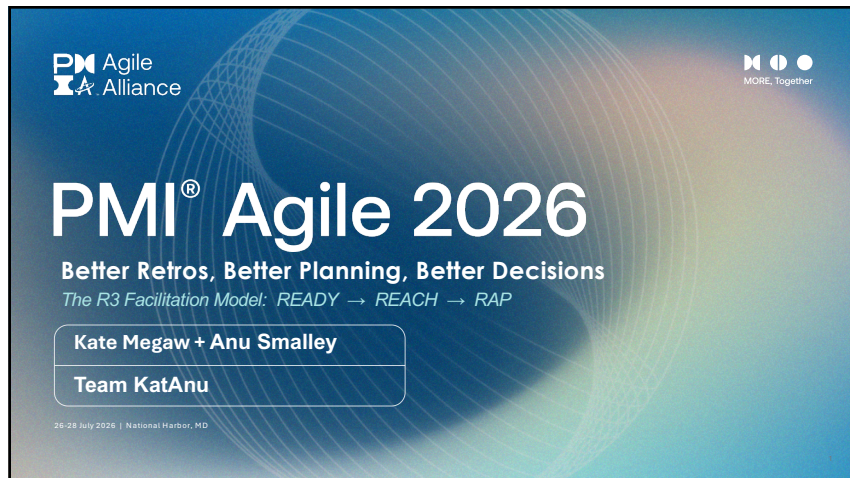
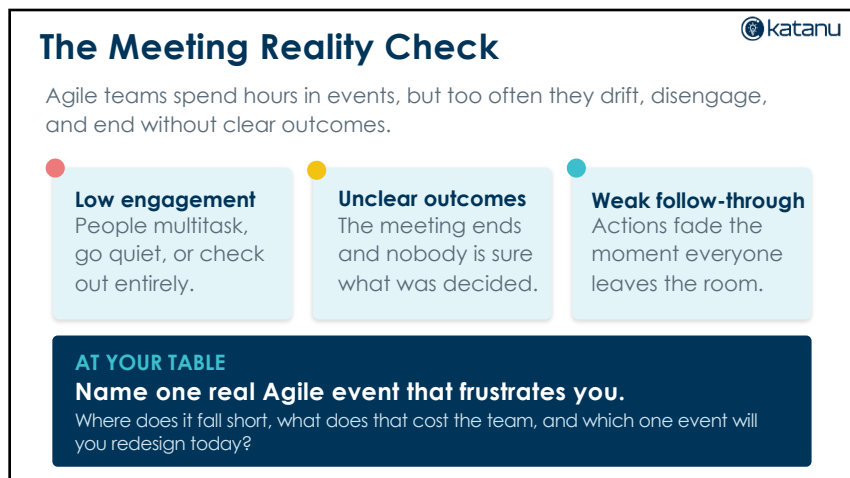




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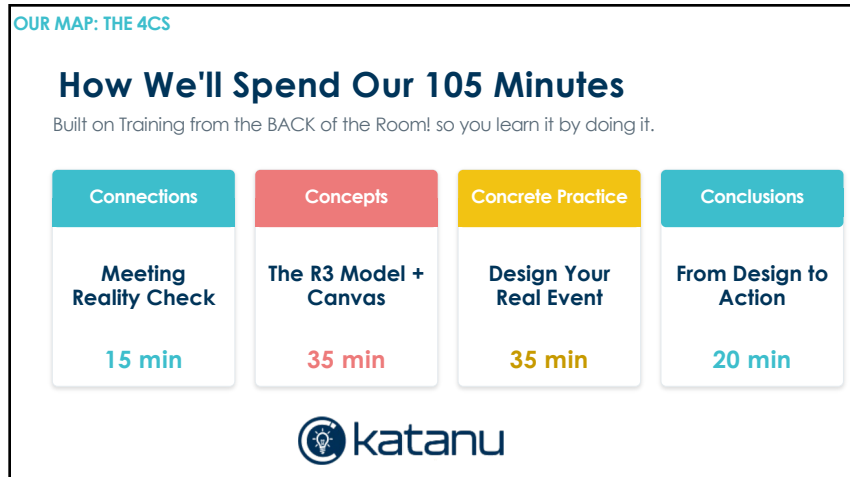
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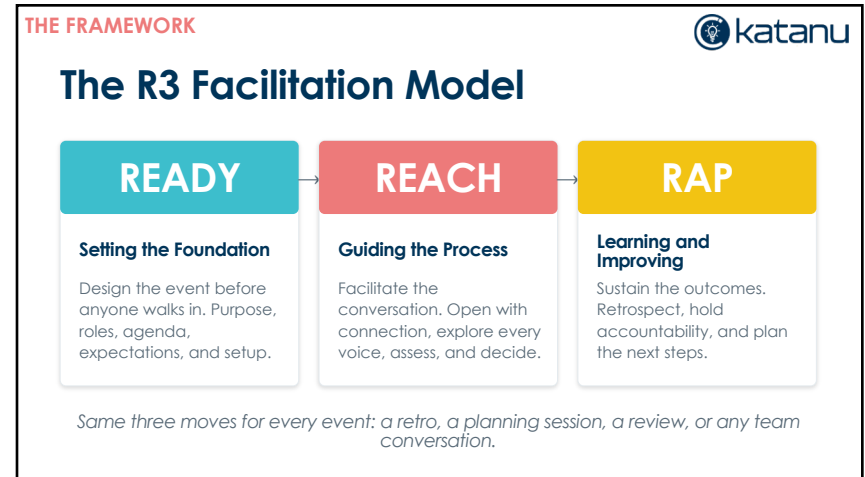
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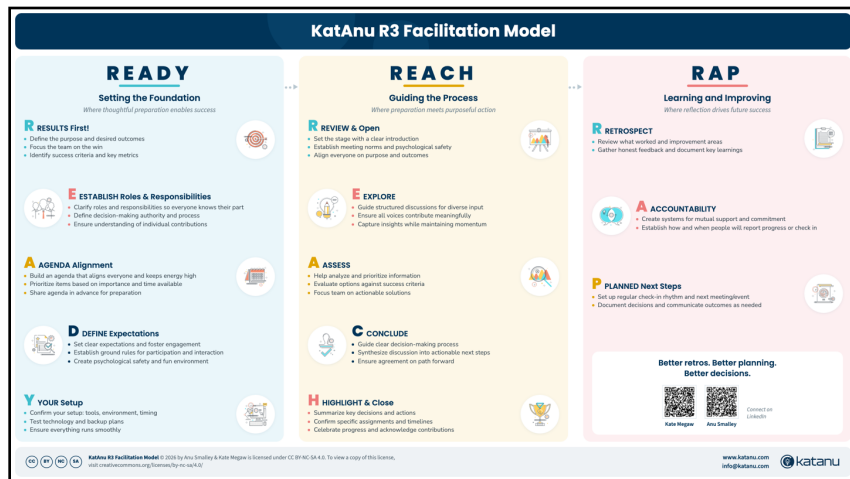
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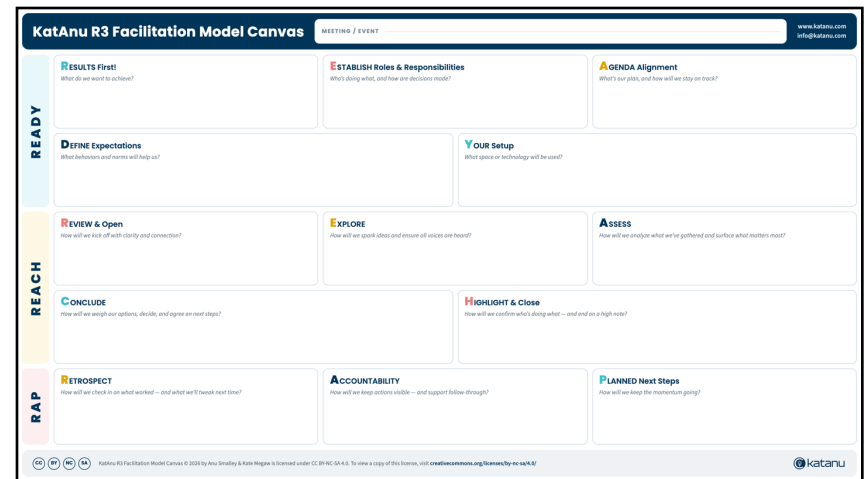
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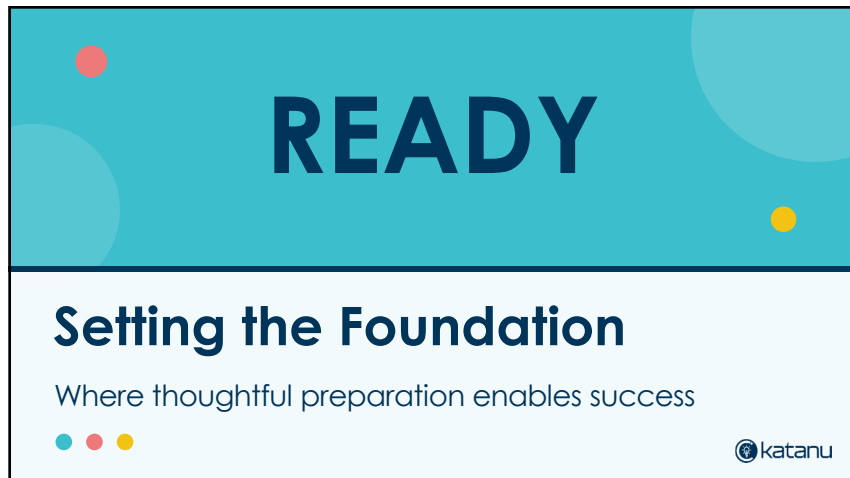
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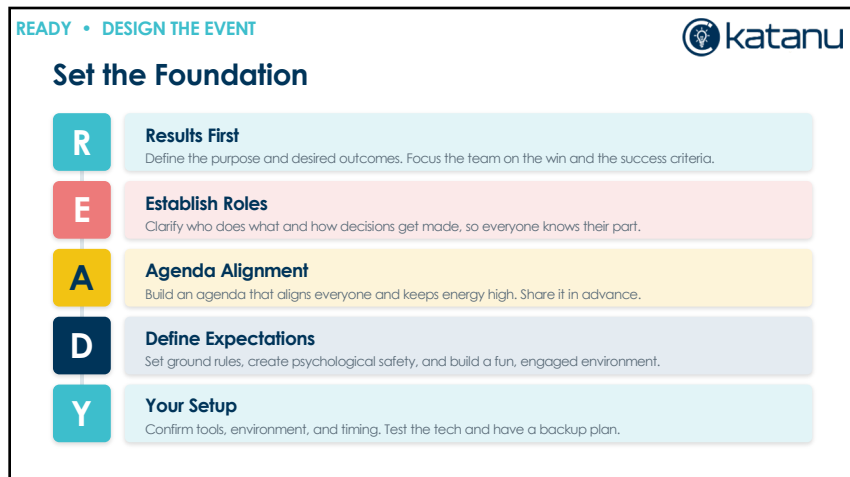


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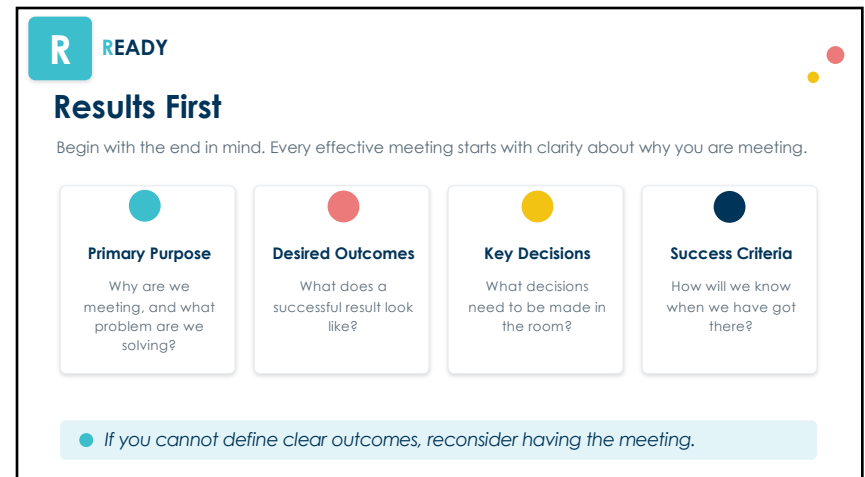


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11



12

Table Talk Turn to the people around you and compare notes. There are no wrong answers - just an honest, shared view!

Where You Are
What does this look like today? Do you do this already?

The Obstacle
What gets in the way most?

One Change
What could you try next time?

The Impact
What would be the impact of this change?

13

E READY

Establish Roles & Responsibilities

Get the right people in the room and make each role clear.

- Decision Makers**
Have the authority to make final calls. Without them, reschedule.
- Subject Matter Experts**
Bring the knowledge and insight that inform decisions.
- Facilitator**
Guides the process, keeps focus, and ensures all voices are heard.
- Note-taker**
Captures key discussions, decisions, and action items.

● Separate required from optional participants. If a required person cannot attend, consider rescheduling.

14

Establish Roles: Group Dynamics & Authority

Understanding dynamics and authority helps you plan for effective facilitation.

- Consider Team Dynamics**
 - Who needs to buy in for decisions to move forward?
 - Who tends to dominate, and who rarely speaks up?
 - Are there pre-existing conflicts to manage?
- Authority Check**
 - What can this group decide independently?
 - Which decisions require higher approval?
 - Are the decision boundaries clearly understood?

● Use RACI (Responsible, Accountable, Consulted, Informed) to clarify roles for key decisions.

15

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What gets in the way most?

One Change
What could you try next time?

The Impact
What would be the impact of this change?

16

A READY

Agenda Alignment

Your agenda is the roadmap to your outcomes. Every item should connect to a desired result.

- 1 Create a Structured Plan**
Organize topics in a logical flow that builds toward decisions.
- 2 Connect to Outcomes**
Every agenda item links directly to your meeting objectives.
- 3 Keep It Visible**
Display the agenda throughout to maintain focus and track progress.

● Challenge each item: how does this topic help us achieve our stated outcomes?

17

Tips for a Great Agenda

A strong agenda turns a meeting into a working session..... Build every one with these four moves.

- Outcomes, Not Topics**
State each item as a decision or result, not a vague topic.
- Tag Every Item**
Label each Decide, Discuss, or Inform so people know how to engage.
- Timebox & Assign**
Give each item a time limit and an owner. Lead with what matters.
- Share It Early**
Share the agenda and pre-reads early. Close with clear next steps.

● Test each item: if it does not drive a decision or shared understanding, cut it or send an email.

18

Sprint Retrospective Agenda - 60 Minutes

Five phases that move a team from raw data to committed action. Flex the timeboxes to fit your sprint.

Set the Stage	Gather Data	Generate Insights	Decide What to Do	Close the Retro
Welcome, restate the sprint goal, and read the room.	Surface the facts, events, and how it felt.	Find patterns and root causes together.	Pick one or two improvements to commit to.	Confirm actions and owners, then appreciate.
5 min	15 min	15 min	15 min	10 min

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"Agile Retrospectives: Making Good Teams Great" Diana Larsen & Esther Derby

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Table Talk Turn to the people around you and compare notes. There are no wrong answers - just an honest, shared view!

- Where You Are**
What does this look like today? Do you do this already?
- The Obstacle**
What gets in the way most?
- One Change**
What could you try next time?
- The Impact**
What would be the impact of this change?

20

D READY

Define Expectations

Set clear participation guidelines and create psychological safety before you begin.

Participation Guidelines

Full attention, no multitasking, and active participation expected.

Psychological Safety

Make it safe to speak up, disagree, and contribute.

Engagement Norms

Cameras on for remote, and one conversation at a time.

Tools in Play

Name the whiteboard, breakout rooms, or docs you will use.

● Send expectations in advance so participants arrive ready to engage.

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Define Expectations: Working Agreements

Working agreements build clear expectations and a sense of psychological safety.

Respect the Conversation

One voice at a time. No interrupting. Listen actively.

Time Consciousness

Start and end on time. Respect the agenda.

Full Engagement

Be present. No side conversations or multitasking.

Balanced Participation

Make space for everyone. Step up, step back.

Respectful Disagreement

Challenge ideas, not people.

● Co-create these with your team to increase buy-in and accountability.

22

Table Talk Turn to the people around you and compare notes. There are no wrong answers - just an honest, shared view!

Where You Are

What does this look like today? Do you do this already?

The Obstacle

What gets in the way most?

One Change

What could you try next time?

The Impact

What would be the impact of this change?

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Y READY

Your Setup

Manage logistics and environment so the meeting runs smoothly.

Timing Tools

Use visible timers to keep discussion on track.

Collaboration Tools

Set up digital whiteboards, shared docs, or spaces in advance.

Visual Management

Keep the agenda, agreements, and key info visible to all.

Technical Checks

Test all technology before you start to avoid delays.

● Build a facilitator checklist for your regular meetings to stay consistent.

24

Table Talk Turn to the people around you and compare notes. There are no wrong answers - just an honest, shared view!

Where You Are
What does this look like today? Do you do this already?

The Obstacle
What gets in the way most?

One Change
What could you try next time?

The Impact
What would be the impact of this change?



25

TIME TO WORK

Design Your Event - YOUR CANVAS

READY
Fill in this block for the real event you named earlier. Work solo first, then compare with a partner.

- Results First** - What do we want to achieve, and what does a win look like?
- Establish Roles** - Who is doing what, and how are decisions made?
- Agenda Alignment** - What is our plan, and how will we keep it visible?
- Define Expectations** - What norms and ground rules will help us engage?
- Your Setup** - What space, tools, and tech checks do we need?

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REACH

Guiding the Process

Where preparation meets purposeful action



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KatAnu R3 Facilitation Model · Session Notes REACH 1/4

Guiding the Process
Where preparation meets purposeful action

	MY NOTES — from the session	OUR TABLE'S IDEAS	OTHER IDEAS
REVIEW & Open <i>How will we kick off with clarity and connection?</i>			
EXPLORE <i>How will we spark ideas and ensure all voices are heard?</i>			
ASSESS <i>How will we analyze what we've gathered and surface what matters most?</i>			
CONCLUDE <i>How will we weigh our options, decide, and agree on next steps?</i>			
HIGHLIGHT & Close <i>How will we confirm which doing what — and end on a high note?</i>			

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REACH • FACILITATE THE CONVERSATION



Guide the Process

- R Review & Open**
Kick off with clarity and connection. Set norms, purpose, and psychological safety.
- E Explore**
Spark ideas and make sure every voice is heard while you keep momentum.
- A Assess**
Analyze information thoroughly. Evaluate options. Focus on actionable solutions.
- C Conclude**
Guide decision-making. Assign clear ownership. Ensure agreement on next steps.
- H Highlight & Close**
Confirm who is doing what, celebrate progress, and end on a high note.

29

R REACH

Review & Open

Always formally open the meeting. Never just drift into discussion.

- Set the Stage**
Open with a welcome and a quick activity to build energy.
- Review Purpose**
State the objectives and expected outcomes clearly.
- Confirm Agenda**
Walk through items and timing so everyone is aligned.

A strong opening sets the tone for focused, productive collaboration.

30

Review & Open: Setting the Stage



- Elements of an Effective Opening**
 - Welcome participants personally
 - Introduce meeting purpose and desired outcomes
 - Review agenda and timing
 - Confirm roles (facilitator, note-taker, etc.)
 - Establish or remind of working agreements
 - Create engagement with an opening activity
- Opening Activity Examples**

Build energy and engagement with a brief opening activity:

 - One word to describe your current state
 - What's one win from the past week?
 - What's one thing you hope to get from today?
 - Share a quick metaphor for the current project state

31

Table Talk Turn to the people around you and share ideas!

- Meeting Kick off**
What does this look like for you today?
- Ideas for opening**
What are some ideas for opening a meeting / event?
- The Impact**
What would be the impact of using one of these?

32

E REACH

Explore (Divergent Thinking)

Generate many ideas without judgment. Diverse viewpoints lead to breakthroughs.

**Guide Discussions**

Structure topics and timebox to keep momentum.

**Amplify All Voices**

Use round-robin so quiet voices contribute and no one dominates.

**Capture Insights**

Document ideas visibly and track emerging themes.

● The facilitator is the process guardian: enable ideation while advancing toward the goal.

33

Explore: Divergent Techniques

Pick a technique based on your group and your desired outcome.

**Classic Brainstorming**

Quantity over quality. No criticism during ideation.

**Silent Sticky Notes**

Everyone writes at once, then shares. Balances participation.

**Round Robin**

Each person shares one idea in turn. No one is skipped.

**Reverse Thinking**

Ask how we could make it worse, then reverse for solutions.

● Capture every idea visibly so people build on each other's thinking.

34

**Table Talk**

Turn to the people around you and share ideas!

**Brainstorming Ideas**

What does this look like for you today?

**Ideas**

What are some ideas for encouraging active participation?

**The Impact**

What would be the impact of full engagement?

35

A REACH

Assess (Emergent Thinking)

Analyze, organize, and evaluate the ideas you generated. Build shared understanding before deciding.

**Evaluate Objectively**

Judge each idea on its merits, not its source.

**Foster Understanding**

Help the group grasp each other's views first.

**Active Listening**

Reflect back what you hear so people feel heard.

**Powerful Questions**

Ask open questions that surface deeper thinking.

● Your goal: create mutual understanding among all participants before decisions.

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Facilitative Listening Skills

Seven skills that keep every voice in the room while the group thinks together.

- Stacking**
Line up who speaks next so voices are heard in turn.
- Intentional Silence**
Let a pause give people room to think before responding.
- Paraphrasing**
Restate a point to confirm the group understood it.
- Helping People Listen to Each Other**
Link comments so the group builds on each other's views.
- Listening for the Logic**
Track the reasoning behind a comment, not just the words.
- Making Space for a Quiet Person**
Open a door for those who haven't spoken up yet.
- Drawing People Out**
Invite someone to say more and clarify their thinking.

The goal: let the best thinking emerge before the group moves to a decision.

Source: Facilitator's Guide to Participatory Decision-Making by Sam Kaner

37

Table Talk

Turn to the people around you and share ideas!

- Assessing all Ideas**
What does this look like for you today?
- Techniques**
What are some techniques you could use to analyze, organize, and evaluate the ideas generated?

38

REACH

Conclude (Convergent Thinking)

Turn discussion into decisions and clear accountability.

- Guide Decision-Making**
Pick a method: voting, consensus, or leader decision. Document the reasoning.
- Assign Ownership**
Specify deliverables and confirm capacity before assigning.
- Document Agreements**
Capture decisions in a shared, reference-friendly location.

Be explicit about how decisions will be made before you start deciding.

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Conclude (Convergent Thinking) Techniques

Turn discussion into decisions and clear accountability.

- Affinity Mapping**
Group similar ideas to surface themes and patterns.
- Dot Voting**
Limited votes per person quickly reveal group priorities.
- Pros and Cons**
Weigh the strengths and weaknesses of each option.
- Impact / Effort**
Plot options by impact and effort to spot the quick wins.

40

Table Talk Turn to the people around you and share ideas!

Conclude
What does this look like for you today?

Techniques
What are some additional techniques you could use for convergent thinking (Concluding)

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H REACH

Highlight & Close
Capture the value: summarize, confirm actions, and set next steps. End on a high note.

Summarize
Sum up the main decisions and insights. Build common understanding.

Action Items
List clearly who does what by when.

Plan Follow-Up
Set check-ins and confirm the next meeting.

Closing Ideas: one word on our progress, one takeaway, or confidence from 1 to 10.

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The 3 Ws of Action Planning
Transform decisions into commitments with the Three Ws.

1 WHAT
Define the exact action. Avoid vague commitments like 'look into it.'

2 WHO
Assign one accountable owner. When everyone owns it, no one does.

3 WHEN
Set a specific date and time. Avoid 'soon' or 'next week.'

Or use SMART: Specific, Measurable, Achievable, Relevant, Time-bound.

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Highlight & Close: Ending with Clarity

Elements of an Effective Close

- Revisit the agenda and confirm completion
- Summarize the key decisions made
- Review all action items with the 3 W's
- Confirm next meeting date/time if needed
- Thank participants for their contributions
- End with a brief closing activity

Closing Activity Examples
End on a positive, forward-looking note:

- One word for how you feel about our progress
- One thing you're taking away from today
- One thing you look forward to implementing
- Rate your confidence in our plan (1-10)

A formal close signals respect for participants' time and reinforces the commitments made.

44

Table Talk Turn to the people around you and share ideas!

Meeting Closing
What does this look like for you today?

Ideas for Closing
What are some ideas for closing a meeting / event?

The Impact
What would be the impact of using one of these?

45

TIME TO WORK

Facilitate Your Event – YOUR CANVAS

REACH
Fill in this block for the real event you named earlier. Work solo first, then compare with a partner.

- Review & Open** - How will we kick off with clarity and connection?
- Explore** - How will we spark ideas and make sure every voice is heard?
- Assess** - How will we sort ideas and decide what matters most?
- Conclude** - How will we agree on decisions and assign clear ownership?
- Highlight & Close** - How will we confirm actions and end on a high note?

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RAP

Learning and Improving
Where reflection drives future success

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KatAnu R3 Facilitation Model · Session Notes RAP 1/4

Learning and Improving
Where reflection drives future success

	MY NOTES — from the session	OUR TABLE'S IDEAS	OTHER IDEAS
R ETROSPECT <i>How will we check in on what worked — and what we'll tweak next time?</i>			
A CCOUNTABILITY <i>How will we keep actions visible — and support follow-through?</i>			
P LANNED Next Steps <i>How will we keep the momentum going?</i>			

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RAP • SUSTAIN THE OUTCOMES 

Learn and Improve

R

A

P

Retrospect
Review what worked and what to tweak. Gather honest feedback and capture key learnings.

Accountability
Keep actions visible. Create systems for mutual support and follow-through.

Planned Next Steps
Set a check-in rhythm and the next event. Document decisions and communicate outcomes.

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R RAP 

Retrospect

Reflection drives future success through continuous improvement.

What Went Well
Name the wins that are worth repeating.

What Could Improve
Be honest about what fell short.

What We Will Change
Choose one thing to do differently next time.

● Collect feedback from participants and document key learnings for future meetings.

50

RETURN ON TIME INVESTED – FIST OF FIVE 

Was this worth your time? Hold up the number of fingers that matches how you feel.








● **1 Definitely not.** A total waste of my time.

● **2 Not really.** Useful, but not worth all the time.

● **3 Somewhat.** I gained enough to justify the time.

● **4 Mostly.** I gained more value than the time spent.

● **5 Absolutely.** A lot of value — well worth my time.

Source: teamretro.com/return-on-time-invested

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A RAP 

Accountability

The facilitator is not responsible for all action items. Build shared accountability.

Clear Assignment
Every action has one owner, defined with the Three Ws.

Mutual Accountability
Agree how attendees will hold each other accountable.

Track Progress
Use tools and regular check-ins to keep momentum.

● Create a system for follow-up that does not rely on the facilitator chasing.

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P
RAP

Planned Next Steps

Keep the momentum going after everyone leaves the room.

Schedule the Next Check-In

Confirm date, time, and purpose for the next touchpoint.

Establish a Rhythm

Agree a recurring cadence: weekly, biweekly, or monthly.

Document Decisions

Capture agreements and owners in a shared tracker or board.

Communicate Outcomes

Share decisions and next steps with all stakeholders.

● *Alignment continues between meetings, not just during them.*

53

Sustain Your Outcomes – YOUR CANVAS

RAP

Fill in this block for the real event you named earlier. Work solo first, then compare with a partner.

- Retrospect:** How will we assess what worked and what we will tweak next time?
- Accountability** - How will we keep actions visible and support follow-through?
- Planned Next Steps** - How will we maintain momentum after we leave?

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Closing Reflection: Take It Back to Your Team

You've worked through **READY** → **REACH** → **RAP**.
Before you go, capture what matters most.

Your Biggest Takeaway

The one insight or aha moment you want to keep.

A Question to Explore

Something you're still curious about or want to ask.

Your First Move

One idea you'll try with your team this week.

Superpower & Growth Edge

What you already do well - and the one thing you'll build next.

A strong close turns insight into action — Let's make your next event worth everyone's time!

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KatAnu R3 Facilitation Model · Session Notes
GENERAL NOTES 1/4

Key takeaways

Questions I want to ask

Ideas to try with my teams

Aha moments & quotes

My facilitation takeaway
What I already bring — and the one thing I'll build next

My facilitation superpower what I already do well
My growth edge the one thing I'll build

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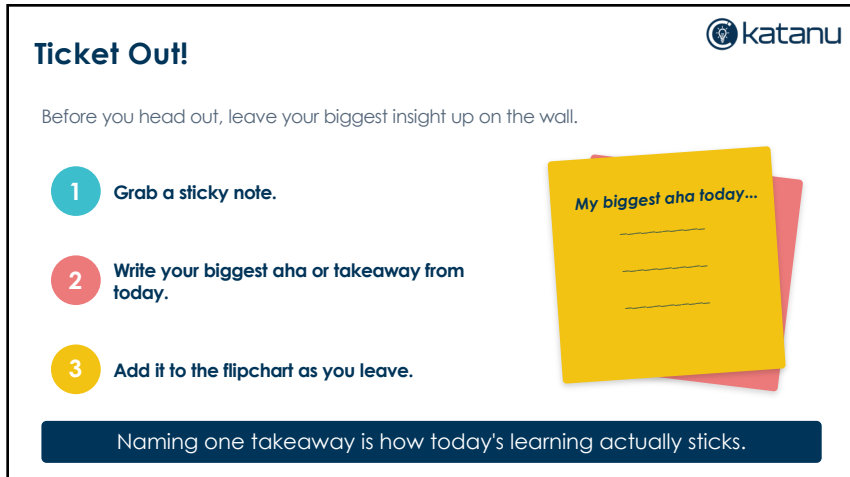
Ticket Out!

Before you head out, leave your biggest insight up on the wall.

- 1 Grab a sticky note.
- 2 Write your biggest aha or takeaway from today.
- 3 Add it to the flipchart as you leave.

My biggest aha today...

Naming one takeaway is how today's learning actually sticks.



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Better Retros. Better Planning. Better Decisions.

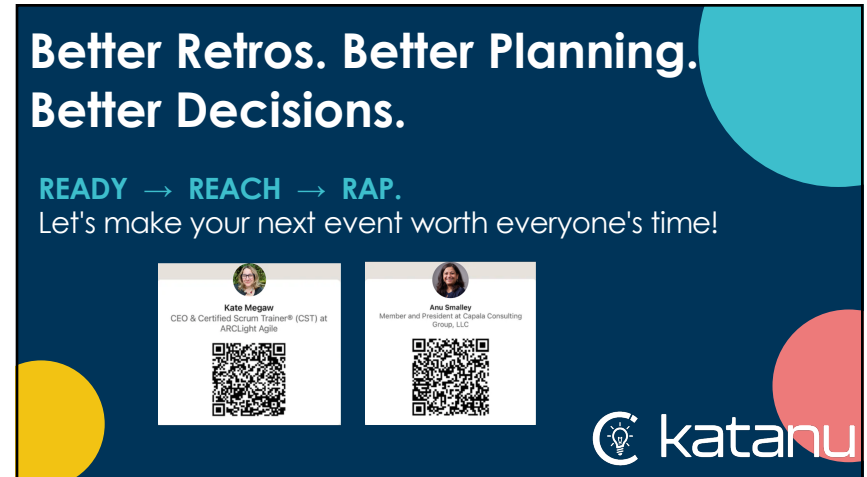
READY → REACH → RAP.
Let's make your next event worth everyone's time!



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CEO & Certified Scrum Trainer® (CST) at
ARCLight Agile



Anu Smalley
Member and President at Capella Consulting
Group, LLC



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