

Effective Meeting Planning and Facilitation



<https://www.analystscorner.org/>

Overview

This practical course equips professionals with skills to design, facilitate, and conclude results-oriented meetings

Effective Meeting Planning and Facilitation training course is designed for business analysts, product owners, project managers, and aspiring professional facilitators to build a toolset and skillset needed to design and steer a meeting of any kind: from simple on-line catch-ups to complex hybrid townhalls.

We will study the stages of a meeting, learn the facilitation cycle, explore techniques for different meeting activities, and be prepared to keep a meeting on track when things go wrong.

What You Will Learn

- **Core Facilitation Principles:** Understand the role of a facilitator, the phases of the facilitation cycle
- **Outcome-Driven Agenda Design:** Move meeting agendas from open-ended "topics to discuss" to "outcomes to reach".
- **Session Mechanics & Exercises:** Prepare effective warm-ups, decision-making, innovation and problem-solving activities, learn how requirements elicitation may work, facilitate break-out sessions, and refresh your presentations with immersive exercises like gallery walks
- **Cross-Format Logistics:** Plan room setups, breakouts, and logistics across in-person, virtual,, and hybrid environments to ensure equal participation.
- **Group Dynamics:** Address disruptive dynamics, including managing the HiPPO (Highest Paid Person's Opinion), drawing out silent participants, keeping the conversations on track, and remediating conflict
- **Psychological Safety:** Establish ground rules, apply "Parking Lots" for out-of-scope ideas, build psychological safety.

You will get exposure to the theory and practice of facilitation and will ensure your meetings are the ones people will love turning up to.

Audience

- **Aspiring Facilitators** who regularly lead hybrid, remote, or co-located working sessions and want to manage the groups with confidence
- **Business Analysts and Product Managers** needing structured approach to workshoping and aligning people
- **Scrum Masters, Agile Coaches, and Project Managers** looking to run engaging, outcome-oriented ceremonies and collaborative workshops
- **Team Leads and People Managers** seeking to eliminate unproductive calendar clutter and replace it with efficient meetings

This course will offer

1. Actionable frameworks spanning pre-session planning, facilitator agendas, live group navigation, and post-session follow-ups.
2. Repeatable templates and best practices for session design
3. Best practices for shared digital workspaces, visual mental models, and attention management in digital and hybrid settings.
4. Ready-to-use verbal prompts and protocols to keep the collaboration going.

Level

This course forms a part of Analyst's Corner **Business Analysis Capability Ladder** - a structured multi-step approach to building strong business analysis skills and expertise.

It consists of 4 distinct rungs tailored to people at different stages of their professional lifecycle:

- **Foundation:** Learn the ropes of business analysis | Build the baseline for professional career
- **Progression:** Deepen your analysis expertise | Scale your toolkit and analytical rigour
- **Specialisation:** Develop strategic specialisms | Cultivate niche expertise in high-value domains
- **Leadership:** Gain authority and leadership | Lead business analysis for your team or organisation

Each rung consists of multiple training courses and an assessment; finishing the whole Ladder provides the depth of practical knowledge that rivals traditional academic BA programs.

This course is one of the courses on the **Foundation** rung.

Note: Analyst's Corner is an Endorsed Education Provider™ by IIBA®, which means the materials and references to IIBA® and its publications used in this course are licensed for us to do so. In

addition to that, Analyst's Corner has been reviewed and approved by the PMI® Authorized Training Partner Program. By enrolling in this course you support legal use of intellectual property and contribute to the development of business analysis and project management professions.

Analyst's Corner is not a regulated academic body or university. Our "BA Capability Ladder" is a proprietary professional development framework focused on practical, high-impact skills based on industry standards and best practices; and is not part of the formal higher education sector.

All the trademarks belong to their rightful owners. Any references to third party materials, products & services or elements of popular culture are done for educational purposes only, i.e. in fair use.

Duration

The course consists of:

- 5 hours of pre-recorded video lessons
- 1 hrs of quizzes and hands-on exercises

Syllabus

Module 1: The foundations of facilitation

IIBA® Knowledge Areas alignment	Elicitation and collaboration (KA2) Underlying Competencies: Facilitation
PMI® Talent Triangle alignment	Power Skills: interpersonal, behavioral, and leadership competencies that enable professionals to influence stakeholders, guide teams, resolve conflict, and drive change

Title	Type
Why do we meet? The role of a facilitator.	video
What makes meetings hard	video
Stages of a facilitated session	video
Facilitation Cycle	video
Quiz	quiz

Module 2: Design the session

IIBA® Knowledge Areas alignment	Elicitation and collaboration (KA2) Underlying Competencies: Facilitation Techniques: Workshops, Brainstorming, Collaborative games, Decision Analysis
PMI® Talent Triangle alignment	Ways of Working: the procedural toolkit of a project professional ensuring you have the right delivery mechanism for a given problem

Title	Type
Goals. Do I need a meeting?	video
Outcome-Driven Agendas	video
Introductory activities and warm ups	video
Decision making activities	video
Innovation and problem solving activities	video
Information radiation activities	video
As-is analysis and requirements elicitation activities	video
Wrap-up activities	video
Meeting roles	video
Facilitator's agenda	video
Quiz	quiz

Module 3: Meeting logistics

IIBA® Knowledge Areas alignment	Elicitation and collaboration (KA2) Underlying Competencies: Facilitation Techniques: Workshops, Brainstorming, Collaborative games, Decision Analysis
PMI® Talent Triangle alignment	Power Skills: interpersonal, behavioral, and leadership competencies that enable professionals to influence stakeholders, guide teams, resolve conflict,

	and drive change
--	------------------

Title	Type
Challenges and benefits of in-person meetings	video
In-person meeting logistics	video
Setting the room	video
Breakout group activities	video
Challenges and benefits of online meetings	video
Online meetings logistics	video
Reading: Online facilitation tools	reading
Challenges of a hybrid meeting	video
How to run a hybrid meeting	video
Quiz	quiz

Module 4: Keeping the meeting on track

IIBA® Knowledge Areas alignment	Elicitation and collaboration (KA2) Underlying Competencies: Facilitation, Leadership and Influencing, Teamwork, Negotiation and Conflict Resolution Techniques: Workshops, Brainstorming, Collaborative games, Decision Analysis
PMI® Talent Triangle alignment	Power Skills: interpersonal, behavioral, and leadership competencies that enable professionals to influence stakeholders, guide teams, resolve conflict, and drive change

Title	Type
Intro to the section	video
HIPPO	video
Silent participants	video

Tangent Kings	video
Conflict remediation	video
Safe space mechanics	video
Plan B	video
Shared mental model	video
Quiz	quiz

Module 5: Wrap up

IIBA® Knowledge Areas alignment	Elicitation and collaboration (KA2) Underlying Competencies: Facilitation
PMI® Talent Triangle alignment	Power Skills: interpersonal, behavioral, and leadership competencies that enable professionals to influence stakeholders, guide teams, resolve conflict, and drive change

Title	Type
Wrapping up a meeting	reading
Final assignment	assignment