

Facilitation Skills for Trainers

Adapted from the *Facilitation Skills for Trainers* 3-day course

Complete the brief survey at the end of the session and:

- Receive a free copy of the “Are Great Trainers, Great Facilitators?” article written by Michael Wilkinson, CEO of Leadership Strategies and Certified Master Facilitator.



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A. Getting Started

- A1. Who is Leadership Strategies?
- A2. Session Objectives
- A3. Survey
- A4. Session Agenda
- A5. Handling Questions
- A6. Our Session Facilitator
- A7. Course Overview

A1. Who is Leadership Strategies?

- The Facilitation Company - expert meeting facilitators and facilitation training in the U.S.
- Over 500 facilitators under contract through The Facilitator Database
- Over 17,000 trained in facilitation skills through The Effective Facilitator and other courses
- Provides public classes in Atlanta, Boston, Chicago, Dallas, DC, Denver, Houston, LA, New York, San Francisco, Seattle, Sydney, Toronto and private, onsite classes globally.

A2. Session Objectives

- Outline best practices from the **Facilitation Skills for Trainers** course related to developing training that appeals to all learning styles.
- Provide over a dozen techniques you can begin using immediately
- Provide next steps for those who would like to learn more

A3. Survey

For all of those who **complete** the short survey at the end of the session, we will:

- Send you a free article, *“Are Great Trainers, Great Facilitators?”*, written by Michael Wilkinson, Certified Master Facilitator and CEO of Leadership Strategies, Inc.

A4. Session Agenda

- Getting Started
- Overview of the Principles of Facilitation/Training
- Facilitation Tools and Techniques
- Next Steps
- Questions & Answers

A5. Handling Questions

If you have questions:

- Type them into the question panel
- Call 800.824.2850
- Contact us online www.leadstrat.com
- Email etraining@leadstrat.com
- Connect on LinkedIn, Facebook, and Twitter

A6. Our Session Facilitator

Wayne Pendle

LEADERSHIP STRATEGIES

A7. Course Overview



B. PLANNING FOR RESULTS

- B1. Defining Results
- B2. **The 4 Levels of Training Evaluation**
- B3. Developing Learning Objectives
- B4. The 3 Learning Styles
- B5. **The Principles of Engagement**
- B6. **Instructional Methods and Engagement Strategies**
- B7. Creating from Scratch
- B8. Designing for Results
- B9. Developing for Results
- B10. Handling Logistics
- B11. Training Impact

****Only the topics in bold are covered in this webinar. All topics are covered in our full, 3-day public or private “Facilitation Skills for Trainers” course.*

B2. The 4 Levels of Training Evaluation

While training evaluation is beyond the scope of this course, below is a review of Donald Kirkpatrick's Four-Phase Evaluation Model.

- Level 1 measures the trainees' _____
and acceptance of the material
- Level 2 Measures the trainees' _____
of knowledge and skills
- Level 3 Measures changes in _____
and on-the-job improvement
- Level 4 Measures organizational _____ &
improved operational performance

B5. Five Principles of Engagement

1. Assure the _____ of content to the real world and workplace.
2. Assure a high degree of learner _____, which will in turn assure high levels of participation.
3. Plan a _____ of difference learning experiences.
4. Maintain interest by selecting the appropriate learning _____.
5. Allow learners to share their _____ in the classroom setting.

B6. Instructional Methods

1. Case Studies
2. Demonstration
3. Discussion
4. Exercises
5. Feedback Activities
6. Games
7. Icebreakers
8. Lecture
9. Participant Practice
10. Role Plays
11. Simulations
12. Sub-Groups

B6. Instructional Methods

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FACILITATION SKILLS FOR TRAINERS

What?	Case Studies are written or video scenarios that contain learning points specifically tied to the subject matter being taught. They usually present a problem or situation that needs resolution --- sometimes very sophisticated and sometimes very simple. Harvard Case Studies, used for executive development, might be fifty pages long and contain multiple situations that complicate the sub-group's ability to reach consensus. In comparison, a mini-case study used in supervisory development might be written on a half page, which ends with the question, "What action should the supervisor take?" In either case, the situation must be detailed out enough for the sub-group working on the case to analyze the current situation and project a logical solution.
When?	• To introduce new key learning points
	• To reinforce ideas and concepts already presented

How?

Introduce the case study:

- Present the case study in detail.
- Give participants ample time to read and study the case before discussion begins.
- Provide the case study questions in advance in written form.
- Provide specific time frames for reading the case, discussing the case, and resolving the case.
- Provide flipchart paper, pens and other necessary supplies.

Facilitate the case study:

- Circulate from group to group, checking on the group's progress. Make yourself available to assist and support the groups, but stay neutral. Assist but don't participate.
- Observe both task and process, so you can provide specific feedback during the processing stage.
- Keep participants informed of the time requirements, and end the case study appropriately project a logical solution.

Wrap?

Process the case study:

- Set aside an appropriate amount of time for processing.
- Review the case study questions one at a time. Rotate from group to group asking the “spokesperson,” from each group to report. Don’t let the first group that reports give all the information. You might have groups answer different questions rather than respond to every one.
- **Record and point out the differences in each group:**
 - What information they paid attention to
 - How they went about arriving at conclusions
 - The different conclusions they drew from the same information that was presented
 - How the conclusions they drew relate to the problem-solving process, etc. they were being taught

B6. Engagement Strategies

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FACILITATION SKILLS FOR TRAINERS

1. Bingo
2. BINGO Icebreaker
3. Brainstorming (Basic)
4. Brainstorming with Post-Its
5. Brief Encounters*
6. Crossword Puzzle, Find-a-Word, & Cryptogram
7. Dot Voting*
8. Drawing
9. Dump and Clump*
10. Dyads / Triads
11. Elevator Speech*
12. Examples
13. Forced Analogies*
14. Future Letter
15. Group Questioning*
16. Introductions
17. Introductions Using Drawing
18. Jeopardy
19. Journaling
20. Last Person Standing*
21. Metaphors and Analogies
22. More Of / Less Of*
23. Rotating Flip Charts*
24. Round Robin
25. Selecting Team Leaders
26. Start / Stop / Continue*
27. Stories
28. Structured Discussion
29. Talking Stick*
30. Think-Pair-Share
31. Wheel-of-Fortune
32. Whip*

Name	LAST PERSON STANDING
Type	Gather information; generating unique items for a list or ideas.
Purpose	To identify the _____ information from a large set of team ideas in a short and energy-filled period of time.
General Description	Teams (or individuals) are asked to gather as much input as they can. Then the Team Leader has a competition with other Team Leaders to determine which team has the most number of unique ideas. (All other participants act as the judges to help identify the duplicates.)
Benefit	Competitive and energetic approach to infuse energy into the session. Especially good during those lull times of the day.
Sample Words	• The purpose of this exercise is for us to identify as many different characteristics of (an energetic speaker) as we can. • For example, if we were looking for a list of all of the automobile models that we could think of, we would be looking for a list that would include items like Taurus, Impala, Escort, Escalade, Jetta, 626, etc. But we are not...

Sample Words (cont.)	• What we are doing is identifying the characteristics of an energetic speaker. So, think about the last time you were at a meeting or presentation and a speaker began his or her presentation. Right away the speaker simply captured your attention; you were almost on the edge of your chair because of the speaker's approach. • Let's write each of those characteristics, one per post-it note, that caused you to listen to what he/she was saying...
Other Tips	Each team leader is asked to come to the front of the room and one-by-one, team-by-team they post their answers to a flip chart. For example, Team Leader #1 posts one answer and moves to the back of the line, then Team Leader #2 posts one answer and moves to the back of the line, etc. While the Team Leaders are posting their answers, ask the audience to identify duplicates by raising crossed arms and saying "oonk." This helps to keep the entire group engaged. When a duplicate is identified, the facilitator collects that post-it and the Team Leader goes to the back of the line. The second duplicate eliminates that team. By using color post-its by team, it is clear when the 2nd duplicate is identified.

Name	JEOPARDY
Type	Games
Purpose	To review information that has been _____.
General Description	Participants play Jeopardy to review course content or to establish how much they already know about the course content.
Benefit	• Group competition motivates participants • Energizes the class • Fun and enjoyable
Sample Words	Instructions: • On a flipchart slide create the frame for the game with 5 categories and points from 100 to 500 in increments of 100. • Label the 5 categories across the top. • Create 5 answers for each category and record on cards. The 100 point answers must be more difficult than the 500 point answers.

Sample Words (cont.)

- You can decide if the answer they give must be phrased as a question. You should also decide if teams can use books and notes to help find answers. You can also choose to start each team out with 0, 500 points, or something in between to allow for mistakes.
- Divide the class into teams. Have one person stand from each team to be the team leader. (You can have the leader rotate after three or four questions).
- You can use a buzzer or bell or have people raise their hand to indicate they know the answer. Or you can just rotate the question from team to team.
- The game starts by having a person select a category and an amount. (Cross out the category and amount on the flip chart when it is requested.)
- Read the answer card. The team that buzzes first has 15 second to give a response. If the team gets it correct, the team is awarded that number of points. If the team gets it wrong or runs out of time, the team loses that number of points and another team gets to attempt to answer.
- The team that last gave a correct response then chooses a category and amount.

Sample Words (cont.)	• You can choose to have a “Final Jeopardy” question in which all teams have an opportunity to answer the last question. In this case the teams all privately set the amount they want to wager after learning the category of the final response. All teams are given the final answer, and teams record their responses. • Each team’s final answer is revealed and then their wager to determine the highest scoring team.
Other Tips	If participants are familiar with other ways to play the game, explain that you have changed or modified the rules to suit course purposes.

C. Starting with Impact

- C1. When You Arrive...
- C2. Your Opening Words: I.E.E.I.
- C3. Request Participant Objectives (Involve)**
- C4. Review the Agenda
- C5. Establish Ground Rules
- C6. Define the Parking Boards (ICA)
- C7. Review Housekeeping Items

C3. Request Participant Objectives

Why?

1. _____ them immediately.
2. Lets them know their _____ and _____
are being considered
3. Provides opportunity to _____
into the training.

Set the Stage with Your Opening: I-E-E-I

	...about the purpose and product
	...about the benefits to them
	...by discussing the important role they play in the process
	...through personal objectives and participation

D. Delivering for Results

- D1. **Training vs. Facilitation**
- D2. Ask Starting Questions that Ignite Discussion
- D3. Ask Reacting Questions to Probe and Clarify
- D4. Use Checkpoints for Transitions
- D5. Warm up the Group
- D6. Use PeDeQs to Give Directions
- D7. Redirect Side Issues
- D8. Order Speakers to Maintain Control
- D9. Summarize Results
- D10. Be Conscious of Time
- D11. Keep the Energy High

D1. Training vs. Facilitation

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FACILITATION SKILLS FOR TRAINERS

	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	_____ Telling _____ Listening	_____ Telling _____ Listening	_____ Telling _____ Listening

Cornerstones of a Good Instructor



E. Managing Visual Information

E1. Using Visual Aids in Training

E2. Recording Information

E3. Recording Techniques

E4. Maintaining Interest and Order

E1. Using Visual Aids in Training

- Are the visual tools we use today the most effective?
 - What are the tools that we use to present information?
 - Which are most beneficial and successful?
 - Which are least?
 - What can we do to improve this in the our setting?

F. Confirming Results & Closing

- F1. **Confirming Knowledge Transfer**
- F2. Reviewing to Close
- F3. **Evaluating**
- F4. Wrapping Up
- F5. Conducting the Debrief

F1. Confirming Knowledge Transfer

Reviewing material is absolutely critical. It reinforces the learning, and it should be done as often as possible --- especially around critical learning points. But, repetition must be varied.

Examples:

- Reviewing for Knowledge Transfer
- Testing and Quizzing
- Dots
- Jewels
- Backward Build-up
- Course Action Planning
- Climate Checks
- Support Groups

F3. Evaluating

1. _____ is a critical part of the continuous improvement cycle.
2. Encourage specific _____.
3. Do a group _____ if possible.

G. Managing Dysfunction

- G1. Understanding Dysfunctional Behavior
- G2. Separate Symptom from Root Cause
- G3. Focus on Prevention**
- G4. Detect Non-Verbal Cues
- G5. Address Dysfunction Effectively**
- G6. Inform the Group When Appropriate
- G7. Reward Functional Behavior
- G8. Respond Appropriately When Challenged

G3. Focus on Prevention

Develop and execute strategies for preventing problems.

- Assigning _____
- Adding _____

- Making sure you _____ with particular people
- Paying close attention to particular _____
- Holding _____ during breaks

NEXT STEPS

If you would like to learn more:

- **Public Class:** Facilitation Skills for Trainers

Atlanta: April 22-24, November 4-6

Private Class: At Your Company

Most cost-effective for 8 or more

- **Purchase a Product**

The Secrets of Facilitation, 2nd Edition

Facilitator Guides



Questions?

- Call: 1-800.824.2850
- Email: info@leadstrat.com

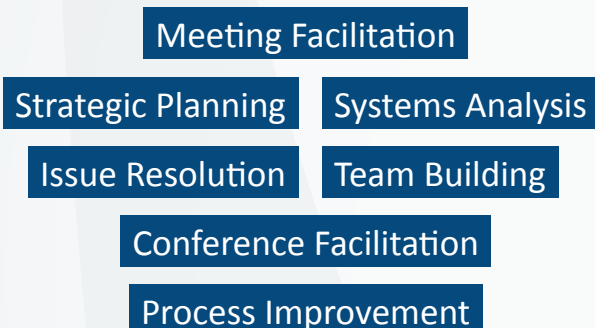
Answers to the Fill-in-the-Blank

Page	Fill-in-the-blank Information
9	Reactions, Learning, Behavior, Results
10	Relevance, Involvement, Variety, Methods, Experience Sharing
22	Involves, Needs and Desires, Integrate their interests
22	Inform, Excite, Empower, Involve
24	80%/20%, 50%/50%, 20%/80%
27	Feedback, Comments, Review
28 - 29	Seats, Ground Rules, Interact, Reactions, Informal Meetings



Leadership Strategies - The Facilitation Company is the US leader in meeting facilitation services and training. We provide companies with expert facilitators who facilitate executive teams and task forces in topics such as strategic planning, issue resolution, requirements analysis, process improvement and conference forums.

Professional Facilitation



Leadership Training



Along with being expert facilitators, we also train people in facilitation skills, leadership, team building, presentations and consulting skills. We offer public classes in Atlanta, Chicago, Dallas, Denver, Houston, Los Angeles, Seattle and Washington, DC, and on-site private classes globally.



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