

# Lucid Facilitator's Guide

## MONTHLY + ANYTIME

## DECISION MAKING MEETING

To achieve high performance, teams must make important decisions in a timely fashion. While we can never know exactly how a decision may play out in the future, research has shown several strategies that can improve the likelihood that we'll make a good decision – one that leads to a meaningful result and minimizes our risk of failure.

This template explains how to prepare for and run a solid decision making meeting. This straightforward process walks your team through the critical decision making steps. It doesn't rely on any specific analytical frameworks or fancy group exercises. You can run this meeting as is, or use it as a starting place when building a more elaborate decision-making session.

### Contents

Introduction.....	2
Assigning Roles .....	3
Two Approaches to Making the Final Decision .....	4
Agenda.....	7
Step-by-Step Instructions.....	8
Before the Meeting .....	8
During the Meeting.....	11
After the Meeting .....	16
Techniques To Unblock Decision Making.....	17
Additional Resources .....	20
About the Author.....	21



# INTRODUCTION

Every team needs to make decisions, but few have the foresight to plan for them. Many groups make decisions as they arise, giving each one scarcely more introspection than they give the lunch menu. Others make all decisions by committee, permitting even minor choices to consume time and resources that can never be recouped.

High-performance teams make a clear distinction between big and small decisions, and know how to deal with each efficiently and effectively. The meeting outlined here works as one part of a team's decision making approach, showing one way to plan for big decisions.

## What Makes A Decision Big

Teams use this meeting when faced with a decision that:

- **Doesn't have an obvious right answer:** controversial or contested decisions
- **Isn't well understood:** new or confusing decisions and problems with unclear root cause
- **Changes the overall strategy:** decisions that will impact multiple parts of the organization and how it operates
- **Could go badly wrong:** risky decisions
- **Could go very right:** high-reward "let's not screw this up!" decisions

[Research on decision making](#) shows that teams make better decisions when they:

- Take time to understand the issue
- Avoid false choices by considering 3 or more valid alternatives
- Use data and facts to evaluate these options

Beyond a quality decision, teams also need to ensure that the decision they make translates into action. This requires everyone to commit to the decision in the meeting, and honor that commitment afterwards.

To secure this commitment, this meeting leads teams to:

- Clarify the decision making process, so everyone knows who has the final say
- Ensure everyone contributes to the discussion
- Get very specific by documenting the decision made
- Clarify next steps with due dates and owners before leaving the room

## Assigning Roles

A discussion like this creates an opportunity for conflict. Constructive conflict—the kind in which the group vigorously questions the ideas without attacking the people—leads to better decisions. To keep the debate focused on the content and the process running smoothly, it can help to clearly define roles in advance.

We recommend assigning the following roles:

- **A Facilitator or Chair**  
Responsible for keeping the process on track, participants engaged, and the discussion productive.
- **Subject Matter Experts**  
Responsible for researching and reporting on the decision, outlining realistic alternatives, and contributing to the discussion.
- **The Decision Maker(s)**  
Responsible for making the final decision when using the Consult decision-making process. (See next page.)
- **The Record Keeper**  
Responsible for taking notes, documenting the final decision, and documenting next steps.

# Two Approaches to Making the Final Decision

This meeting forces the team to get very specific about the decisions they make. To do this, they need to know when a decision is final.

Of the many ways groups can finalize a decision, there are two that work well in this streamlined process.



## CONSULT

### How it works :

The Decision Maker(s) make the final decision after hearing input from the group.

### Pros:

- Efficient, but not careless
- Keeps lines of responsibility and accountability clear
- Can increase buy-in to the decision

### Cons:

- Can backfire if the input provided isn't treated with respect
- Can result in weaker team commitment

The Consult approach is the most efficient and simple approach to making decisions with a group. We recommend the Consult process for most business decisions and for decisions that don't need passionate backing from the whole team.



## CONSENSUS

### How it Works:

A decision is discussed, and everyone involved agrees to live with it.

### Pros:

- Most inclusive and participatory process
- Creates greatest shared commitment to the decision
- Helps teams engage in constructive debate

### Cons:

- Time consuming
- Can be ambiguous; false consensus is common
- Prone to excessive compromise, leading to weaker decisions

Consensus is the process we assume when we say “Everybody good with that?” We assume that if anyone has an issue with the decision, they’ll speak up. Often they don’t, so we get false consensus.

You can avoid this problem by defining consensus up front, then making the moment of decision explicit. Before the group starts discussing the options, agree on what consensus looks like.

Consensus can mean:

Unanimity. Everyone completely backs the decision.

*or*

Everyone can live with and will support the decision.

Of these definitions, smart leaders opt for “Everyone can live with it.” In some organizations, this is called “Disagree, and commit.” Once everyone has their say and the decision is made, everyone commits to supporting it.

By contrast, striving for unanimity often results in big delays and weaker decisions. All the inevitable compromises made in an effort to achieve unanimous consensus wear out the group; they end up agreeing to a solution no one particularly likes just to be done with it.

### **What if you need unanimous consensus?**

Some decisions require unanimous consensus, either for legal reasons or because the potential impact is so great that nothing short of full commitment will do.

When that’s the case, consider using a more formal decision making method, such as voting. You’ll find other decision making templates in the Lucid Template gallery and in the [Additional Resources](#) here.

# AGENDA

## GOAL

Make a decision and secure the team's commitment to act.

## DURATION

60 to 90 minutes or more, depending on the decision or decisions under discussion

- ① Welcome
- ② Present the Decision Challenge
- ③ Debate and Discuss Options
- ④ Decide and Commit
- ⑤ Define Next Steps
- ⑥ Closing

# STEP-BY-STEP INSTRUCTIONS

## Before the meeting

### Two Approaches to Scheduling

As the title implies, we recommend **proactively reserving time for a decision making meeting every month**.

Why schedule this meeting before you know the challenge you'll face?  
Three reasons:

1. This is a longer meeting involving key decision makers in your organization. It can be very hard to get time on their calendar on short notice.
2. Dedicating this time every month for longer problem-solving discussions keeps them from bogging down the weekly operational meeting. Without a monthly time reserved, it's tempting to tackle big challenges during the weekly meeting, which sabotages the tactical nature of that meeting and leads to rushed and/or sloppy decision making. With this meeting safely on the calendar, teams can defer the conversation and feel confident that the big discussion they need will happen.
3. There are always strategic challenges! New opportunities, new threats, hard decisions: c'mon! You know this stuff will come up, so you might as well have a plan for dealing with it.

You can also **schedule a decision making meeting any time you need to urgently make a big decision as a group**. Schedule the meeting far enough in advance to ensure the team has time to prepare. (See next page)





## Preparing the Background Information

These meetings fail when the team “rat holes,” talking about related problems, all kinds of options, and trying to figure out what the criteria for making the decision should be all at once.

To make sure your meeting results in a quality decision, assign one or more Subject Matter Experts (SMEs) to address these questions in advance.

- **Who has the final decision?**  
In a Consult situation, this will be one or more individuals. Other decisions require Consensus from the entire group.
- **What specifically do you need to achieve in this meeting?**  
For example, when you meet about a problem in the marketing campaign, do you need to make a decision about the budget, the vendor, or about canceling the campaign?
- **What background information do people need to know about the challenge to make a good decision?**  
This doesn’t need to be exhaustive; just enough to make sure people understand the situation.
- **What criteria or constraints should be used to pick the best option?**  
For example, any upcoming deadlines, resource constraints, or quality targets.
- **What are the most promising options?**

### The best decisions start with 3 to 5 realistic options.

Beware of “Yes” or “No” decisions. Yes/No means that all other options have been considered and rejected, and that you have no other way to tackle the challenge before you. [Research found that yes/no decisions fail half the time.](#) When faced with a decision like this, people try to figure out “how to make it work” rather than whether the option before them is the best way to achieve the goal. To discover more options, consider questions such as:

- Is there a better way?
- What else could we do?

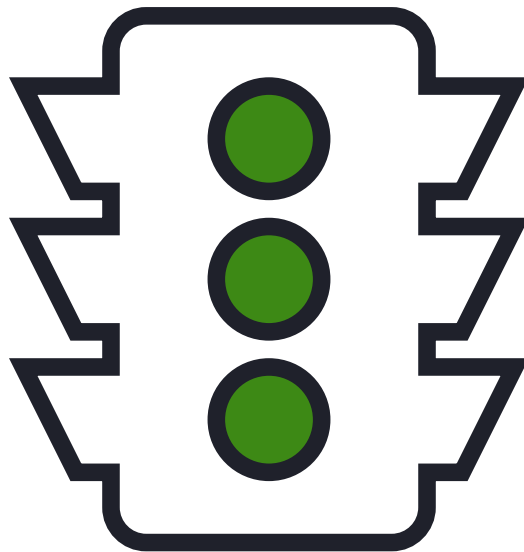
**The SMEs don’t need to do this work by themselves.**

Often the fastest and best way to answer these questions is to **meet one-on-one with team members in advance**.

Take 5 minutes and ask each person what they think needs to be accomplished, the criteria to use, and what options they'd consider. This approach gets you the needed background information AND builds a shared view of the challenge in advance.

**Document the challenge**, and distribute this information before the meeting.

**You're ready to go!**



# During the meeting

1

## Welcome

Purpose	Confirm the meeting purpose and decision making approach
Outcome	Clarity on what's being decided and how it will be decided
Duration	5 minutes

### Instructions

This agenda item transitions the group into the meeting. Take a moment for everyone to get comfortable and greet each other before you begin. Once everyone's ready, start by quickly stating the meeting goal and clarifying the decision making method.

Example when using Consent:

“Today we’re here to make a decision about the September marketing campaign. We’ll offer our perspective and advice to Berta, who has the final decision today.”

Another example using Consensus:

“Today we’re here to figure out how to address the budget shortfall. Because this decision impacts us all, we’re going to work to achieve consensus.

There aren’t any perfect options, so I suggest we define consensus as **we can all live with and support** the option we choose. You don’t have to love it, but you will need to support it. Does that work for everyone?”

## 2

## Present the Decision Challenge

Purpose	Ensure everyone understands the decision and the options
Outcomes	A shared understanding of the challenge and the decision making criteria  An overview of the options under consideration
Duration	15 minutes or less

### Instructions

The SMEs lead this discussion about the report they sent out beforehand. Since everyone has supposedly read the report, they do NOT present it here. Instead, use this time to address questions.

If there are no specific questions, consider asking the group:

- Is there any information we're missing?
- Is there another way of approaching this decision that could give us better options?

and finally:

- Do we understand this topic and the criteria well enough to start discussing the options?

When the answer is Yes, move on.

If the answer is No, you have three choices:

1. Proceed anyway, and work to pick the least-risky option.
2. Instead of choosing one option, find a way to try multiple safe-to-fail options. In other words, hedge your bets and experiment so you can learn more.
3. Get more information. You can do this by immediately [using a group problem-identification technique](#) or you can end the current meeting and assign someone responsibility for gathering the missing details.

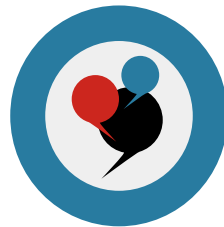
### 3

## Debate and Discuss Options

Purpose	Evaluate the merits of different options
Outcomes	Selection of a preferred option An understanding of the team's commitment to this option
Duration	30+ minutes

### Instructions

This is the main event. As a group, discuss the benefits and drawbacks of the options before you until a clear preference emerges. The Facilitator's job here is to help the group stay on track and ensure everyone has an opportunity to contribute. In teams with an established meeting cadence, you don't usually have to manage this discussion too much. If the topic is particularly heated, though, or the group doesn't yet know how to engage in constructive conflict, consider using a more structured approach like those described in [Rick Lent's guide to Structures for Making Decisions with a Group](#).



The Record Keeper may want to write down key points that explain the rationale for the decision later, but we do not recommend trying to document the whole discussion.

Keep an eye on time. If this discussion runs more than 60 minutes, call a time-out. Ask if the group feels they can finish up within another 15 minutes.



If not, **suggest that everyone takes a break.** If the group has time, you can resume the discussion after the break, or reschedule it for another day.

Once the Decision Maker reaches a conclusion or the group reaches Consensus, move on to the next agenda item.

## 4

## Decide and Commit

Purpose	Document the decision and validate commitment
Outcomes	A clearly documented decision that can be referenced after the meeting  Commitment from each person to support the decision
Duration	5 minutes

### Instructions

Now that you have a decision, the Note Taker will write it out where everyone can see. Why? Two reasons:

1. This makes it easy to find and reference the decision later.
2. The specific wording matters.

For example:



### Final Decision:

We will cater lunch every Thursday for all employees. Lunch will include a meat and a vegetarian option followed by cake.

The process of putting the final decision in writing reveals any lingering disagreements or confusion. As the group gets the wording right, they'll also get more specific about the implications of their choice. In our example, stating "all employees" rather than "employees in the Boston office" could have a significant impact on next steps.

Review and refine the written decision until everyone agrees it's correct.

Finally, if you're using the Consensus process or think it would be helpful, go around the room and ask each person to confirm their support for the decision in turn.

# 5

## Define Next Steps

Purpose	Create a plan for implementing the decision
Outcome	A list of next steps with defined owners and due dates
Duration	15 minutes

### Instructions

Now that you have a decision, it's time to figure out what happens next. For each task identified, the Note Taker will write down Who, What and When.

Your next steps should address these questions:

- 1. What actions will we take to implement this decision?**  
 For example, drafting a plan, assembling a team, signing the deal
- 2. Who else needs to know about this decision?**  
 For example, the employees, customers, or board
- 3. What do we need to communicate about this decision?**  
 Get specific about the message to share with each stakeholder group.
- 4. When and how will we get an update about this decision?**  
 If your team has a weekly meeting cadence, these next steps should be added to the tasks you review in your weekly meeting. Otherwise, set a date and time for a follow-up meeting.



## 6

### Closing

Purpose	Review and confirm the meeting results
Outcomes	Agreement that the decision and next steps are complete An evaluation of the meeting
Duration	10 minutes

#### Instructions

End the meeting by first asking if anyone has anything else they need to say. Then, review the next steps to make sure every task is clearly understood and has an appropriate owner and due date.

Next, take a moment to thank the group, and for the group to acknowledge each other's contributions.

Finally, ask everyone to quickly review the meeting. If you want feedback, you must ask for it specifically.

If you use Lucid Meetings, you can say:

“There are a lot of ways to run this kind of meeting, and we all want to make sure this is a good use of our time. Before you leave, please quickly rate this meeting and provide some feedback on the evaluation form you'll see once the meeting ends.”

### After the meeting

Send out the meeting record in a follow-up email, which makes sure everyone gets their action items and a full report in their inbox, even if they couldn't attend the meeting.



# TECHNIQUES TO UNBLOCK GROUP DECISION MAKING

Groups facing hard decisions easily get stuck. When the conversation starts to circle or the dialogue becomes unproductive, it's handy to have a few group decision techniques in your back pocket.

## Using the Gradients of Agreement to Structure a Consulting Discussion

In Sam Kaner's [Facilitator's Guide to Participatory Decision Making](#), he describes a way to hear everyone's perspective on a decision and evaluate their commitment to support it. The Gradients of Agreement is an 8-point scale for expressing support.

1. Whole-hearted Endorsement: "I really like it!"
2. Agreement with a Minor Point of Contention: "Not perfect, but it's good enough."
3. Support with Reservations: "I can live with it."
4. Abstain: "This issue does not affect me."
5. More Discussion Needed: "I don't understand the issues well enough yet."
6. Don't Like But Will Support: "It's not great, but I don't want to hold up the group."
7. Serious Disagreement: "I am not on board with this - don't count on me."
8. Veto: "I block this proposal."

Each person tells the decision maker(s) where he or she sits regarding a proposed option along this scale, and explains that rating. For example:

"I'm a 3 on this option. I can live with it, but I'm not wild about including cake with every meal. I'd prefer pie."

Based on what they hear, the decision maker(s) can then decide if the commitment level is “good enough” to proceed, or if they need more time to consider what they’ve learned.

You can also use the Gradients as an explicit way to establish Consensus. In that situation, the group continues to debate the options until everyone rates a 4 or better.

## Breaking a Stalemate Between Two Options

Taught by Leadership Strategies, this technique helps a group break a deadlock between two options.

First, the facilitator asks the group to outline the facts about how they believe each option would work. So, for Option A and then Option B, they list out:

- How would it work? What’s involved in implementing it?
- Who would it involve?
- How long would it take?
- What would you get at the end?
- How much would it cost?



Then the Facilitator asks “Do we have a clear winner?” If not, the group takes another pass, listing for each option the benefits or values of that approach, e.g., faster time to market, less risky, more fun, etc. Again, the facilitator asks if the winner is now clear.

If the group still can’t agree, the group then circles the most important feature of each option and sees if they can build an Option C made up of the best qualities from Options A and B.

More here:

<http://www.leadstrat.com/blog/solving-a-level-2-disagreement-different-values-or-experiences/>

## 3 Techniques to Better Understand a Challenge

1

### The 5 Whys

Used to find the root cause or core value behind the challenge, and make sure the options under consideration address the “real” issue. Start by stating the initial goal—such as “We need to lay off 20 people this quarter. How should we go about it?”—and then ask “Why?” For every answer, continue asking “Why?” until the group feels they understand the root challenge.

More here:

[https://www.mindtools.com/pages/article/newTMC\\_5W.htm](https://www.mindtools.com/pages/article/newTMC_5W.htm)

2

### Challenging Assumptions

Break apart the challenge and discover where assumptions may be limiting your options. Start by writing out the decision goal, then underlining every word that implies an underlying assumption. For example:

We need to lay off 20 people this quarter.

Then, for every underlined word or phrase, list the assumption behind it and discuss possible alternatives. Need or want? Do you have to lay people off, or are there alternatives? 20? Why not 50, or 7? and so on.

More here: [http://creatingminds.org/tools/assumption\\_busting.htm](http://creatingminds.org/tools/assumption_busting.htm)

3

### Sequential Question and Insight Diagram (aka The Squid!)

On a blank wall or in a collaborative mind mapping tool, post the challenge. Invite everyone to add a sticky with a question they have about the challenge, and draw a line from the central topic to each question. If anyone has an answer to a question, they add it on a new sticky and draw a line back to the question they’ve answered. These answers can then spur new questions, which get added and connected like before. The group continues adding questions and answers until they run out of ideas. They can then see if they know enough to proceed, or if there are remaining unanswered questions that need to be addressed first.

More here: <http://gamestorming.com/squid/>

# ADDITIONAL RESOURCES

There are many techniques and approaches to decision making. Our blog post on Making Decisions in Meetings covers the science, theory and practice behind a decision making meeting.

Making Decisions in Meetings

<http://blog.lucidmeetings.com/blog/making-decisions-in-meetings>

The additional resources below will help translate all that theory into practice.



## Related Templates and Blog Posts

The 4 Meeting Agendas that Drive Strategic Execution

<http://blog.lucidmeetings.com/blog/4-meeting-agendas-that-drive-strategic-execution>

Facilitator's Guide to Making Decisions with a Group, by Rick Lent

<http://blog.lucidmeetings.com/hubfs/facilitator-guides/Structures-Decision-Making-Facilitators-Guide.pdf>



## On the Web

Mind Tools Guide to Decision Making Techniques

[https://www.mindtools.com/pages/main/newMN\\_TED.htm](https://www.mindtools.com/pages/main/newMN_TED.htm)

## Decision Support Software

Useful both before and during the meeting to structure the conversation and increase engagement.

- [Pownoodle](#)
- [MeetingSphere](#)
- [Stormz](#)
- [GroupMap](#)



## Books

The Facilitator's Guide to Participatory Decision Making

by Sam Kaner

<https://smile.amazon.com/Facilitators-Participatory-Decision-Making-Jossey-Bass-Management/dp/1118404955>

# ABOUT THE AUTHOR

This template was designed and produced by Lucid Meetings founder **Elise Keith**, with support from the fabulous team at Lucid Meetings.



See more of Elise's work on running effective meetings here:

<https://www.lucidmeetings.com/authors/elise-keith>

Learn more about Lucid Meetings [on our website](#).

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