



FACILITATION GLOSSARY OF TERMS

Facilitator:

- **Role:** the process of the meeting. The main goal of a facilitator is to ultimately get the group where the group has agreed to go during the meeting, meeting the outcomes as specified in the agenda. (In an ideal world, the facilitator is neutral to the content, and therefore better able to not participate in the content of the meeting. In reality, at Zingerman's, facilitators are almost always a member of the group, and must carefully balance their facilitator role with that of active participant. When the facilitator is also an active participant, the perception can be that it's an unfair environment, and that the facilitator is swaying the discussion in their favor.)
- **Agenda:** The facilitator is responsible for publishing and sticking with the agenda, and keeping track of any "hot topics" that need to be discussed. Often, the Facilitator works with the Leader to set the agenda. In the meeting, the facilitator will look to the leader to determine priorities if the agenda needs to change in the moment.
- **Who:** Can be in any position, and it's crucial that they work well with the Leader, Note-Taker, Time-Keeper, line-owners, etc.
- When the meeting is running well, the focus is on what the group is doing, not the facilitator. They're keeping the group on track and on time, making sure that everyone who wants to participate has an opportunity (within the time constraints) and keeping track of who's turn it is to ask a question or make a comment, if more than one person wants to speak at any given time. The facilitator makes suggestions, not decisions.

Leader:

- **Role:** the content of the meeting. In general, the leader is ideally speaking the least (this is a difficult change to make for some managers) and not answering questions as much as they're asking them. They're paying attention to what is said, leading with great energy in the meeting, and backing the facilitator.
- **Agenda:** The leader is responsible for setting the agenda in advance of the meeting, often working with the facilitator. They set the priorities of the meeting.
- **Who:** Often a manager or Managing Partner – the leader is in the role of decision maker.
- When the meeting is running well, the group is running the department or business together, and the leader is ensuring that everyone is moving in the right direction and may step in to be the final decision-maker when there is disagreement. The leader is the ultimate content arbitrator.

Note-taker: The person responsible for capturing the notes and sending them out to a wider audience. The note-taker is ideally someone who has been in the department/business for long enough that they know all participants by name, know the jargon, and understands the work of the business/dept. – in other words, this is not a great role for someone new to the business. *****they have free rein to interrupt the***



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Facilitator! *If the note-taker didn't hear something, we want them to ask in the moment for clarity.*

Notes: The highlights from the meeting/huddle. Key information that other staff who aren't in the room would need to know, such as key measure highlights, decisions, monkeys, announcements and appreciations. (See also: Super Six) These are often published ZCoB wide, via an everyone email. Having a consistent format is highly recommended. Notes are very helpful to the facilitator and also to the people in the meeting, allowing them remember what happened so we can all move forward.

Minutes vs. Notes: Some organizations/meetings use minutes, which are designed to be a detailed record of the entire meeting. At Zingerman's, we default to taking notes, which allows the note-taker to be an active participant in the meeting; they capture the results of the discussion, not the whole discussion. *(An exception to this is the Partner's Group, where the note-taker is capturing much more of what is going on in the room.)*

Time-keeper: the person responsible for help the meeting run on schedule by paying careful attention to the timing for each item on the agenda, and subtly letting the facilitator know when the time for an item is almost out. **This is NOT an interruptive role. Ideally the facilitator and time-keeper agree on a way of indicating that time is running out that does not break the flow of discussion or disrupt the entire group.

Monkey-keeper: The person responsible for capturing the monkeys (see below) which come up during the meeting. In a small department/business, the role may be the same as the note-taker. ** Should know the anatomy of a monkey (on Google Site)

Monkey: A deliverable that someone has taken on in support of the work of the group. A good monkey includes: who is responsible for the item/task, what the item/task is, when it's due, and why we're doing it (sometimes it's obvious, sometimes it needs more explanation.) ** Generally, it's not recommended to assign monkeys to people who are not in the room.

Huddle: The part of the departmental or business meeting in which the DOR is discussed. At Zingerman's, this has become synonymous with our weekly, hour-long meetings, of which the huddle is a part. All Huddles at Zingerman's contain a DOR component, while not all meetings do.

Meeting: Formal or informal deliberative assembly of individuals called to discuss certain issues and problems, and to make decisions.

Agenda: The outline for the items to be covered in a meeting or huddle, along with designed times for each item/content area. Ideally, this is established and published in



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advance along with any pre-work for the group. Set by the Leader, shared and followed by the Facilitator. Can include DOR Report, topics, outcomes, homework, and “standard” agenda items such as Announcements and Appreciations.

Proxy: the authority to represent someone else – a stand in when the responsible person is unable to attend the meeting. At the Partner’s Group level, a proxy for a Partner who will be called on to vote must also be a voting member of that group.

Super Six: A highlight in the notes of the top things that someone else from the department or business should know. Voted on at the end of a huddle by the participants.

Norms: a standard or pattern that is expected of a group. For example: no cell phone usage during a meeting, expectation of participants/line-owners to send a proxy when they’re unable to attend the meeting, no interrupting your co-workers, etc. Can be very helpful, particularly for new staff, to have published norms for a huddle.

Hot Topic: Some huddles employ the use of an agenda item called “Hot Topic”, which is a catch all phrase for in-the-moment discussion or info share items that don’t fit within a standing agenda. For example, at ZingTrain, 10 minutes are routinely set aside for Hot Topics: people put items on the white board in a designated area at any time over the week, in a standard format (What the item is, who owns it, how long you anticipate it will date, and whether the item is IS, D, or ND (Info Share, Discussion/Decision, or Help Needed.) For example: “Great Service Tune-Up, eg, 5 min, HN”) This allows the facilitator to prioritize the Hot Topic agenda items.

Parking Lot/ Cooler/ Freezer: A visible listing of items that come up during a meeting that aren’t on the agenda in the moment, but are ideally captured for future discussion. You “park” items there! An alternative is the Cooler/ Freezer idea – items that are nearer term are put to cool in the Cooler, and longer term items go in the Freezer.