

# Advanced Facilitation Skills



*Raising Your Skills to  
a Higher Level*

Leadership  
Strategies   
Level up.

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# Leadership Strategies

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## 1. GETTING STARTED

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- 1.1 Course Objectives
- 1.2 Personal Objectives
- 1.3 Agenda
- 1.4 Ground Rules
- 1.5 Best Practices List
- 1.6 Introductions

## **1.1 COURSE OBJECTIVES**

1. Define the "*Level 3*" Facilitator
2. Provide advanced techniques for:
  - Reading your participants
  - Facilitating on the fly
  - Probing issues
3. Identify alternative engagement strategies
4. Provide a forum for participants to share best practices
5. Give students detailed *practice and feedback* on performance

## **1.2 PERSONAL OBJECTIVES**

Imagine that one year from now, you receive an award for “Most Improved Facilitator.”

Though you were already a very good facilitator, you received this award because you improved your skills in a few key areas, you just got better at doing certain things, there were a handful of things that you got better at.

What are the critical skills you would like to emphasize in this class that would make you deserving of that award?

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# 1.3 AGENDA

Day 1	Day 2	Day 3
1. Getting Started  2. The Level 3 Facilitator  <b>Exercise #1 Baseline Skills</b>	Review  4. Facilitating on the Fly  <b>Exercise #2 Facilitating on the Fly</b>	Review  6. Probing Skills  7. Best Practices  <b>Exercise #4 Facilitator's Choice</b>
Lunch	Lunch	Lunch
3. Reading Participants – DISC  Review and Close	5. Engagement Strategies  <b>Exercise #3 Engagement</b>  Review and Close	<b>Exercise #4 Facilitator's Choice</b>  8. Action Planning  Review and Close
Close	Close	Close

## **1.4 GROUND RULES**

1. Always Open for Questions
2. Respect the Speaker / One Conversation
3. No Beeps, Buzzes, or Ringie-Dingies
4. Spelling Doesn't Count
5. Start on time / End on time
6. The Choo-Choo

## **1.5 BEST PRACTICES LIST**

*List below activities or techniques you would like to share with the group*

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## **1.6 INTRODUCTIONS**

1. Your name and organization
2. Your job function
3. The types of sessions you facilitate

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## 2. THE LEVEL THREE FACILITATOR

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- 2.1 The Principles Summarized
  - 2.2 The Facilitator's Methodology
  - 2.3 The Level 3 Facilitator
  - 2.4 Principles by Level

## **2.1 THE PRINCIPLES SUMMARIZED**

**Principle 1. PREPARING FOR SUCCESS**

Cover All the Bases

**Principle 2. GETTING THE SESSION STARTED**

Inform, Excite, Empower, Involve

**Principle 3. FOCUSING THE GROUP**

Establish the Course, Avoid Detours

**Principle 4. RESPECTING THE POWER OF THE PEN**

Use It, Don't Abuse It, Make It Theirs

**Principle 5. INFORMATION GATHERING**

Know Your Tools and How to Use Them

**Principle 6. MANAGING DYSFUNCTION**

Conscious Prevention, Early Detection, Clean Resolution

**Principle 7. CONSENSUS BUILDING**

Generate a Consensus-Focused Process

**Principle 8. KEEPING THE ENERGY HIGH**

Set the Pace, Anticipate Lulls, React Accordingly

**Principle 9. CLOSING THE SESSION**

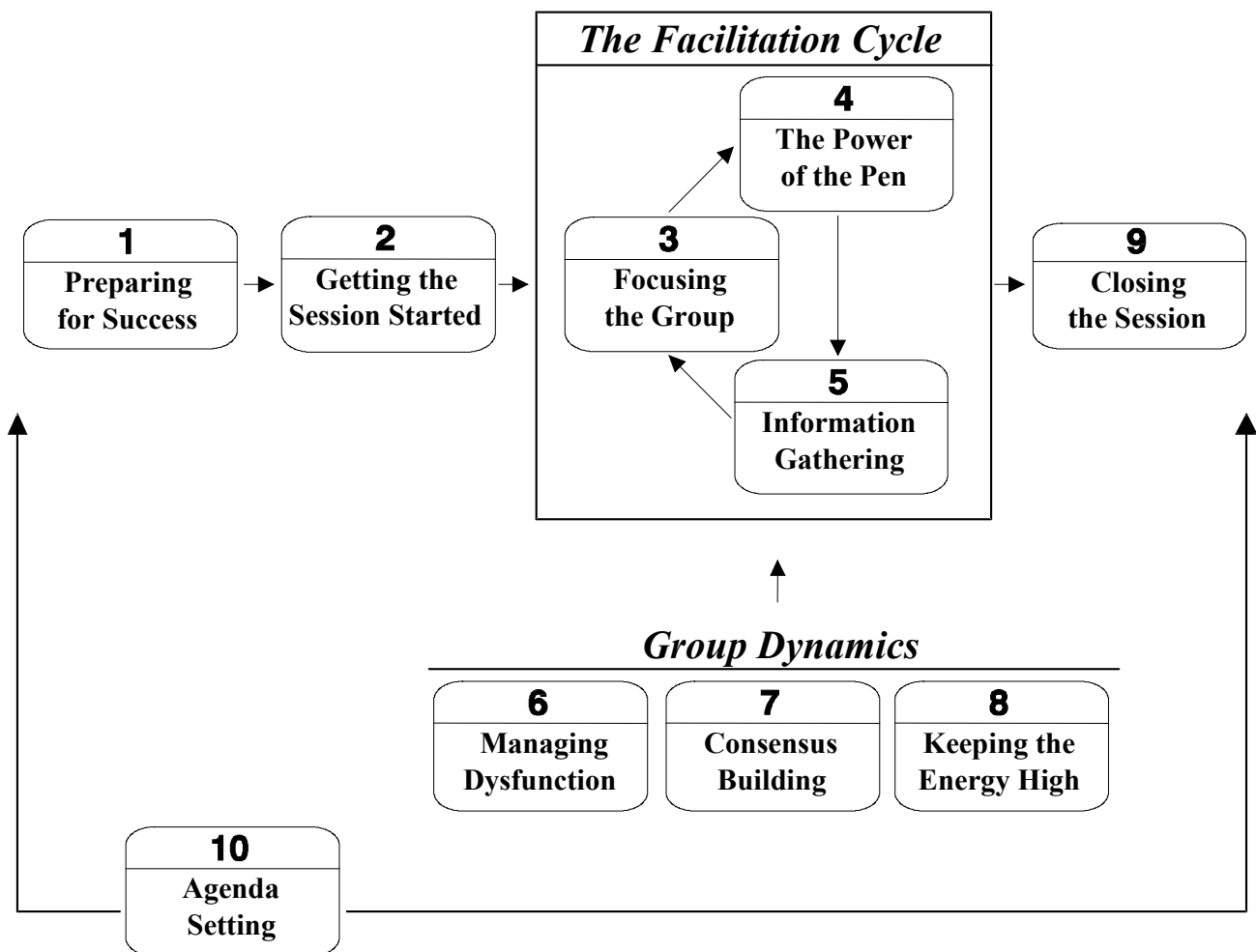
Review, Evaluate, Close, Debrief

**Principle 10. AGENDA SETTING**

Adapt Your Agenda to Address the Need

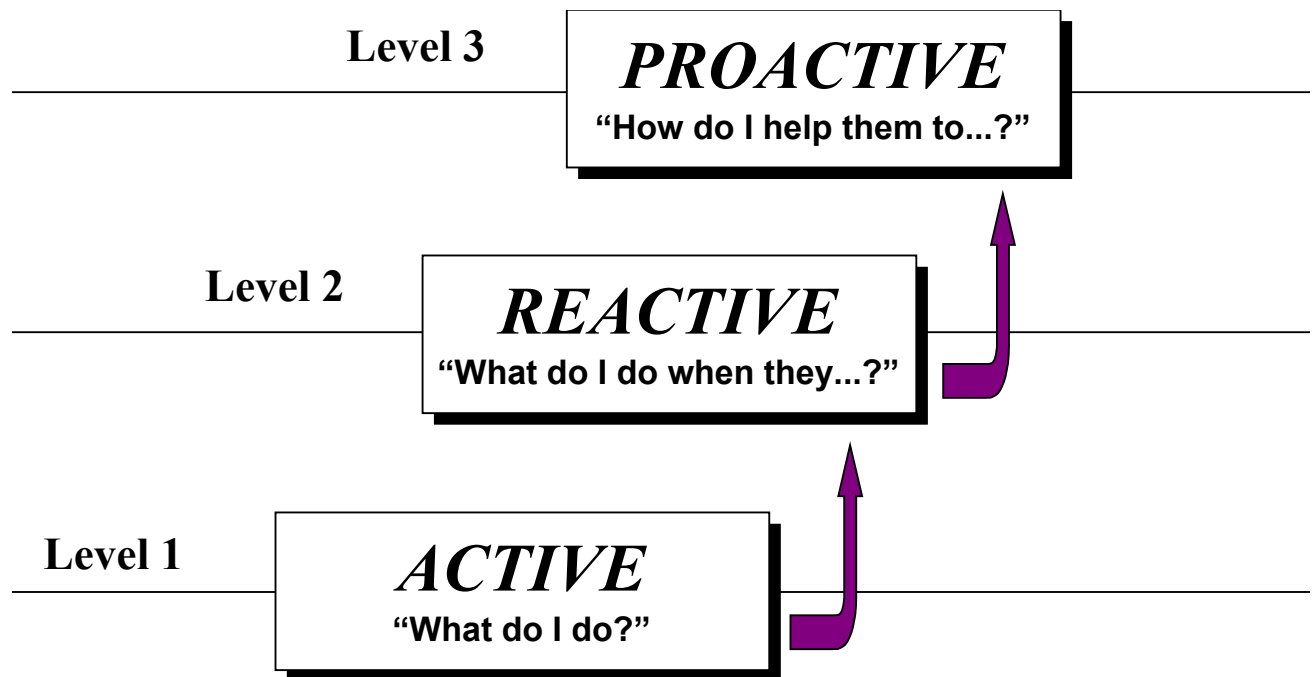
## 2.2 THE FACILITATOR'S METHODOLOGY™

# The *Leadership Strategies* Approach For Structuring Successful Group Sessions



## 2.3 THE LEVEL 3 FACILITATOR

As facilitators increase their skills, they pass through three distinct levels of development. **Each level has specific areas and skills that must be mastered.**



## 2.4 PRINCIPLES BY LEVEL

Principles	Where Are You Now? 1 – 2 – 3	Level 1 <i>What do I do?</i>	Level 2 <i>What do I do when they...?</i>	Level 3 <i>How do I help them to...?</i>
1. Preparing for Success		Interview the project sponsor		<b>Interview the participants</b>
2. Getting the Session Started		Inform, Involve Your Ground Rules	Adding Ground Rules	<b>Excite, Empower Their Ground Rules</b>
3. Focusing the Group		Review, Preview PEDEQs	Redirection	<b>Big View Warm-up</b>
4. The Power of the Pen		Write first Write what is said	Ask for the Headline	<b>Avoid lulls while writing</b>
5. Information Gathering		Listing, Grouping Brainstorming	Reacting Questions	<b>Starting Question Lobbying</b>
6. Dysfunctional Behavior		Early Detection	Clean Resolution	<b>Conscious Prevention</b>
7. Consensus Building		Define Consensus	Delineation Strengths and Weaknesses	<b>Merging Evaluation Criteria</b>
8. Keeping the Energy High		Level 3 Energy Establish recharge	Get people moving Break	<b>Re-energize following breaks Adjust to lulls</b>
9. Closing the Session		Review, evaluate close, debrief	Responding to outstanding issues	<b>Change / benefit Poll the jury</b>
10. Agenda Setting		Tailoring agendas		<b>Constructing a new agenda</b>

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## 3. READING YOUR PARTICIPANTS

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- 3.1 Understanding Communication Styles
  - 3.2 Identifying the Styles of Others
  - 3.3 Facilitating a Project Team
  - 3.4 Which Style Would Be Best?
  - 3.5 Facilitating the Styles
  - 3.6 Success Strategies
  - 3.7 Classic DISC Profiles
  - 3.8 Your Personal DISC Profile

## 3.1 UNDERSTANDING COMMUNICATION STYLES

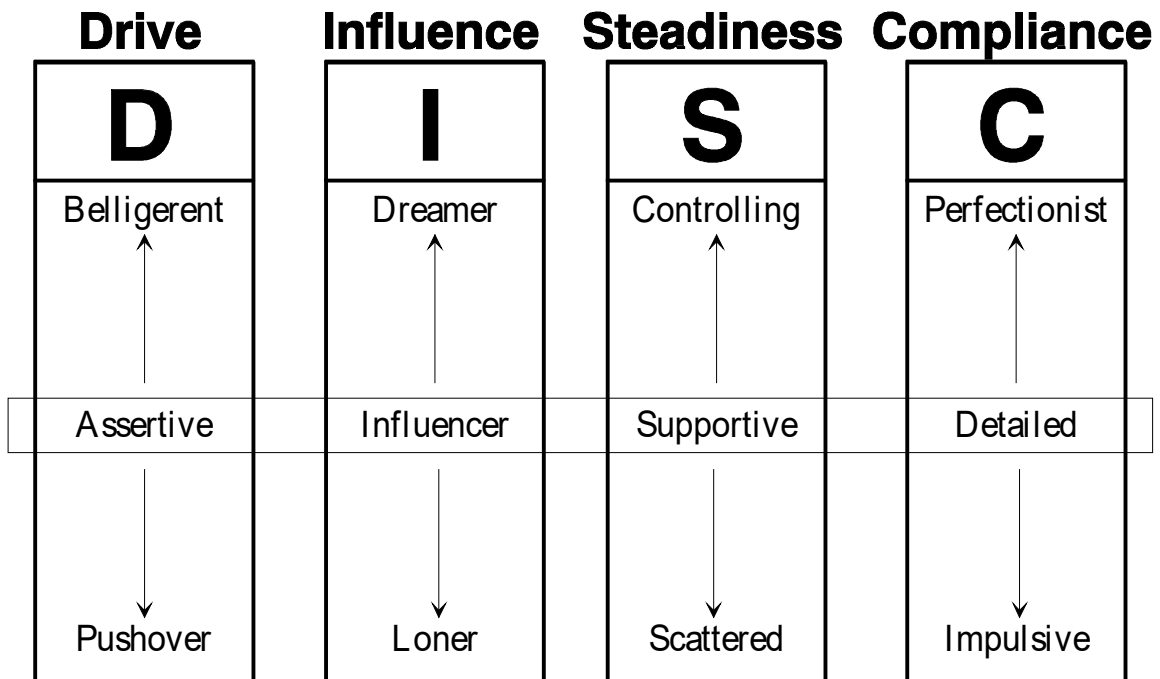
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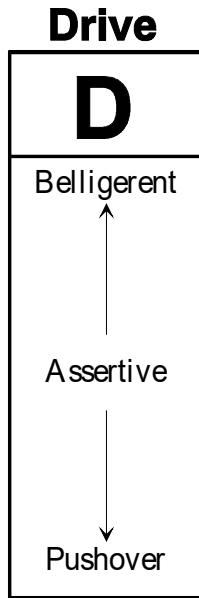
*If it feels as if you and your participants are speaking different languages, you might be right!*

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### The DISC Model

- Where did it come from?
- What does it mean?
- How can we use it?





# The High D

## "Breaks through the Wall"

High Ds tend to take a direct, assertive approach to solving problems. They enjoy challenges and get satisfaction from overcoming them.

### Classic Occupations

Entrepreneurs, team leaders, directors

Value to the Organization	Potential Weaknesses
High Ds tend to: <ol style="list-style-type: none"> <li>1. Focus efforts on getting the job done</li> <li>2. Address problems directly</li> <li>3. Make tough decisions quickly</li> </ol>	High Ds can: <ol style="list-style-type: none"> <li>1. Be overly abrasive, pushy, competitive</li> <li>2. Be too concerned about the goal, not people</li> <li>3. Make decisions too quickly before having all the facts</li> </ol>

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**Key Factors: GETTING IT DONE, OVERCOMING OBSTACLES**

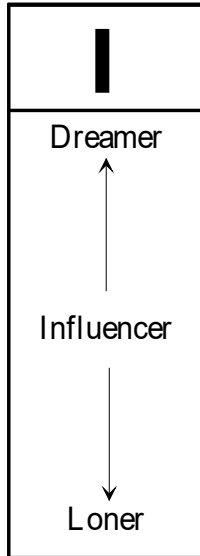
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Communication Dos	Communication Don'ts
<ol style="list-style-type: none"> <li>1. Be prepared - tell them what you are going to tell them</li> <li>2. State your points clearly, briefly, specifically</li> <li>3. Give only as much detail as necessary</li> </ol>	<ol style="list-style-type: none"> <li>1. Don't waste their time with idle chatter</li> <li>2. Don't ramble or tell long stories</li> <li>3. Don't be too detailed unless they ask for it</li> </ol>

**Influence**



# The High I

**"Motivates people to overcome the wall"**

High Is tend to enjoy helping people see the big picture. They motivate and inspire others to succeed.

## Classic Occupations

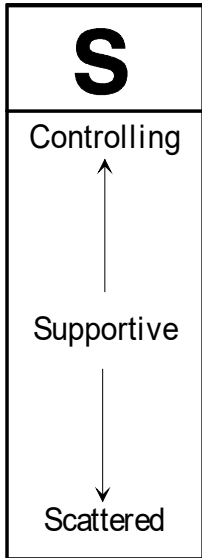
Salespeople, teachers, planners

Value to the Organization	Potential Weaknesses
High Is tend to: <ol style="list-style-type: none"> <li>1. See the big picture</li> <li>2. Motivate and sell others</li> <li>3. Develop creative solutions</li> </ol>	High Is can: <ol style="list-style-type: none"> <li>1. Be so talkative that they don't listen</li> <li>2. Spend so much time on the vision that they never execute</li> <li>3. Overlook details</li> </ol>

**Key Factors: IDEAS, BEING HEARD**

Communication Dos	Communication Don'ts
<ol style="list-style-type: none"> <li>1. Give them the big picture before going into details</li> <li>2. Give them a chance to share their ideas</li> <li>3. Keep the conversation friendly and warm</li> </ol>	<ol style="list-style-type: none"> <li>1. Don't dwell on details and facts; provide these in writing instead</li> <li>2. Don't tell them what to do without giving them an opportunity to respond</li> <li>3. Don't allow them to ramble too long</li> </ol>

**Steadiness**



# The High S

**"Helps others over the wall"**

High Ss tend to be the stabilizing force within an organization. They tend to be dependable, loyal workers who prefer a stable, secure environment.

## Classic Occupations

Social service workers, retail clerks, civil servants

Value to the Organization	Potential Weaknesses
High Ss tend to be: <ol style="list-style-type: none"> <li>1. Supportive, dependable workers</li> <li>2. Accommodating and tolerant of others</li> <li>3. People-oriented, good listeners</li> </ol>	High Ss can: <ol style="list-style-type: none"> <li>1. Avoid dealing with issues until they become big problems</li> <li>2. Be slow to accept change; hold grudges</li> <li>3. Lack vision and creativity</li> </ol>

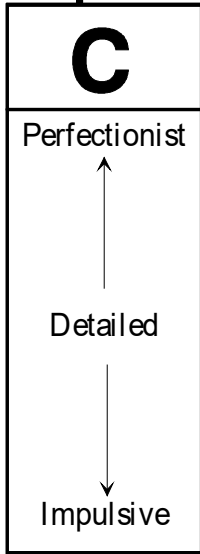
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**Key Factors: SECURITY, BEING LIKED**

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Communication Dos	Communication Don'ts
<ol style="list-style-type: none"> <li>1. Start with a personal comment</li> <li>2. Present ideas deliberately and clearly; provide assurances</li> <li>3. Make sure they are in agreement before moving on</li> </ol>	<ol style="list-style-type: none"> <li>1. Don't dive straight into business</li> <li>2. Don't be demanding or abrasive</li> <li>3. Don't assume "silence means consent"</li> </ol>

**Compliance**



# The High C

**"Develops detail plans for scaling the wall"**

High Cs tend to rely on rational logic and evidence to reach conclusions. They make sure that things are done "by the book."

## Classic Occupations

Researchers, analysts, accountants

Value to the Organization	Potential Weaknesses
High Cs tend to: <ol style="list-style-type: none"> <li>1. Be organized and detail-oriented</li> <li>2. Make sure decisions are well supported</li> <li>3. Ensure that procedures are properly followed</li> </ol>	High Cs can be: <ol style="list-style-type: none"> <li>1. Perfectionists and very hard to please</li> <li>2. Too focused on facts and figures and not on people</li> <li>3. Overly cautious, take too long to make a decision (analysis paralysis)</li> </ol>

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**Key Factors: ACCURACY, GETTING IT RIGHT**

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Communication Dos	Communication Don'ts
<ol style="list-style-type: none"> <li>1. Present ideas in a logical fashion</li> <li>2. Stay on topic</li> <li>3. Provide facts and figures that back up claims</li> </ol>	<ol style="list-style-type: none"> <li>1. Don't be disorganized or make random comments</li> <li>2. Don't rely on emotional appeal to gain agreement</li> <li>3. Don't force a rapid decision</li> </ol>

## A SAMPLE SCENARIO

A problem has arisen in your area.

- You have fully researched the problem.
- You have created an eight page document which delineates the problem, specifies four possible alternatives, and gives the strengths and weakness.
- You favor alternative four.

You are about to meet with your boss who knows nothing about the problem. You knock on the door. You hear, “Come in.” **Depending on your boss’ communication style, what would be the first words out of your mouth?**

*(Hint: Given this style’s key factor, what would your boss want from you when you walked through the door?)*

<b>HI-D</b> <i>Getting it Done</i>	
<b>HI-I</b> <i>Being Heard</i>	
<b>HI-S</b> <i>Being Liked</i>	
<b>HI-C</b> <i>Getting it Right</i>	

**A Sample Scenario (continued)**

Of the four types, which would likely take 15 minutes or less? Which type would likely take 60 minutes or more? Of the two remaining types, give one 30 minutes and the other 45.

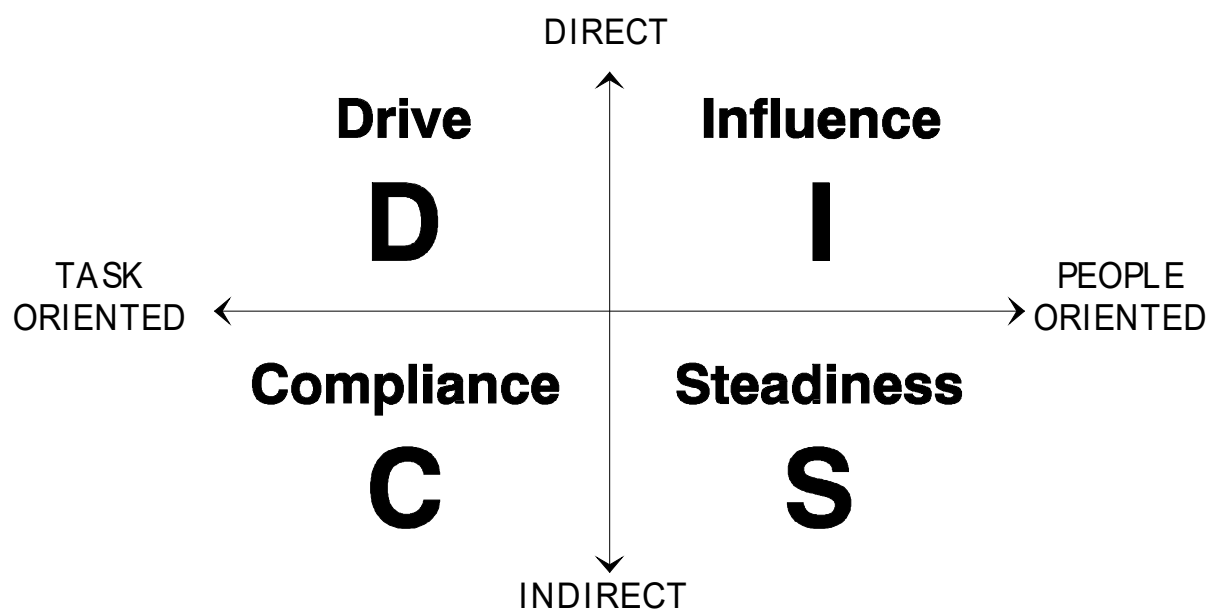
	<b>D</b>	<b>I</b>	<b>S</b>	<b>C</b>
<b>Total Time</b>				

Depending upon the style of your boss, which activities would you do 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup>, etc.

	<b>D</b>	<b>I</b>	<b>S</b>	<b>C</b>
Pleasantries				
Explanation of the problem - High-level explanation				
- Detailed explanation				
Asking how to solve the problem				
Offering your solution(s) - High-level explanation				
- Detailed explanation				
Benefits of your solution(s) - Asking sponsor for the benefits				
- Explaining the benefits				
Reaching agreement on the next step				

## 3.2 IDENTIFYING STYLES

- Why do this?
  - The "Grandma" example
- Understand the dimensions
  - Direct versus Indirect
  - People-oriented versus Task-oriented
- Examples



## 3.3 FACILITATING A PROJECT TEAM

You have been assigned to facilitate a task force that has been given two days to identify key problems, develop potential solutions, and create a detailed implementation plan to improve a business process. **If every one on the team had the same DISC style**, how would it impact the team’s ability to function effectively?

	What would be the Key Issue in the room?	Would they finish?	What would be the quality of what they finished?	How would they feel about one another?
	“Who _____”	Yes / No	High / Medium / Low	Like / Not Like / Neutral
<b>HIGH D</b>				
<b>HIGH I</b>				
<b>HIGH S</b>				
<b>HIGH C</b>				

Keep in mind that if your team is heavily weighted toward a particular DISC style, it may produce dysfunctional behavior. As the facilitator, you must consider communication styles in your strategies for preventing and resolving dysfunction.

## 3.4 WHICH STYLE WOULD BE BEST?

Consider the DISC styles of your participants when creating breakout groups and when assigning tasks to breakout groups.

	Drive	Influence	Steadiness	Compliance
	<b>D</b>	<b>I</b>	<b>S</b>	<b>C</b>
1. Identifying problems				
2. Brain-storming solutions				
3. Developing the detailed plan				
4. Documenting the plan				
5. Selling the plan to management				
6. Overseeing plan execution				
7. Executing the work plan				

## 3.5 FACILITATING THE STYLES\*

<b>High Ds at their Best in a session</b>	<b>High Ds at their Worst</b>	<b>Being Proactive with a High D</b>
<b>High Is at their Best in a session</b>	<b>High Is at their Worst</b>	<b>Being Proactive with a High I</b>
<b>High Ss at their Best in a session</b>	<b>High Ss at their Worst</b>	<b>Being Proactive with a High S</b>
<b>High C at their Best in a session</b>	<b>High C at their Worst</b>	<b>Being Proactive with a High C</b>

\*Detailed notes provided at the end of this section.

## 3.6 SUCCESS STRATEGIES

1. In facilitating a group, consider the communication styles of the individuals present; pay particular attention to the styles of those whom you think may cause you difficulty, or who appear to be exhibiting dysfunctional behavior.
  
2. Adjust your facilitation approach to adapt to the various styles present
  
3. Recognize your own communication bias!
  
4. Look for signs that you may be mis-communicating

<b>HI-D</b> <i>Getting it Done</i>	
<b>HI-I</b> <i>Being Heard</i>	
<b>HI-S</b> <i>Being Liked</i>	
<b>HI-C</b> <i>Getting it Right</i>	

## 3.7 CLASSIC PROFILES

<p><b>D I S C</b></p> <hr/>	<p><b>D I S C</b></p> <hr/>
<p><b>D I S C</b></p> <hr/>	<p><b>D I S C</b></p> <hr/>

## 3.8 YOUR PERSONAL DISC PROFILE

Your personal DISC profile is based on your responses to the 24 questions. You may find that many of the statements in the report are extremely accurate; others you may disagree with; and some others you may not be sure about. As you read your profile:

1. Circle the major items with which you agree.
2. Cross out the major items with which you disagree.
3. Put a question mark next to the major items where you are unsure.

It may be helpful to share your report with someone who knows you well.

Note below the three items with which you most agree:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# FACILITATING THE STYLES

<b>High Ds at their Best in a session</b>	<b>High Ds at their Worst</b>	<b>Being Proactive with a High D</b>
<ol style="list-style-type: none"> <li>1. Driving for efficiency</li> <li>2. Talking</li> <li>3. Directing</li> <li>4. Direct comments</li> <li>5. Give end point first</li> </ol>	<ol style="list-style-type: none"> <li>1. Kill creativity</li> <li>2. Not letting people catch up</li> <li>3. Alienating by being forceful</li> <li>4. Snap decisions</li> <li>5. Unaware of what is happening in group</li> </ol>	<ol style="list-style-type: none"> <li>1. Lay out the process</li> <li>2. Get them on your side</li> <li>3. Let them know you "need their help"</li> <li>4. Keep session fast paced, well planned</li> <li>5. Ask them to help move session along</li> </ol>
<b>High Is at their Best in a session</b>	<b>High Is at their Worst</b>	<b>Being Proactive with a High I</b>
<ol style="list-style-type: none"> <li>1. Participating</li> <li>2. Creative</li> <li>3. Talking</li> <li>4. Keeping energy up</li> <li>5. Cheerleading (supporting)</li> </ol>	<ol style="list-style-type: none"> <li>1. Don't stop talking</li> <li>2. Don't listen</li> <li>3. Don't want to take time for important details</li> <li>4. Blue-skying, unrealistic</li> <li>5. Storyteller</li> </ol>	<ol style="list-style-type: none"> <li>1. Give lots of chances to talk</li> <li>2. Enlist help for out of box thinking and getting others to speak</li> <li>3. Have ground rules: keep discussions relevant, end point first, avoid bar discussion</li> <li>4. Take reality check</li> </ol>
<b>High Ss at their Best in a session</b>	<b>High Ss at their Worst</b>	<b>Being Proactive with a High S</b>
<ol style="list-style-type: none"> <li>1. Friendly</li> <li>2. Supportive, nodding, agreeing</li> <li>3. Pay attention, good listeners</li> <li>4. Tolerant</li> <li>5. Peace makers</li> </ol>	<ol style="list-style-type: none"> <li>1. Going along with what they don't believe</li> <li>2. Grieving silently</li> <li>3. Checked out</li> <li>4. Don't want to change</li> </ol>	<ol style="list-style-type: none"> <li>1. Ask questions</li> <li>2. Check for consensus</li> <li>3. Use their names frequently</li> <li>4. Reinforce with praise, smiles, and eye contact</li> <li>5. Identify decision level</li> </ol>
<b>High Cs at their Best in a session</b>	<b>High Cs at their Worst</b>	<b>Being Proactive with a High C</b>
<ol style="list-style-type: none"> <li>1. Looking at the details</li> <li>2. Constructive critiquing</li> <li>3. Identifying impacts of decision</li> <li>4. Keeping on task</li> <li>5. Providing reality check</li> </ol>	<ol style="list-style-type: none"> <li>1. Boggging down in details</li> <li>2. Give all the reasons why it won't work</li> <li>3. Don't allow intuitive judgment</li> <li>4. Unrealistic expectations of quality, details</li> </ol>	<ol style="list-style-type: none"> <li>1. Identify decision level</li> <li>2. Have High Cs take notes</li> <li>3. Keep them focused so as not to get bogged down</li> <li>4. Have staged detailing, with greater detailing done outside of session</li> </ol>

## 4. FACILITATING ON THE FLY

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4.1 Why on the Fly?

4.2 Facilitating on the Fly

## **4.1 WHY ON THE FLY?**

It is not unusual for a facilitator to have less than a day to prepare for a session. In extreme cases, you may be given less than fifteen minutes notice!

**What are reasons we would have to facilitate on the fly?**

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## 4.2 FACILITATING ON THE FLY

<b>10 Bases to Cover</b>	<b>How to Address with Little Time to Prepare</b>
<b>Sponsor</b>	
<b>Project Team</b>	
<b>Participants</b>	
<b>Objective</b>	
<b>Agenda</b>	
<b>Process</b>	
<b>Deliverable</b>	
<b>Business Area</b>	
<b>Room</b>	
<b>Your Aids</b>	

## 4.2 FACILITATING ON THE FLY

*\*Items on which to focus your energy*

### **\*Objective & Sponsor**

If you are unable to get with the project sponsor ahead of time, ensure that the project sponsor is in the room for the opening. Make the first facilitated process a listing exercise in which the participants respond to two questions:

*"What is the real purpose of this session. . .? What are the key results that we need to have when we are done?"*

### **Deliverable**

If you have a sample deliverable already available, use it. Otherwise plan to skip this step because you will probably not have the time to create one.

### **\*Participants**

With limited time, you will probably not have the opportunity to interview the participants ahead of time. After facilitating the group through creating the objective and agenda, consider asking the following:

*Now that we have agreed on the objective and the agenda we will use to achieve it, let's step back for a second and ask, "What are the potential barriers that might prevent us*

*from achieving our objective? What could happen that would cause this not to work?" Now that we understand the potential barriers, what can we do now or during the session to prevent these barriers from blocking our progress?*

## **\*Agenda**

Once the purpose is identified, label a chart "Proposed Agenda" and either write down a first draft of an agenda based on your past experience, or facilitate the group to create the proposed agenda by asking:

*"Given this as our purpose, think about the steps that will get us there. What should be our major agenda items in order to ensure that we meet this objective?"*

If you facilitate the creation of the agenda, don't be concerned about the order initially. Record the proposed agenda items, then follow up by helping the group decide the logical order to cover the items.

## **\*Process**

Since you are facilitating "on the fly," you will not have time to create a detailed agenda. Therefore, it is important that you use facilitated processes with which you are already familiar. Use your available time to create good starting questions and to determine the examples you will use.

## **Business Area**

You will probably not have time to investigate the business area, so ask the participants to help you with understanding the jargon and business issues as needed.

## **\*Project Team**

As with a normal session, it is important that you take a few minutes to establish roles for each member of the Project Team.

## **The Room**

Try to use a room with which you are already familiar. If you are not familiar with the room, take a few minutes to ensure proper set-up. Be sure to establish your **wall plan!**

## Your Aids

Since you probably will be using familiar processes, you will know what items you need. If you facilitate frequently, consider having a small bag that always contains the materials you use. If you facilitate infrequently, keep this checklist handy:

Timer	Sticky notes (several sizes)
Multi-colored markers	Dots
Dry erase markers	Scissors
Tape	Toys/props

## Opening Words

*"Good morning, it is a pleasure to be here this morning. The first thing I would like to do is **Inform** you about what is going to occur over the next several days. Our session objective is to . . . This is an **Exciting** opportunity because . . . I want you to know you have been **Empowered** by management to . . . Before we get started I would like to **Involve** you in the process by asking what you would like to get out of the next several days. Pretend for a second that the session was over, and you were ecstatic because we . . . What was it that we accomplished which would really make you ecstatic? ... Let's build our agenda. What steps will get us to the end results we are looking for? ... What ground rules, or guidelines, should we put in place to make sure we meet our objective? ... Are there any logistical issues we need to discuss? ... Do we need to do introductions? OK, let's begin with ..."*

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# *Leadership Strategies*

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## **5. ENGAGEMENT STRATEGIES**

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# ENGAGEMENT STRATEGIES SUMMARY

<b>Name</b>	<b>Type</b>	<b>Purpose</b>
Appreciations	Closing	To close a session on a high positive by giving participants the opportunity to express appreciation
Brainstorming (Basic)	Generating Ideas	To generate a large number of ideas
Brainstorming in Teams	Generating Ideas	To generate a large number of ideas
Breakout Groups	Generating Ideas	To increase engagement and reduce time by having groups work on different parts of an activity
Brief Encounters	Inquiry	To allow participants to get input from others on a question they have
Dot Voting	Decision-making	To narrow a list or select items from a list
Dump and Clump	Generating Ideas and Categorizing	To gather information and then categorize that information
Dyads/Triads	Generating Ideas	To generate ideas or answers in groups
Elevator Speech	Reflecting	To have participants develop a short statement that summarizes the results of a session or other information
Forced Analogies	Generating Ideas	To provide a creative approach for a group to identify potential solutions to a problem
Future Letter	Closing	To encourage commitment to action
Gifts and Hooks	Introduction	To get participants familiar with one another at the beginning of a series of facilitated meetings

## Advanced Facilitation Skills

Name	Type	Purpose
Group Questioning	Inquiry	To increase engagement during a Q&A period and help ensure that the most important questions are asked
Grouping	Categorizing	To categorize information into groups
Informed Majority	Decision-making	To make a decision about wording or other item where full consensus is not needed
Introductions	Introduction	To have people become more familiar with one another
Journaling	Reflecting	To encourage individual involvement, engagement and learning transfer
Last Person Standing	Generating Ideas and Categorizing	To identify the most unique information or ideas in a short and energy-filled period of time
Lobbying	Decision-making	To build consensus around a few set of ideas and to increase the level of commitment people feel to participate in implementation
More of/Less of	Generating Ideas	To help participants identify what is needed more of and less of from an organization in response to a likely change
Rotating Flip Charts	Reviewing	To review information that has been developed in breakout groups and have teams provide detailed feedback
Start/Stop/Continue	Generating Ideas	To help participants identify what they should start, stop or continue in response to a likely change
Talking Stick	Reflecting	To promote deeper discussion and listening
Think-Pair-Share	Generating Ideas	To gather information in groups of two and share the information in a crisp, concise manner
Whip Around	Reflecting	To give participants an opportunity to briefly share their thoughts or feelings about something

## Advanced Facilitation Skills

Name	Appreciations
Type	Closing
Purpose	To close a session on a high positive by giving participants the opportunity to express appreciation
General Description	In front of the entire group, the participants individually express appreciation by addressing another person in the second person (“I appreciate you for...”)
Benefit	<ul style="list-style-type: none"> <li>• Closes the session on a high positive note</li> <li>• Draws the team closer to one another through the expression of appreciation</li> </ul>
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b>  <i>We have come to the close of the session. Before we end, however, I would like to give everyone the opportunity to express appreciation to one person in the room. This will give the gift of acknowledgement in another what we see that he or she brings to the group.</i> </li> <li>• <b>Give the instructions.</b>  <i>I'm asking everyone to pick out one person in particular whose contributions during the session you very much appreciate. We will be starting with [Sean] and go around the room to the left. [Sean], you will call that person by name and then speak to that person in the second person. Avoid saying, “I want to appreciate [Doug] because <u>he</u>...” Instead, talk directly to the person as the feedback tends to be much more powerful that way – “[Doug], I want to appreciate <u>you</u> for...” Any questions?</i> </li> <li>• <b>Ask your starting question and give reflection time.</b>  <i>So, take 30 seconds to reflect back on the session. Perhaps think about that moment that you thought was most pivotal. Think about who was speaking or whose sharing you found most helpful or most significant. Take 30 seconds now to jot down that person’s name and any notes about what you want to say.</i> </li> <li>• <b>Get started.</b>  <i>So, let’s start with [Sean]. [Sean], call the name of the person you want to appreciate and tell that person directly what was helpful by saying, “You...”</i> </li> </ul>
Other Tips	<ul style="list-style-type: none"> <li>• While you will be getting all views, it may be helpful to the group to start with someone who will readily have a response and who tends to be fairly positive in his/her reactions. This will allow the session to begin with a positive example.</li> </ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Brainstorming (Basic)</b>
<b>Type</b>	Generating Ideas
<b>Purpose</b>	To generate a large number of ideas
<b>General Description</b>	<p>With Basic Brainstorming, the facilitator asks a question designed to generate a lot of ideas from participants that are recorded by the facilitator. Basic Brainstorming is widely used in facilitation. Examples of items that might be brainstormed include:</p> <ul style="list-style-type: none"> <li>• Ways we can apply what we have just learned</li> <li>• Possible strategies for improving a manufacturing process</li> <li>• Employee issues that should be referred to the Employee Assistance Program</li> <li>• Types of conflict in the organization</li> </ul>
<b>Benefit</b>	<ul style="list-style-type: none"> <li>• Generates ideas around the topic specified</li> <li>• Increases group energy</li> </ul>
<b>Preparation</b>	Have several flip charts pre-titled with the topic so that you won't have to spend time labeling the charts during brainstorming.
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b> <i>Today, we will be looking at ways to improve our communication. Since we all work together, let's talk about how to improve communication between the departments. To make it easy, let's give our ideas in a verb-object format, such as, "Implement a...Create the...Change our..."</i></li> <li>• <b>Ask your starting question and allow think time.</b> <i>Before we get started, let's take a minute first to each write down any idea you have about improving our communication. Think about the challenges we have had with communicating. Think about things we could do to solve these challenges or strategies we might implement to make our communication even better. Go ahead and take a minute to write some of those thoughts down. When the minute is over, we will start with [Don] and go clockwise around the room.</i></li> <li>• <b>Give the time limit, start the process, record the responses and keep it moving.</b> <i>Let's get started. We'll go around the room starting with [Don] and then go on to the next person. If you don't have something different, you can just say, "Pass." While we are doing it, please – no judgment at all. We will save that for later. We'll go five or so minutes, or we'll stop if there are no</i></li> </ul>

## Advanced Facilitation Skills

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Name	Brainstorming (Basic)
	<i>more different ideas. Any questions? Okay, [Don], give me your first item. I'll record it, and then, we will go to the next person.</i>
<b>Other Tips</b>	<ul style="list-style-type: none"><li>• Record responses or have someone else record the responses.</li><li>• This should be a fast-paced activity. Keep the process moving by asking for more ideas: "Who's next?...Okay, give me another idea... What else?"</li><li>• Remind participants of the no judgment rule as often as necessary. Do not let criticism go by without comment.</li><li>• Encourage participants to use, modify, expand, etc. the ideas of other participants.</li><li>• After the brainstorming, be sure to group or prioritize the information. Having the ideas on sticking notes will make this easier. (See Basic Grouping or Dump and Clump.)</li></ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Brainstorming in Teams</b>
<b>Type</b>	Generating Ideas
<b>Purpose</b>	To generate a large number of ideas
<b>General Description</b>	As is the case with Basic Brainstorming, when utilizing Brainstorming in Teams, the facilitator asks a question designed to generate a lot of ideas from participants. However, instead of the facilitator taking responses from the entire group, the participants work in teams, and team leaders record the responses.
<b>Benefit</b>	Brainstorming in Teams frequently generates more responses in less time than Basic Brainstorming. Brainstorming in Teams also allows for greater participation from more people and provides a level of intimacy that generally results in greater involvement from the less vocal participants.
<b>Preparation</b>	Have several flip charts pre-titled with the topic so that you won't have to spend time labeling the charts during brainstorming.
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b> <i>Today, we will be looking at ways to improve our communication. Since we all work together, let's talk about how to improve communication between the departments.</i></li> <li>• <b>Identify teams and team leaders.</b> <i>To do this, let's use our teams. For this meeting we have divided the group into [three] teams. We have the Red team over here (Red team, are you there?), the Blue team... To help in the team process, I would like to ask that the person from your team who is closest to me serve as your team leader. Team leaders, please grab the pad and colored marker.</i></li> <li>• <b>Give instructions.</b> <i>Team leaders, you and your team will have two minutes to identify as many issues as you can related to our objective. There are only three rules:</i> <ul style="list-style-type: none"> <li>○ <i>You must use the pen you have been given and the pad you have been given and only these.</i></li> <li>○ <i>Only one item per sticking note. You can have as many items as you please.</i></li> <li>○ <i>When the two minutes is up and the clock rings, your pen must be capped; otherwise, you will lose two issues.</i></li> </ul> </li> <li>• <b>Ask your starting question.</b> <i>So, think about the challenges we have had with communicating. Think about things we could do to solve these challenges or</i></li> </ul>

## Advanced Facilitation Skills

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Name	Brainstorming in Teams
	<i>strategies we might implement to make our communication even better. If we are going to improve our communications, what might we do? The clock is starting.</i>
<b>Other Tips</b>	<ul style="list-style-type: none"><li>• After the brainstorming, be sure to group or prioritize the information. Having the ideas on sticking notes will make this easier. (See Basic Grouping or Dump and Clump.)</li></ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Breakout Groups</b>
<b>Type</b>	Generating Ideas
<b>Purpose</b>	To increase engagement and reduce time by having groups work on different parts of an activity
<b>General Description</b>	When a team has to perform the same activity several times (e.g., define measures for five goals, develop action plans for six initiatives), the facilitator does the first item as an entire team, splits the team into breakout groups with each breakout group assigned to one of the other items, and then, has the full group review the work done.
<b>Benefit</b>	<ul style="list-style-type: none"> <li>Increases engagement by allowing more people to speak at the same time (e.g., with five breakout groups, five people can be speaking simultaneously—one in each breakout group)</li> <li>Can result in more work being done in less time, as the work of the breakout teams is done at the same time rather than sequentially</li> </ul>
<b>Preparation</b>	Have the names of the items to be assigned to each breakout group listed on a chart.
<b>Sample Words</b> (Purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li><b>Clearly describe the purpose.</b> <i>We have identified our five goal areas. Our next step is to create definitions for each of these goal statements. These definitions will help us to further refine our vision.</i></li> <li><b>Do the first element as a group.</b> <ul style="list-style-type: none"> <li><i>We'll do the first goal together. Then, we'll use Breakout Groups to create a first draft for the others.</i></li> <li><i>Remember, a goal starts with an 'infinite' verb and includes an object. 'Infinite' verbs are words such as provide, promote, maximize versus 'finite' verbs like develop, build, establish.</i></li> <li><i>Let's review the sticky notes that were created for this first goal area. Given these items, think about what we are trying to achieve in this area... We would have been successful if we have achieved what? Who wants to get me started with an infinite verb? What are we trying to do in this area?</i></li> <li><i>Okay, who can give me the object and finish the sentence?</i></li> </ul> </li> <li><b>Assign goals to breakout teams.</b> <ul style="list-style-type: none"> <li><i>We have developed the goal statement for the first goal. Our next step is to define the goal statement for each of the other goals so that we will have goal statements for each goal. To save a little time, let's use Breakout Groups for each goal area.</i></li> <li><i>We will need new team leaders. So, current team leaders, please pass the pad and marker on to another member of your team who will serve as team leader for this activity.</i></li> </ul> </li> <li><b>Give final directions and get started.</b></li> </ul>

Name	Breakout Groups
	<ul style="list-style-type: none"> <li>○ <i>Each breakout team will work on the goal area assigned to them. Team leaders, you and your team will have 15 minutes to draft the goal statement. Remember the process:</i> <ul style="list-style-type: none"> <li>□ <i>Read the sticky notes for the goal area.</i></li> <li>□ <i>Ask, “What words describe our intention with this goal?”</i></li> <li>□ <i>Start with an infinite verb (e.g., provide, maximize, promote, maintain).</i></li> <li>□ <i>Add the object and complete the sentence.</i></li> <li>□ <i>Review to ensure that the goal is global in scope and excludes references to specific quantities or timeframes.</i></li> </ul> </li> <li>○ <i>When you are done, your goal statement should be written on a flip chart page. Please write large and leave plenty of space for improvements.</i></li> <li>○ <i>Any questions? Okay, in 15 minutes have your goal statements on flip charts.</i></li> <li>● <b>Report back.</b> <ul style="list-style-type: none"> <li>○ <i>Now that we are complete, let’s have all the flip charts in the front of the room, so we can review the drafts from each team.</i></li> <li>○ <i>Keep in mind that the teams have given us a starting point only. Our job is to refine each one to ensure the goal statements work for the entire group.</i></li> <li>○ <i>Team Red, we’ll start with you presenting, and Team Green, you’ll give your input first by sharing what you like about their goal statement and any improvement suggestions. Then, the other teams will have an opportunity to give their improvement suggestions as well.</i></li> <li>○ <i>Any questions? Okay, let’s get started. I’ll read the goal that came from Team Red, and then Team Green, we want your comments – first, what you like, and then how to improve it.</i></li> </ul> </li> </ul>
<b>Other Tips</b>	<ul style="list-style-type: none"> <li>● Breakout Groups can be used anytime a process is repeated several times as in the goal example.</li> <li>● You can divide into teams in a number of different ways including: based on how people are seated, based on a pre-determined assignment, or based on the preference of each participant.</li> <li>● Consider using the Informed Majority process to get agreement on suggested changes to the work done by the breakout groups.</li> </ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Brief Encounters</b>
<b>Type</b>	Inquiry
<b>Purpose</b>	To allow participants to get input from others on a question they have
<b>General Description</b>	Brief Encounters is a fast-paced activity that has participants pairing up for a brief, insightful exchange about a question each has before moving on to the next pairing to have another exchange. In the time allotted (usually 10-20 minutes), participants are encouraged to have as many brief encounters as possible to gain as many responses as they can to their question.
<b>Benefit</b>	<ul style="list-style-type: none"> <li>• Gets participants up and moving</li> <li>• Allows participants to get considerable input into a question</li> <li>• Gives participants an opportunity to hear about and make recommendations on the questions of others</li> </ul>
<b>Sample Words</b> (Purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b> <i>Many of us come to conferences with a specific question we want to have answered. We want you to have the opportunity to get as many responses to your question as you can. We are going to do an activity called "Brief Encounters" in which you will have a total of 15 minutes to engage in brief one-on-one conversations to get input on your question from as many participants as possible.</i></li> <li>• <b>Have participants identify their question.</b> <i>I'm going to give you a minute to formulate your question such as, "How do I give constructive feedback without sounding judgmental?" If you had the opportunity to get input from 15-20 people on a question, think about what that question would be. Think about the challenges you are facing, the barriers that are standing in your way, or any other area in which you would like input. You may want to know, "How do I...?...What's the best way to...?o How would you deal with...?"...Go ahead now and write down your question.</i></li> <li>• <b>Give instructions.</b> <i>In a minute, I am going to ask everyone to stand and pair up with someone to have a brief encounter. Each encounter should happen exactly the same way. One of you will say your name and then ask a question. The other person will answer the question. You will say, "Thank you very much." Those are the only four words you get to say in response: "Thank you very much." Then, the person will ask you</i></li> </ul>

Name	Brief Encounters
	<p><i>his/her question, and you will answer it. And, that person will say, "Thank you very much." Then, you will find someone else and have your next brief encounter. There is no back and forth conversation. When the person answers, what do you say? [Pause for a response. Participants should answer, "Thank you very much.]" Any questions?</i></p> <ul style="list-style-type: none"> <li>• <b>Get started.</b> <i>Everyone stand! Quickly pair up with someone and start your brief encounter!</i></li> <li>• <b>End.</b> You may very well find that once people start Brief Encounters, they don't want to come back! It may be very helpful to use a group attention mechanism such as the following: <i>Our time has come to end Brief Encounters. Clap once if you can hear my voice. Now, if you can hear my voice, clap twice. Finally, if you can hear my voice, clap three times.</i></li> </ul>
<b>Other Tips</b>	<ul style="list-style-type: none"> <li>• At the end of Brief Encounters, you may hold a debrief to allow people to share either what they learned or their thoughts about the experience.</li> <li>• Brief Encounters is especially beneficial at the beginning of a conference to get people focused and engaged with others or at the end of a conference as a last opportunity for people to have their burning questions answered.</li> <li>• Brief Encounters can be done with hundreds of people but is generally not as effective with groups under 16, as people will be frequently waiting for other conversations to end.</li> <li>• If there is an odd number, the facilitator might consider serving as a participant.</li> </ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Dot Voting</b>
<b>Type</b>	Decision-making
<b>Purpose</b>	To narrow a list or select items from a list
<b>General Description</b>	With dot voting, participants receive a number of dots, which they place on the items from a list that they believe are of greatest importance.
<b>Benefit</b>	Fast, visual way to determine the most important items on a list
<b>Preparation</b>	Be sure to have dots ready to be handed out and the items to be voted on posted and easily accessible.
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b> <i>Now that we have discussed our strategies, we are about to move into the priority setting stage in which each of you will use dots to vote for your top strategies.</i></li> <li>• <b>Give directions.</b> <i>You have been given eight dots. Four dots are blue, and four are red. The blue dots count as three points each, while the red dots each count one point. Place the blue dots on the four strategies you believe are the most important, and your red dots on four other strategies.</i></li> <li>• <b>Give exceptions.</b> <i>You will have five minutes to review the strategies and place your dots on the ones that you feel are the best. You may NOT place more than one dot on a strategy. Any questions?</i></li> <li>• <b>Get started.</b> <i>The polls are now open for five minutes. Let's vote.</i></li> <li>• <b>Tally scores.</b> <i>Now that the polls are closed and we have tallied the scores, it appears that we have a natural break in scores after [xyz] strategy. Based on this information, would someone like to make a motion as to which strategies should become our priority?</i></li> </ul>
<b>Other Tips</b>	<ul style="list-style-type: none"> <li>• To determine the number of dots to give each person, consider using 20-30% of the total number of items. Alternatively, if you know that you only want the top X items, give X dots to each person.</li> <li>• Using two different colored dots (with each dot of one color representing 3 points and each dot of the other color representing 1 point) causes a greater spread in scores and makes it easier to determine where a logical break in the scoring occurs.</li> </ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Dump and Clump</b>
<b>Type</b>	Generating Ideas and Categorizing
<b>Purpose</b>	To gather information and then categorize that information
<b>General Description</b>	Each team records their responses to a listing activity (e.g., what are all of the steps in the hiring process? What are my objectives for this session?) or a brainstorming session (e.g., where might we plan our company outing?). These items are collected (dumped) and then organized in categories (clumped).
<b>Benefit</b>	Provides an approach to have many people involved in developing and categorizing a large amount of input in a relatively short timeframe
<b>Preparation</b>	In advance, create either a four-cell or six-cell matrix for placing sticky notes on two charts.
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b> <i>In a few minutes, we will build a list of the key issues that need to be addressed in this session if we are going to achieve our objective. To do this, <b>let's use our teams</b>. For this meeting we have divided the group into [three] teams. We have the Red team over here (Red, are you there?), the Blue team...</i></li> <li>• <b>Select leaders.</b> <i>To help in the team process, I need a volunteer from each team to stand. Volunteer, please grab the pad and colored marker in one hand and, with your other hand, touch the shoulder of one of your teammates. Please hand this person the pad and marker. The person you are touching is the <b>TEAM LEADER</b> for this exercise. Volunteers, you can sit down, thank you.</i></li> <li>• <b>Provide instructions and the starting question.</b> <i>I have instructions for team leaders and team members. <b>Team leader instructions</b> first – you and your team will have two minutes to identify as many issues as you can related to our objective. There are only three rules.</i> <ul style="list-style-type: none"> <li>○ <i>You must use the pen you have been given and the pad you have been given and only these.</i></li> <li>○ <i>Only one item per sticking note. You can have as many items as you please.</i></li> <li>○ <i>When the two minutes is up and the clock rings, your pen must be capped; otherwise, you will lose two issues.</i></li> </ul>   <i><b>Team member instructions</b> – your job is to contribute. So, think about our objective for a minute, the things we are doing well, the things we need to do better. If we are going to improve things in this area, there are many issues we will have to address. We want to list these. Any questions? Remember both quantity and quality count. What are the key issues we need to address? Team leaders, the clock is ticking...</i> </li> </ul>

Name	Dump and Clump
	<ul style="list-style-type: none"><li data-bbox="548 285 1453 583">• <b>Give the quantity and quality awards.</b> <i>Now, let's see how many responses we have from each team and, at the same time, do introductions. Let's go first with the Red team starting with the person who is on the team leader's left, and then, we'll have each person on the team give his/her name and organization. After the team leader gives his/her name, let us know how many issues your team came up with... So, it looks like our quantity award goes to the ..._____ team. Let's give them a hand!</i></li><li data-bbox="548 596 1437 793">• <i>That's the QUANTITY award; now, let's check the QUALITY award, shall we? Let's start with the winning team. Their first issue is _____. Let's put that in a category. What is a broad name for this that might include other similar issues? Let's move on to the next item...Now that we have finished with that team, let's move on to the next team...</i></li><li data-bbox="548 806 1437 932">• <i>Now that all the sticky notes have been grouped, it looks like the RED team shows up in __ groups, the BLUE team in _____ groups... So, the QUALITY award goes to the _____ team. Let's give them a hand!</i></li></ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Dyads/Triads</b>
<b>Type</b>	Generating Ideas
<b>Purpose</b>	To generate ideas or answers in groups
<b>General Description</b>	Participants work in groups of two or three on an assigned task and then share their results with the entire group.
<b>Benefit</b>	Provides an opportunity for participants to share their views without the time required to have one participant at a time speak before the entire group
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b> <i>We have just heard a presentation on new approaches different organizations are taking for performance reviews. Next, I would like for us to work in pairs to identify the strategies you and your partner think are worth considering for our organization. This will give us concrete ideas that we possibly will take forward.</i></li> <li>• <b>Pair up.</b> <i>Let's start by pairing up. Please pair up with a person that is NOT sitting next to you and move to a place at the table or around the room where the two of you can have a five-minute conversation.</i></li> <li>• <b>Give instructions.</b> <i>Now that you are with your teammate, you will have five minutes to identify one to three strategies that we might implement in our organization around improving performance reviews. When you are done you should have the strategies written on a sticky sheet – one strategy per sheet. Decide now who will be doing the writing.</i></li> <li>• <b>Ask the starting question.</b> <i>So, think about the information you heard shared, the things in particular you thought were good ideas or strategies that we could possibly implement. Let's get started.</i></li> </ul>
<b>Other Tips</b>	<ul style="list-style-type: none"> <li>• As an alternative method for forming teams, you can first determine the number of teams you need and then have people count off by that number. For example, if there are 24 people in the room, and you want groups of three, you will need eight teams. So, you would have the group count off 1-8.</li> <li>• Following the Dyads/Triads, you can use a grouping or report-back activity to process the information.</li> </ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Elevator Speech*</b>
<b>Type</b>	Reflecting
<b>Purpose</b>	To have participants develop a short statement that summarizes the results of a session or other information
<b>General Description</b>	<p>An elevator speech is a short statement on a point you want to make presented in the time it takes an elevator to go from the first floor to the top floor of a building—about 30 seconds. The elevator speech should grab attention and deliver the key points in very few words.</p> <p>Participants develop their own elevator speech and share the speech in sub-groups.</p>
<b>Benefits</b>	<ul style="list-style-type: none"> <li>• Gets participants to focus on the most important information worth sharing</li> <li>• Prepares participants to share information with others following the session</li> </ul>
<b>Preparation</b>	Record on a flip chart, “Two things an elevator speech should do: inform and excite.”
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b>  <i>We are nearing the completion of our strategy session. Before we close out, however, it will be important for us to agree on what will be said to others following the session.</i></li> <li>• <b>Introduce the Elevator Speech.</b>  <i>I would like to use the Elevator Speech process to help us define this. An elevator speech is a short statement on a point you want to make presented in the time it takes an elevator to go from the first floor to the top floor of a building—about 30 seconds. The elevator speech should grab attention and deliver your key points in very few words. Each person will create his/her own elevator speech.</i></li> <li>• <b>Define the key points – “Oh WOW!”.</b>  <i>The elevator speech should cover this four key points which you can think of as “Oh WOW!”</i> <ul style="list-style-type: none"> <li>○ <b>Overall</b>, I thought it was... (give adjective).</li> <li>○ <b>What we did</b> was... (describe major items).</li> <li>○ <b>One thing</b> I found especially exciting was...(describe the one thing and why it was beneficial).</li> <li>○ <b>What I am looking forward to next is...</b>(describe next steps).</li> </ul> </li> <li>• <b>Give instructions.</b>  <i>So, now that we have our key points, you are ready to work individually to develop your own elevator speech. Keep in mind that your elevator speech should be about 30 seconds and should answer the items in “Oh WOW!” You will have eight minutes. So,</i></li> </ul>

## Advanced Facilitation Skills

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Name	Elevator Speech*
	<p><i>Imagine that it's Monday morning, you get on the elevator, and someone on it who works for the company asks you, "How was the retreat?" Using the key points, think about what you would say to that person and the words you would use to convey those points. Go ahead and get started now.</i></p> <ul style="list-style-type: none"><li>• <b>Share the elevator speeches.</b> <i>Now that we have written our elevator speeches, let's review them in teams of four. Have all your team members read their elevator speech and pick one of the four to share with the entire group.</i></li></ul>
<b>Other Tips</b>	<ul style="list-style-type: none"><li>• As an alternative: following the Elevator Speech creation you can use Dyads/Triads or Think-Pair-Share as the vehicle for sharing the speeches.</li><li>• Alternatively, you can have each participant stand in front of the group to give his/her elevator speech.</li><li>• Be sure to have the group clap after each participant shares to keep the energy up.</li></ul>

\*Adapted from, "How to Craft an Effective Elevator Speech" by Chris King

## Advanced Facilitation Skills

<b>Name</b>	<b>Forced Analogies</b>
<b>Type</b>	Generating Ideas
<b>Purpose</b>	To provide a creative approach for a group to identify potential solutions to a problem
<b>General Description</b>	The facilitator chooses an object that is completely unrelated to the issue under study. The facilitator asks the group to brainstorm ways that the issue is like the object. Once the brainstorm is complete, the participants go back to brainstorming solutions to the problem using the forced analogies as a starting point.
<b>Benefit</b>	<ul style="list-style-type: none"> <li>• Encourages groups to think outside the box and consider possibilities that might not be readily apparent</li> <li>• Provides a method to use to move groups or teams beyond the ideas they produced during basic brainstorming</li> </ul>
<b>Preparation</b>	Decide in advance the object you will use for the forced analogy.
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b> <i>We have completed an initial brainstorm around ways to solve this problem. I would like to take a few minutes to see if we can help our minds think out of the box and, perhaps, come up with additional possibilities.</i></li> <li>• <b>Introduce Forced Analogies.</b> <i>The process I want to use is called Forced Analogies, where we compare our problem with an object. For example, if we were looking at ways to improve the hiring process, and the comparison object was hockey stick, I would ask, "How is our hiring process like a hockey stick?" And, someone might respond, "If we don't put the stick in the hands of people who know what they are doing, you will never score by getting the right people hired."</i></li> <li>• <b>Give directions.</b> <i>We will spend only about five minutes on this. I am going to ask the question, and we will go around the room answering. Feel free to pass, and we will go to the next person. I'll be scribbling down the answers as you give them.</i></li> <li>• <b>Start.</b> <i>[Jane], I am going to start with you. So, think about how this issue is like a [car]? In what ways is [issue] similar to a [car]? [Jane], get me started...</i></li> <li>• <b>Debrief.</b> <i>Now that we have finished our time, let's review our answers and see what other ideas occur to you for how we might address this issue. We said this issue is like a [car] in the follow ways...So, based on what we have said, what other ideas occur to you for solving this issue? Let's take five minutes in our groups to</i></li> </ul>

## Advanced Facilitation Skills

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<b>Name</b>	<b>Forced Analogies</b>
	<i>brainstorm additional ways to address this issue.</i>
<b>Other Tips</b>	<ul style="list-style-type: none"><li>• Consider using teams for Forced Analogies once you get the first few answers.</li><li>• During the session, be sure to keep repeating the question, “How is this issue like a...” to keep it moving.</li></ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Future Letter</b>
<b>Type</b>	Closing
<b>Purpose</b>	To encourage commitment to action
<b>General Description</b>	Participants write a letter to themselves committing to take a specific action.
<b>Benefit</b>	<ul style="list-style-type: none"> <li>Knowing that this letter will arrive is often a sufficient inspiration to keep their commitment alive and well</li> <li>Receiving the letter will often rekindle any commitments that have deteriorated</li> </ul>
<b>Preparation</b>	<ul style="list-style-type: none"> <li>Record on a flip chart samples of what a future letter should do as follows. Display when appropriate. <i>Write a letter to yourself describing one or more of the following:</i> <ul style="list-style-type: none"> <li><i>The commitment that you are making and why it is important to you and to your organization</i></li> <li><i>How you are feeling at this moment and why</i></li> <li><i>Any obstacles you may face in fulfilling your commitment despite your determination to make it happen</i></li> </ul> </li> </ul>
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li><b>Clearly describe the purpose.</b> <i>The training session is complete, and now, it is time to commit to action. Research shows that when people commit in writing to take an action following training and then share that commitment with another person, the likelihood of the action actually being taken increases significantly. We would like to harness this power of intention by having you do just this.</i></li> <li><b>Give directions.</b> <i>We have just reviewed the key tools from the course. From this tool list, pick one that you will commit to using in the next 30 days to ensure you and your organization benefits from this class. TAKE five minutes to write a letter to yourself describing one or more of the following:</i> <ul style="list-style-type: none"> <li><i>The commitment that you are making and why it is important to you and your organization</i></li> <li><i>How you are feeling at this moment and why</i></li> <li><i>Any obstacles you may face in fulfilling your commitment despite your determination to make it happen</i></li> </ul> <i>Be sure to put your name on your letter and your e-mail address.</i> </li> <li><b>Explain what will happen next.</b> <i>I will collect the letters and we will be emailing them back to you in three to four months after the workshop. When you receive the e-mail, please take a few minutes to write back to us letting us know what you did.</i></li> </ul>
<b>Other Tips</b>	<ul style="list-style-type: none"> <li>As an option, have people share their letters with either a partner or a small group to further reinforce the commitment before you collect the letters.</li> </ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Gifts and Hooks</b>
<b>Type</b>	Introduction
<b>Purpose</b>	To get participants familiar with one another at the beginning of a series of facilitated meetings
<b>General Description</b>	Each person shares with the group three gifts and one hook. The gifts indicate what a person brings to the table that will benefit the group; the hook indicates the one thing that needs to happen to keep the person engaged and coming back for future meetings.
<b>Benefit</b>	<ul style="list-style-type: none"> <li>• Gets participants introduced to one another by learning about gifts that each person has that may be relevant to the work</li> <li>• Participants also learn where there are common gifts and frequently see how most members of the group have similar hooks (e.g., seeing results, making a difference, having positive interactions)</li> </ul>
<b>Preparation</b>	<p>Have a chart that gives the definitions of gifts and hooks and display when appropriate.</p> <ul style="list-style-type: none"> <li>○ Your Gifts: the skills, knowledge, resources, or anything else you bring to the group that will help it accomplish its work.</li> <li>○ Your Hook: the one thing that has to happen to keep you engaged and at the table.</li> </ul>
<p><b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)</p>	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b> <ul style="list-style-type: none"> <li>○ <i>Each person brings gifts to the table (e.g., skills, knowledge, resources) that are valuable for the team in getting its work done. It is important that the team understand these gifts up front.</i></li> <li>○ <i>At the same time, each person also has one or more hooks. Hooks represent what the individual needs to experience to remain fully engaged and actively involved as the group progresses in its work.</i></li> <li>○ <i>Through this exercise we would like to know what are the gifts and hooks we have in the room.</i></li> </ul> </li> <li>• <b>Give instructions.</b> <p><i>Each person has one green sticky note and one yellow sticky note. Please place your name at the top of each sticking note and then take two minutes to record the three most important gifts you bring to the group and your most important hook. Remember, the gifts might be the skills, knowledge or resources you bring or something else. Your hook is that one thing that has to happen to keep you engaged and at the table. So, let's do that now: record your name on both sticky notes and then your three gifts on the green note and your one hook on the yellow note. We will be collecting these, so please write so that our documenter can read it!</i></p> </li> <li>• <b>Share the gifts and hooks.</b></li> </ul>

Name	Gifts and Hooks
	<p><i>Now that everyone has written their gifts and hooks, let's hear them. I would like to start with the person on my left. You will be the first person to give your gifts and your hook. Given the number of people in the room, I will use a one-minute clock just to ensure that we don't run too long. If you hear the clock, it means your minute is up, so please wrap up with a sentence or two. At the end we'll collect the pages and record them in the minutes. Any questions? Okay, let's get started with the person on my left.</i></p> <ul style="list-style-type: none"> <li>• <b>Ask for reflections.</b>  <i>Now that everyone has shared their gifts and hooks, let's reflect on what we heard.</i> <ul style="list-style-type: none"> <li>○ <i>What are the common themes?</i></li> <li>○ <i>What does this tell us about our team?</i></li> <li>○ <i>What do we need to keep in mind as we move forward?</i></li> </ul> </li> </ul>
<p><b>Other Tips</b></p>	<ul style="list-style-type: none"> <li>• Depending on the size of the group, participants can work individually or in pairs to identify gifts and hooks.</li> <li>• As people are sharing, consider recording gifts and hooks in general terms (two or three words) on flip charts and putting a check mark each time there is a repeat, so people can see common themes.</li> <li>• Consider having people clap after each person, or if there is a large group, clap after a table is complete. This will help keep the energy going.</li> <li>• If there are more than 15 people, reduce the time per person to less than one minute to ensure the exercise does not go too long.</li> <li>• If you facilitate cross-functional teams or community task forces assembled to address a specific issue, it is likely that there will be a large percentage of your team members who are unfamiliar with one another. Gifts and Hooks is superbly suited for these situations.</li> </ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Group Questioning</b>
<b>Type</b>	Inquiry
<b>Purpose</b>	To increase engagement during a Q&A period and help ensure that the most important questions are asked
<b>General Description</b>	Following a presentation, the participants work in teams to identify the questions they would like answered. The facilitator then gives each team one to five minutes to ask as many of the questions they would like.
<b>Benefit</b>	<ul style="list-style-type: none"> <li>• Prevents one person's questions from dominating the discussion</li> <li>• Empowers the group to ensure that the most important questions are asked</li> </ul>
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b> <i>Now that we have heard the presentation, we are ready for a Q&amp;A period. But, we want to make sure that we spend our time on the most important questions.</i></li> <li>• <b>Provide general overview.</b> <i>To do this, you will have two minutes to work with the team at your table to identify the most important questions your team members want answered by the presenter.</i></li> <li>• <b>Get team leaders.</b> <i>To help identify your questions, we need a new team leader for each table. Let's have the person to the left of the current team leader serve as the new team leader. Team leaders, you should record your team's questions on a sheet of paper. For this exercise it is okay to have all the questions on one sheet. You will have two minutes with your team to do this.</i></li> <li>• <b>Ask your starting question.</b> <i>So, teams, this is our opportunity to really dig much deeper into the presentation. Think about what you just heard. There may have been times when you had questions about what was being said, how things actually worked, why things were done that way, or something else. Take two minutes now in your teams to identify your questions.</i></li> <li>• <b>Explain how the questioning will be done.</b> <i>Now that we have our questions, we are going to be starting with the team leader at the first table. You will have three minutes to ask your questions and have the speaker respond.</i> <ul style="list-style-type: none"> <li>○ <i>If your team has received the answer to a question and wants to save time and move on to another question, but the speaker is still speaking, remember, it is your three minutes. I give you permission to interrupt the speaker by saying, "Thank you for that; we would love to get to another question."</i></li> <li>○ <i>And, other team leaders, while you are waiting for your turn, if another team asks your question, go ahead and cross it off</i></li> </ul> </li> </ul>

## Advanced Facilitation Skills

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Name	Group Questioning
	<p><i>your list so that when it is your team's turn, you won't ask a question that has already been asked.</i></p> <ul style="list-style-type: none"><li>○ <i>Any questions? Okay, let's get started. Table one, your three-minute clock is starting. Ask your first question.</i></li></ul>
<b>Other Tips</b>	<ul style="list-style-type: none"><li>• As an alternative to giving each team three minutes, the facilitator can have each team ask one question, and then, if time permits, another rotation is done.</li><li>• This technique can also be used for pre-questioning. As an example, <u>before</u> a presentation or panel discussion, use the technique to have participants work in teams to identify the questions they would like to see answered as a result of the presentation. You can then have them check off the questions as they are answered in the presentation. After the presentation, any questions that haven't been answered can then be asked.</li></ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Grouping (Nominal Group Technique)</b>
<b>Type</b>	Categorizing
<b>Purpose</b>	To categorize information into groups
<b>General Description</b>	The facilitator reviews each response identified (on a chart or on sticking notes) and asks the group to assign a category for each.
<b>Benefit</b>	<ul style="list-style-type: none"> <li>• Helps ensure nothing is omitted from a group of ideas</li> <li>• Helps to organize the work</li> </ul>
<b>Preparation</b>	<ul style="list-style-type: none"> <li>• Arrange all the brainstorm lists near the front of the room once Brainstorming is complete, so they can be easily seen and marked.</li> <li>• Have a chart for recording the category names.</li> </ul>
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b> <i>The objective of this next facilitated process is to take the items that we have created and group them into categories. We might end up with anywhere from three–to–eight categories. Once we have all items categorized, we will be able to analyze the benefits of the key alternatives.</i></li> <li>• <b>Either ask the participants to define the category for the first item or suggest a category.</b> <i>It sounds like this first one has to do with entry at the source – does that sound like a reasonable category?</i>  (Write the category name on a flip chart and label it "Group A." Place an "A" in a different color next to the first item in the brainstorm list to indicate in which group it was categorized.)</li> <li>• <b>Ask the group to evaluate each item on the brainstorming list.</b> <i>This next one reads...Is this one the same as [category already named], or does it belong in a different category?</i>  (If the team says the item is the same as an existing category, write the letter of the category next to the item.)</li> <li>• <b>If “Different,” ask for a new category title.</b> <i>Since this one is different, let’s name the category, but let’s give it a general name that other items can fit under.</i>  (If the team says the item belongs to a different category, ask the group to name the category. Make sure the title is fairly global so that other items will be included. List the name of the new group. Give it a letter.)</li> <li>• <b>Continue the last two steps until all items on the brainstorm list have been labeled.</b></li> <li>• <b>Review the groups to determine if additional consolidation is appropriate.</b></li> </ul>

<b>Name</b>	<b>Grouping (Nominal Group Technique)</b>
	<p><i>Let's look back at each category to decide if a category is so large, that it is worth splitting up. Or, if a category is so small or so similar to something we already have, it can be combined with another.</i></p>
<b>Other Tips</b>	<ul style="list-style-type: none"><li>• Consider potential categories to be used during grouping while the brainstorming or listing process is still in progress. Especially be sure to consider categories for the first one or two items.</li><li>• Alternative: Rather than writing the category letter next to each item in the list, you could create a separate flip chart page for each group (A, B, C, etc.) and then rewrite each item from the brainstorm list onto the appropriate page as its group is determined. This process takes longer but results in a grouped list with which you can continue to work.</li><li>• Alternative: Members of the group can come to the flip charts and put items in categories rather than having the facilitator ask the group.</li><li>• Alternative: Instead of naming a category when it is created, you might wait until at least two items are in a category before naming it. Or, you might wait until all items are grouped before naming the categories. However, naming categories early and writing the names of the category in large print can make it easier for people to remember the different categories.</li><li>• Alternative: See the Dump and Clump process for an alternative grouping method.</li></ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Informed Majority</b>
<b>Type</b>	Decision
<b>Purpose</b>	To make a decision about wording or other item where full consensus is not needed
<b>General Description</b>	For informed majority, when a relatively minor decision is needed (e.g., about a word change or how to rate a particular element), have someone speak for the change, have someone speak against, ask for other comments, and then, take a majority vote.
<b>Benefit</b>	<ul style="list-style-type: none"> <li>• Offers a quicker alternative to full consensus when the decision is relatively minor</li> <li>• Ensures that people have an opportunity to be informed about the choices by having someone speak to each alternative</li> <li>• Provides a simple process for making decisions about wording changes</li> </ul>
<b>Sample Words</b> (Purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b> <i>Okay, we have a draft goal statement from a team. It's time to give everyone else an opportunity to improve it. I want to use a process called "Informed Majority" to help us make decisions about changes to the wording. The Informed Majority process allows us to have good discussion yet, at the same time, come to decisions without spending too much time on the words.</i></li> <li>• <b>Give general directions.</b> <i>The way Informed Majority works is that I'm going to first collect all the changes that are recommended. Then, we'll have people speak to each change and then go with the majority to decide which changes we want to make. Are we okay with this?</i></li> <li>• <b>Collect alternatives.</b> <i>Okay, let me re-read the goal, and then, I'll take suggestions for how to improve it... Okay, I have the first suggestion, any others?</i></li> <li>• <b>Have people speak to the alternatives.</b> <i>Now that we have recommended improvements, let's decide which ones to make. Let's look at the first area for change. It looks like there are two changes recommended to the first part of the sentence, and we also have the alternative to leave it as is. Let's start with the first recommended change. Who wants to speak for it? If no one speaks for the change, it gets dropped as an alternative. How about the second alternative; who wants to speak for it? Again, if no one speaks for the change, it gets dropped as an alternative. How about the third alternative to leave it as it is...? Any other comments from anyone?</i></li> <li>• <b>Call for the majority vote.</b> <i>Okay, we have heard someone speak for all the alternatives. Is everyone clear which alternative he or she will vote for? Give me</i></li> </ul>

## Advanced Facilitation Skills

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Name	Informed Majority
	<p data-bbox="591 275 1453 405"><i>a head nod to indicate, "Yes." Okay, let's call for the question. The first alternative says...All those in favor of the first alternative, raise your hands please. Let's move on to the second alternative...</i></p> <ul data-bbox="545 422 1453 514" style="list-style-type: none"><li data-bbox="545 422 1453 514">• <b>Report the results.</b> <i>It sounds like we have a majority voting for the second alternative, so let's make this change.</i></li></ul>
<b>Other Tips</b>	<ul data-bbox="545 531 1453 772" style="list-style-type: none"><li data-bbox="545 531 1453 594">• When suggests are made for improvements, record the improvements on a chart.</li><li data-bbox="545 604 1453 667">• Collect all improvements before using informed majority to process each one.</li><li data-bbox="545 678 1453 772">• If there is only one change and no one speaks to leaving things as they are, the change is "made by acclamation," and no vote is needed since no one spoke against it.</li></ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Introductions</b>
<b>Type</b>	Introduction
<b>Purpose</b>	To have people become more familiar with one another
<b>General Description</b>	Near the beginning of the session, have people introduce themselves by giving answers to a series of questions. In advance of responding, give people a minute to record their responses to the questions so that they will be able to listen to others without being preoccupied with thinking about what they will say when it is their turn.
<b>Benefit</b>	<ul style="list-style-type: none"> <li>• Can serve to get people more comfortable with one another before engaging in the work of the session</li> </ul>
<b>Preparation</b>	<p>Have the questions you want answered on a flip chart and show the chart at the appropriate time. For example, your questions might be:</p> <ul style="list-style-type: none"> <li>○ Your name</li> <li>○ Your organization and role</li> <li>○ The most important thing you want to make sure happens in this session</li> </ul>
<b>Sample Words</b> (Purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b> <i>We have gone over our session purpose, the key products we will be producing, the critical issues to be addressed, our agenda and ground rules. Let's take a few minutes now to find out who is in the room.</i></li> <li>• <b>Give general directions.</b> <i>In a minute, I would like to start with [Tom] and go around the room to [Tom's] left. We'll each have 30 seconds to answer the following questions:</i> <ul style="list-style-type: none"> <li>○ <i>Your name</i></li> <li>○ <i>Your organization and role</i></li> <li>○ <i>The most important thing you want to make sure happens in this session</i></li> </ul> </li> <li>• <b>Have people record their answers.</b> <i>I don't know about you, but in my experience, if I am the eighth person to do introductions, I will not hear anything the first seven people say because I will be busy thinking about what I will say when it's my turn! I don't want that to happen to any of you. I want you to be able to listen to everyone. So, take 30 seconds now to write down your answers to the questions that you see on the flip chart. And, then, we'll start with [Tom] and go forward.</i></li> <li>• <b>Give final directions and start.</b> <ul style="list-style-type: none"> <li>○ <i>Our time is up, so let's get started. Now, we want to hear from everyone. But, my experience with introductions has been that the first person typically takes about 15 seconds, and then, the time creeps. So, by the time it's the last person, it</i></li> </ul> </li> </ul>

## Advanced Facilitation Skills

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Name	Introductions
	<p><i>can be five minutes or so where we hear a life history, "I was born in a log cabin. At the age of six, I got my first bicycle..."</i></p> <ul style="list-style-type: none"><li>○ <i>So, I'll use my trusty clock here. Let's see if we can limit the introductions to 30 seconds. [Tom] is going to go first, and he'll have up to 30 seconds to introduce himself by answering the questions or saying whatever else he wants to say.</i></li><li>○ <i>[Tom], if you hear the clock ring, that means you've gone over your time. Go ahead and finish your sentence, and we'll move on to the next person.</i></li><li>○ <i>Any questions? Okay, let's get started...[Tom]?</i></li></ul>
<b>Other Tips</b>	<ul style="list-style-type: none"><li>• Consider answering the questions, yourself, either first or last.</li><li>• As an alternative, you can do a form of Think-Pair-Share by having people pair up and share their introduction with their partner. Then, their partner introduces them to the rest of the group.</li></ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Journaling</b>
<b>Type</b>	Reflecting
<b>Purpose</b>	To encourage individual involvement, engagement and learning transfer
<b>General Description</b>	While in class, participants keep a journal by recording notes about course content that is particularly significant to them.
<b>Benefit</b>	<ul style="list-style-type: none"> <li>• Participants document their thoughts and ideas throughout the class rather than waiting until the end, which encourages a more thoughtful experience of the session</li> <li>• The journal can be used for action planning after the course</li> <li>• The journal typically results in a more thoughtful response during the course evaluation because the participant is more inclined to remember impressions and experiences from early in the class</li> </ul>
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b> <i>I don't know if you have had the experience that I have had, but there have been times when I was a student in a class and scribbled all my notes and key insights on the pages of the student manual; Then, several weeks after the class when I wanted to find a note that I had made, I had to go through the whole manual to find it. Let's not have this happen to you.</i></li> <li>• <b>Explain Journaling.</b> <ul style="list-style-type: none"> <li>○ <i>You have next to your manual something we call your Spring Forward Journal.</i></li> <li>○ <i>As we are going through the class, if a tool or technique in particular appeals to you, record it in your journal. If you have an idea about how you might use something, journal it. If a significant insight occurs to you about how you could have handled a prior situation differently, journal it. If there is something about the course you like, journal it. If you get someone's e-mail to follow up with, journal it. You get the point.</i></li> <li>○ <i>This way, all your important thoughts are in one place, and you know where to go to find them.</i></li> <li>○ <i>In addition, when it is time to evaluate the class and indicate what you liked about it and ways the class could have been improved, you will likely find answers in your journal. As well, if you are asked to identify an action you will take following the class, you will already likely have potential actions in your journal.</i></li> </ul> </li> </ul>
<b>Other Tips</b>	<ul style="list-style-type: none"> <li>• Physically, the journal can be the front and back of a single sheet, several sheets typed together, an 11x17 inch sheet folded in half or any other medium convenient for the participants.</li> </ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Last Person Standing</b>
<b>Type</b>	Generating Ideas and Categorizing
<b>Purpose</b>	To identify the most unique information or ideas in a short and energy-filled period of time
<b>General Description</b>	Following a Brainstorming activity, the team leaders take part in a lively activity to post the ideas without having a duplicate.
<b>Benefit</b>	<ul style="list-style-type: none"> <li>• Competitive and energetic approach to generate a unique list of responses</li> <li>• Especially effective during lull times (after lunch, mid-afternoon)</li> </ul>
<b>Preparation</b>	Have a chart prepared for placing the sticky notes.
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b>  <i>The purpose of this exercise is for us to identify as many different characteristics of [an energetic speaker] as we can.</i></li> <li>• <b>Provide an example.</b>  <i>For example, if we were looking for characteristics of a great car, the list might include: excellent acceleration, great responsiveness, comfortable seating, fuel efficient, low maintenance cost, and top safety ratings. But, we are not talking about characteristics of a car. We want to build a list of [the characteristics of a great speaker].</i></li> <li>• <b>Pick team leaders.</b>  <i>To do this, we will be using team leaders. Current team leaders, please hand the marker and sticky note pad on to someone on your team who hasn't been a team leader already.</i></li> <li>• <b>Brainstorm responses.</b>  <i>New team leaders, you and your team will have two minutes to record as many [characteristics of a great speaker] as you can. Please note:</i> <ul style="list-style-type: none"> <li>○ <i>You have to use the marker and pad you have been given, nothing else.</i></li> <li>○ <i>One item per sticky note; so, if your team comes out with seven [characteristics], you will have seven sticky notes.</i></li> <li>○ <i>And, when the two minutes is up, your pen should be capped and in the air; otherwise, your team loses one response.</i></li> <li>○ <i>Any questions, team leaders?</i></li> </ul> </li> <li>• <b>Ask your starting question.</b>  <i>So, think about times you were at a presentation or meeting, and the speaker was fantastic. Think about what it was that made those speakers so great. Think about what the speakers did, how the speakers did it, or whatever it was that made those speakers great. What are the characteristics of a great speaker? Team leaders, let's get started.</i></li> <li>• <b>Get team leaders up front and in line.</b> <ul style="list-style-type: none"> <li>○ <i>Team leaders, please gather all the sticky notes and come to</i></li> </ul> </li> </ul>

Name	Last Person Standing
	<p><i>the front of the room. The sooner you get here, the faster, but no running – we don't want to lose anyone!</i></p> <ul style="list-style-type: none"> <li>○ <i>This activity is called Last Person Standing. The team whose leader is the last person standing is declared the winner.</i></li> <li>○ <i>There is an advantage to going last, so the person who arrived up here first, you get to be the last person in line. The person who arrived second, please step in front of the last person in line and so on until we get to the person who arrived up front last - you are going to be first person in line.</i></li> </ul> <ul style="list-style-type: none"> <li>● <b>Give instructions for Last Person Standing.</b> <ul style="list-style-type: none"> <li>○ <i>In a minute, the first person in line will read an idea on one of his/her sticky notes, hand it to me and then go to the back of the line. I will repeat his/her sticky note and post it.</i></li> <li>○ <i>Then, the next person in line will read a different idea, hand it to me and go to the back of the line. I will post the sticky note.</i></li> <li>○ <i>However, if a person comes up and reads a sticky note that is a duplicate of something already posted, the audience will let the person know it is a duplicate by making an X with their arms and making a loud buzzer noise.</i></li> <li>○ <i>When a person gets a first X, I will take that sticking note but will not post it, and you will remain in the competition and go to the back of the line.</i></li> <li>○ <i>However, if a team leader gives a second duplicate, the team is eliminated, and the team leader will have to sit down.</i></li> <li>○ <i>We will continue to rotate through the team leaders until we have only one person left – the last person standing. This team will have been the one with the most unique answers and will be declared the winner.</i></li> <li>○ <i>Any questions?</i></li> </ul> </li> <li>● <b>Get started.</b> <ul style="list-style-type: none"> <li>○ <i>Okay, let's get started. First person in line, read your sticky note, hand it to me and go to the back of the line.</i></li> </ul> </li> </ul>
<p><b>Other Tips</b></p>	<ul style="list-style-type: none"> <li>● As you post the sticky notes, consider repeating them, so the audience is hearing the information twice. This will help both the audience and you with identifying duplicates.</li> <li>● To help you more easily identify duplicates, you may also want to have already created three or four sections on the flip chart that you can use to group similar sticky notes when you post them. For example, if the exercise is related to characteristics of a great speaker, you might use one of the sections for ideas related to voice, another for body, another for words said, another for behaviors, etc. By having the groupings, you will be able to more quickly find possible duplicates. If you use this approach, avoid writing the names of the categories on the flip chart, as this can distract the audience—they might be focusing on if they agree with how you are categorizing as opposed to focusing on what is being said.</li> </ul>

Name	Last Person Standing
	<ul style="list-style-type: none"><li>• There will likely be times in Last Person Standing when the audience will buzz a duplicate, and the team will object. Consider using the following “appeal” process.<ul style="list-style-type: none"><li>○ Have someone from the team giving the response explain why it is not a duplicate, and then, have someone else explain why it is a duplicate.</li><li>○ Ask for other comments if people have them (though you may have to limit the additional comments to two or three people to avoid taking too much time).</li><li>○ Take a vote by raised voice (more energetic) or raised hand (more accurate). Let everyone know that people who are on the team with the possible duplicate answers are NOT permitted to vote.</li><li>○ If raised voice is used, have those who think the answer is different and not a duplicate yell “Different;” then, have those who think the answer is a duplicate give the buzzer sound. The loudest group wins the appeal.</li></ul></li></ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Lobbying</b>
<b>Type</b>	Decision
<b>Purpose</b>	To build consensus around a few sets of ideas and to increase the level of commitment people feel to participate in implementation
<b>General Description</b>	During Lobbying, participants have the opportunity to highlight specific items (e.g., strategies, ideas) and explain why they believe these items should be given support.
<b>Benefit</b>	<ul style="list-style-type: none"> <li>• Can build consensus by having people hear from one another why certain items should be supported</li> <li>• In addition, after lobbying when it comes time for people to “sign up” to assist in the implementation of the winning ideas, the people who lobbied strongly often feel an unspoken responsibility to contribute to bringing the idea into reality.</li> </ul>
<b>Preparation</b>	Be sure that the items for discussion are clearly visible to all.
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b>  <i>Now that we have discussed our strategies, we are about to move into the priority setting stage in which each of you will use dots to vote for your top strategies. Before we vote, however, each of you will have the option of taking up to [30 seconds] to indicate any strategies for which you would like to request the vote of the rest of the group. This is the time to lobby for the strategies you personally believe should be given highest priority.</i> </li> <li>• <b>Give instructions.</b>  <i>When you lobby, you should indicate which strategies you support and, most importantly, why. It is the “why” that will help persuade others. I will place a tick mark next to a strategy each time someone lobbies for it just to indicate the number of times a strategy has received support.</i> </li> <li>• <b>Explain the timer and passing.</b>  <i>I am going to start with [Don] and go to the right. You will have up to [30 seconds] to lobby for as many as you would like. But, once the clock sounds, I’ll say, “thank you,” and we will move on to the next person. If you don’t want to lobby, you can say, “Pass.” Any questions?</i> </li> <li>• <b>Remind them to give the “why” and get started.</b>  <i>Okay, remember the important thing isn’t the number of times something is supported – it is the reasons people give for supporting it. So, [Don], you are on the clock. What do you want to lobby for and why?</i> </li> </ul>

## Advanced Facilitation Skills

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Name	Lobbying
Other Tips	<ul style="list-style-type: none"><li>• While Lobbying can be impactful, it also can easily get out of hand. While the first person might give a 30-second explanation, by the time the last person gets up to speak, the so-called short lobbying time may have extended to over five minutes per person. Therefore, when you use Lobbying, consider having a timer that buzzes once the person's allotted time is completed.</li><li>• While 30 seconds is frequently adequate for each participant to lobby, you may want to provide as much as one minute per person for smaller groups or if time permits.</li></ul>

## Advanced Facilitation Skills

Name	More of/Less of
Type	Generating Ideas
Purpose	To help participants identify what is needed more of and less of from an organization in response to a likely change
General Description	Once a group defines a change (e.g., the creation of a new vision/mission, the development of operating norms, consensus on a strategic direction, decision to operate in a new market), the participants identify what the organization needs more of and less of to be successful in implementing the change.
Benefit	<ul style="list-style-type: none"> <li>• Defines changes in behaviors and attitudes required to implement a change</li> <li>• Helps identify key messages for communication strategies to influence outcomes</li> </ul>
Preparation	Title a flip chart page, “How We Must Change.” Divide the chart into two by drawing a vertical line down the middle. Label one column “More of” and the other “Less of.”
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b>  <i>Now that we have defined our new [vision], our next step is to define how we will need to change to make this new [vision] our reality. The way I would like to do this is to ask what we need more of and what we need less of if we are going to achieve our [vision].</i> </li> <li>• <b>Provide an example.</b>  <i>For example, if we were trying to become a nimble organization, in the “more of” category we might list, “delegated authority, continuous assessment of changes in customer needs,” and the “less of” list might include, “requirement for multiple approvals, detailed studies before testing a concept.”</i> </li> <li>• <b>Provide directions.</b>  <i>For our work, we want to understand what we must have more of and less of to achieve our [vision]. We will start by taking a minute for each person to record his/her own thoughts of what is needed more of and less of, and then, we will do a round-robin around the room to collect your thoughts.</i> </li> <li>• <b>Ask the starting question.</b>  <i>So, think about where we are today as an organization. Think about what we have to do differently to achieve our [vision]. Consider the things we will need to do more of and the things we will need to do less of. Go ahead now and write down what you believe we need more of and less of. Let’s take two minutes to do this.</i> </li> <li>• <b>Record responses.</b> <ul style="list-style-type: none"> <li>○ <i>Now that you have recorded your thoughts, let’s hear them. I’m going to start with [Chris] and go around clockwise. If</i> </li> </ul> </li> </ul>

## Advanced Facilitation Skills

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Name	More of/Less of
	<p><i>someone says one of your thoughts, just cross it from your list. Feel free to pass when it comes to your turn. I'll be writing as we go.</i></p> <ul style="list-style-type: none"><li>○ <i>Let's start first with the "more of" list. Get me started, [Chris] – what did you indicate as something we will need more of?</i></li><li>○ <i>Since there are no additional "more of" thoughts, let's go to the "less of" list. Again, we'll start with [Chris], but let's go in the opposite direction this time. Get me started, [Chris] – what did you indicate as something we will need less of?</i></li></ul>
<b>Other Tips</b>	<ul style="list-style-type: none"><li>• As an alternative, consider using Dump and Clump or Last Person Standing to have participants work in breakout groups to identify the "more of" and "less of." With both of these methods, you will not have to record the responses since they will already be on sticky notes.</li></ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Rotating Flip Charts</b>
<b>Type</b>	Reviewing
<b>Purpose</b>	To review information that has been developed in breakout groups and have teams provide detailed feedback
<b>General Description</b>	After teams have worked in breakout groups to record responses to a question on a flip chart, teams rotate to the next chart, identify what they like (by placing a check mark in their assigned pen color), and add recommendations for improvement (by marking an “X” and writing the improvement on a sticky note posted on the flip chart). After three-five minutes working on one chart, teams rotate to the next team’s chart to do the same and so on. When teams reach their original chart, they reflect on the comments of others and decide which to incorporate.
<b>Benefit</b>	<ul style="list-style-type: none"> <li>• More feedback and better quality feedback than a standard process in which teams present their work because small groups tend to feel a greater responsibility to focus and provide comments than when a presentation is done in a large group</li> </ul>
<b>Preparation</b>	Have the flip charts for the breakout groups spaced evenly around the room to allow room for teams to work on them during the rotation.
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b> <i>Now that we have completed the [draft of the objectives for each goal], it is time for us to review the work that was done. We will use a process called Rotating Flip Charts for this.</i></li> <li>• <b>Select team leaders and set up for the first rotation.</b> <ul style="list-style-type: none"> <li>○ <i>We will need new team leaders. So, current team leaders, please pass the pad and marker on to another member of your team who will serve as team leader for this activity.</i></li> <li>○ <i>I need all team members to stand and go to their own flip chart. Team leaders, you should bring your team’s marker and sticky note pad with you.</i></li> <li>○ <i>Now, would each team rotate and move to the flip chart to your right.</i></li> </ul> </li> <li>• <b>Explain the process.</b> <ul style="list-style-type: none"> <li>○ <i>You will have [five] minutes at this chart to indicate what you like, add to it or make recommendations for changes.</i></li> <li>○ <i>If your team likes an objective, put a check mark next to it.</i></li> <li>○ <i>If your team doesn’t like the objective or target, put an “X” mark next to it, write a sticky note that gives your team’s recommendation for how to fix it, and place the sticky note next to the item you don’t like. Writing a sticky note that explains what is wrong with the objective is NOT helpful. We</i></li> </ul> </li> </ul>

Name	Rotating Flip Charts
	<p>want your note to explain how to fix it.</p> <ul style="list-style-type: none"> <li>○ If you want to add an objective, do so.</li> <li>○ At the end of the [five] minutes, every objective should have a check mark or an “X” mark next to it in your team’s assigned pen color. And, each “X” mark must have a sticky note explaining how to fix it. You will then rotate to the next chart to the right.</li> <li>○ Any questions? Okay, let’s get started.</li> </ul> <ul style="list-style-type: none"> <li>● <b>Give instruction to rotate to the next chart and so on.</b> <ul style="list-style-type: none"> <li>○ The [five] minutes is up. Teams, would you rotate to the next chart? Once more, you have [five] minutes. Be sure also to place a check mark or an “X” mark on anything on the chart including sticky notes and items written. And, remember, anytime you make an “X” mark, place a sticky note on the chart that explains how to fix it.</li> <li>○ Now that the five minutes is up, time to rotate again...</li> </ul> </li> <li>● <b>Explain how to process the sticky notes on your team’s chart.</b> <ul style="list-style-type: none"> <li>○ Now that you have rotated back to your own chart, review each of the sticky notes. If you agree with the comment, mark it, “YES.” This will tell the documenter to make this change. If you disagree, mark the sticking note “NO,” and these will be the ones we will discuss as an entire group.</li> </ul> </li> <li>● <b>Decide on the NOs.</b> <ul style="list-style-type: none"> <li>○ Since everyone has reviewed all the charts, all we need to do is resolve the differences.</li> <li>○ Let’s take the first goal area, which was done by the [RED] team. Any “NOs” from this team?</li> <li>○ Okay, the first “NO” was to a comment made by the [GREEN] team. Listen closely, everyone, because we will have to decide whether to make the recommended change or not. [GREEN] team, please take just a few seconds to explain what you meant by the comment.</li> <li>○ Now, [RED] team, you said, “NO,” to this. I would like someone from your team to explain why.</li> <li>○ So, we have heard from the team making the suggestion, and we heard why the suggestion was rejected. Any comments from anyone before we call the question and go with the majority of the group?</li> <li>○ Those in favor of making the change suggested? Those in favor of not making the change? Okay, we’ve made a decision. Let’s move on.</li> <li>○ Any other “NOs” here? If not, let’s give the team a hand and move on to the next team...</li> </ul> </li> </ul>

<b>Name</b>	<b>Rotating Flip Charts</b>
<b>Other Tips</b>	There may be cases in which a team said, “NO,” to a change, but the whole group voted “YES” and over-ruled the team. In these cases, be sure to change the “NO” on the sticky note to a “YES” for documentation purposes.

## Advanced Facilitation Skills

<b>Name</b>	<b>Start/Stop/Continue</b>
<b>Type</b>	Generating Ideas
<b>Purpose</b>	To help participants identify what they should start, stop or continue in response to a likely change
<b>General Description</b>	<p>Similar to More of/Less of, once a group defines a change (e.g., the creation of a new vision/mission, the development of operating norms, consensus on a strategic direction, decision to operate in a new market), the participants identify what the organization, or what they, themselves, will:</p> <ul style="list-style-type: none"> <li>○ Start (things they commit to start doing based on the change),</li> <li>○ Stop (things they commit to stop doing), and</li> <li>○ Continue (things they commit to continue doing).</li> </ul>
<b>Benefit</b>	<ul style="list-style-type: none"> <li>● Defines changes in behaviors and attitudes required to implement a change</li> <li>● Helps identify key messages for communication strategies to influence outcomes</li> </ul>
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>● <b>Clearly describe the purpose.</b> <i>We have covered a lot of important items in this afternoon's session. What I would like us to do for the next few minutes is to each make a list of at least one thing that each of us will commit to start, stop and continue based on this session.</i></li> <li>● <b>Give an example.</b> <i>For example, if we had just listened to a presentation on physical fitness, one of us might commit to <b>start</b> exercising each day, to <b>stop</b> eating that candy bar each day, and to <b>continue</b> the time we spend each day tracking our caloric input.</i></li> <li>● <b>Give directions.</b> <i>Well, we did not talk about physical fitness today, but we discussed [how each of us will become more effective leaders of our respective teams.] So, for the next [five] minutes, I would like us to each take the time to comprise a list of at least one thing that we will start, at least one thing will stop and at least one thing we will continue to improve our individual leadership skills in the next six months. Any questions?</i></li> <li>● <b>Give the starting question.</b> <i>Okay, think about each presentation we listened to over the course of the afternoon. From [John's] discussion on ways leaders make a difference to [Sally's] talk about the Ten Commandments for Managers.....What are those things that resonated for you personally? What are those things that you will make a personal commitment to start doing? To stop doing? And, to continue doing?....What are the things that will make each of us a better leader and move our organization forward in an exciting way? Please identify now at least one item in each of our three categories: start/stop/continue.</i></li> </ul>

## Advanced Facilitation Skills

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Name	Start/Stop/Continue
<b>Other Tips</b>	<ul style="list-style-type: none"><li>• This exercise can be done individually or in breakout groups.</li><li>• If the exercise is done individually, you can use Dyads/Triads to review the results.</li><li>• If the information is collected in groups, consider using Dump and Clump, Last Person Standing, Rotating Flip Charts, or the standard break out, report back process to review the information.</li></ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Talking Stick</b>
<b>Type</b>	Reflecting
<b>Purpose</b>	To promote deeper discussion and listening
<b>General Description</b>	Participants stand in a circle with one person in the middle who has the talking stick and will speak first. The person speaks for as long as he/she wants and, once finished, holds the talking stick out to offer it to anyone who wants to speak next. Whoever chooses then comes to the center of the circle and receives the stick, and the previous speaker rejoins the circle. This continues until no one else wants to speak.
<b>Benefit</b>	<ul style="list-style-type: none"> <li>• Slows down the conversation</li> <li>• Encourages listening and thoughtful consideration of ideas</li> <li>• Builds a sense of community</li> </ul>
<b>Preparation</b>	<ul style="list-style-type: none"> <li>• During a break or at some other time in advance, be sure to ask someone to serve as the first person for the Talking Stick exercise. Considering picking someone who tends to be both positive and readily expressive. Explain to that person the same instructions you will give to the whole group so that the person will be prepared to speak.</li> </ul>
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b> <i>We have had an eventful two days together. Before closing, I would like to give anyone who would like the opportunity to share whatever they would like with the group. For example, you might want to say something about what the last days have meant to you, maybe something about your expectations for the future, or maybe even a statement appreciating one or more people in the group.</i></li> <li>• <b>Ask the group to form a circle.</b> <i>I would like to use something called the Talking Stick process for the closing. I would like to get everyone to stand and form a circle to get us in a position to start.</i></li> <li>• <b>Give instructions.</b> <i>Now that we are in a circle, I have asked [Cindy] to go first. When we are ready to start, [Cindy] will come to the middle of the circle and take the talking stick, and I will join the circle. [Cindy] will make her statement, speaking as long as she would like, and then hold the talking stick out for whoever wants it next. Whoever chooses will then come to the center and take the talking stick, and [Cindy] will return to the circle. When that person finishes, he/she will hold out the stick, and so on, until everyone who wants to speak has spoken.</i></li> <li>• <b>Explain how you will close.</b> <i>When no one else walks forward to take the talking stick, I will twice ask, "Anyone else?" If no one comes forward, I will come to</i></li> </ul>

## Advanced Facilitation Skills

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Name	Talking Stick
	<p><i>the center, take the talking stick, and end the session. Any questions?</i></p> <ul style="list-style-type: none"><li>• <b>Get started.</b> <i>So, [Cindy], please come to the middle of the circle and take the talking stick to get us started. Share with the group anything you would like to about the last two days: what they have meant to you, your expectations for the future, anyone you especially want to appreciate or anything else.</i></li></ul>
<b>Other Tips</b>	<ul style="list-style-type: none"><li>• While the talking stick is frequently used as a closing exercise, it can also be used at any time when the group might benefit from slowing down the conversation (e.g., when tension is high or when people are frequently interrupting one another).</li></ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Think-Pair-Share</b>
<b>Type</b>	Generating Ideas
<b>Purpose</b>	To gather information in groups of two and share the information in a crisp, concise manner
<b>General Description</b>	Individuals reflect and record responses to a question posed by the facilitator. The entire group is then paired in groups of two, who share with one another their responses. Then, one in the pair shares their combined thinking with the rest of the group.
<b>Benefit</b>	<ul style="list-style-type: none"> <li>• Provides individual think time, which can be helpful to the more introverted participants</li> <li>• Saves time by hearing from only half the members of the group rather than having everyone speak</li> </ul>
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b> <i>We have just heard a presentation on new approaches different organizations are taking to managing remote employees. I would like for us to take some time now to reflect on what we heard and identify the most important points. We will be using a process called Think-Pair-Share to do this. We will first have individual think time to reflect on what was presented; then, you will pair up to provide your reflections to one other person; and then, one of the two of you will share your combined thoughts with the entire group.</i></li> <li>• <b>Give the starting question for the think time.</b> <i>First, let's give everyone a minute or so to reflect on what was said. I would like everyone to jot down one or more key points you found in the presentation. Think about the various points that the speaker made. Think about the ones you found most fascinating, most applicable, or most compelling. Go ahead now and jot down the key points you heard.</i></li> <li>• <b>Pair up.</b> <i>Now that we have completed the think time, next, I would like for us to pair up with someone. Please pair up with a person that is NOT sitting on either side of you and move to a place at the table or around the room where the two of you can have a four-minute conversation.</i></li> <li>• <b>Give instructions on what to do in the pair.</b> <i>Now that you are with your teammate, you will have four minutes to share with one another your thoughts on the presentation and the key points you noted. Decide who will go first, and then, share your thoughts. Before the time is up, be sure to decide between the two of you who will share your combined thoughts with the rest of the group. Any questions? Okay, decide who will go first, and let's get going.</i></li> <li>• <b>Have pairs share with the group.</b></li> </ul>

## Advanced Facilitation Skills

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Name	Think-Pair-Share
	<p><i>We have completed the pair time. Now, it's time for sharing. I am going to start with the first pair here, [Tom and Valerie]. Whichever of you were selected to share? Take no more than 30 seconds now to tell the group the key points the two of you had. Let's get started.</i></p>
<b>Other Tips</b>	<ul style="list-style-type: none"><li>• Think-Pair-Share is very similar to Dyads/Triads with the exception of the initial think time and the specific report-back process.</li><li>• If you are planning to use Think-Pair-Share after a presentation, consider asking people before the presentation to jot down the key points they hear so that they will have their notes to reference and discuss following the presentation.</li><li>• If it will be important to have information recorded, have the pairs write their key points legibly on sticky notes during the pair time and collect these during the share time.</li></ul>

## Advanced Facilitation Skills

<b>Name</b>	<b>Whip Around</b>
<b>Type</b>	Reflecting
<b>Purpose</b>	To give participants an opportunity to briefly share their thoughts or feelings about something
<b>General Description</b>	The facilitator asks a question that can be answered in one or two words and then quickly rotates around the room to get a response from each participant. After the responses, the group reflects to determine if any action is needed.
<b>Benefit</b>	<ul style="list-style-type: none"> <li>• Quick way to take the temperature of the group or determine how a group feels about an idea or approach</li> <li>• Identifies any corrective action needed</li> </ul>
<b>Sample Words</b> (purpose, example if necessary, general directions, specific exceptions, questions, starting question)	<ul style="list-style-type: none"> <li>• <b>Clearly describe the purpose.</b> <i>We are about half-way through our agenda for the day, and I would like to take a temperature check to determine how people are feeling about the session.</i></li> <li>• <b>Provide instructions.</b> <i>Let's go around the room starting with [Rick], and we will go clockwise from there. I am looking for everyone to give a one or two-word response to the question, "How are you feeling about the session right now?"</i></li> <li>• <b>Make sure everyone is ready.</b> <i>Before we start, I want to make sure we all have our one or two words ready because once we start, it will go very fast. So, I am starting with [Rick] and looking at every person one-by-one. Give me a head nod if you have your one or two-word answer to how you are feeling about the session right now.</i></li> <li>• <b>Get started.</b> <i>Okay, it looks like everyone is ready. So, let's get started with [Rick], and we will go quickly around the room. [Rick], get me started. What is your one or two-word response to the question, "How are you feeling about the session right now?"</i></li> <li>• <b>Reflect on what was heard.</b> <i>Let's reflect now on what we just heard. Given the comments, are there changes anyone would like to suggest on how we spend the second half of the day?</i></li> </ul>
<b>Other Tips</b>	<ul style="list-style-type: none"> <li>• While you will be getting all views, it may be helpful to the group to start with someone who will readily have a response and who tends to be fairly positive in his/her reactions. This will allow the session to get a positive start.</li> <li>• There is no need to record the comments from Whip Around, as it will slow down the group.</li> <li>• It may be important for the group to decide on the suggestions that come from the reflection on what was heard. If so, consider using the Informed Majority process for this purpose.</li> </ul>

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## **6. Probing Skills**

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6.1 Reacting Questions

6.2 Drilling Down

6.3 Discerning

6.4 “SSR-ing” Problem Statements

6.5 Funneling Evaluation  
Statements

## 6.1 REACTING QUESTIONS

Type	Purpose	Example
<b>Direct Probe</b>	<b>Challenge or Probe</b> <i>You don't think what was said is correct or you need additional explanation</i>	<b>Why is that important?</b> What causes that? How do you mean?
<b>Indirect Probe</b>	<b>Probe/Clarify</b> <i>Additional explanation, especially appropriate for less-confident participants</i>	<b>Is the reason that's important because...?</b> (closed ended, gives the answer)
<b>Redirection</b>	<b>Get back on track</b> <i>The point is not relevant to the current discussion</i>	<b>That's a good point. Can we put that on the issues list?</b>
<b>Playback</b>	<b>Confirm</b> <i>Give the speaker assurance that you understood the point</i>	<b>It sounds like what you are saying is...is that right?</b> Is what you are saying is...
<b>Leading Question</b>	<b>Lead to other thoughts</b> <i>You want to guide the group to other solutions</i>	<b>Are there solutions in the area of...?</b> What other alternatives are there? Is there a way to achieve this and that too?
<b>Prompt Question</b>	<b>Keep the ideas flowing</b> <i>The group has temporarily stalled and needs prompting</i>	<b>What else....</b> We have [x], [y] and [z]. What others are there?
<b>Tag Question</b>	<b>Get acknowledgment</b> <i>You are warming up the group, or keeping it alert</i>	<b>That's important, isn't it?</b>
<b>Float an Idea</b>	<b>Give a possible solution</b> <i>A potentially suitable solution has been overlooked</i>	<b>What about...? What are the benefits...?</b>

## 6.2 DRILLING DOWN

When disagreements occur in a discussion, frequently the disagreement is due to a poor understanding of why each person supports his/her position. As facilitators, our job is to move the discussion away from the positions and drill down to the real issues.

Optimist:	I believe the best alternative to solving this problem is to pull a team of people together, let them develop a consensus solution and present it to management for approval.
Nay-sayer:	That's a bad idea.
Optimist:	No it isn't. In my old company, we've tried this same strategy on numerous issues with considerable success.
Nay-sayer:	Nope. That stuff may work elsewhere, but not here. Not a chance.
Optimist:	I don't understand why you are being so negative.
Nay-sayer:	I'm not being negative. I'm just telling you like it is. That won't work.



**How could a facilitator have aided in this disagreement?**

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As facilitators, we know that when disagreements occur, the appropriate response is to **seek understanding by drilling down to the source of the disagreement**. If someone believes something is a “bad idea,” the facilitator’s goal is to ensure that the group has a chance to understand why. Let’s try this discussion again.

### **Drilling Down**

Optimist:	I believe the best alternative to solving this problem is to pull a team of people together, let them develop a solution and present it to management for approval.
Nay-sayer:	That’s a bad idea.
Facilitator:	You may very well be right. Help us understand, why do you believe it’s a bad idea?
Nay-sayer:	Two years ago we wasted six days in team meetings around improving the hiring process and management didn’t implement a thing.
Facilitator:	Why do you think management didn’t implement a thing?
Nay-sayer:	They said they didn’t see the benefit.
Optimist:	Well it sounds like if we do this team approach, we will have to make sure that we get management’s commitment up front to implement our recommendations if we can demonstrate adequate benefit.
Nay-sayer:	I doubt if they will be willing to give that commitment. But if they do, I’m willing to call their bluff.

## 6.3 DISCERNING

A group session is typically divided into a series of agenda items that come together to achieve a desired end. For example, the session purpose and agenda for a process improvement session might look like this:

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### Sample Agenda

**Purpose:** Develop a plan to increase the effectiveness of the hiring process

**Agenda:**

- A. Introduction
  - B. Steps in the Current Process
  - C. Problems with the Current Process
  - D. Potential Improvements
  - E. Prioritize Improvements
  - F. Implementation Planning
  - G. Review and Close
- 

Though the agenda is divided into distinct parts, participants often drift into other areas. A less discerning facilitator might allow the group to drift aimlessly among the various agenda items without reaching a sense of completion or closure.

To avoid aimless drifting and recording a mix of topics under an agenda topic, the facilitator must understand the characteristics of each agenda item and use focusing techniques to keep the group on track. The facilitator must also look for signs that the discussion has reached its peak and that participants are ready to move on.

**Discerning**

Facilitator: Now that we have completed discussing the steps in our current process, let's turn our attention to problems. Remember, problems are the things that cause us pain. We'll get to solutions in a later step. So, imagine the last time you had to hire someone. What gave you headaches during the process?

Mixed Up: Well, the problem is that our process is just not efficient!

Facilitator: You're right. That's why we're here. So let's try to get down to specifics. Can you give me **one example of something inefficient** in the process?

Mixed Up: Well, it takes too many people to sign off on the final offer. It can be weeks before you get all the signatures you need, and by that time we've lost the candidate.

Facilitator: Good. I've got that one down. **What other problems** do we have with our hiring process?

Confused: I think we need to develop an automated system to handle applicant paperwork.

Facilitator: That sounds like an excellent idea for a potential solution. **Would it be okay** if we captured that on our "Solutions" parking board? Great. Now, help me understand – **what specific problems** would an automated system help to address?

Confused: Oh, I get it: the automated system would help us with the delays that occur when the paperwork is lost or misfiled.

## 6.4 “SSR-ing” Problem Statements

When you hear a key problem, attempt to “SSR” it by identifying the **size, symptom, and root cause**.

### Example of SSR-ing a Problem Statement

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Sponsor: One of our problems is that we waste unnecessary dollars on want-ad advertising.

Facilitator: **About how much** are you spending? (**size**)


Sponsor: About \$10,000 a month.

Facilitator: That is a lot. **How do you know** it is wasted? (**symptom**)

Sponsor: Most of the jobs are filled in-house through our job posting system.

Facilitator: **Why** is advertising done if most jobs are filled in-house? (**root cause**)

Sponsor: I think one of our personnel policies requires that a job be widely advertised for some number of days before we fill the position.

	Why is it important to SSR a problem?

## SSR-ing Practice

Determine the questions to ask to SSR the following problems:

**1. We are not hiring the right people.**

Size: \_\_\_\_\_

Symptom: \_\_\_\_\_

Root Cause: \_\_\_\_\_

**2. Our hiring process needs streamlining.**

Size: \_\_\_\_\_

Symptom: \_\_\_\_\_

Root Cause: \_\_\_\_\_

**3. Our information systems cause problems with hiring.**

Size: \_\_\_\_\_

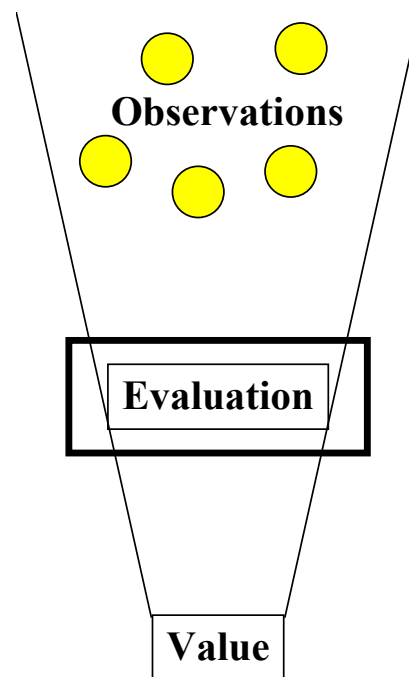
Symptom: \_\_\_\_\_

Root Cause: \_\_\_\_\_

## 6.5 Funneling Evaluation Statements

When you hear an evaluation statement, **probe for observations** that support the evaluation, and **identify the underlying values**. Evaluation statements include:

- “It did not work very well”
- “It was the best job ever done”
- “I liked it”
- “He’s not too smart”



### Example of Probing an Evaluation Statement

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- Sponsor: We had a Facilitator in last year looking at this same process, but he wasn't very good. **(evaluation)**
- Facilitator: Really? **What was it** that he did or didn't do that made him not that good? **(probe)**
- Sponsor: He didn't have a methodology. He never came to a meeting with an agenda. He just seemed to wing it. My boss got frustrated and we didn't ask him back after the third meeting. **(observations)**
- Facilitator: So, it sounds like organization and a well-defined process are important to you. Is that right? **(playback)**

## **Funneling Practice**

Determine the questions to ask to funnel these statements:

1. This class is fabulous!

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2. His recommendations were way off base.

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3. Our competitor has an interesting marketing program.

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# Leadership Strategies

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## 7. BEST PRACTICES

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<b>Best Practices</b>
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*Each attendee in the Advanced Facilitation Class has the option of sharing techniques proven to be successful. If you would like to share a best practice, please complete the information below. We will copy these sheets and have them available at the end of the class.*

<b>Name of Best Practice</b>	
<b>Submitted By</b>	
<b>Company</b>	
<b>Phone</b>	
<b>Email</b>	

**Description:**

--

<b>Best Practices</b>
-----------------------

*Each attendee in the Advanced Facilitation Class has the option of sharing techniques proven to be successful. If you would like to share a best practice, please complete the information below. We will copy these sheets and have them available at the end of the class.*

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**Description:**

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<b>Best Practices</b>
-----------------------

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<b>Name of Best Practice</b>	
<b>Submitted By</b>	
<b>Company</b>	
<b>Phone</b>	
<b>Email</b>	

**Description:**

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# 8. ACTION PLANNING

8.1 Identifying Your Jewels

8.2 Planning Change



## 8.1 IDENTIFYING YOUR JEWELS

**As you consider the key points made in the class, list the topics or concepts you found to be the most valuable:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_



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## Public Class Coupon

### 10% Off Your Next Public Class

This coupon entitles you to 10% off a public class, including any one of the following:

- Accelerated Workshop
- Advanced Facilitation Skills
- Certification Preparation
- Facilitative Consultant
- Effective Facilitator
- Facilitating IT Sessions
- From Management to Leadership
- Strategic Planning

Coupon is valid for up to 12 months from the date of this class. Coupon must be rendered at time of registration. May not be combined with any other offer.

***Michael Wilkinson***

Managing Director, Leadership Strategies, Inc.

**Expires: 12 Months After Class**

## Facilitation Coaching Coupon

### 10% Off Your Next Facilitation Coaching Session

This coupon entitles you to 10% off your first Facilitation Coaching session, and can include telephone assistance or on-site coaching. Minimum charges may apply, so please check with your Client Relationship Manager for details.

This coupon is only valid for 3 months from the date issued. This coupon must be rendered at time of use and may not be combined with any other offer or discount.

***Michael Wilkinson***

Managing Director, Leadership Strategies, Inc.

**Expires: 12 Months After Class**

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# Please Help Us Get The Word Out!

<p><b>A. Certificate for 25% off a public class (Up to a \$250 value)</b></p> <ul style="list-style-type: none"> <li>• Certificate may be used for any of our public, open enrollment classes offered monthly in various cities across the country.</li> <li>• Certificate is valid for 12 months.</li> <li>• Certificate may not be combined with any other offer.</li> </ul>	<p><b>B. <i>The Effective Facilitator Course Manual</i> (250 pages, \$125 value)</b></p> <ul style="list-style-type: none"> <li>• A full methodology for facilitation with ten <i>Principles</i>, over 90 techniques, and detailed facilitation guides for success.</li> <li>• <i>The Principles</i> provide a highly structured framework for guiding the facilitator, from preparing for a successful session, through achieving buy-in and commitment, to session wrap up and close.</li> </ul>
<p><b>C. <i>The Effective Consultant Course Manual</i> (225 pages, \$125 value)</b></p> <p>Provides internal and external consultants with powerful tools for managing client relationships and achieving success in engagements. Through 12 sections, the workbook provides a complete framework for the consulting process, including:</p> <ul style="list-style-type: none"> <li>• What is Consulting?</li> <li>• The Relationship Management Process</li> <li>• Understanding Your Client</li> <li>• Interviewing and Defining the Need</li> <li>• Proposing / Solution Processes</li> <li>• Executing the Project</li> <li>• Reviewing and Assessing</li> </ul>	<p><b>D. <i>The Facilitation Guides and Diskette</i> (\$75 value)</b></p> <p>Fifteen detailed guides for facilitating numerous sessions. A diskette is included so you can modify the guides to meet your specific needs.</p> <ul style="list-style-type: none"> <li>• Initial Team Meeting</li> <li>• Strategic Planning</li> <li>• Process Improvement</li> <li>• Issue Resolution</li> <li>• Data Modeling</li> <li>• Process Modeling</li> <li>• Focus Groups</li> <li>• And More...</li> </ul>
<p><b>E. <i>The Advanced Facilitation Course Manual</i> (160 pages, \$75 value)</b></p> <ul style="list-style-type: none"> <li>• Gain an understanding of the "Level 3 Facilitator" and learn to assess at which level you operate.</li> <li>• Learn to read and adjust to the communication style of others to improve your ability to effectively managing group interaction.</li> <li>• Facilitating on the Fly – Techniques for facilitating when circumstances do not allow adequate preparation.</li> <li>• Additional facilitation guides.</li> </ul>	<p><b>F. <i>From Management to Leadership Course Manual</i> (125 pages, \$75 value)</b></p> <p>What is the difference between a Manager and a Leader? How do you inspire members of your team to excel? What is a vision and why does a leader need one? How do you communicate your vision and facilitate them gaining ownership? This manual provides participants with a clear picture of the role and impact of leaders in serving as catalysts for inspiring strategic action within their organizations.</p>
<p align="center"><b>G. Gift Certificate (\$50 value)</b></p> <p align="center">American Express gift certificate valid for use anywhere the American Express card is accepted.</p>	

# Please Help Us Get The Word Out!

**HELP US GET THE WORD OUT** about the extraordinary learning experience created by our facilitators, our training materials, and our classroom methods. Please identify up to four people, within your current organization or other organizations, whom you feel might benefit from our courses.

**WE WILL SEND YOU A GIFT** as our way of saying thanks to you for each person who enrolls in one of our public courses in the next six months as a result of this referral. You may request to receive the same gift or a different gift for each enrollment. See the reverse side for a description of each gift.

<b>Your Name:</b> _____	<b>Telephone:</b> _____
<b>Organization:</b> _____	<b>Email:</b> _____
<b>Course You are Taking Now:</b> _____	<b>Course Date:</b> _____
<b>Send me the following GIFT when first person enrolls:</b> _____	A. Certificate for 25% off a public class (Up to \$250 value)
When a 2 <sup>nd</sup> person enrolls: _____	B. <i>The Effective Facilitator</i> Course Manual (\$125 value)
When a 3 <sup>rd</sup> person enrolls: _____	C. <i>The Effective Consultant</i> Course Manual (\$125 value)
When a 4 <sup>th</sup> person enrolls: _____	D. The Facilitation Guides and Diskette (\$75 value)
	E. <i>The Advanced Facilitation</i> Course Manual (\$75 value)
	F. <i>From Management to Leadership</i> Manual (\$75 value)
	G. Gift Certificate (\$50 value)

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**Name:** \_\_\_\_\_ **Telephone:** \_\_\_\_\_

**Organization:** \_\_\_\_\_ **City/State:** \_\_\_\_\_

**Title:** \_\_\_\_\_ **Email:** \_\_\_\_\_

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**Name:** \_\_\_\_\_ **Telephone:** \_\_\_\_\_

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**Title:** \_\_\_\_\_ **Email:** \_\_\_\_\_

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**Name:** \_\_\_\_\_ **Telephone:** \_\_\_\_\_

**Organization:** \_\_\_\_\_ **City/State:** \_\_\_\_\_

**Title:** \_\_\_\_\_ **Email:** \_\_\_\_\_

# From Classroom to Application

Name: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

## The Effective Facilitator

Location: \_\_\_\_\_

Date: \_\_\_\_\_

## In what way do you plan to apply the skills you've learned?

**Please indicate a specific action you will take** in the next 30 days to implement one or more of the tools and techniques covered in your class. We will email you in 45-60 days to check-in and see how you did!

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# Facilitation Coaching Services

Another value-added service from Leadership Strategies, Inc.

## Wouldn't it be great if you could:

- Get expert advice on an upcoming meeting?
- Get help in developing a facilitation plan for an important session?
- Gain insights on how to address a unique dysfunction?
- Have a veteran facilitator sit in on your session and provide you with structured feedback on your facilitation technique?
- Have a veteran facilitator co-facilitate with you?

**Facilitation Coaching** is a consulting service designed for participants who have taken one of our facilitation classes and would like more help in applying new knowledge and techniques on the job. As we emphasize in all of our courses, practice alone does not improve performance. It is the powerful combination of **practice, feedback and application** that translates classroom learning into increased effectiveness.

Our expert coaches can walk you through **designing a session**, preparing **sample deliverables**, and developing a **detailed agenda**. They can also help you develop specific strategies for **managing dysfunctional behavior**. During a session, our coaches can either co-facilitate portions of the agenda, or simply observe your performance and offer detailed suggestions for improvement. Throughout the entire process, the coach can offer **in-depth feedback** to help refine the skills learned in class and boost your confidence.

This service is billed on an hourly basis, with a minimum charge of one hour for telephone assistance, half a day for on-site local work, and a full day for work requiring out of town travel.

<b>About Our Coaches</b>	<b>Who Should Use This Service?</b>
Our coaches are not only certified instructors who are skilled at observing student performance and giving feedback, they are also experienced facilitators who can bring a real-world perspective to the process.	<ul style="list-style-type: none"><li><input type="checkbox"/> Anyone who would like assistance in preparing for or conducting a facilitated session</li><li><input type="checkbox"/> Anyone who would like in-depth individual coaching and feedback on "real-life" facilitation work</li></ul>

Call your Leadership Strategies client relationship manager for more details. Or, call our corporate office at 1-800-824-2850. And be sure to check out our website at [www.leadstrat.com](http://www.leadstrat.com) for free facilitation tips!

Course Name: <b>Advanced Facilitation Skills</b>		Date:		
Instructor:		Location:		
<b>PACE</b> of the class was (circle): <b>Too fast</b> <b>Somewhat fast</b> <b>Just right</b> <b>Somewhat slow</b> <b>Too slow</b>				
<b>COURSE</b>	<b>Excellent</b>	<b>Good</b>	<b>OK</b>	<b>Poor</b>
1. Content of class (topics covered, depth, accuracy, etc.)				
2. Quality of class materials				
3. Comprehensiveness of subjects covered				
4. Pace of class				
5. Allocation of time among subjects covered				
Overall Assessment of Course				
<b>INSTRUCTOR</b>	<b>Excellent</b>	<b>Good</b>	<b>OK</b>	<b>Poor</b>
1. Knowledge of subject area				
2. Ability to present material effectively				
3. Ability to maintain appropriate pace				
4. Responsiveness to questions				
5. Flexibility and sensitivity to needs of the group				
Overall Assessment of Instructor				
<b>PERFORMANCE</b>	<b>Excellent</b>	<b>Good</b>	<b>OK</b>	<b>Poor</b>
1. How well were the objectives of the course met?				
2. How well did the course help you learn the material?				
3. How beneficial was this course to you personally?				
Overall Assessment of Performance				
On a 0-to-10 scale how likely are you to recommend us to a friend or colleague?		Highly Unlikely-----Highly Likely		
(Please circle one)		0 1 2 3 4 5 6 7 8 9 10		
<b>OVERALL RATING</b>	<b>Best course ever taken</b>	<b>One of the best courses</b>	<b>As good as most courses</b>	<b>Not as good as most courses</b>
How would you rate this course?				

<b>PRE-SESSION SERVICE</b>	<b>Excellent</b>	<b>Good</b>	<b>OK</b>	<b>Poor</b>	<b>N/A</b>
If applicable, please rate your experience with our Training Coordinator on registration confirmation, delivery of pre-course materials, answering questions, providing directions, etc.					
<b>COMMENTS</b>					
1. What topic was of most value to you?					
2. What topic was of least value to you?					
3. What was most beneficial about the course? Use the back of this page for additional space if needed.					
4. How could this session have been improved? Use the back of this page for additional space if needed.					
5. What other courses and services would you be interested in? Please use the back of this page for additional space if needed.					
<b>Optional:</b> We would like permission to use your comments in printed materials and to follow-up with you if we have questions. At your option, please record your name and telephone number below.					
Name:			Telephone:		

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