Contents

Examples, Exhibits, and Tables xi
Web Contents xiii
Acknowledgments xv
The Authors xvii
Introduction xix
About This Book xix
A Quick Lookup Resource xx

PART 1 FROM CONTACT TO CONTRACT 1

1 Initial Contact 3
Completing a Preliminary Screen 5
  Coordinates: Date(s) and Location • Purpose, Objectives, and Deliverables • Process Leadership • Eighteen Types of Processes
Decision Making After the Screen 11
Communicating a Decision 13

2 Building Agreements That Work 15
Types of Agreements 16
Drafting Agreements 16
Agreements in Action: Four Maxims 18
  1. Don’t Start Work Without an Agreement • 2. Bring Fresh Eyes to Your Experience • 3. When in Doubt, Write It Out
  • 4. Cock-ups Are Collaborative
Work Plans and Cost Estimates 21
  Developing Work Plans • Dealing with Pricing Perils
Acting on Values 24
PART 2  APPROACH AND STYLE  33

3 Approach  35
   Integrated  35
   Customized  36
   Outcomes • People • Group Development • Ethnocultural Considerations • Literacy • Organizational Culture
   Systematic  38
   Completing a Process Management Prompter • Accountability
   The Approach in Action: Integrated, Customized, Systematic  45

4 Style  51
   High-Tech Teddy  52
   Controlling Caroline  53
   Loosey-Goosey Lucy  54
   Overconsulting Oliver  55
   Anxious-to-Please Annie  56
   Bureaucratic Bill  57
   Optimizing Management Styles  57

PART 3  MANAGEMENT x 5: PARTICIPANTS, SPEAKERS, LOGISTICS, DOCUMENTS, FEEDBACK  59

5 Participants  61
   Clarify the Rationale for Participation  62
   Monitor the Mix and Number of Participants  66
   Consider Participant Types • Gatekeep Participant Numbers
   • Maintain a Participant Database
   Create the Invitations  73
   Persuade • Inform • Engage • Determine the Focus
   • Obtain Input and Feedback • Write the Confirmation Letter

6 Speakers  95
   Speaker Management  95
   Clarify Requirements • Create Invitations • Confirm Expectations
   Presentation Guidelines  104
   Opening Remarks • Speaker Introductions and Acknowledgments
   • Presentations by Experts • Presentations by Panels • Closing Remarks

7 Logistics  119
   Select and Set Up the Site  120
   Venue • Layout • Health, Safety, and Security • Technical and Audiovisual Support
   Enable Participant Engagement  132
   Accommodating Differences • Identification • Accessibility
Examples

1.1 When the Client’s Answer Is Yes 13
1.2 When Your Answer Is No 14
2.1 Informal Letter of Agreement 25
2.2 Memo of Understanding 26
2.3 Formal Contract for a Complex, Multiphase Project with a Large Organization 29
5.1 Finding Participants for a Restricted Session 65
5.2 Upstream Prevention 81
5.3 Writing Invitations for Specific Situations 85
5.4 Six Invitations 89
6.1 Informal Speaker Invitation 99
6.2 Speaker Confirmation Letter 102
6.3 Outline for Opening Remarks 110
6.4 Outline for Closing Remarks 116
8.1 Matching Documents to a Process 146

Exhibits

1.1 The Preliminary Screen 4
3.1 Process Management Prompter 40
5.1 Participant Database Checklist 74
5.2 Participant Database Information Form 75
5.3 Invitations and Announcements Checklist 83
5.4 Feedback on Draft Invitation 88
5.5 Confirmation Letter Checklist 94
6.1 Identify Speaker Functions 96
6.2 Speaker Confirmation Letter Checklist 100
7.1 Logistics Checklist 129
7.2 Enabling Participant Engagement Checklist 136
7.3 “Mobilizing Yourself” Logistics Checklist 138
9.1 Feedback Map 153
9.2 Form for Reviewing Feedback Tools 154
9.3 Interim Participant Feedback Form: Version 1 159
9.4 Interim Participant Feedback Form: Version 2 160
9.5 Summative Participant Feedback Form: Version 1 161
9.6 Summative Participant Feedback Form: Version 2 162
9.7 Summative Participant Feedback Form: Version 3 163
9.8 Summative Participant Feedback Form: Version 4 164
9.9 Workshop Manager Feedback Form 165
9.10 Workshop Management Log 166
9.11 Client or Stakeholder Feedback Form 167

Tables

1.1 Types of Facilitated Processes 8
2.1 Types of Agreements 17
5.1 Participation: Five Options 62
7.1 Room Layout Options 124
Web Contents

This book includes premium content that can be accessed from our Web site when you register at www.josseybass.com/go/dorothystrachan using the password professional.

Exhibits

1.1 The Preliminary Screen
3.1 Process Management Prompter
5.1 Participant Database Checklist
5.2 Participant Database Information Form
5.3 Invitations and Announcements Checklist
5.4 Feedback on Draft Invitation
5.5 Confirmation Letter Checklist
6.1 Identify Speaker Functions
6.2 Speaker Confirmation Letter Checklist
6.3 Speaker Invitation Checklist
7.1 Logistics Checklist
7.2 Enabling Participant Engagement Checklist
7.3 “Mobilizing Yourself” Logistics Checklist
7.4 Participant Physical Accessibility Map
8.1 Matching Documents to a Process
9.1 Feedback Map
9.2 Form for Reviewing Feedback Tools
9.3 Interim Participant Feedback Form: Version 1
9.4 Interim Participant Feedback Form: Version 2
9.5 Summative Participant Feedback Form: Version 1
9.6 Summative Participant Feedback Form: Version 2
9.7 Summative Participant Feedback: Form: Version 3
9.8 Summative Participant Feedback Form: Version 4
9.9 Workshop Manager Feedback Form
9.10 Workshop Management Log
9.11 Client or Stakeholder Feedback Form