND TABLE GROUP -- MEETING ACTION PLAN

DATE: \_\_\_\_\_

This sheet is designed to organize the specific actions you hope to take in individual Group meetings. These actions should be taken from the SUMMARY ACTION PLAN and, as new ideas occur to you, added to before the meeting.

1

2.

3.

4.

5.

6.

8.

9.

10.

## APPENDIX D

### ICE-BREAKERS

These are a few examples of "ice-breakers" that allow group members to get to know each other more quickly as people. They can often be helpful in moving from one stage of development to the next.

#### CAREER LINE

1. Envision a business progress chart as you draw a line that depicts the past, present, and future of your career. On this line mark an "X" to show where you are now.
2. Write a brief explanation of the career line that you have drawn.
3. When the other members of your triad have finished this page, share these data.

#### FULFILLMENT LINE

1. Envision a business progress chart as you draw a line that depicts the past, present and future of your personal fulfillment. (Consider every level from personal growth to material acquisitions.)
2. Write a brief explanation of the affiliation line that you have drawn.
3. As soon as the other members of your triad have finished this page, share these data.

#### CONVERSATION STARTERS

Each person should share his/her ending with the group and describe the rationale for choosing that ending.

1. People who run things should . . .
2. When I let go . . .
3. One thing I like about myself is . . .
4. The thing I like best about myself is . . .
5. There are times when I . . .
6. What was the high point of last week? Talk about it briefly
7. Who is the one person who has done the most to make you who you are today?  
How was that person significant?
8. What was most risky decision that you have made? Why?

9. Tell about one missed opportunity in your life.
10. If by magic you could change one thing about yourself, what would it be? Why?
11. One-minute Questions that can be answered briefly:  
What is the one quality that you value most?
12. What did you always want to be when you were young?
13. Who is your favorite hero and why?
14. Where do you expect to be living in 30 (20) years?
15. If you had only six months to live what would you try to do in that time?
16. To whom in the group do you feel closest? Why?
17. What has been your biggest disappointment in life?

An excellent exercise is "I pretend . . . ". One at a time each person is given the opportunity to say to the person next to them "I pretend . . . ". What they say is of course up to them. Go around the room twice or perhaps three times. The Scribe should list the items that are obvious items for The Parking Lot and should be discussed later by the group or the individual. It is amazing how much will come to the surface during this exercise.

## APPENDIX E

### GROUP EVALUATION QUESTIONS

**Key Result Areas:** What are the things that, if we do them well, we will fulfill our mission? List them. How will we know if (when) our group is successful? Can we measure it? What process will we follow to continuously improve the group?

#### **Presentations:**

Who did the last one(s)?

How was the quality of the feedback that received?

How does your group follow-up Presentations?

Does everyone get take home value from the Presentations?

How are presenters selected?

Is the Presentation format being followed?

Is coaching required? If so, who does it?

#### **Norms:**

Is the Group Mission Statement well known?

Are the Norms being followed?

Are they reviewed at least once each year?

Is there a written agenda for each meeting?

Does the agenda include the Mission Statement?

Does everyone get enough "air time"?

Is the group workload being shared?

Do the members have "jobs"? (see Role of the Moderator)

#### **Updates:**

Is the Update form being used?

Do members complete it before the meetings?

Time limits? Is there a Time Keeper?

How does your group handle emergency issues?

#### **Goals:**

Is your group using the Goals Workbook?

Is there a Goal Keeper?

Do you review / revise it quarterly?

Do members make each other accountable?

Do members do presentations on their Goals?

#### **Parking Lot:**

Does your group have a Parking Lot Attendant?

Is there adequate time allocated for PL issues?

Is the PLA listening for topics to include in the Parking Lot?

Does the group agree on priority for discussion?  
Do you allot a certain amount of time to each item?  
Do you recognize when a PL item needs to be upgraded to a full Presentation?  
Do you follow the Presentation Norms during PL discussions?  
Do you follow-up on PL issues at the next meeting if the member forgets to include it in the Update?

**Commitment:**

How strong is the commitment as measured by attendance rates?  
How well do we commit to the success of the group?  
Does every member attend the annual retreats?

**Trust:**

When was it last measured? What was it? What is it now?  
How well do we avoid a breach of confidentiality outside the meetings?  
How much financial disclosure is being done?  
How deep are personal matters probed?

**Productivity:**

Are the members getting take home value from most meetings?  
Are meetings being rated and discussed?  
What is being done to improve the productivity?

**Meeting Etiquette:** How well do we . . .

Raise hand and be recognized before speaking?  
Avoid interrupting during Updates, Presentations, Parking Lot?  
Keep to the point and be brief?  
Make points calmly?  
Keep open minds?  
Listen actively without biases and preconceptions?  
Understand what is said?  
Understand others feelings?  
Avoid side conversations?  
Avoid personal (private) agendas?  
Avoid dominance of one (or a few) individuals?  
Have fun?

**Needs:**

Do we periodically review the accomplishments of the group?  
What role has the group played in individual accomplishments?  
Is the group and the process meeting the needs of each member?

## MEMBERS' NEEDS / WANTS SURVEY

Date: \_\_\_\_\_

In order for your BRT experience to be as beneficial as possible for each member it's important that everyone understand clearly what they are looking for from the group's activities. When asked what people want from the groups here are the usual responses: sounding board, learn, understanding friends, advice, support, shoulder to cry upon, hold me accountable to help me stop procrastinating. Most people want some of all these things. How much of each do you want and how much are you getting from your group?

### Sounding Board

*I want it this much*

1    2    3    4    5    6    7    8    9    10

*I'm getting this much*

1    2    3    4    5    6    7    8    9    10

### Friendship

*I want it this much*

1    2    3    4    5    6    7    8    9    10

*I'm getting this much*

1    2    3    4    5    6    7    8    9    10

### Advice

*I want it this much*

1    2    3    4    5    6    7    8    9    10

*I'm getting this much*

1    2    3    4    5    6    7    8    9    10

### Support

*I want it this much*

1    2    3    4    5    6    7    8    9    10

*I'm getting this much*

1    2    3    4    5    6    7    8    9    10

### Hold me accountable

*I want it this much*

1    2    3    4    5    6    7    8    9    10

*I'm getting this much*

1    2    3    4    5    6    7    8    9    10

### New ideas

*I want this much*

1    2    3    4    5    6    7    8    9    10

*I'm getting this much*

1    2    3    4    5    6    7    8    9    10

### Learn from others' actual experiences

*I want it this much*

1    2    3    4    5    6    7    8    9    10

*I'm getting this much*

1    2    3    4    5    6    7    8    9    10

## GROUP EFFECTIVENESS SURVEY

Date: \_\_\_\_\_

1) **Group Norms – How well are we following them? Attendance, Punctuality, etc.**  
 1            2            3            4            5            6            7            8            9            10

We're really off track

They are followed closely

2) **Presentations – How well are they prepared and how valuable are they?**  
 1            2            3            4            5            6            7            8            9            10

Unprepared, casual, superficial

Really well done and valuable

3) **Leadership – Is the Moderator doing a good job?**  
 1            2            3            4            5            6            7            8            9            10

Ineffective

Excellent

4) **Group Function – How open, trusting, understanding and effective are we?**  
 1            2            3            4            5            6            7            8            9            10

We're dysfunctional

It's great

5) **Trust – I think the average trust level of the group is ...**  
 1            2            3            4            5            6            7            8            9            10

6) **Trust – I currently trust the group at a ...**  
 1            2            3            4            5            6            7            8            9            10

7) **Overall - The group is meeting my needs.**  
 1            2            3            4            5            6            7            8            9            10

We need change

The group is a meaningful and important part of my life

## MEMBERSHIP EFFECTIVENESS SURVEY

Date: \_\_\_\_\_

### 1) Attendance

1      2      3      4      5      6      7      8      9      10  
A different group at each meeting      Almost 100% attendance

### 2) Punctuality

1      2      3      4      5      6      7      8      9      10  
No clear starting time      No wasted time – meetings start and stop on time

### 3) Knowledge of other members

1      2      3      4      5      6      7      8      9      10  
Little idea of values and motivations of others      I know them like family

### 4) Conflicts of Interest

1      2      3      4      5      6      7      8      9      10  
Significant conflicts limit openness      Complete freedom for open discussion

### 5) Confidentiality

1      2      3      4      5      6      7      8      9      10  
I'm still concerned      No problem – all matters are always confidential

### 6) Trust

1      2      3      4      5      6      7      8      9      10  
I feel uncomfortable      I fully disclose even personal matters

### 7) Presentations - Preparation

1      2      3      4      5      6      7      8      9      10  
Presenters unprepared with unclear objectives      Really well done

### 8) Presentations - Depth

1      2      3      4      5      6      7      8      9      10  
Show & Tell, superficial, after the fact      Really meaningful

### 9) Dominant Member(s)

1      2      3      4      5      6      7      8      9      10  
Someone always has all the answers      Involved discussions





## TRUST EVALUATION AND BUILDING SURVEY

Date: \_\_\_\_\_

The benefits of BRT participation only accrue if the members are telling the whole story not just the good stuff. Good feedback and counsel from the other members is directly related to the level of disclosure. Full disclosure requires high trust. The purpose of this document is to enable the group to assess the level of trust within the group, discuss the findings of the analysis and to implement measures that will assist in raising the trust level.

1) **How often is someone in the group teased, ridiculed or chastised, even mildly?**

1    2    3    4    5    6    7    8    9    10  
Frequently Never

2) **Am I doing full disclosure, all the facts, or am I still holding things back?**

1    2    3    4    5    6    7    8    9    10  
There's a lot they don't know Nothing is held back

3) **Are most members doing full disclosure or is there still a lot we don't know?**

1    2    3    4    5    6    7    8    9    10  
Much hidden We know it all

4) **Do we moralize, preach or tell people what they should do?**

1    2    3    4    5    6    7    8    9    10  
We often "should" on people Never

5) **How well do we demonstrate that we really care about each other ?**

1    2    3    4    5    6    7    8    9    10  
Not at all It's obvious

6) **How much bragging, machismo and bravado goes on in the group?**

1    2    3    4    5    6    7    8    9    10  
Lots None

7) **How often do things happen in the group that discourages openness and trust?**

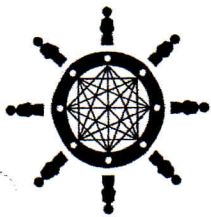
1    2    3    4    5    6    7    8    9    10  
Frequently Never

8) **How high do you think the trust level could ever get in the group?**

1    2    3    4    5    6    7    8    9    10

**If not, Why not all "10's"?**

9) **What do we need to do to raise the trust level even higher?**



# Business Round Table

## Monthly Meeting Evaluation

Date: \_\_\_\_\_

Location: \_\_\_\_\_

Please circle the number most closely representing your rating of this meeting. (1 is low and 10 is high)

1. Facilities

1	2	3	4	5	6	7	8	9	10
Poor conditions, too cold or hot, too small or large room. Not equipped with necessary A/V equipment.						Excellent conditions, correct size, comfortable temperature. A/V equipment available.			

2. Meeting

1	2	3	4	5	6	7	8	9	10
Out of hand, not controlled. Didn't accomplish much. Boring. Dominated by one or more persons.						Ran smoothly. Beneficial to group or certain individual(s). All contributed.			

Presentation

1	2	3	4	5	6	7	8	9	10
Not done or not organized. Not prepared, not sure what to do. Didn't follow guidelines. Doesn't know what he/she wants to accomplish.						Very well prepared. Organized. Followed guidelines. Member input helpful to presenter.			

4. Meeting benefit to you

1	2	3	4	5	6	7	8	9	10
Of no benefit to me								Of extreme benefit	

5. Benefit to others in group

1	2	3	4	5	6	7	8	9	10
Of no benefit to others							Of extreme benefit to others		

6. In your eyes, at this time, how is your group doing?

1	2	3	4	5	6	7	8	9	10
Very poorly, not worth my time. Needs major fixing. Dysfunctional.						Very well, communication is excellent and members' businesses and personal lives are improved.			

## Group Health Survey

Is your group in excellent health or is it at risk for becoming dysfunctional or dying?

Place a ✓ or an ✖ before the comment that most applies to your group. Base your answers on group activity within the past 12 months.

	✓	Healthy	✖	At Risk
1.		Your group has held a retreat and stayed the second night.		Your group has not held a retreat or your last one did not include the 2 <sup>nd</sup> night.
2.		Your group has written Group Norms and follows them.		Your group doesn't have written Group Norms or doesn't usually abide by them.
3.		Assuming you have completed the Goals Workbook, your group uses it as recommended.		Your group has completed the Goals Workbook but doesn't use it regularly or as recommended.
4.		Most of the time your group has well-prepared presentations.		Your group had no presentations at 2 or more meetings (not including the retreat).
5.		Your group evaluates each meeting by rating it on a scale of 1 - 10. A form or survey is used to evaluate most meetings.		Your group frequently does not rate meetings and seldom or never uses a form or survey to evaluate meetings.
6.		Your group often evaluates the Trust level among members and it is rated 7 or higher.		Your group seldom evaluates the Trust level among members and/or it is rated less than 7.
7.		Most of the time members of your group contribute to the discussions without monopolizing.		There is at least one person in your group who monopolizes the discussions and/or thinks they have all the answers.
8.		Your group keeps a record of attendance.		Your group doesn't keep a record of attendance.
9.		Your group has a written agenda for every meeting.		Your group seldom has a written agenda.
10.		Your group receives the agenda at least one day before the meeting.		Your group often does not receive the agenda at least one day in advance.
11.		Your last two group meetings started on time.		Your last two group meetings didn't start on time.
12.		Most meetings end on time.		Your meetings often go overtime.
13.		Your group has a Mission Statement and puts it on your Update form, Agenda and other documents used.		Your group does not have a Mission Statement and/or does not use it on documents used.
14.		Your group is often reminded of the importance of Confidentiality and the contract is reviewed & signed annually by each member.		Your group is seldom reminded of the importance of Confidentiality and/or there has been a breach of Confidentiality. It is not reviewed and signed annually by each member.

## IS YOUR BRT GROUP IN EXCELLENT HEALTH?

Total the # of ✓ \_\_\_\_\_ and the # of ✗ \_\_\_\_\_

If your Healthy score is	Diagnosis	If your At Risk score is
14	Your group is in excellent condition. No changes are necessary.	0
11 to 13	Your group is in fairly good health. Keep a watchful eye.	1 to 4
8 to 10	Your group needs to identify what isn't working and make a some changes.	5 to 7
7 or less	Your group needs to meet with BRT administration ASAP to determine what changes can be made to ensure that your group stays together, becomes more productive and a better value for everyone.	8 or more

What can you do to help your Moderator and your group reduce the Risk of Dysfunction (or worse Death) and improve your group Health?

Reduce Risk

Improve Health

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_

Date: \_\_\_\_\_

1. Making group decisions  
 1      2      3      4      5      6      7      8      9      10  
 Makes decisions for group  
 Holds votes  
 Always gets consensus
  
2. Meeting agendas  
 1      2      3      4      5      6      7      8      9      10  
 Never sends it before meetings  
 Always sends it a few days before meeting.
  
3. Constitution / Norms / Mission Statement  
 1      2      3      4      5      6      7      8      9      10  
 Group does not have them.  
 Ensures that Norms are reviewed annually and followed.  
 Has Mission Statement on group forms.
  
4. Presentations  
 1      2      3      4      5      6      7      8      9      10  
 Members not prepared, poorly done  
 Less than six per year  
 Guidelines followed. Has Presentation Coach.  
 One at every meeting.
  
5. Control of discussions during Updates, Presentations and Parking Lot  
 1      2      3      4      5      6      7      8      9      10  
 Not able to handle interruptions.  
 Has no control. Allows monopolizing.  
 Always follows question / comment  
 format. Has full control.
  
6. Ability to keep meeting on schedule and on topic  
 1      2      3      4      5      6      7      8      9      10  
 Seldom starts / ends on time.  
 Follows agenda. Always starts / ends on time.
  
7. Meeting evaluations  
 1      2      3      4      5      6      7      8      9      10  
 Never asks for meeting evaluation  
 Evaluates every meeting and discusses results.  
 Varies method of evaluating.
  
8. Ability to Delegate  
 1      2      3      4      5      6      7      8      9      10  
 Never delegates.  
 Members share the group jobs.
  
9. Group dynamics' problems.  
 1      2      3      4      5      6      7      8      9      10  
 Never addresses them.  
 Always addresses them according to  
 BRT program guidelines
  
10. Reminds group of confidentiality  
 1      2      3      4      5      6      7      8      9      10  
 Never  
 At every meeting



## Strongest / Weakest Link Survey \*\*

\*\* It has been said, "A group is only as strong as its weakest link." Find out if you are one of the strongest or weakest links in your group. Place a ✓ or an ✘ before the comment that most applies to you. Base your answers on BRT activity within the past 12 months.

	✓	Strong Link	✘	Weak Link
1.		You attended the last 12 regular meetings. (If you are a new member, you attended all meetings to date.)		You missed 3 regular meetings (in the past 12 months).
2.		You attended all of your group's last retreat.		You did not attend your group's last retreat.
3.		You have been late for a meeting only once or not at all. You have not left a meeting early.		You have been late 2 or more times and/or you left one or more meetings early.
4.		You have done at least one presentation.		You have not done a full presentation ever or at the last 12 meetings.
5.		You have always done your presentations when scheduled.		You did not do your presentation when scheduled because you were not prepared or were absent for the meeting.
6.		You can state your group's Mission Statement without referring to it.		You cannot state your group's Mission Statement without referring to it.
7.		You always have your Updates done before the meeting and you usually keep within the time limit.		You sometimes do not complete your Update form until you arrive and/or you often go overtime on your Updates.
8.		You are prepared to make BRT a high priority.		You are not prepared to make BRT a high priority.
9.		You usually keep your Presentation within the set time limit.		Your Presentation usually takes more time than allotted.
10.		You usually achieve your Goals and you are willing to be held accountable.		You seldom achieve your Goals and you don't want to be held accountable.
11.		You paid your last annual dues within 30 days.		You didn't pay your annual dues within 30 days.
12.		Since joining BRT, you attended a Moderator or Group Effectiveness Training Workshop at least once.		You have never attended a Moderator or Group Effectiveness Training Workshop.
13.		You value the BRT program and strongly believe that your group cannot operate effectively outside the program.		You think (or have said to your group) that you can operate outside of the BRT program.
14.		You have written a personal mission statement.		You have not written a personal mission statement.

## ARE YOU ONE OF THE STRONG LINKS IN YOUR BRT GROUP?

Total the # of ✓ \_\_\_\_\_ and the # of ✗ \_\_\_\_\_

If your Strong Link score is	Evaluation	If your Weak Link score is
14	You are one of the most valuable members of your group.	0
11 to 13	You are a good contributor to your group. You are generally participating quite well.	1 to 3
8 to 10	You may be hindering your group in some ways. Determine what things you need to change to become a better participant.	4 to 6
7 or less	You either need to make significant changes or resign from BRT so your group can move forward.	8 or more

What steps can you take to reduce your weak links and increase your strength in your group?

Increase Strength

Reduce or Eliminate Weak Links

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_



# **GESTALT LANGUAGE PROTOCOL**

## **Rules for Effective Communication with Others Fostering Trust and Openness**

The Gestalt Language Protocol comes from Gestalt psychology. Practicing this protocol is a discipline that has far reaching effects on the quality, operation and value derived from a BRT group. The seven points of the protocol are difficult to absorb and practice for new groups. They are however a key component in creating a safe environment where members will feel comfortable sharing openly. Begin with 1, 2 and 5. As your group grows and develops, learn and practice the other points.

1. Speak from your own experience rather than give advice.
  - a. A tip to ensure that you are speaking from experience: Are you using the past tense? If you are, then it is.
  - b. Giving advice or telling someone what to do is a matter of opinion. In a situation where there are many opinions, mine always wins.
  - c. By sharing experiences, we end up with data. Better data allows for better decision making.
  - d. "I would" is synonymous with "you should." Both are a form of advice.
  - e. No one but the person who needs the group's help is going through the situation and all its intensity. No one else has to live with the consequences. What works for me doesn't have to work for you.
  - f. The most help you can provide someone is to share your relevant experience in a similar situation.
  - g. As one BRT member put it, "I can't possibly insult you by telling you what I did."
  - h. Avoid the word "you" during the summary stage of the presentation. This will help to keep you from giving advice.
  - i. Speaking from experience allows for sharing which leads to bonding and the building of cohesion within a group.
  
2. Use "I" statements, not "One" or "You", but "I."
  - a. This is to help clarify what is being said. If I was to say, "Do you know when you're driving down the road at 130 kph and you see a cop hiding in the bushes and your heart drops to your knees . . ." We don't know if that statement is hypothetical; we don't know if it actually happened; we don't know if I actually had the experience. It also gives the impression that it happens to everyone. If on the other hand I was to say, "This morning when I was driving to the airport, doing 130 kph and saw a cop hiding on the side of the road, my heart dropped to my knees." That would be a tangible, valid statement that you can count on.

- b. Likewise if I were to say, "When one has money, life is better." I'm not taking ownership for the statement. Instead I would say, "When I have money life is better."
3. Speak in specifics not generalities. If I were to say, "All men are workaholics," that would be a generality. Instead if I were to say, "My dad and my partner are workaholics," that would be specific.
4. Ask "How" not "Why" to prevent defensiveness. If I were to say, "Why didn't you fire your bookkeeper when you found out he was stealing from you?" that may be attacking. Instead if I were to say, "How did you come to the decision as to whether or not you should fire your bookkeeper?"
5. Make a statement to declare your position before you ask a question.
6. Say, "I feel" to mean real feelings, like sad, afraid, angry or glad, rather than saying, "I feel you are . . ." BRT is a uniquely personal experience where emotions are as important to the process as the facts. By asking someone, "How do you feel?" we attempt to evoke the emotions in the person that are perpetuated by the situation. Using "feel" in the right context will allow for deeper presentations.
7. Replace "I don't know" and "I can't" with "I won't" decide" or "I don't want to say." Also replace "I should", "I must" or "I have to" with "I choose to".

Distribute this to your group and take time to discuss each "rule". Is everyone trying to follow them?

Review it with the group from time to time, perhaps at each retreat.