

Lucid Facilitator's Guide

URGENT PROBLEM SOLVING MEETING

This meeting format helps a team form a short-term plan for responding to an urgent problem.

Use this template when you need to quickly build a common understanding of the problem and devise a coordinated solution that the team can put in action right away.

Best For



Creating a tactical plan for resolving a problem

Non-emergency situations

Small groups with direct responsibility

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INTRODUCTION

This meeting design helps a team find short-term tactical solutions to an urgent problem. The conversation includes time to gain a shared understanding of the problem, but focuses primarily on listing and evaluating possible solutions and the creation of a short-term action plan.

Use this meeting to **answer the question:**

“What are we going to do about this problem now?”

This design is NOT intended for use during an emergency, nor does it focus on finding the root cause of a problem.

Because the end-result of this meeting is a short-term plan, it should always be **followed by another meeting dedicated to reviewing progress on the solution.**

Once a problem stabilizes and the urgency level decreases, we recommend scheduling a retrospective or root cause analysis meeting. These conversations are designed to help teams learn how the problem arose, then find ways to prevent similar problems in the future.



TIP
Schedule a retrospective after the situation stabilizes.

THE AGENDA

GOAL

To create an action plan for addressing this problem.

DURATION

Depends on the complexity of the problem.

1

Situation Report

Review data about the problem.

2

Solution Goals & Constraints

Goal solution and time / resource constraints.

3

Brainstorm Solutions

List options and select an approach.

4

Define Action Plan

Set who does what by when.

5

Confirm Next Steps

Confirm plans and set time for meeting to check progress.

PREPARING FOR THIS MEETING

Schedule the meeting **at least 1 hour but no more than 1 day in advance**.

Keep the group small. Invite only those people directly responsible or impacted by the problem.

Assign Roles

This meeting can be intense and exhausting. You'll cover a lot of information and move from information gathering to brainstorming to planning, with each demanding a different kind of collaboration.

In our team, we **have different team members facilitate each agenda item**, based on our strengths and our relationship to the project. If that doesn't make sense for your team, **identify one person who can focus primarily on facilitating** to keep the process running.

You need at least one person to **take responsibility for capturing notes and documenting the action plan**. These will need to be sent to anyone who needs to be informed afterwards.

Make sure you have a way for everyone to write and share ideas during the meeting. This is built-in to Lucid Meetings. If you don't have a Lucid account, use sticky notes and a white board when meeting face-to-face, or set up an online collaborative editing document for remote participants.

Prepare the Situation Report

Ask the people most familiar with the problem to **prepare the situation report**. Ask them to keep it short and factual; it does not need to be detailed or fancy.

The report should answer questions like:

- What happened?
- What makes this problem urgent?
- What has been tried?
- What have we learned?
- What are the tricky obstacles to solving this problem?

These questions may or may not be the right ones for your situation, but you may find them useful for prompting the team's thinking.

Add the report to the agenda, and **distribute it to everyone invited before the meeting**.



LEADING THE MEETING

1

Situation Report

Start by thanking the team for coming together on short notice. Then, quickly **set expectations**.

For example, you might say:

“ **The goal of this meeting is to create a short-term plan for addressing this problem.** We’ll start by making sure everyone understands the situation, and then spend most of our time talking about our options and creating the plan.

This is not the time to address why this problem arose or to assign blame. We can look at the cause and how to prevent these kinds of problems later.

Our job is to figure out what we’re going to do about this problem right now, and how we can most quickly and effectively improve the situation.”

Next, **get a shared understanding of the immediate problem.** You all need to know enough about the situation so you can shape an effective response.

If the group received the situation report in advance, confirm that everyone read it, then dive right into questions. If there wasn’t time to review the report before the meeting, take a few minutes and let everyone read the report for themselves.

Ask and answer questions until everyone agrees that they understand the situation.

When you’re ready, **click “Next >”** to start defining the solution.

2

Solution Goals & Constraints

In the next agenda item, the group will brainstorm possible solutions.

Before doing so, take a few minutes to clarify as a team:

What does our solution need to achieve, at a minimum?

What do we have to work with?

What limits on our resources, time, and other constraints must our solution work within?

Simply ask these questions and record the replies.

Clarifying the solution goals and constraints before brainstorming will help focus the team's ideas. Usually when you brainstorm, you want to encourage as many ideas as possible, and not worry about whether an idea is practical in the short-term. During an urgent problem solving meeting, however, spending time on too many wild ideas, or ideas that fail to achieve the goal, is a time-consuming distraction.

This step will improve the quality of the solution ideas generated during the brainstorm.

When the team feels they have an adequate understanding of the constraints, **click “Next >”** to start brainstorming solutions.

3

Brainstorm Solutions

Start with a few minutes of silent individual brainstorming, which gives everyone a chance to incorporate all they've learned into their thinking. Each person then writes their ideas separately.

If you are using sticky notes and a white board, give each person a stack of notes to write ideas on. Ask them to write one idea per note.

If you are using Lucid Meetings, ask each person to **"Add a Note"** with all their ideas, but not to save the note until everyone is ready.

When ready, **have everyone post their ideas at once.**

In Lucid, simply have everyone **"Save"** their note to have it appear to the group. Alternatively, have everyone place all their sticky notes on the board at once.

As a team, **look at all the ideas and discuss them.** You will naturally see similar themes and ideas that may be combined to form a new option. Work together to **identify the best short-term solution** based on these ideas and the discussion that follows.

When you have selected a solution to try, **click "Next >"** to begin work on the action plan.



4

Define an Action Plan

It's time to get specific. Write down **the specific actions required to implement the selected solution.**

For each task, **set a due date and assign a single responsible person.** This person will be in charge of making sure the action happens and reporting back to the group on the result.

Using Lucid, you'll capture these as **"Action Items"** to make sure each person sees their assignments clearly in the follow-up.

Aim for a plan that is "good enough"; you do not need to go into exhaustive detail in this meeting. Capture enough specifics to ensure those involved in implementing the solution can coordinate, and leave the rest of the details to those doing the work.

When the plan is ready, **click "Next >"** to finish up.

5

Confirm Next Steps

Finally, review everything.

- Does your plan address the immediate problem?
- Do you know exactly what will happen next?
- Is everyone clear and committed to what they need to do?

Then, **set a time to meet again and check progress.**

When done, click **"End Meeting"**.



After the meeting, send the follow-up email to everyone and schedule the next call.

COMMON PROBLEMS & HOW TO SOLVE THEM

Problem	Try
People start looking for root cause and assigning blame	<ul style="list-style-type: none">• Remind everyone that how the problem happened doesn't matter right now - how to fix it does.• Start a parking lot where people can capture ideas about root cause to be reviewed later. Whenever a root-cause discussion starts, stop the discussion, add the idea to the parking lot, and move on.
The group can't agree on a solution	<ul style="list-style-type: none">• Determine in advance the decision making process you'll use if a consensus approach fails. In this situation, the "problem owner" usually makes the decision if the team cannot agree.

RELATED RESOURCES



About this Template

How to Run an Urgent Problem Solving Meeting
<http://blog.lucidmeetings.com/how-to-run-an-urgent-problem-solving-meeting>

Related Templates

Lucid Template Gallery
<http://www.lucidmeetings.com/templates>



Useful Articles

Westside Toastmasters
“Leader Role in Problem Solving Discussions”
http://westsidet Toastmasters.com/resources/meeting_management/ch07lev1sec4.html

MeetingSift
“How to Run Problem Solving Meetings”
<http://meetingsift.com/problem-solving-meetings/>

ABOUT THE AUTHOR

This template was designed and produced by the team at Lucid Meetings.



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