



KEEP IT FRESH

- 1. Get proficient one principle at a time.** Choose a module. Read it from beginning to end once a week or so. Practice the techniques until you feel proficient. Then, move on to another module.
- 2. Train every opportunity you get!** When asked to train, do it if at all possible. Real improvement can't come without opportunities to practice.
- 3. Seek quality feedback.** Following every training session, hold a review session. Consider using the class feedback form as a guide, especially if there are others in the session who have taken our class.
- 4. Use the techniques informally.** In conversations, use the question types and checkpoints. In meetings, make sure the purpose and process are clear. Use strategies for addressing dysfunctional behavior.
- 5. Complement your skills with The Facilitative Consultant.** Key topics include: defining your client's need, building winning proposals, managing expectations, assessing risk, and developing recommendations.

WHAT'S NEXT?

FACILITATION SERVICES

Avoid wasting valuable time! Our professional facilitators provide the expertise and techniques for focused retreats and planning sessions.

- Meeting Facilitation
- Strategic Planning
- Systems Analysis
- Team Building
- Issue Resolution
- Process Improvement

We offer a free, one-hour briefing on "The Level-3 Organization." Call for more information.

FACILITATION TRAINING

Give your key people the training they need! Our dynamic instructors will provide your people with detailed tools and techniques for success.

- The Effective Facilitator
- Advanced Facilitation Skills
- Facilitator Certification Prep
- Facilitating Virtual Meetings: Comprehensive
- Leadership Through Facilitation
- The Seven Separators of Facilitation Excellence
- Secrets to Facilitating Strategy
- The Facilitative Consultant
- Facilitation Skills for Trainers
- Facilitating Virtual Meetings: Essentials
- Facilitating Masterful Meetings
- Masterful Technical Meetings

Call about our monthly class schedule. Ask about classes we can teach at your site!

STAY CONNECTED:



FACILITATION SKILLS FOR TRAINERS

MINI MANUAL

Take a Facilitative Approach to Training

PLANNING FOR RESULTS

Four Levels of Training Evaluation

- **Level 1:** Trainee reaction
- **Level 2:** Trainee learning
- **Level 3:** Changes in behavior
- **Level 4:** Organization results

Learning Objectives

- A **measurable and observable statement of what learners will be able to do** once they have completed the learning experience successfully
- **Sample observable verbs:** address, apply, conduct, develop, explain, implement
- **Sample unobservable verbs to avoid:** appreciate, be familiar with, know, learn, recognize, understand

Three Learning Styles

- **Visual** learners need to visualize how something works.
- **Auditory** learners like to hear explanations and discuss what they have heard.
- **Kinesthetic** learners want hands-on experience with how something is done.

IMPROVING YOUR DESIGN

Principles of Engagement - VISIRR

- Plan a **Variety** of experiences.
- **Assure** a high degree of learner **Involvement**.
- Allow learners to **Share Their Experiences**.
- Maintain learner interest by selecting **Interesting Methods**.
- Assure the **Relevance** of content to the workplace.
- Address learner **Readiness** before you begin.
- Pace the instruction at an appropriate **Rate**.
- Plan for frequent **Repetition**.

Instructional Methods

- Case Studies
- Demonstration
- Discussion
- Exercises
- Feedback Activities
- Games
- Icebreakers
- Lecture
- Participant Practice
- Role Plays
- Simulations
- Sub-Groups

Designing for Success

- **The Why:** What the learning will be able to do and why
- **The What:** The course content
- **The How:** The engagement methods

Engagement Strategies

- Techniques, based on one or more instructional methods, that engage participants, get them involved and motivate them to learn
- Bingo
 - Brainstorming with Post-Its
 - Brief Encounters
 - Crossword Puzzle
 - Dot Voting
 - Drawing
 - Dump and Clump
 - Dyads / Triads
 - Elevator Speech
 - Examples
 - Forced Analogies
 - Future Letter
 - Group Questioning
 - Introductions
 - Introductions Using Drawing
 - Jeopardy
 - Journaling
 - Last Person Standing
 - Metaphors and Analogies
 - More Of / Less Of
 - Rotating Flip Charts
 - Round Robin
 - Selecting Team Leaders
 - Start/Stop/Continue
 - Stories
 - Structured Discussion
 - Talking Stick
 - Think-Pair-Share
 - Wheel-of-Fortune
 - Whip

STARTING WITH IMPACT

Opening Words (IEEI)

- **INFORM** – Purpose & product
Inform the participants about what is going to happen.
- **EXCITE** – Benefits to them
Get them excited about the process by giving them a clear vision of the overall result to be achieved and the benefits.
- **EMPOWER** – Their role
Empower them by discussing the important role they play in the process and the authority that has been given to them.
- **INVOLVE** – Their key topics
Get them involved in the process by having them speak as early as possible (e.g., their objectives, concerns).
- Review agenda and link to their objectives
- Establish ground rules to make the group **SELF-CORRECTING**
 - Everyone speaks
 - Respect the speaker
 - Titles left outside the door
 - No idea is dumb
 - The parking boards
 - Avoid "bar discussion"
 - "Choo Choo"
 - **Start on time/end on time**
- Define the parking boards (ICA)
 - Issues, Coming Attractions, Actions
- Housekeeping
 - Schedule for lunch and breaks
 - Location of restrooms, etc.

DELIVERING FOR RESULTS

Starting Questions

- Start with an image-building phrase: "Think about . . . Imagine . . . If . . . Consider . . ."
- Extend the image with at least two phrases, so the participants can see their answers.
- End with the direct question.

Reacting Questions

- Direct Probe
Why is that important?
- Indirect Probe
Is the reason that's important because...?
- Redirection
Interesting point. Can we put it on the issues list?
- Playback
It sounds like what you are saying is...Is that right?
- Leading Question
Are there solutions in the area of...?
- Prompt Question
What else?
- Tag Question
That's important, isn't it?
- Float an Idea
What about...? What are the benefits? How do you want me to write it?

Warm Up the Group

- Ask at least two pre-questions that require a NON-VERBAL response.

Checkpoints

- Use Checkpoints at the beginning of each major activity.
- **Review** what has been done.
- **Preview** what is happening next.
- **Big view** - Explain how the activity fits into the objective.

Extended Checkpoints

- Restart with Extended Checkpoints
 - **Remind** the participants of the overall purpose/objective.
 - **Review** all agenda items that have been completed to date.
 - **Preview** all the agenda items remaining to be completed.
 - **Explain** how the specific items to be completed relate to the overall course purpose.

PeDeQs for Directions

- Purpose for the activity
- Example
- General Directions
- Specific Exceptions
- Ask for Questions
- Ask your Starting Question

Confirming Knowledge Transfer

- Reviews
 - Visual recaps
 - Review using dots
 - Review using games (e.g., Jeopardy!, 3-question panic)
- Jewels
- Backward build-up
- Course action plan
- Climate checks

MANAGING DYSFUNCTION

Definition

- Dysfunctional behavior is **any activity by a participant** that is consciously or unconsciously a substitution for expressing displeasure with the **process used, content** of the session, or an **outside factor** unrelated to the session.
- Be sure to separate the **symptom** from the **root cause**.

Prevention Strategies

- Based on issues identified in the preparation stage, consider:
 - Assigning seats
 - Adding ground rules
 - Making sure you interact with particular people
 - Paying close attention to particular reactions
 - Holding informal meetings during breaks

Detection Strategies

- Dysfunction check - actively looking for SIGNS OF DYSFUNCTION
 - Participants who are not speaking
 - Folded arms, legs crossed away
 - Side conversations

Resolution Strategies

- Approach privately or **GENERALLY**.
- Empathize with the **SYMPTOM**.
- Address the **ROOT CAUSE**.
- Get agreement on the **SOLUTION**.

USING VISUAL AIDS

The Power of the Pen

- Write **first**, discuss **second**.
- Write what is **said**, not what you **heard**.
- Ask speaker to **headline it**.

Make it Theirs

- Make it theirs
 - Write, so they can **read** it.
 - Edit by **adding**; use a different **pen**.
 - If more than one person tries to speak, give an **order** to the **speakers**.
- **Avoid lulls** while writing by:
 - Standing close to the boards
 - Begin writing immediately
 - Repeat as you are writing
 - Ask the speaker to repeat
 - Ask a direct probe

CLOSING

Closing

- Review
 - The **course content**
 - The **session purpose**
 - The **participants' objectives**
 - The **parking boards**: issues, coming attractions, actions
- Evaluate
 - The **session**
 - The **facilitator**
 - The **performance** against objectives
- Close
 - **Thank** the participants.
 - Remind them of the **next step**.
 - Formally **end** the session.
 - **Debrief** with the sponsor.

ENERGY

