

# Moderating and Facilitating Groups: Creating a Meeting Summary

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Knowledge is personal, and shared.

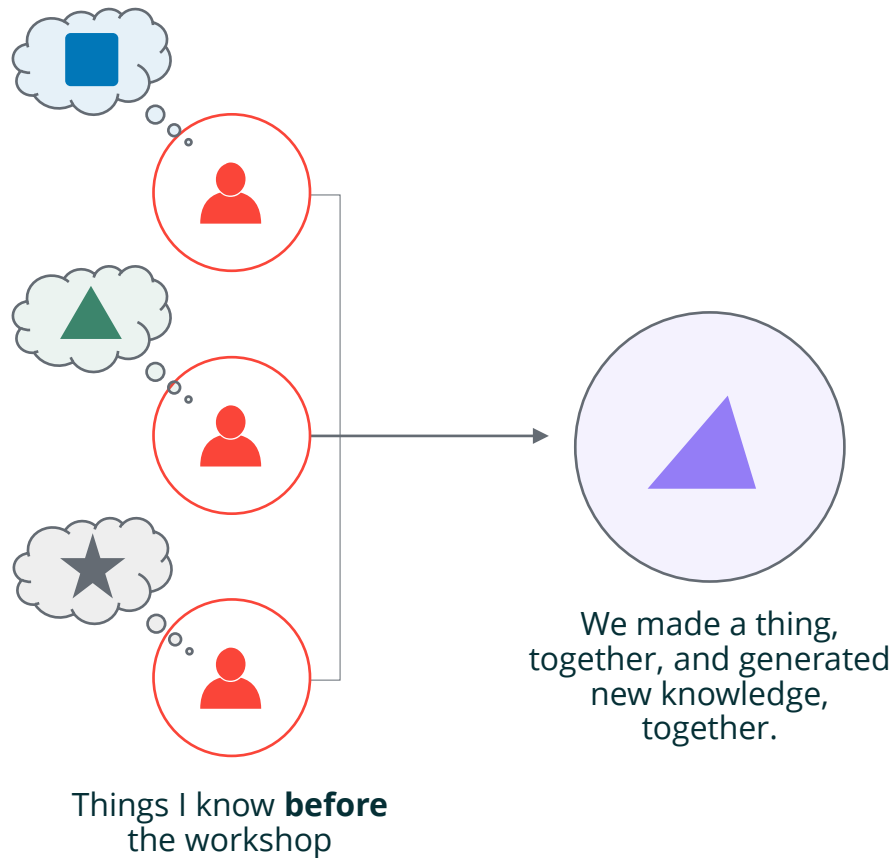
# When people arrive at a workshop, they know different things.



Things I know **before**  
the workshop

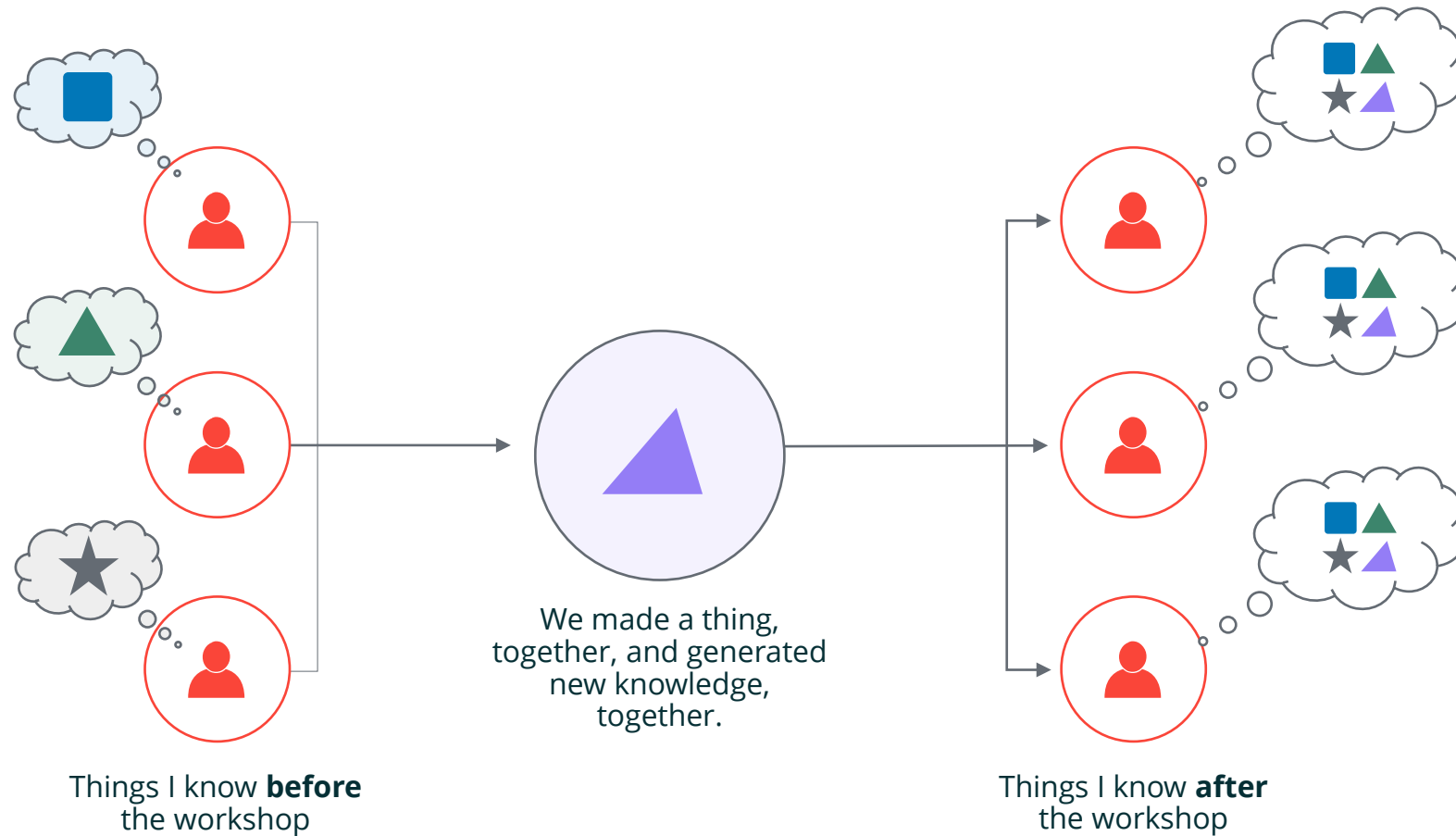
Knowledge is personal, and shared.

# During a workshop, shared knowledge is created.



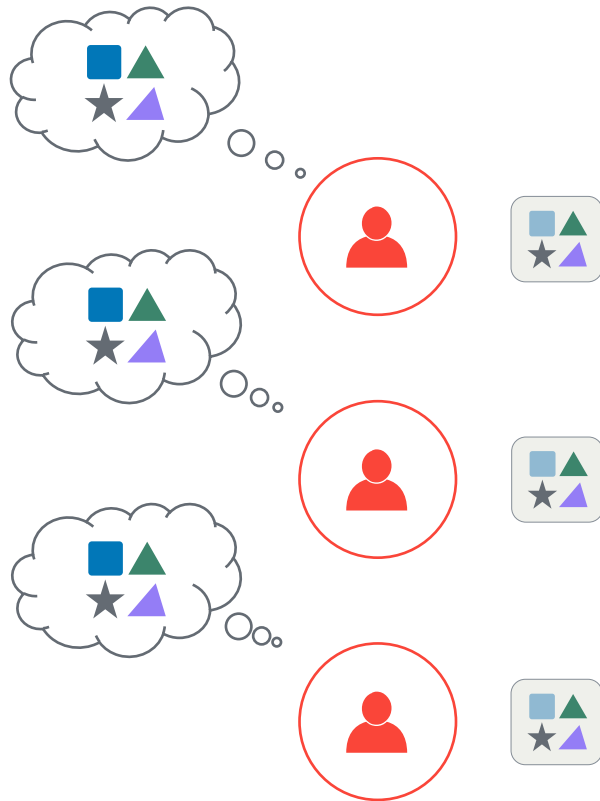
Knowledge is personal, and shared.

# When everyone leaves, they have *shared knowledge*.



Knowledge is personal, and shared.

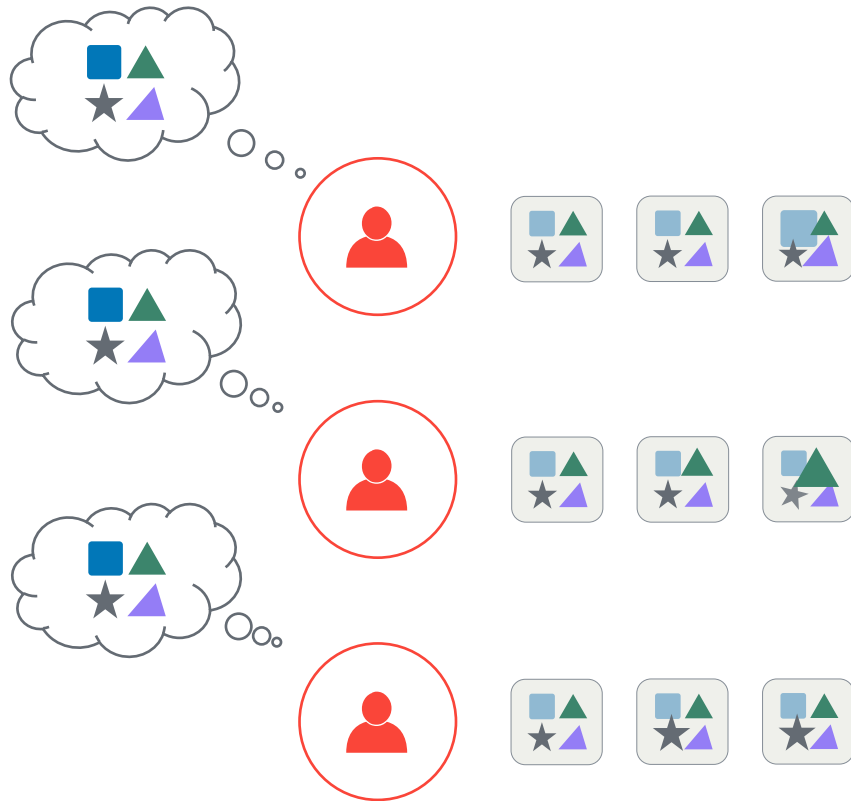
# But over time, that knowledge shifts again.



Things I know after the workshop

Knowledge is personal, and shared.

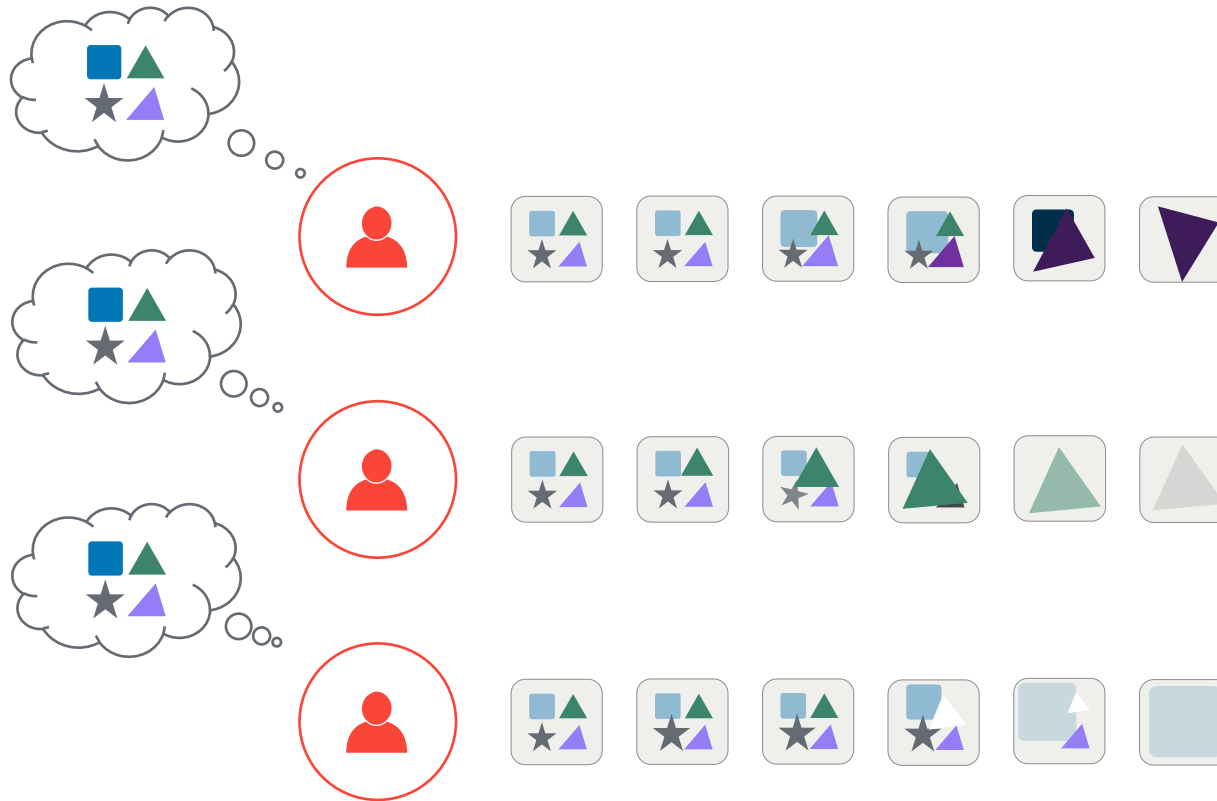
# But over time, that knowledge shifts again.



Things I know after the workshop

Knowledge is personal, and shared.

# The longer we're apart, the more we diverge.



Things I know after the workshop

Knowledge is personal, and shared.

# We learn things, our opinions change, and we forget things.



Things I know after the workshop

Things I know **after time has passed.**



## Building a summary

# *A workshop summary* brings us back together.

### **A summary is a reminder of what we did.**

Since a workshop is a unique form of meeting, the summary reminds the team of what they did and why they did it.

The summary captures the process of shared creation, which then rationalizes and justifies the output.

### **A summary is a reminder of what knowledge we generated.**

The summary document is a representation of a moment in time, where everyone in the session knew the same things. This becomes a milestone – while knowledge evolves and changes, it acts as a common and shared point of reference.

## Building a summary

# A summary includes:

### Goals

Who was there?

What occurred?

What was accomplished?

What are next steps?

### Goals

What was the point of the workshop? Be specific.

- Generate new ideas
- Synthesize data or concepts
- Align on a direction
- Share knowledge

## Building a summary

# A summary includes:

Goals

Who was there?

What occurred?

What was accomplished?

What are next steps?

## Attendees

Who was involved in the workshop? When appropriate, include titles and business units. Anticipate where this may be contentious – who was left out, or included without reason?

## Building a summary

# A summary includes:

Goals

Who was there?

What occurred?

What was accomplished?

What are next steps?

## Activities

Describe – and show – the activities that occurred.

- Include an overview of each activity and the goal of that particular activity.
- Show the materials that were used in their raw, “before” state.
- Show the final output.
- Include photos of participants participating.

## Building a summary

# A summary includes:

Goals

Who was there?

What occurred?

What was accomplished?

What are next steps?

## Output

Describe – and show – what new knowledge, learnings, or ideas were created.

- Add enough detail that someone who was not there can understand the output.
- Remake artifacts if they are illegible. In-person workshops often include sketchy artifacts; digital canvases can feel overwhelming.
- Don't simply screenshot the output of the activities – build the materials, like any other presentation, so they make sense.

## Building a summary

# A summary includes:

Goals

Who was there?

What occurred?

What was accomplished?

What are next steps?

## Next Steps

Articulate what the team will do next, both with the workshop data as well as in the general scope of the project. Be specific about timelines, including when the workshop team will be able to meet again.

## Building a summary

# When the summary is done, it needs to be *socialized*.

**The artifact will live on its own, but you can control the narrative.**

Schedule small-group meetings (1:1, 1:2) with various stakeholders – those included, and those not included in the workshop – to walk through the results.

Use the document as a talk-track to remain consistent in how you reference and describe the materials and the value of the new knowledge that's been created.

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# Thank you!

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