Slide 1

Leadership Strategies
Level up.

atd CORE4
NEW ORLEANS
OCT 24–25, 2022

SESSION:
Secrets of Facilitation

SPEAKER:
Michael Wilkinson, CMF

Slides and other free resources available at
www.leadstrat.com/virtual-booth

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Slide 2

Session Objectives

Leadership Strategies

As a result of this session, you will be able to…
- Use key facilitation strategies to guide groups, improve group sessions, and gain higher levels of buy-in and commitment to action.

We will achieve this objective by…
- Outlining a comprehensive approach for facilitating groups
- Providing eight techniques you can use immediately
- Providing next steps for those who want to learn more

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Slide 3

Who is Leadership Strategies?

Leadership Strategies

The #1 provider of professional facilitators and facilitation training in the U.S.

Published Books

13 Facilitation Courses
Including:
- *The Effective Facilitator*
- *The Engaging Trainer*
- *Facilitative Con...*
- *Facilitatio...*
- *Le...*
- *...itation...op*
- *...ilitation Certification Preparation*

FindaFa...t.com
On... ...tors
- ...Resolution
- ...Process Improvement
- Meeting Facilitation

Effective Facilitator
- ✓ Over 35,000 trained
- ✓ 10 principles
- ✓ 100+ techniques
- ✓ 6 practice sessions

Facilitation 'R Us

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Slide 4

The Facilitator's Methodology

Leadership Strategies

The Facilitation Cycle

1. Preparing for Success
2. Getting the Session Started
3. Focusing the Group
4. The Power of the Pen
5. Information Gathering
9. Closing the Session

Group Dynamics
10. Agenda Setting
6. Managing Dysfunction
7. Consensus Building
8. Keeping the Energy High

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Slide 5

Training vs. Facilitation – Is There a Difference?
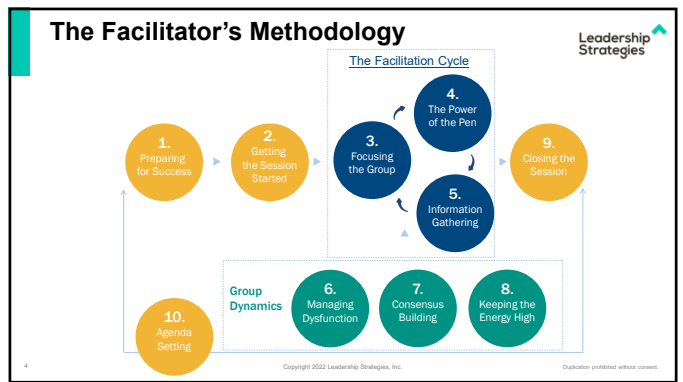
Leadership Strategies

	PRESENTATION	TRAINING	FACILITATION
Focus			
Deliverable			
Approach			
Telling vs. Listening			

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Slide 6

Training vs. Facilitation – Is There a Difference?

Leadership Strategies

	PRESENTATION	TRAINING	FACILITATION
Focus	Focus on Content		
Deliverable			
Approach			
Telling vs. Listening			

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Training vs. Facilitation – Is There a Difference?

Leadership Strategies

	PRESENTATION	TRAINING	FACILITATION
Focus	Focus on Content		Focus on Process
Deliverable			
Approach			
Telling vs. Listening			

7

Training vs. Facilitation – Is There a Difference?

Leadership Strategies

	PRESENTATION	TRAINING	FACILITATION
Focus	Focus on Content	Focus on both Content & Process	Focus on Process
Deliverable			
Approach			
Telling vs. Listening			

8

Training vs. Facilitation – Is There a Difference?

Leadership Strategies

	PRESENTATION	TRAINING	FACILITATION
Focus	Focus on Content	Focus on both Content & Process	Focus on Process
Deliverable	Information/ Inspiration		
Approach			
Telling vs. Listening			

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Training vs. Facilitation – Is There a Difference?

Leadership Strategies

	PRESENTATION	TRAINING	FACILITATION
Focus	Focus on Content	Focus on both Content & Process	Focus on Process
Deliverable	Information/ Inspiration		Group Insight/ Decisions
Approach			
Telling vs. Listening			

10

Training vs. Facilitation – Is There a Difference?

Leadership Strategies

	PRESENTATION	TRAINING	FACILITATION
Focus	Focus on Content	Focus on both Content & Process	Focus on Process
Deliverable	Information/ Inspiration	Skill Development	Group Insight/ Decisions
Approach			
Telling vs. Listening			

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Training vs. Facilitation – Is There a Difference?

Leadership Strategies

	PRESENTATION	TRAINING	FACILITATION
Focus	Focus on Content	Focus on both Content & Process	Focus on Process
Deliverable	Information/ Inspiration	Skill Development	Group Insight/ Decisions
Approach	Presents/Tells		
Telling vs. Listening			

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Training vs. Facilitation – Is There a Difference?

Leadership Strategies

	PRESENTATION	TRAINING	FACILITATION
Focus	Focus on Content	Focus on both Content & Process	Focus on Process
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Approach	Presents/Tells		Asks/Guides
Telling vs. Listening			

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Training vs. Facilitation – Is There a Difference?

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Training vs. Facilitation – Is There a Difference?

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Focus	Focus on Content	Focus on both Content & Process	Focus on Process
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Approach	Presents/Tells	Teaches/Involves	Asks/Guides
Telling vs. Listening	80% Telling 20% Listening		

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Training vs. Facilitation – Is There a Difference?

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Focus	Focus on Content	Focus on both Content & Process	Focus on Process
Deliverable	Information/ Inspiration	Skill Development	Group Insight/ Decisions
Approach	Presents/Tells	Teaches/Involves	Asks/Guides
Telling vs. Listening	80% Telling 20% Listening		20% Telling 80% Listening

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Training vs. Facilitation – Is There a Difference?

Leadership Strategies

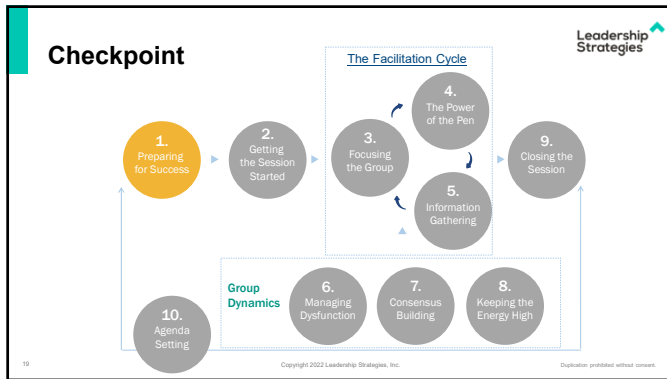|	PRESENTATION	TRAINING	FACILITATION
Focus	Focus on Content	Focus on both Content & Process	Focus on Process
Deliverable	Information/ Inspiration	Skill Development	Group Insight/ Decisions
Approach	Presents/Tells	Teaches/Involves	Asks/Guides
Telling vs. Listening	80% Telling 20% Listening	50% Telling 50% Listening	20% Telling 80% Listening

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Question for You…

Leadership Strategies

When I facilitate a training class, the participants are speaking about ____ % of the time.

a. About 10% of the time
b. About a quarter of the time
c. About a third of the time
d. About half the time
e. More than half the time

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Checkpoint

Leadership Strategies

The Facilitation Cycle

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Standing Poll#1: True or False?

Leadership Strategies

Outside of logistics, the three most important things to know in preparing for a group session are the 3 Ps: the participants, the desired products, and the process or agenda.

- **Answer:** FALSE!
- **Why:** The MOST IMPORTANT thing to know in preparing for a meeting is the session purpose

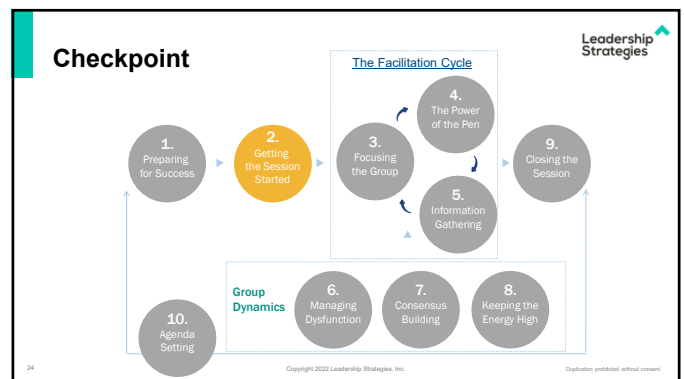Copyright 2022 Leadership Strategies, Inc.   Duplication prohibited without consent.

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PRINCIPLE 1.
PREPARING FOR SUCCESS
Cover All The Bases

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Principle 1 – Preparing for Success
Covering All the Bases

Leadership Strategies

A. Interview Sponsor
B. Identify Key Roles in the session
C. Define Objective and Agenda
D. Prepare Sample Deliverable
E. Know the Process Cold

F. Educate the Project Team
G. Prepare for Hat Technique
H. Interview the Participants
I. Get Oriented on the Business Area
J. Prepare the Room
K. Prepare Opening

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Preparation

Leadership Strategies

- **The 6 P's:**
  - **Purpose** – Why are we having this session?
  - **Product** – What do we need to have when we are done?
    - **Hands** – What do they need to have in their hands?
    - **Head** – What do you want them to know?
    - **Heart** – What do you want them to believe?
  - **Participants** – Who will be attending? What are their attitudes?
  - **Probable Issues** – What issues will be addressed?
  - **Process** – What steps will get us there?
  - **Place/Platform** – Logistics, location, etc.

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Checkpoint

Leadership Strategies

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Standing Poll#2: True or False?

After introductions, if necessary, it's generally a BAD IDEA to start a facilitated session with a review of the agenda.

- **Answer:** TRUE!
- **Why:** Start with PURPOSE.

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PRINCIPLE 2.
GETTING THE SESSION STARTED
Inform, Excite, Empower, Involve

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Principle 2 – Getting the Session Started
Inform, Excite, Empower, Involve

A. Set-up with 30 Minutes to spare
B. Optimize Your Set-up
C. Utilize the Gathering Period
D. Kick-off Promptly
E. Set the Stage with Your Opening
F. Memorize Your Opening

G. Effectively Deliver Your Opening
H. Request Participants' Objectives
I. Review the Agenda
J. Establish Ground Rules
K. Define the Parking Boards
L. Define Consensus
M. Open "On the Fly"

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Set the Stage With Your Opening

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Set the Stage With Your Opening

- Through your opening words, you must …
  - **Inform** participants about the purpose and product.
  - "The purpose of this session is… when we are done we will have…"

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Set the Stage With Your Opening

- Through your opening words, you must …
  - **Excite** participants about benefits.
  - What is the overall result to be achieved? WII-FM?

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Set the Stage With Your Opening

Leadership Strategies

- Through your opening words, you must …
  - **Empower** participants by discussing the important role they play in the process.
  - Why were they selected? What authority have they been given?

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Set the Stage With Your Opening

Leadership Strategies

- Through your opening words, you must …
  - **Involve** participants
  - Ask their personal objectives or gain participation.

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Set the Stage With Your Opening

Leadership Strategies

- Which are we best at?
- Which are we worst at?
- Let's look at 2 examples

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Slide 34

Excite Example #1

Leadership Strategies

- Good morning, it's a pleasure to be here this morning.
- Our objective for the next two days is to walk away with a plan for improving the hiring process (inform).
- What is exciting about this?
- If we are successful, we will walk away with a new hiring process that will help our organization get the right people hired and get them hired quickly.

Manual NA

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Excite Example #2

Leadership Strategies

- Good morning, it's a pleasure to be here this morning.
- Our objective for the next two days is to walk away with a plan for improving the hiring process (inform).
- What is exciting about this?
- Having staff with the skills and attitude you need is the key to your success. When you have the right people in the right jobs, your day gets easier, and it's also easier for your team to accomplish its goals. This is your opportunity to put strategies in place to ensure that you get the people you need to be truly successful.

Manual NA

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Slide 36

Which is better? Why?

Leadership Strategies

#1 If we are successful, we will walk away with a new hiring process that will help our organization get the right people hired and get them hired quickly.

#2 Having staff with the skills and attitude you need is the key to your success. When you have the right people in the right jobs, your day gets easier, and it's also easier for your team to accomplish its goals. This is your opportunity to put strategies in place to ensure that you get the people you need to be truly successful.

Manual NA

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Which is better? Why?

#1 If we are successful, we will walk away with a new hiring process that will help our organization get the right people hired and get them hired quickly.

Notice the # of "you" and "your"!

Say "you" or "yours" at least 4 times

#2 Having staff with the skills and attitude **you** need is the key to **your** success. When **you** have the right people in the right jobs, **your** day gets easier, and it's also easier for **your** team to accomplish its goals. This is **your** opportunity to put strategies in place to ensure that **you** get the people **you** need to be truly successful.
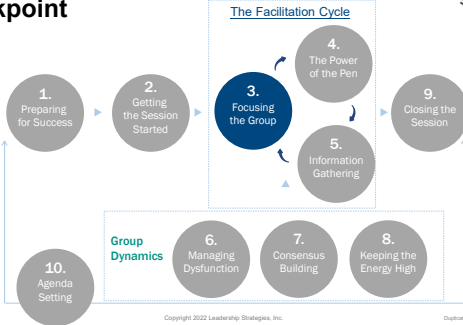
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Checkpoint

The Facilitation Cycle

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8. Keeping the Energy High

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PRINCIPLE 3.
FOCUSING THE GROUP
Establish the Course, Avoid Detours

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Principle 3 – Focusing the Group
Establish the Course, Avoid Detours

A. Set the course with checkpoints
B. Restart with extended checkpoints
C. Warm up the group
D. Use your PEDEQS
E. Label charts to improve focus
F. Redirect side issues
G. Use extended prompt questions
H. Summarize results
I. Be conscious of time
J. Use breakout sessions
K. Know when to regroup

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Set the Course with Checkpoints

At the beginning of each facilitated process…

REVIEW → **PREVIEW** → **BIG VIEW**

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Set the Course with Checkpoints

- **Review**
  Review quickly what has been done to date.
- **Preview**
  Describe briefly what the group is about to do.
- **Big View**
  Explain how the previewed agenda item fits into the overall objective of the session.

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Slide 43 — Sample Agenda

Leadership Strategies

Sample Agenda

Purpose:
Define the changes necessary to increase the efficiency and effectiveness of the hiring process

Agenda:
A. Introduction
B. How does it work today?
C. What are the problems and root causes
D. What are the potential improvements
E. Prioritize improvements
F. Develop an implementation plan
G. Review and close

Review-Preview-Big View

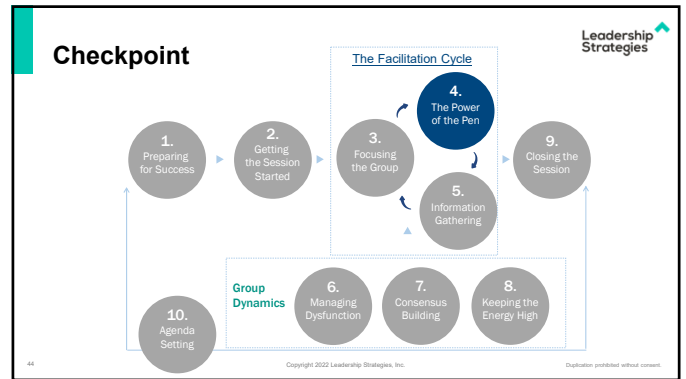- We have just completed…
- Next, we are going to…
- This is important because…

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Slide 44 — Checkpoint

Leadership Strategies

Checkpoint

The Facilitation Cycle

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Slide 45 — Standing Poll #3: True or False?

Leadership Strategies

Standing Poll#3: True or False?

When recording information on a flip chart, you should avoid paraphrasing even if you ask people for permission to do so.

- **Answer:** TRUE!
- **Why:** When you write _your_ words, you disempower the group and reduce ownership.

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Slide 46 — Principle 4

PRINCIPLE 4.
POWER OF THE PEN
Use It, Don't Abuse It, Make It Theirs

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Slide 47 — Principle 4 – Power of the Pen

Leadership Strategies

Principle 4 – Power of the Pen
Use It, Don't Abuse It, Make It Theirs

A. Write First, Discuss Second
B. Write What is Said
C. Add Your Words Discriminately
D. Ask, Don't Tell
E. Write So They Can Read It
F. Use Additive Editing
G. Avoid Lulls While Writing
H. Assign an Order to Your Speakers
I. Use Multiple Flip Charts
J. Employ the Right Recording Tool
K. Post According to Your Wall Plan

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Slide 48 — Write First, Discuss Second

Leadership Strategies

Write First, Discuss Second

- Record what is said without regard to value or completeness
  - If what is said is incomplete…**Record it!**
  - If what is said can be improved upon…
  - If what is said is not what you were looking for…
  - If what is said is wrong…
 - **Still Record It!**

- By recording what is said, you are saying "Thank You" for making a contribution
- You can use your questioning techniques to make sure that the comment is refined or deleted later

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Write What is Said, Not What You Heard

- Record as many of the speaker's words as is necessary
- It is not necessary to record all the speaker's words
- If you are not certain what was said, ask for confirmation, or **ask for the headline**

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Checkpoint
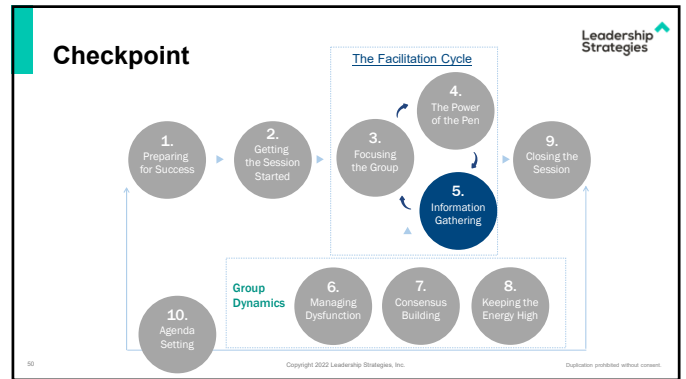
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Standing Poll#4: True or False?

When formulating questions to get lots of ideas, the most important attribute of the question is that it is open-ended.

- **Answer:** FALSE!
- **Why:** The key is to formulate a question that helps the participates VISUALIZE THE ANSWERS!

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PRINCIPLE 5.
INFORMATION GATHERING
Know Your Tools and How To Use Them

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Principle 5 – Information Gathering
Know Your Tools and How to Use Them

A. Ask Great Starting Questions
B. Guide With Reacting Questions
C. Float Ideas if Necessary
D. List to Gather Details

E. Brainstorm to Generate Ideas
F. Group to Categorize
G. Prioritize to Identify Key Items
H. Lobby to Gain Buy-In

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The Starting Question

You are interviewing a group of school registrars to talk with them about the scheduling process. Which is the better starting question? Why?

Question Type A
The first thing we want to talk about are inputs. What are the inputs to the scheduling process?

Question Type B
If you were about to develop the school schedule, what is the information you would need to have close by?

Ask starting questions that draw a vivid image of the answers!

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Slide 55

Ask Great Starting Questions
Leadership Strategies

- Three parts to a great starting question
  - **Begin with an image building phrase** ("think about", "imagine", "consider", "if")
  - **Extend the image to the answers** (at least two phrases)
  - **Ask the direct question** (Type A) to get the information you want

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Slide 56

Ask Great Starting Questions
Leadership Strategies

You want the participants to identify the steps in the hiring process.

Begin with an image building phrase…
- "Think about the last time your hired someone."

Extend the image to the answers… | Synonyms! |
- Think about all the things you had to do to get that person hired, all the steps you had to go through, all the people you had to talk with, the forms and everything.
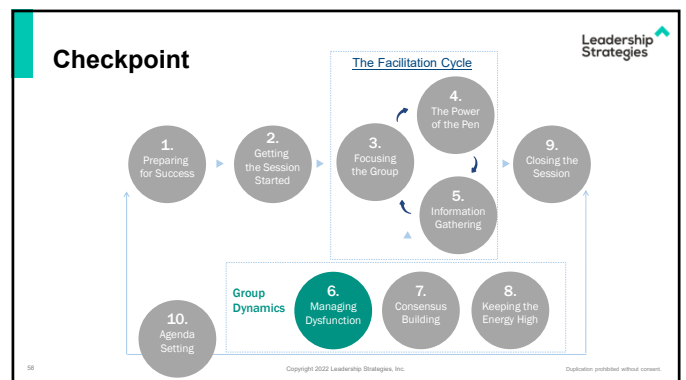
Ask the Type-A question?
- "What are the steps in the hiring process?"

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Slide 57

Ask Great Starting Questions
Leadership Strategies

- **When do you use a Type-B?**
  - At the beginning of every agenda item
- **It takes preparation!**
  - If you don't prepare, you will most likely use a Type-A
- **Our Recommendation:**
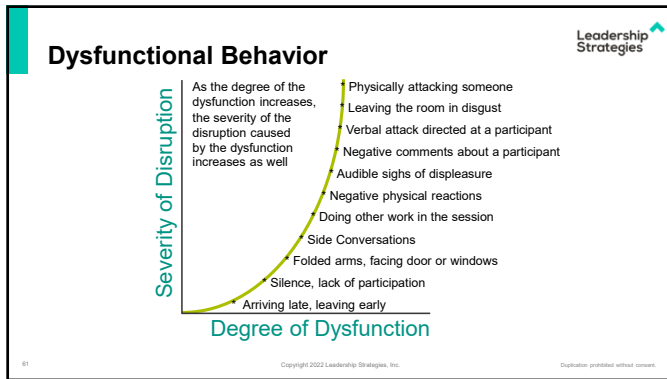 - Create a list of Type-B questions for the standard sessions you facilitate.

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Checkpoint
Leadership Strategies

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Slide 59

PRINCIPLE 6.
MANAGING DYSFUNCTION
Conscious Prevention, Early Detection, Clean Resolution

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Slide 60

Principle 6 – Managing Dysfunction
Conscious Prevention, Early Detection, Clean Resolution
Leadership Strategies

- A. Understand Dysfunctional Behavior
- B. Separate Symptom from Root Cause
- C. Focus on Prevention
- D. Detect Non-Verbal Cues
- E. Address Dysfunction Effectively
- F. Inform the Group When Appropriate
- G. Reward Functional Behavior
- H. Respond Appropriately When Challenged

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Dysfunctional Behavior

As the degree of the dysfunction increases, the severity of the disruption caused by the dysfunction increases as well

Severity of Disruption

- Physically attacking someone
- Leaving the room in disgust
- Verbal attack directed at a participant
- Negative comments about a participant
- Audible sighs of displeasure
- Negative physical reactions
- Doing other work in the session
- Side Conversations
- Folded arms, facing door or windows
- Silence, lack of participation
- Arriving late, leaving early

Degree of Dysfunction

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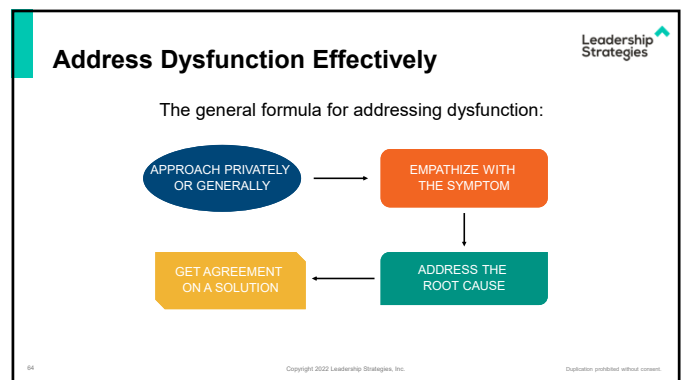
Understand Dysfunctional Behavior

*Dysfunctional behavior is **any activity** by a participant which is consciously or unconsciously **a substitution** for expressing **displeasure** with the session content, the facilitation process, or an outside factor.*

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Separate Symptom from Root Cause

- Treat dysfunctional behavior as a sign that the participant is asking for help
- The participant is waving a red flag that is masking the real issue **(root cause)**
- Dysfunctional behavior is a **symptom**
- Dysfunctional behavior tends to get worse over time

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Address Dysfunction Effectively

The general formula for addressing dysfunction:

APPROACH PRIVATELY OR GENERALLY → EMPATHIZE WITH THE SYMPTOM
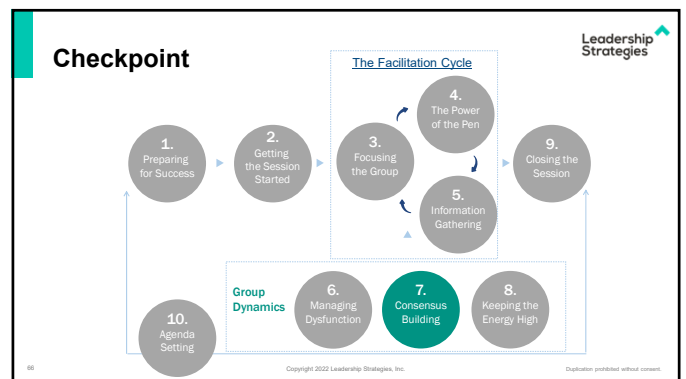
GET AGREEMENT ON A SOLUTION ← ADDRESS THE ROOT CAUSE

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Dealing with Dysfunction

- Late Arriver / Early Leaver
- Drop-out
- Loudmouth
- Storyteller
- Broken Record
- Naysayer
- Whisperer
- Workaholic
- Verbal Attacker
- Door Slammer
- Physical Attacker

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**PRINCIPLE 7.
CONSENSUS BUILDING**
Generate a Consensus-Focused Process

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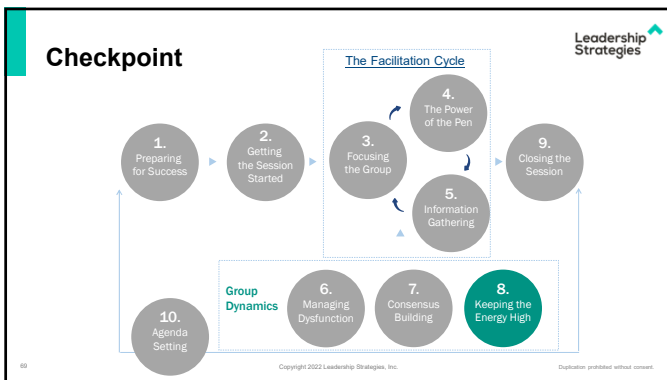
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**Principle 7 – Consensus Building
Generate a Consensus-Focused Process**

Leadership Strategies

A. Understand Disagreement
B. Start with Consensus
C. Decide if Agreement is Necessary
D. Let Participants Seek Agreement
E. Take Control As Necessary
F. Delineate Alternatives
G. Identify Strengths and Weaknesses
H. Merge Alternatives
I. Use Ranking Techniques
J. Converge on a Solution
K. If All Else Fails, Move On

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Checkpoint

Leadership Strategies

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**PRINCIPLE 8.
KEEP THE ENERGY HIGH**
Set the Pace, Anticipate the Lulls, React Accordingly

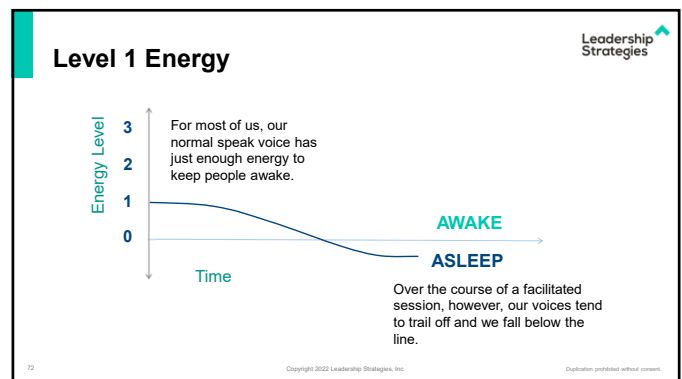Copyright 2022 Leadership Strategies, Inc.   Duplication prohibited without consent.

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**Principle 8 – Keep the Energy High
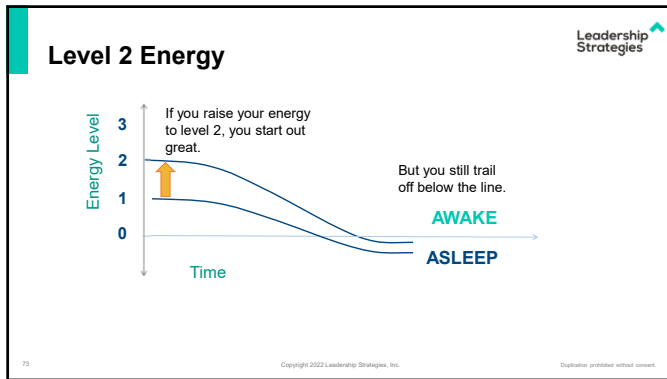Set the Pace, Anticipate the Lulls, React Accordingly**

Leadership Strategies

A. Set An Energetic Pace
B. Reset the Energy Level After Breaks
C. Adjust to Lull Times
D. Establish a Recharge Activity
E. Use Brainteasers
F. Get People Involved and Moving
G. Encourage Team Building
H. Break If Necessary

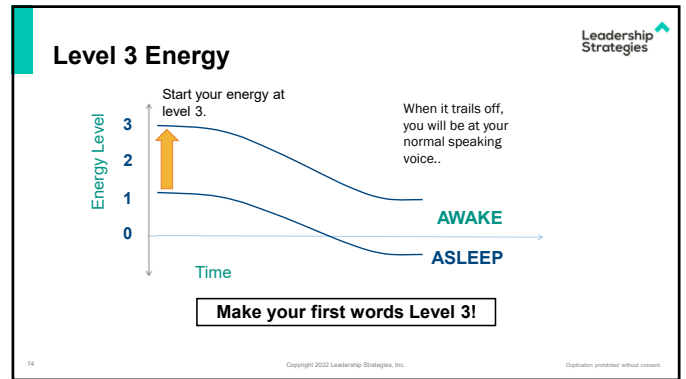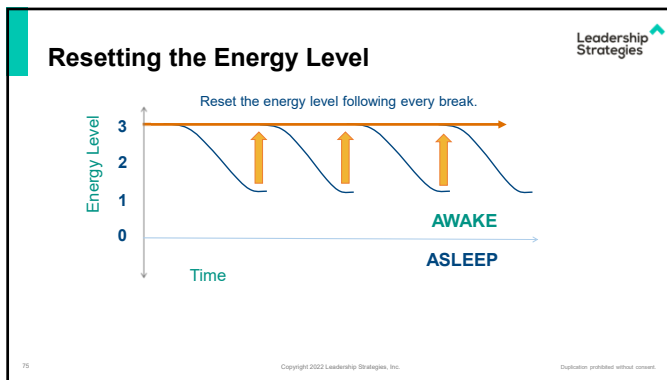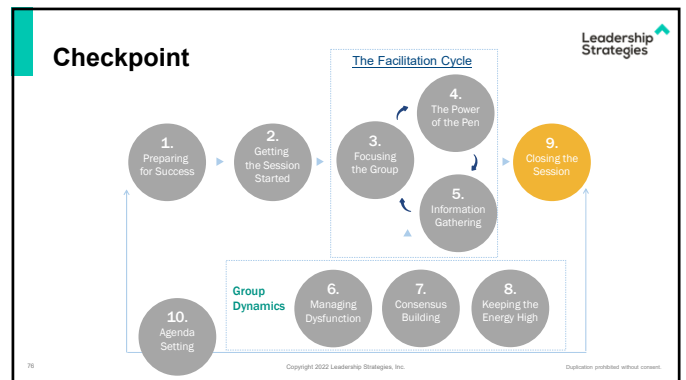Copyright 2022 Leadership Strategies, Inc.   Duplication prohibited without consent.

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Level 1 Energy

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Energy Level
3
2
1
0

For most of us, our normal speak voice has just enough energy to keep people awake.

AWAKE
ASLEEP

Time

Over the course of a facilitated session, however, our voices tend to trail off and we fall below the line.

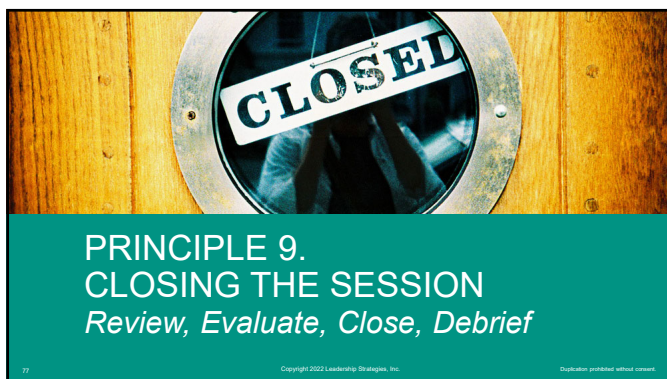Copyright 2022 Leadership Strategies, Inc.   Duplication prohibited without consent.

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Level 2 Energy

If you raise your energy to level 2, you start out great.

But you still trail off below the line.

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Level 3 Energy

Start your energy at level 3.

When it trails off, you will be at your normal speaking voice..

Make your first words Level 3!

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Resetting the Energy Level

Reset the energy level following every break.

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Checkpoint

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PRINCIPLE 9.
CLOSING THE SESSION
Review, Evaluate, Close, Debrief
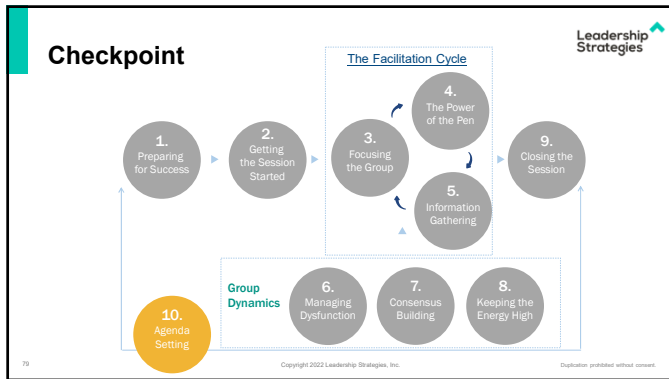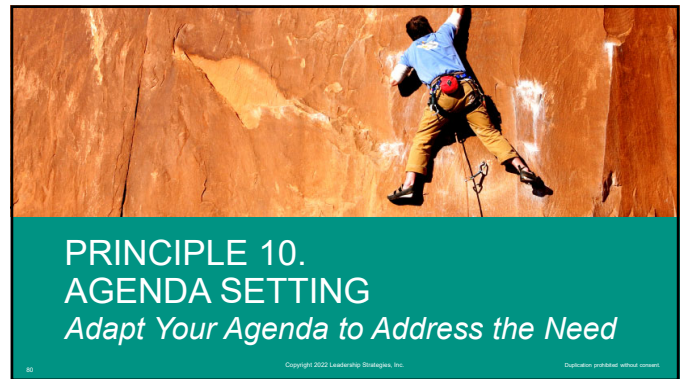
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Principle 9 – Closing the Session
Review, Evaluate, Close, Debrief

A. Request Time Extensions if Needed
B. Review the Activities Performed
C. Review Session Purpose
D. Review Personal Objectives
E. Review Parking Boards

F. Ask Participants to Evaluate
G. Close and Set the Stage
H. Use Partial Close as Needed
I. Debrief with Planning Team
J. Debrief with Sponsor
K. Document Session Results

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Slide 79 — Checkpoint

Checkpoint

Leadership Strategies

The Facilitation Cycle

1. Preparing for Success
2. Getting the Session Started
3. Focusing the Group
4. The Power of the Pen
5. Information Gathering
9. Closing the Session

Group Dynamics

6. Managing Dysfunction
7. Consensus Building
8. Keeping the Energy High

10. Agenda Setting

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PRINCIPLE 10.
AGENDA SETTING
Adapt Your Agenda to Address the Need

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Principle 10 – Agenda Setting
Adapt Your Agenda to Address the Need

Leadership Strategies

A. Choose Agenda Based on Objectives
B. Tailor Agenda to Specific Need
C. Incorporate Consensus-Building Principles
D. Construct a New Agenda as Needed
E. Confirm Agenda with Project Team
F. Prepare a Detailed Agenda
G. Track Performance Against Agenda
H. Record Process Notes
I. Incorporate Recommendations

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Done! - Techniques Covered

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1. 6Ps of Preparation
2. Start with IEEI
3. Checkpoint
4. Use, Don't Abuse the Pen
5. Headline
6. Starting Questions
7. 4 Steps for Dysfunction
8. Level 3 Energy

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The Full Course:
Over 100 Tools and Concepts

Leadership Strategies

Covered at least partially today

Preparing	Starting	Focusing	Respecting the Pen	Info Gathering
A. Interview Sponsor	A. Set-up with 30 Minutes to Spare	A. Set the Course with Checkpoints	A. Write First; Discuss Second	A. Ask Great Starting Questions
B. Identify Key Roles in the Session	B. Optimize Your Set-up	B. Restart with Extended Checkpoints	B. Write What Is Said	B. Guide with Reacting Questions
C. Define Objective and Agenda	C. Utilize the Gathering Period	C. Warm-up the Group	C. Add Your Own Words Discriminately	C. Floats Ideas If Necessary
D. Prepare Sample Deliverable	D. Kick-off Promptly	D. Use Your PEDEQS	D. Ask; Don't Tell	D. List to Gather Details
E. Know the Process Cold	E. Set the Stage with I-E-E-I	E. Label Charts to Improve Focus	E. Write So the Group Can Read It	E. Brainstorm to Generate Ideas
F. Educate the Project Team	F. Memorize Your Opening	F. Redirect Side Issues	F. Use Additive Editing	F. Group to Categorize
G. Prepare for Hat Technique	G. Effectively Deliver Your Opening	G. Summarize Results	G. Avoid Lulls While Writing	G. Prioritize to Identify Key Items
H. Interview the Participants	H. Request Participants' Objectives	H. Be Conscious of Time	H. Assign an Order to Your Speakers	H. Lobby to Gain Buy-In
I. Get Oriented on the Business Area	I. Review the Agenda	I. Use Breakout Sessions	I. Use Multiple Flip Charts	
J. Prepare the Room	J. Establish Ground Rules	J. Know When to Regroup	J. Employ the Right Recording Tool	
K. Prepare Opening	K. Define the Parking Boards		K. Post According to Your Wall Plan	
	L. Define Consensus			
	M. Open "On the Fly"			

Dysfunction	Consensus	Energy	Closing	Agenda Setting
A. Understand Dysfunctional Behavior	A. Understand Disagreement	A. Set an Energetic Pace	A. Request Time Extensions if Needed	A. Choose Based on Objectives
B. Separate Symptom from Root Cause	B. Start with Consensus	B. Reset the Energy Level Following Every Break	B. Review the Activities Performed	B. Tailor Agenda to Specific Need
C. Focus on Prevention	C. Decide If Agreement Is Needed	C. Adjust to Lull Times	C. Review Session purpose	C. Incorporate Consensus-Building
D. Detect Non-Verbal Cues	D. Let Participants Seek Agreement	D. Establish a Recharge Activity	D. Review Personal Objectives	D. Construct a New Agenda
E. Address Dysfunction Effectively	E. Take Control As Necessary	E. Use Brainteasers	E. Review Parking Boards	E. Confirm Agenda with Team
F. Inform the Group When Appropriate	F. Delineate Alternatives	F. Get People Involved and Moving	F. Ask Participants to Evaluate	F. Prepare a Detailed Agenda
G. Reward Functional Behavior	G. Identify Strengths and Weaknesses	G. Encourage Team Building	G. Close and Set the Stage	G. Track Performance Against Agenda
H. Respond Appropriately When Challenged	H. Merge Alternatives	H. Break If Necessary	H. Use Partial Close As Needed	H. Record Process Notes
	I. Use Ranking Techniques		I. Debrief with the Planning Team	I. Incorporate Recommendations
	J. Converge on a Solution		J. Debrief with Sponsor	
	K. If All Else Fails, Move On		K. Document Session Results	

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Slide 84

Done! - Review Objectives

Leadership Strategies

As a result of this session, you will be able to…
• Use key facilitation strategies to guide groups, improve training sessions, and gain higher levels of buy-in and commitment to action.

We will achieve this objective by…
• Outlining a comprehensive approach for facilitating groups
• Providing eight techniques you can use immediately
• Providing next steps for those who want to learn more

Next Steps to Learn More

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Next Steps – Get Free Resources

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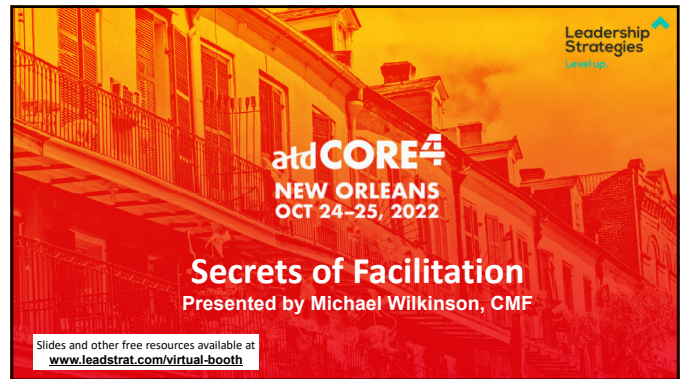- 10 Principles of Facilitation eBook
- Copy of today's slides
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The Ten Principles of Facilitation:
A Facilitator's Methodolgy

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