
Better Outcomes Start Before You Convene¹

Jeff Oltmann

Good facilitation creates leverage. It helps groups focus on what matters most, make better decisions, and move important work forward.

I recently facilitated a series of small-group discussion sessions with about 40 participants. Timelines were tight, with most people available for only 25 minutes at a time. We needed to quickly identify disconnects, get rich information flowing, and keep everyone on time and on topic. In other words, herd the cats without making people feel pushed.

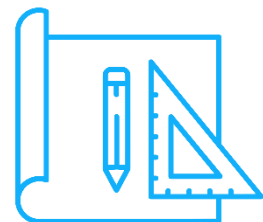
These constraints made it clear that success in the room depended on careful preparation before anyone even showed up. I included several of the facilitation techniques I've written about before, such as consolidation and drawing out quiet participants. Those tools helped, as they often do, but they represent only a small part of the value facilitation provides. Effective facilitation isn't just about deploying tactics in the moment. It's about the choices you make in advance to help a group do its best thinking together.

Here's the way I think about the work of a facilitator—drawing on ideas from the International Institute for Facilitation and Change—and why so much of that work happens before the meeting ever begins.

Before: The Facilitator as Architect

Effective facilitation starts long before anyone enters the room.

- Assess the organizational, political, emotional, and technical context.
- Establish agreement on clear, shared objectives.
- Design the flow of the session to produce the desired outcomes.
- Set up logistics so the group can focus on substance, not distractions.



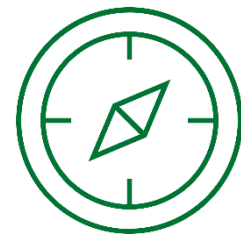
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This is where most of the leverage (and risk) lives. In my experience, thoughtful assessment and design often take more time than the session itself. That investment is what separates a mediocre meeting from one that leads to real decisions, agreement, and action.

During: The Facilitator as Navigator

Once the session begins, the facilitator takes on the role of navigator.

- Clarify roles so participants know how to engage effectively.
- Manage pace and energy.
- Monitor progress toward objectives and adjust course in real time.
- Help the group avoid thrash and churn, ensuring closure and forward progress.
- Handle room setup, tools, and materials unobtrusively, in the background.

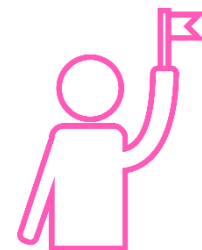


This is active guidance of the process, not passive observation. A session that looks free-flowing is usually the result of careful planning and real-time adjustments that keep the group on a productive path.

Always: The Facilitator as Guide

Some responsibilities never turn off.

- Create trust and psychological safety so all voices can contribute.
- Guide the group's problem-solving process, ensuring decisions are robust and agreed on.
- Inject enthusiasm and energy when it's needed.
- Help participants turn open-ended discussions into actionable next steps.



These quietly shape how people think, speak, and decide together. They determine whether a group does its best work or defaults to its usual patterns.

Flexible Facilitation Is Designed, Not Improvised

None of this happens by accident. Success depends on behind-the-scenes work: careful assessment, thoughtful design, and disciplined follow-up. That's what enables agility and rapid pivots during the session.

Important meetings deserve more than ad-hoc facilitation. As you prepare for your next strategy session, portfolio review, or retrospective, ask yourself who will architect it. Who will help

participants navigate the path and guide them toward action? If that isn't clear, even strong ideas may stall.

If you want to compare notes on applying this approach to your portfolios or projects, I'm happy to share insights from my work.

I teach and consult about highly effective projects, portfolios, and teams. You can contact me at jeff@spspro.com and read more at spspro.com/blog.

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Jeff Oltmann helps organizations accelerate results through strategy deployment and project portfolio management. He consults, teaches, and leads forums for senior PMO leaders. He is principal at Synergy Professional Services (spspro.com) in Portland, Oregon and is on the faculty of the Division of Management at Oregon Health and Science University. He was previously on executive staff at IBM and is the founder of the Portfolio and Project Leaders Forum, a gathering of senior managers who lead project-based organizations (pplforum.org).

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