

Facilitation basics

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sequence

Goal

- Empower everyone at Sequence to facilitate:
 - Be more effective in structured discussions
 - Help groups generate and prioritize information
 - Achieve consensus and drive decision making in challenging situations
 - Lead office, team, and client meetings and workshops

Goals for Sequence

- Use these skills all the time!
 - Internal meetings (for projects)
 - Client meetings
 - Design presentations and reviews
 - Pitches
 - Client workshops
 - Brown-bag lunches
- Be goal-directed and encourage others to do the same
- Jump in!!!

Ground rules for today

- Be an active listener (no interruptions, no side conversations)
- Stay engaged (no cell phones, no laptops)
- Raise your hand

Summary

- Facilitation is the process of *leading* a group of people in a *goal-oriented discussion*
- Facilitation is a set of learned skills and knowledge that requires concerted practice
 - Listen
 - Question
 - Direct

Agenda

- Introduction and Goals
- What is facilitation
- The facilitator
- Listening
- Questioning
- Directing
- Summary

What is facilitation?

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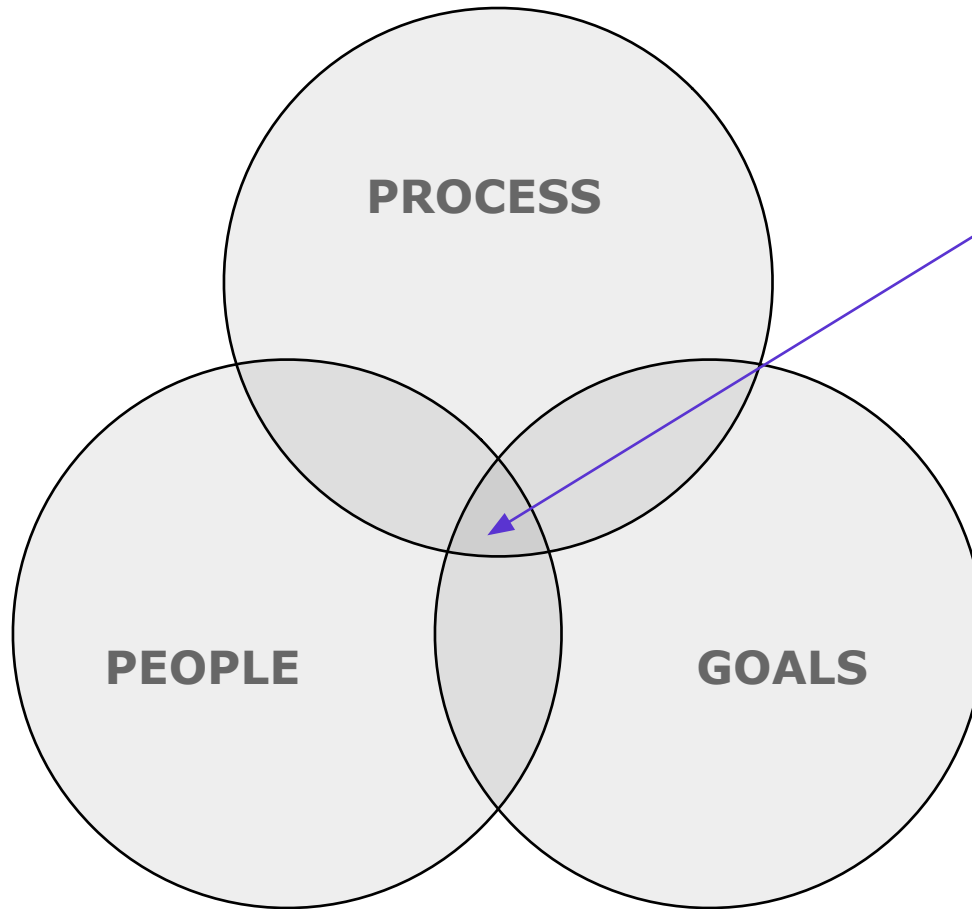


What is facilitation?

The process of leading a group of people in a goal-oriented discussion.

- *Process:* Facilitation involves a series of activities
- *Group of people:* Facilitation involves managing the challenges of group human dynamics
- *Goal-oriented:* Facilitation is always aimed at achieving a goal

What is facilitation?



Successful facilitators use processes to achieve goals, balanced by the ability to understand and manage groups of people with competing needs, desires and opinions.

The Facilitator

Who can facilitate?

- ANYONE!!!
- Facilitation is a set of skills and knowledge that can be learned
- Being good at facilitation requires only two things:
 1. Learn the basics
 2. Practice, practice, practice

The facilitator

- Leader of the goal-oriented discussion



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Facilitator roles and responsibilities

- Prepare agenda, PODs, and activities
- Restructure activities in real-time (if necessary)
- Manage time
- Ensure high-quality and applicable content

Facilitator roles and responsibilities

- Manage participation, energy, and group dynamics
- Listen actively
- Make sure information is captured in a comprehensive and organized manner
- Work with (and lead) a team to be successful
- Avoid the "illusion of shared understanding"



The essence of a facilitator: LiQuiD

- **L**isten, **L**ook and **L**earn
- **Q**uestion
- **D**irect

Listening

Listen, Look and Learn

- Listening is THE most important job of the facilitator
- It creates *awareness*, which can be translated into *action*
- Separate what is said from what is meant
- Understand who is speaking and their orientation

Listen, Look and Learn

- Listening will help pull related ideas together (synthesis)
- It also helps pull them apart to understand (deconstruct)
- Know when to shut up (i.e., most of the time)
- Pay exquisite attention to everyone:
 - Who is talking, who wants to, who isn't

Questioning

Questions (Part I)

- Questions are an essential tool used to:
 - Enhance understanding and clarify
 - Generate information
 - Expose issues
 - Deflect attention away from yourself
 - Engage people
 - Lead to decisions
- The type of question determines the type of answer
- Be careful what you ask for...

Questions (Part II) – Asking

- Open-ended: A question without parameters to the response, which gives the responder lots of room.

"What do you think are the greatest challenges facing this project?"

- Closed-ended: A question with strict parameters in the response, which offers little option for further discussion.

"What time is it?"

Questions (Part III) – Responding (as facilitator)

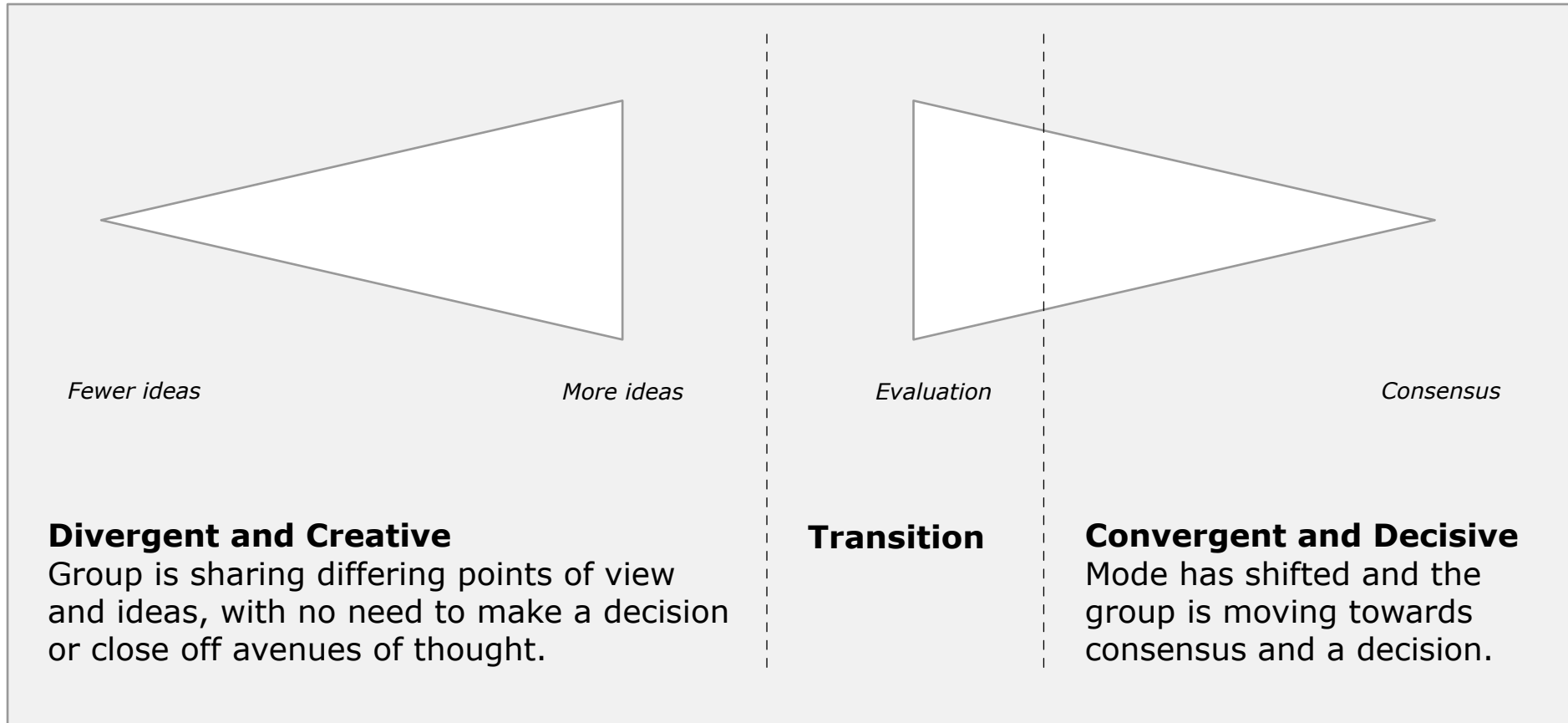
- Answer
- Parrot (restate in same words)
- Paraphrase (restate in different words, for clarity)
- Boomerang (to individual or group)
- Probe (Who, What, When, Why, Where)
 - Be careful with *Why*; it can make people feel defensive

Directing

Direct

- Lead and shape the discussion (from beginning to end)
- Direction can take many forms
 - Plan (direction before the fact)
 - Manage time
 - Invite and control participation and dynamics
 - Keeping everyone in the same discussion mode
 - Stay focused on objectives

Direct: Discussion modes



Start of discussion



End of discussion

Physical factors in facilitation

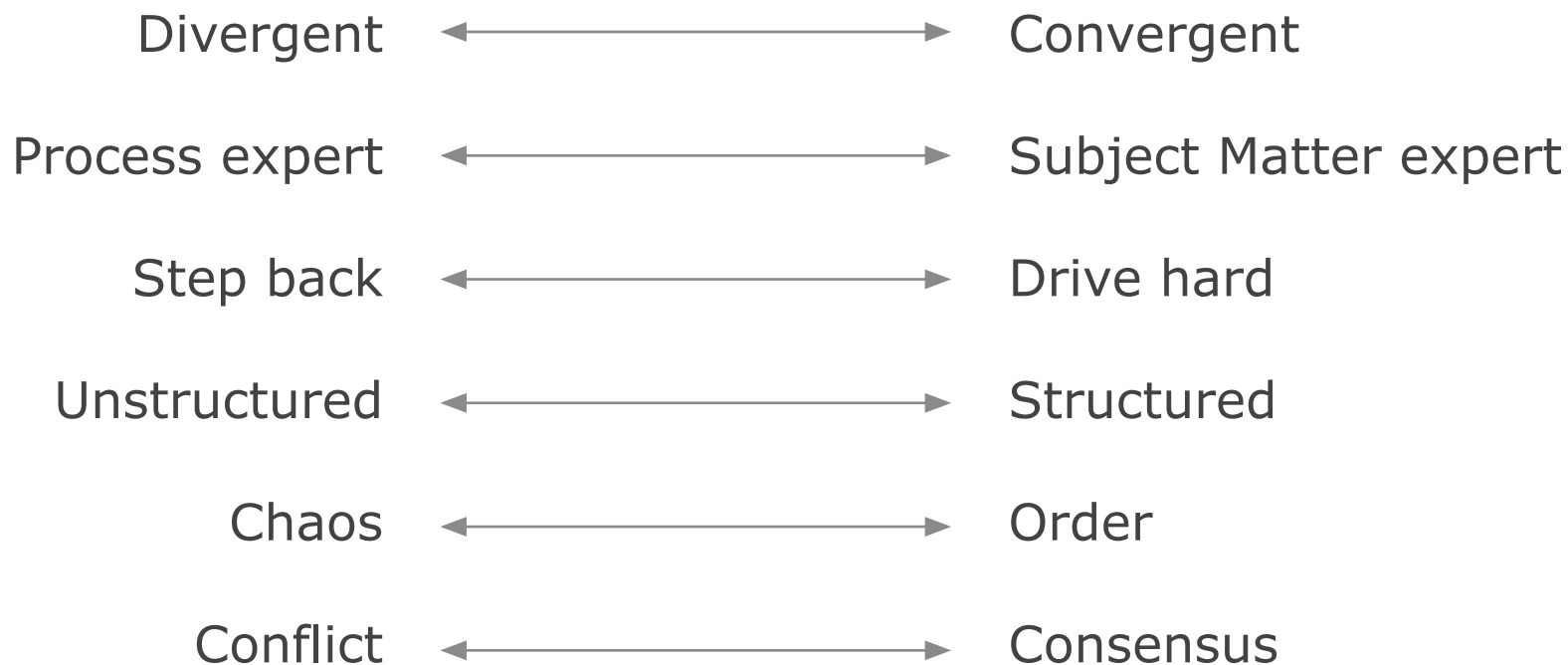
- Eye contact
- Physical engagement and proximity
- Physical acknowledgment
- Position relative to whiteboards or projection
- Orientation of body when speaking
- Physical gestures, actions and movement

Facilitation techniques

- Reinforce agreements
- Identify disagreements (when appropriate!)
- Make a proposal
- Accept, legitimize, deal with, or defer
- Boomerang

Facilitation techniques (cont'd)

- Many different styles and approaches to facilitation are possible, depending on circumstances



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