**SEVEN STEP MEETING PROCESS**

Steps 0-3 prepare the team for the meeting. Typically takes 5-10 minutes.

0. **Call to Order** (To create a climate of collaboration consider using brief openers such as ice-breakers, warm-ups, check-ins or invocations.)

1. **Clarity Objective** (Ensure that all understand and are in agreement with the aim of the meeting)

2. **Review Roles** (Review who will be leader, facilitator timekeeper and recorder. Decide how feedback on time will be given.)

3. **Review Agenda** (Steps 4-7)

Step 4 is the content of the meeting. The time devoted will vary on the nature of the agenda items.

4. **Work thru Agenda** Topic-Method-Time

   Topic: What will be addressed and why (inform, discuss, decide).

   Method: How and person who will lead processing of each agenda item.

   Time: How long will it take to process each agenda item.

Steps 5-7 help the team close the meeting and plan future work. These steps generally take 5 - 15 minutes.

5. **Review Record** (Review the visible record. Call out changes and additions to what has been recorded. Decide which content to keep and which to discard. Decide who will send out record after the meeting)

6. **Plan Next Steps and Next Agenda** (Decide who will do what before the next meeting. Decide and record the objective and agenda for the next meeting. For each agenda item identify the topic, method, person, and time.)

7. **Evaluate** (In a round robin fashion identify: What did the team do well that it should continue doing? What could the team do differently to improve future team meetings and group processes?)

**TEAM MEETING ROLES**

All team **members** contribute share responsibility for team effectiveness, in and outside of meetings. They are chosen because they work in, own, supply, have knowledge, or receive benefit from the work under study. Some will have the added roles below.

The **leader** is typically recognized as the owner of the meeting and the work under study. They coordinate and direct the team’s work and run team meetings.

The **facilitator** provides a set of “sharp eyes during meetings, intervening to help teams stay on track and on time. They work with the leader in planning agendas. Often they are not a member of the team but an advisor or coach to the team.

The **recorder** posts, in real time, significant meeting content on flipcharts or whiteboards in front of the team.

The **timekeeper** calls out the time remaining on particular agenda item. Generally they give half way and two minute warnings, and let team know when time is up.

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**THE PROCESS OF CONSENSUS DECISION MAKING**

Effective consensus decision-making requires increasing uncertainty (generating ideas) before reducing uncertainty (eliminating ideas) in a structured manner. A consensus is one that all members can live with.

**CHARTS FOR DECISION MAKING**

**MULTI VOTE**

<table>
<thead>
<tr>
<th>OBJECTIVE (of the idea generation session)</th>
<th>RANK ORDER (list initials of voters)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**CREATING THE CHART:**

1. Divide chart into three sections.

2. Write objective of decision process at the top.

3. Record Brainstorm or Nominal Group responses in the center section of the flipchart (here).

4. Leave room to place an identifying letter (A-Z) next to each response.

5. On the Multi-Vote side leave enough room (6-7 inches) to tally individual votes.

6. On the Rank Order side, draw enough columns for each member who will vote, plus 1 for totaling.

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**Structured Input** is a group decision-making technique designed to gather one idea per team member. Craft question for input. In turn, members offer one key idea without interruption. Ideas are recorded in front of the group, then summarized.

**Brainstorming** is a group decision-making technique designed to generate a large number of alternative ideas through an interactive team process. To conduct a Brainstorming Session:

1. Clarify the objective of the brainstorming session.
2. Members take turns calling out ideas in a round robin fashion, one by one, without interruption. Ideas should be stated briefly. Do not criticize or compliment ideas as they are presented.
3. Each idea is recorded exactly as presented and is visible to the team.
4. Members can build on and expand the ideas of others. Creative and far-out ideas are encouraged.
5. Members pass when an idea does not come to mind quickly.
6. Avoid stopping when the ideas slow down, rather try to generate as long of a list as possible.
7. After all ideas have been presented, the team clarifies the list by discussion the ideas to assure that all members have the same understanding of each idea. Rather than combining, similar ideas are differentiated to distinguish them apart. Only exact duplicates are eliminated.

**Nominal Group Technique (NGT)** is a group decision making technique designed to generate a large number of alternative ideas through contributions from members who first work individually. To conduct a session using Nominal Group:

1. Clarify the objective of the NGT session.
2. Without discussion, members write down as many ideas as possible.*
3. In a round robin fashion, members take turns calling out ideas from their lists. Ideas should be stated briefly. No discussion. No judgment.
4. Each idea is recorded exactly as presented, and is visible to the team.
5. Members pass when all their ideas have been called out.
6. After all ideas have been presented, clarify each idea. Differentiate similar ideas to distinguish them apart. Eliminate only exact duplicates.

*NOTE: When not moving on to idea reduction tools, sticky notes can also be used. One sticky note per idea. Either post and tell by turn, or post all ideas at once and review as a group.

**Affinity Diagram** is a tool used to group a large number of ideas into clusters such that patterns or natural groupings of the ideas emerge. It is used after ideas are gathered from focus groups, surveys, brainstorming, nominal group technique or other idea generating methods. To create an Affinity Diagram:

1. Write each idea on a sticky note. One idea per note.
2. Place the post-it notes on a flipchart, whiteboard or clear wall.
3. Working in silence, group like or related ideas together. Once ideas are clustered, each group of ideas is read aloud to assure that all ideas belong in the same grouping.
4. Create and record a descriptive title for each group of ideas. Titles should communicate what the cluster is about in a few words.

**Multiple Voting** is a group decision-making technique designed to reduce a long list of ideas (11 and up) to a manageable number (5-10) to move forward with. To conduct Multiple Voting:

1. Agree on the criteria (1-3 guidelines) against which ideas are tested
2. Identify each idea on the list with a letter of the alphabet.
3. The team agrees on the number of ideas for which each member will vote. A general guideline for the number of votes is 20-25% of the ideas listed or 10 votes, whichever is fewer.
4. Without debate or discussion, members vote on ideas:
   - **Dot Method:** Give the participants sticky dots. Members place dots on top ideas. Only one dot per idea. No double dotting. All dots must be used.
   - **Hash Mark Method:** Alternatively hash marks can be placed next to ideas by the recorder as members identify votes in alphabetical order. Only one vote per items, members must use all votes.
5. The team decides which ideas should receive further consideration based on the voting pattern.
6. If a relative long list of ideas remains, a second multiple vote may be taken after discussion of which ideas to move forward with.

**Rank Order** is a group decision-making tool designed to provide a visual display of the individual and team rankings of ideas on a relatively short list (5-10) and to prioritize this list to show the top ranked ideas 1st, 2nd, etc.

To conduct Rank Ordering:

1. Layout your rank order table and assign a letter to each idea.
2. Agree on the criteria (1-3 guidelines) against which ideas are tested
3. Identify each idea on the list with a letter of the alphabet.
4. Members individually list the identifying letters on paper. Using criteria they rank of each idea next to the letter, with “1” being the first choice, “2” the second choice. Members must rank all of the ideas on the list.
5. In a round robin fashion, members take turns calling out their ranking of each idea in alphabetical order A-Z. Rankings are recorded on chart.
6. Add item rankings across rows and record total sum in last column.
7. The team reviews results, selects and marks the few ideas which should receive further consideration, looking at the total, as well as individual votes.
8. If rank ordering reveals considerable disagreement among members, a second ranking may be carried out after discussion and debate.

**Structured Discussion** is a group decision-making technique designed to lead a group in the discussion of a few vital options in order to reach a final decision that all members can live with. It is also useful to gather positions and rational on any issue.

1. Agree on the criteria (1-3 guidelines) against which ideas are tested
2. Members state their position (what) and rationale (why). Can use sticky notes.
3. The recorder notes (or posts) positions and key points on the flipchart. This is not a debate so each person presents their views without rebuttal or debate.
4. When everyone has had a chance to present their views, the notes are reviewed and questions or added thoughts are aired. Open discussion and debate is held. Agreements are summarized, and a consensus is reached.
5. If consensus cannot be reached, close open discussion and repeat steps 2-4.

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