

**Leadership  
Strategies** 

Level up.



# The Effective Facilitator

**EXERCISE PACKET**



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# Exercise Packet

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# Personal Feedback Log

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

## Exercise 1 — Questioning Techniques

Things I did well	Things I would like to do better
	<i>(Circle one for focus in the next exercise.)</i>

## Exercise 2 — The Introduction

Things I did well	Things I would like to do better
	<i>(Circle one for focus in the next exercise.)</i>

## Exercise 3 — Listing

Things I did well	Things I would like to do better
	<i>(Circle one for focus in the next exercise.)</i>

## Exercise 4 — Dysfunctional Behavior

Things I did well	Things I would like to do better
	<i>(Circle one for focus in the next exercise.)</i>

## Exercise 5 — Consensus Building

Things I did well	Things I would like to do better
	<i>(Circle one for focus in the next exercise.)</i>



# Rules of Session Feedback

During session feedback exercises, the facilitator must focus on listening. Therefore, the person scheduled to facilitate the next exercise will serve as the leader for the review.

## Typical Process

1. The leader asks the facilitator, “What was done well?”
  - The facilitator must identify at least *three* things that they did well.
2. The leader says to the rest of the group, “Tell [insert the facilitator’s name] what other things he/she did well.”
  - The group indicates only *new* items that have not previously been shared by the facilitator.
3. The leader asks the facilitator, “What could have made the session better?”
  - The facilitator is permitted to identify *no more than three things* they would like to do better next time.
4. The leader suggests to the rest of the group, “Tell (insert the facilitator’s name) what other things would have made it better for us as participants.”

*Make all comments specific! It is not enough to say, “Good job.” What specifically did the facilitator do well? Do not hold back on ideas for making it better. We are here to improve. Recommend specific ways to apply the feedback.*

## Remember: Practice, Feedback, Application



	<b>#1 Human Resources (HR)</b>	<b>#2 Sales &amp; Marketing</b>	<b>#3 Customer Order Processing</b>
<p>Session Purpose</p>	<p>Improve our method for identifying, interviewing and selecting candidates.</p>	<p>Improve our procedure for tracking our response to leads.</p>	<p>Improve our method for processing orders, from the original customer call to receipt of order</p>
<p>Sample Answers to Exercises 1 and 2</p> <p>Key Topics to be Discussed</p>	<ol style="list-style-type: none"> <li>1. The overall duration of the process</li> <li>2. The quality of the candidates hired</li> <li>3. The turnover rate</li> <li>4. Increasing the level of involvement from the hiring departments</li> <li>5. Saving money where possible</li> <li>6. Finding ways to access resumes of good candidates not hired in a prior search</li> </ol>	<ol style="list-style-type: none"> <li>1. Average time taken to follow up with customers</li> <li>2. Tracking follow-up time by salesperson</li> <li>3. Penalizing salesperson who don't perform timely follow-up</li> <li>4. Providing greater responsibility to the receptionist to send out materials</li> <li>5. Making sure we don't put in computerized answering devices</li> </ol>	<ol style="list-style-type: none"> <li>1. Processing time for customer orders</li> <li>2. Determine ways for data entry to know for sure what products are and aren't available</li> <li>3. Reducing the number of late deliveries</li> <li>4. Getting delivery directions right the first time</li> <li>5. Increasing overall efficiency</li> </ol>
<p>Sample Answers to Exercise 3</p> <p>Typical Process Steps</p>	<ol style="list-style-type: none"> <li>1. Department identifies need for personnel</li> <li>2. HR assists department in writing position description and requirements</li> <li>3. HR assists department in posting position and placing ad</li> <li>4. HR reviews resumes to select candidates to interview</li> <li>5. HR interviews candidates and selects finalists</li> <li>6. Department interviews finalists and selects person to hire</li> </ol>	<ol style="list-style-type: none"> <li>1. Customer calls to request information about product</li> <li>2. Receptionist determines customer's ZIP code and forwards call to appropriate sales representative</li> <li>3. Since sales rep is typically out of office, customer is transferred into voice mail</li> <li>4. Sales rep picks up messages and receives info</li> <li>5. Sales rep returns call while on road or when back in office</li> <li>6. Sales rep sends product literature to customer</li> </ol>	<ol style="list-style-type: none"> <li>1. Customer calls to request a product</li> <li>2. Customer service enters customer's request</li> <li>3. The next day, inventory clerk checks product availability; if unavailable, clerk calls customer</li> <li>4. If inventory is available, clerk creates pick list</li> <li>5. Warehouse clerk pulls inventory and labels</li> <li>6. Shipping clerk boxes inventory and places on proper truck for delivery to customer</li> </ol>
<p>Sample Answers to Exercise 4</p> <p>Problems and Root Causes</p>	<ol style="list-style-type: none"> <li>1. Position descriptions take too long to write</li> <li>2. Department wants greater involvement in selecting finalists</li> <li>3. Money wasted placing ad for positions filled internally</li> <li>4. Don't save resumes of good people whom we previously interviewed</li> <li>5. Overall process takes too long</li> </ol>	<ol style="list-style-type: none"> <li>1. Customers complain that it can take several days for sales rep to call</li> <li>2. Some customers call back when they have not been contacted in a week</li> <li>3. We are losing sales from customers who don't receive timely follow-up</li> <li>4. We are expecting too much from the sales force</li> </ol>	<ol style="list-style-type: none"> <li>1. Customer orders can take up to week to get out the door</li> <li>2. Customers are upset when they are called back and told the product is not available</li> <li>3. Ship-to addresses are often wrong</li> <li>4. A product available when customer calls may not be when order hits warehouse</li> <li>5. Current systems don't commit inventory</li> </ol>
<p>Sample Answers to Exercise 4</p> <p>Potential Solutions</p>	<ol style="list-style-type: none"> <li>1. Scan resumes into computer to permit search on skills and evaluation scores</li> <li>2. Permit departments to be involved in screening process at their discretion</li> <li>3. Publish interview schedules and allow department personnel to sign up</li> <li>4. Track interviewer's comments and ratings</li> <li>5. Place ads only after positions remain unfilled for 45 days</li> </ol>	<ol style="list-style-type: none"> <li>1. Have computer track time call received and automatically assign sales rep by zip code</li> <li>2. Add a sales support position who takes all calls when salesperson is not in</li> <li>3. Have sales support determine if request can be addressed without the sales rep</li> <li>4. Report statistics on sales rep responsiveness</li> <li>5. Report any caller not contacted within one week</li> </ol>	<ol style="list-style-type: none"> <li>1. Enter inventory receipts into computer</li> <li>2. Check inventory availability when customer calls; commit inventory when order placed</li> <li>3. Track product location and automatically create pick list</li> <li>4. Update inventory with each shipment</li> <li>5. Track backlogged items</li> <li>6. Have data entry check for current address</li> </ol>



	#4 Bakery Production Process	#5 Park Cottage Reservations	#6 Accounts Payable (AP)
Session Purpose	Increase labor efficiency to produce our buns, from delivery of raw materials to packaging	Improve our process for reserving cottages in our twelve parks	Improve our method for handling requests for payment that come from the various departments
Sample Answers to Exercises 1 and 2 Key Topics to be Discussed	<ol style="list-style-type: none"> <li>1. Reducing number of problems with packaging materials</li> <li>2. Improving up-time of processing line</li> <li>3. Getting right mix and blend of ingredients first time</li> <li>4. Getting more efficient in transferring from one product to another</li> </ol>	<ol style="list-style-type: none"> <li>1. Increasing staff efficiency</li> <li>2. Having a means to check schedules at other parks</li> <li>3. Leveling out volume of calls (away from first week of each month)</li> <li>4. Increasing revenue and usage of parks</li> </ol>	<ol style="list-style-type: none"> <li>1. Reducing amount of paperwork</li> <li>2. Addressing high number of late payment charges</li> <li>3. Providing a means for vendors to learn status of their invoices without calling staff</li> <li>4. Reducing misfiled payments</li> </ol>
Sample Answers to Exercise 3 Typical Process Steps	<ol style="list-style-type: none"> <li>1. Deliver raw materials to production area and verify</li> <li>2. Deliver raw materials to process vessel</li> <li>3. Blend/mix raw materials</li> <li>4. Verify product ingredients</li> <li>5. Make adjustments to finished product as necessary</li> <li>6. Perform form process; send through proof box and to oven for baking</li> <li>7. Cool and slice; deliver for packaging</li> </ol>	<ol style="list-style-type: none"> <li>1. Customer contacts individual park by telephone, mail, or in person</li> <li>2. Reservation is denied if request is for less than 2 days and call is more than 30 days in advance</li> <li>3. Park determines availability of cottage on dates requested</li> <li>4. If available, park makes tentative reservation</li> <li>5. Park sends written confirmation to customer, requesting deposit within 7 days</li> <li>6. Customer returns deposit and reservation is confirmed</li> </ol>	<ol style="list-style-type: none"> <li>1. Department submits request for payment form with vendor invoice</li> <li>2. AP validates invoice for proper authorizations; sends back to department if not valid</li> <li>3. AP determines date for payment and places invoice in folder with that date</li> <li>4. At noon each day, AP pulls invoices from folder for that day and writes checks for those payments</li> </ol>
Sample Answers to Exercise 4 Problems and Root Causes	<ol style="list-style-type: none"> <li>1. Defects in packaging materials causes down time and rework</li> <li>2. Mechanical down time delays production and decreases efficiency</li> <li>3. Significant time is required to make adjustments to product ingredients to achieve correct blend</li> <li>4. Too many buns end up like pancakes or marshmallows, decreasing yield</li> </ol>	<ol style="list-style-type: none"> <li>1. Staff spends a lot of time answering questions related to the cottage reservation (e.g., "How's the fishing?")</li> <li>2. No central, toll-free number</li> <li>3. Unable to refer customers to other parks</li> <li>4. High call volume on 1st of each month due to policy</li> <li>5. Policies may be limiting revenue generation</li> </ol>	<ol style="list-style-type: none"> <li>1. About 10% of vendor invoices receive late payment charges</li> <li>2. Responding to vendor calls requires almost a full-time position</li> <li>3. Misfiled payment requests take too long to find</li> <li>4. Early-payment discounts offered to vendors are not being utilized</li> </ol>
Sample Answers to Exercise 4 Potential Solutions	<ol style="list-style-type: none"> <li>1. Track number of failures by type of failure; identify improvements for common failures</li> <li>2. Implement better measurement devices to improve accuracy of the amounts used for each ingredient</li> <li>3. Utilize two vendors for packaging materials; set specific criteria for performance</li> </ol>	<ol style="list-style-type: none"> <li>1. Provide single, toll-free number</li> <li>2. Centralize computer reservations</li> <li>3. Eliminate reservation restrictions</li> <li>4. Survey customers</li> <li>5. Get input from park staff</li> </ol>	<ol style="list-style-type: none"> <li>1. Dept. personnel enter check requests; dept. head authorizes on computer</li> <li>2. Computer rejects unauthorized requests</li> <li>3. AP clerk enters payment date; computer generates checks 5 days in advance of due date</li> <li>4. Status of payments available to vendor through Internet with proper ID and password</li> </ol>



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# Exercise 1. Questioning Techniques

1. The objective of this session is to give you practice in using the questioning techniques.
2. Divide into groups of four and assign roles for the first round of the exercise:
  - **Facilitator** — Facilitates the gathering of key topics from the group
  - **Assistant** — Assists the facilitator by checking reacting questions as used
  - **Participant 1** — Participates in the session
  - **Participant 2** — Participates in the session
3. The assistant will share the Exercise 1 document on their screen and place an X next to the reacting questions as they are used by the facilitator.
4. The facilitator starts the 3-minute session by asking a great starting question related to key topics to be discussed in his/her case study. For example:

*“The next thing we are going to do is to identify the key topics you would like to see talked about during this session. We’ll start with... Think about the hiring process, the things you like about the way it works now, the things that you feel should be addressed, and even some of the fixes that you would like to see made. What are some of the topics you would like to see discussed in improving the hiring process?”*



# Exercise 1. Questioning Techniques (Continued)

5. **The participants respond** with an appropriate response using the sample exercise responses, and the facilitator pretends to record the response.
6. **Facilitator responds with a Reacting Question.** The assistant marks the question with an X, indicating that the facilitator has asked this question type.
7. **The participants respond to the question,** and the facilitator pretends to record the response. The facilitator asks another question, the assistant marks that question as needed, the participants respond...and so on until all the questions are marked as used. (The participants should guide the facilitator by making comments that can be “redirected,” “played back,” etc.)
8. When the facilitator is done, the entire group applauds and holds a two-minute debrief led by the assistant.

<b>Done well</b>	<p><i>“Facilitator, what did you do well?” (at least three responses)</i></p> <p><i>“Participants, tell [facilitator] what else he/she did well.”</i></p>
<b>Improve</b>	<p><i>“Facilitator, what would have made it better?” (no more than three responses)</i></p> <p><i>“Participants, tell [facilitator] what else would have made it better.”</i></p>

9. To start the next round, each person rotates to the next role as follows: The assistant becomes the next facilitator, participant 1 becomes the assistant, participant 2 becomes participant 1, and the facilitator becomes participant 2.



# Exercise 1. Questioning Techniques (Continued)

## Sample Exercise Responses

#1 Human Resources (HR)	#2 Sales & Marketing
<ol style="list-style-type: none"> <li>1. The overall duration of the process</li> <li>2. The quality of the candidates hired</li> <li>3. The turnover rate</li> <li>4. Increasing the level of involvement from the hiring departments</li> <li>5. Saving money where possible</li> <li>6. Finding ways to access resumes of good candidates not hired in a prior search</li> </ol>	<ol style="list-style-type: none"> <li>1. Average time taken to follow up with customers</li> <li>2. Tracking follow-up time by salesperson</li> <li>3. Penalizing salespeople who don't perform timely follow-up</li> <li>4. Providing greater responsibility to the receptionist to send out materials</li> <li>5. Making sure we don't put in computerized answering devices</li> </ol>
#3 Customer Order Processing	#4 Bakery Production Process
<ol style="list-style-type: none"> <li>1. Processing time for customer orders</li> <li>2. Determine ways for data entry to know for sure what products are and aren't available</li> <li>3. Reducing the number of late deliveries</li> <li>4. Getting delivery directions right the first time</li> <li>5. Increasing overall efficiency</li> </ol>	<ol style="list-style-type: none"> <li>1. Reducing number of problems with packaging materials</li> <li>2. Improving up-time of processing line</li> <li>3. Getting right mix and blend of ingredients first time</li> <li>4. Getting more efficient in transferring from one product to another</li> </ol>
#5 Park Cottage Reservations	#6 Accounts Payable (AP)
<ol style="list-style-type: none"> <li>1. Increasing staff efficiency</li> <li>2. Having a means to check schedules at other parks</li> <li>3. Leveling out volume of calls (away from first week of each month)</li> <li>4. Increasing revenue and usage of parks</li> </ol>	<ol style="list-style-type: none"> <li>1. Reducing amount of paperwork</li> <li>2. Addressing high number of late payment charges</li> <li>3. Providing a means for vendors to learn status of their invoices without calling staff</li> <li>4. Reducing misfiled payments</li> </ol>



# Exercise 1. Questioning Techniques (Continued)

## Exercise 1 — Questioning Techniques

Things I did well	Things I would like to do better
	<i>(Circle one for focus in the next exercise.)</i>

Plan Start: _____	Agenda Item:		
Actual Start: _____ Actual End: _____		Basis: ____ (intro) + ____ (units)@____ + ____ (addtl) = ____	
<b>What to say</b>			
<b>What to do</b>			



# Exercise 1. Questioning Techniques (Continued)

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

Facilitator's Name: \_\_\_\_\_

Questioning	Comments
+ Starting Question *	
+ Direct Probe *	
+ Indirect Probe *	
+ Redirection *	
+ Playback *	
+ Leading Question *	
+ Prompt Question *	
+ Tag Question *	
+ Float an Idea *	



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# Exercise 2. The Introduction

1. The objective of this exercise is to give you practice in getting a session started.
2. Take 10 minutes to prepare your introduction based on the techniques discussed in class. You can record your opening on the sheets that follow. Use the “mnemonic” technique to help you to remember your points. Make sure you at least cover IEEI. For example:
  - **Inform:** “The objective of this session is...”
  - **Excite:** “This is an important session because...”
  - **Empower:** “Management has selected this team because...”
  - **Involve:** “I would like to start by asking you to think about....”
3. Be sure that your involvement question is a **Type B!**
4. Use your reacting question techniques to keep the session going until the time is up.
5. Before you begin, announce to the group which facilitation skill you want to select as the focus of your improvement effort.
6. Each person will have \_\_\_\_ minutes to speak. Your \_\_\_\_ - minute session will be followed by a three- to four-minute debrief.

*(Continued on next page)*



## Exercise 2. The Introduction (Continued)

7. **When the facilitator is done**, the entire group applauds and holds a three- to four-minute debrief led by the person going next. The facilitator records the feedback on his/her Exercise 2: The Introduction feedback form below.

<b>Done well</b>	<i>“Facilitator, what did you do well?” (at least three responses)</i> <i>“Participants, tell [facilitator] what else he/she did well.”</i>
<b>Improve</b>	<i>“Facilitator, what would have made it better?” (no more than three responses)</i> <i>“Participants, tell [facilitator] what else would have made it better.”</i>

8. **Start a new person every \_\_\_\_\_ minutes.**



# Exercise 2. The Introduction (Continued)

## Sample Exercise Responses

#1 Human Resources (HR)	#2 Sales & Marketing
<ol style="list-style-type: none"> <li>1. The overall duration of the process</li> <li>2. The quality of the candidates hired</li> <li>3. The turnover rate</li> <li>4. Increasing the level of involvement from the hiring departments</li> <li>5. Saving money where possible</li> <li>6. Finding ways to access resumes of good candidates not hired in a prior search</li> </ol>	<ol style="list-style-type: none"> <li>1. Average time taken to follow up with customers</li> <li>2. Tracking follow-up time by salesperson</li> <li>3. Penalizing salespeople who don't perform timely follow-up</li> <li>4. Providing greater responsibility to the receptionist to send out materials</li> <li>5. Making sure we don't put in computerized answering devices</li> </ol>
#3 Customer Order Processing	#4 Bakery Production Process
<ol style="list-style-type: none"> <li>1. Processing time for customer orders</li> <li>2. Determine ways for data entry to know for sure what products are and aren't available</li> <li>3. Reducing the number of late deliveries</li> <li>4. Getting delivery directions right the first time</li> <li>5. Increasing overall efficiency</li> </ol>	<ol style="list-style-type: none"> <li>1. Reducing number of problems with packaging materials</li> <li>2. Improving up-time of processing line</li> <li>3. Getting right mix and blend of ingredients first time</li> <li>4. Getting more efficient in transferring from one product to another</li> </ol>
#5 Park Cottage Reservations	#6 Accounts Payable (AP)
<ol style="list-style-type: none"> <li>1. Increasing staff efficiency</li> <li>2. Having a means to check schedules at other parks</li> <li>3. Leveling out volume of calls (away from first week of each month)</li> <li>4. Increasing revenue and usage of parks</li> </ol>	<ol style="list-style-type: none"> <li>1. Reducing amount of paperwork</li> <li>2. Addressing high number of late payment charges</li> <li>3. Providing a means for vendors to learn status of their invoices without calling staff</li> <li>4. Reducing misfiled payments</li> </ol>



# Exercise 2. The Introduction (Continued)

Plan Start: _____	Agenda Item:
Actual Start: _____ Actual End: _____ Basis: ____ (intro) + ____ (units)@ _____ + _____ (addtl) = _____	
<b>What to say</b>	
<b>What to do</b>	



# Exercise 2. The Introduction Feedback

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

Facilitator's Name: \_\_\_\_\_

	Comments
<p><b>Getting Started</b></p> <ul style="list-style-type: none"> <li>+ Inform, Excite, Empower, Involve *</li> <li>+ Session Purpose, Agenda *</li> <li>+ Ground Rules, Parking Boards *</li> <li>+ Recharge *</li> </ul>	
<p><b>Body</b></p> <ul style="list-style-type: none"> <li>+ Opening Moves *</li> <li>+ Animation *</li> <li>+ Movement *</li> <li>+ Gestures *</li> <li>+ Eye Contact *</li> <li>+ Smiles *</li> </ul>	
<p><b>Voice</b></p> <ul style="list-style-type: none"> <li>+ Animation *</li> <li>+ Volume *</li> <li>+ Speed *</li> <li>+ Clarity *</li> <li>+ Warmth *</li> <li>+ Filler Words, Self-talk *</li> </ul>	
<p><b>Focusing the Group</b></p> <ul style="list-style-type: none"> <li>+ Checkpoint *</li> <li>+ Warming Up the Group *</li> <li>+ PeDeQs, Examples *</li> </ul>	
<p><b>Power of the Pen</b></p> <ul style="list-style-type: none"> <li>+ Writing 1st/Discussing 2nd *</li> <li>+ Writing What Is Said *</li> <li>+ Asking Versus Telling *</li> <li>+ Avoiding Lulls While Writing *</li> <li>+ Writing Clarity *</li> <li>+ Chart Labeling *</li> </ul>	
<p><b>Questioning</b></p> <ul style="list-style-type: none"> <li>+ Starting Question *</li> <li>+ Direct Probe *</li> <li>+ Indirect Probe *</li> <li>+ Redirection *</li> <li>+ Playback *</li> <li>+ Leading Question *</li> <li>+ Prompt Question *</li> <li>+ Tag Question *</li> <li>+ Float an Idea *</li> </ul>	

*(More space for comments on next page)*



## Comments



# Homework Day 1: Managing Dysfunction

1. The objective of this homework assignment is to familiarize yourself with the information in *Click, The Virtual Meetings Book*, Chapter 9, “What If There Is Dysfunction?” We will be reviewing this information in detail on the afternoon of the third day.

## 2. BEFORE READING:

a. Select the dysfunction you find most difficult to manage or the one that occurs most frequently in meetings you attend. Indicate the dysfunction below:

**Dysfunction:** \_\_\_\_\_

b. Indicate how you typically handle this dysfunction currently:

\_\_\_\_\_  
\_\_\_\_\_

3. Read Chapter 9 of *Click*

## 4. AFTER READING:

a. Reflect on the information you gained from the book. Indicate how you might better handle this dysfunction in the future:

\_\_\_\_\_  
\_\_\_\_\_



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# Exercise 3: Listing

1. The objective of this exercise is to provide you practice in facilitating listing.
2. Using your case study, you will facilitate a session in which the participants will identify six to twelve of the major steps in the current process. To do this, you will take the following steps:
  - a. Pre-label your virtual chart as needed.
  - b. Start with a checkpoint (**Principle 3**) such as:
    - **Review:** “So far, we have completed the introduction and set the direction for where we are going.”
    - **Preview:** “We will next identify the major steps in how the process works today.”
    - **Big View:** “This activity is very important because...”
  - c. Next, give directions for the exercise using PeDeQs (**Principle 3**) such as:
    - The **purpose** of this exercise is to identify the steps in the current hiring process.
    - For **example**, a step in the process of cooking a turkey might be “turn on the oven.” What other steps are there in cooking a turkey?
    - Of course, we are talking about the steps in the \_\_\_\_\_ process. The **directions** we will follow are to go around the room and get a step from each person until we feel we have captured all of the steps.
    - Some **expectations** to these directions are the following: if you don’t have a step, you can pass, and we will put them in order after the exercise, so don’t worry about order.
    - What **questions** do you have?

*(Continued on next page)*



# Exercise 3. Listing (Continued)

d. Ask a great **starting question (Principle 5)** to begin the listing:

- *“Let’s start with... Imagine for a second that your department has a need to create a new position and hire someone to fill it and that you have just been given the responsibility to make it happen. There are many steps involved from the time that you first receive the responsibility to the time that the person is hired and starts work. Let’s build a list of the steps. The order doesn’t matter at this point. What are the steps that you would have to take?”*

e. Record the responses, being sure to avoid lulls (**Principle 4**) while writing.

3. Take 10 minutes to prepare. On the pages that follow, first write out your checkpoint, then write out your PeDeQs including your starting question for the listing activity.
4. Session attendees should actively participate and deliberately give the facilitator cause to use a redirection question, refer to the parking boards, etc.
5. Each participant will have \_\_\_\_ minutes to facilitate, followed by a three- to four-minute debrief.
6. When the facilitator is done, the entire group applauds and holds a three- to four-minute debrief led by one of the other participants. The facilitator records the feedback on his/her Exercise 3: Listing Feedback form below.

<b>Done well</b>	<p><i>“Facilitator, what did you do well?” (at least three responses)</i></p> <p><i>“Participants, tell [facilitator] what else he/she did well.”</i></p>
<b>Improve</b>	<p><i>“Facilitator, what would have made it better?” (no more than three responses)</i></p> <p><i>“Participants, tell [facilitator] what else would have made it better.”</i></p>

7. **Start a new person every \_\_\_\_\_ minutes.**



# Exercise 3. Listing (Continued)

<b>Sample Exercise Responses</b>	
<b>#1 Human Resources (HR)</b>	<b>#2 Sales &amp; Marketing</b>
<ol style="list-style-type: none"> <li>1. Department identifies need for personnel</li> <li>2. HR assists department in writing position description and requirements</li> <li>3. HR assists department in posting position and placing ad</li> <li>4. HR reviews resumes to select candidates to interview</li> <li>5. HR interviews candidates and selects finalists</li> <li>6. Department interviews finalists and selects person to hire</li> </ol>	<ol style="list-style-type: none"> <li>1. Customer calls to request information about product</li> <li>2. Receptionist determines customer's ZIP code and forwards call to appropriate sales representative</li> <li>3. Since sales rep is typically out of office, customer is transferred into voicemail</li> <li>4. Sales rep picks up messages and receives info</li> <li>5. Sales rep returns call while on road or when back in office</li> <li>6. Sales rep sends product literature to customer</li> </ol>
<b>#3 Customer Order Processing</b>	<b>#4 Bakery Production Process</b>
<ol style="list-style-type: none"> <li>1. Customer calls to request a product</li> <li>2. Customer service enters customer's request</li> <li>3. The next day, inventory clerk checks product availability; if unavailable, clerk calls customer</li> <li>4. If inventory is available, clerk creates picklist</li> <li>5. Warehouse clerk pulls inventory and labels</li> <li>6. Shipping clerk boxes inventory and places on proper truck for delivery to customer</li> </ol>	<ol style="list-style-type: none"> <li>1. Deliver raw materials to production area and verify</li> <li>2. Deliver raw materials to process vessel</li> <li>3. Blend/mix raw materials</li> <li>4. Verify product ingredients</li> <li>5. Make adjustments to finished product as necessary</li> <li>6. Perform form process; send through proof box and to oven for baking</li> <li>7. Cool and slice; deliver for packaging</li> </ol>

*(Continued on next page)*



# Exercise 3. Listing (Continued)

#5 Park Cottage Reservations	#6 Accounts Payable (AP)
<ol style="list-style-type: none"> <li>1. Customer contacts individual park by telephone, mail, or in person</li> <li>2. Reservation is denied if request is for less than two days and call is more than 30 days in advance</li> <li>3. Park determines availability of cottage on dates requested</li> <li>4. If available, park makes tentative reservation</li> <li>5. Park sends written confirmation to customer, requesting deposit within seven days</li> <li>6. Customer returns deposit and reservation is confirmed</li> </ol>	<ol style="list-style-type: none"> <li>1. Department submits request for payment form with vendor invoice</li> <li>2. AP validates invoice for proper authorizations; sends back to department if not valid</li> <li>3. AP determines date for payment and places invoice in folder with that date</li> <li>4. At noon each day, AP pulls invoices from folder for that day and writes checks for those payments</li> </ol>



# Exercise 3. Listing (Continued)

Plan Start: _____	Agenda Item:
Actual Start: _____ Actual End: _____ Basis: ____ (intro) + ____ (units)@____ + ____ (addtl) = ____	
<b>What to say</b>	
<b>What to do</b>	



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# Exercise 3. Listing Feedback

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

Facilitator's Name: \_\_\_\_\_

	<b>Getting Started</b>	*	<b>Comments</b>
+	Inform, Excite, Empower, Involve	*	
+	Session Purpose, Agenda	*	
+	Ground Rules, Parking Boards	*	
+	Recharge	*	
<b>Body</b>			
+	Opening Moves	*	
+	Animation	*	
+	Movement	*	
+	Gestures	*	
+	Eye Contact	*	
+	Smiles	*	
<b>Voice</b>			
+	Animation	*	
+	Volume	*	
+	Speed	*	
+	Clarity	*	
+	Warmth	*	
+	Filler Words, Self-talk	*	
<b>Focusing the Group</b>			
+	Checkpoint	*	
+	Warming Up the Group	*	
+	PeDeQs, Examples	*	
<b>Power of the Pen</b>			
+	Writing 1st/Discussing 2nd	*	
+	Writing What Is Said	*	
+	Asking Versus Telling	*	
+	Avoiding Lulls While Writing	*	
+	Writing Clarity	*	
+	Chart Labeling	*	
<b>Questioning</b>			
+	Starting Question	*	
+	Direct Probe	*	
+	Indirect Probe	*	
+	Redirection	*	
+	Playback	*	
+	Leading Question	*	
+	Prompt Question	*	
+	Tag Question	*	
+	Float an Idea	*	
<b>Information Gathering</b>			
+	Listing	*	
+	Brainstorming	*	
+	Grouping	*	
+	Ranking	*	

*(More space for comments on next page)*



## Comments



# Exercise 4: Dysfunctional Behavior

1. The objective of this exercise is to practice addressing dysfunctional behavior.
2. Using your selected case study, you will be facilitating a session in which your participants will identify the issues (problems) with the way that a process currently works.
  - a. Pre-label your template as needed.
  - b. Start with a checkpoint (**Principle 3**), such as:
    - **Review:** “We have completed identifying the steps in the current hiring process.”
    - **Preview:** “We will next identify the problems with the current process.”
    - **Big View:** “This activity is very important because...”
  - c. Next, give directions for the exercise using PeDeQs (**Principle 3**) such as:
    - The **purpose** of this exercise is to identify the steps in the current hiring process.
    - For **example**, a problem in the process of cooking a turkey might be “tukey comes out overcooked.” What other problems could we have with cooking a turkey?
    - We are, of course, talking about problems with the \_\_\_\_\_ process. The **directions** we will follow are to go around the room and get a problem from each person until we feel we have captured all of the problems.

*(Continued on next page)*



# Exercise 4: Dysfunctional Behavior (Continued)

- Some **expectations** to these directions are the following: if you don't have a problem to add that hasn't already been captured, you can pass. Or, if someone before you shares the same as the one you were going to say, you can ditto it.
  - What **questions** do you have?
- d. Next, ask a great **starting question (Principle 5)** to begin the listing:  
*“Let's start with...Think about the last time that you had to fill a position, all the problems you encountered, the things that really frustrated you or made you say, 'There's got to be a better way!' Let's build a list of some of those common problems.”* (**An alternative approach:** Take each step in the process one by one and ask, “What are the various problems that are found in this step?”)
- e. Record responses, being sure to avoid lulls (**Principle 4**) while writing.
3. Take 10 minutes to prepare by writing out your checkpoint and PeDeQs including your starting question.
  4. **Warning: your session attendees may exhibit one or more dysfunctional behaviors that they have been assigned. Pay close attention.** Remember: Conscious Prevention, Early Detection, Clean Resolution!
  5. Before you begin, announce to the group which facilitation skill you will focus on improving. Each person will have \_\_\_\_ minutes to facilitate, followed by a three- to four-minute debrief.

*(Continued on next page)*



# Exercise 4: Dysfunctional Behavior (Continued)

6. **When the facilitator is done**, the entire group applauds and holds a three-to four-minute debrief led by the assistant. The Facilitator records the feedback on his/her form.

<b>Done well</b>	<i>“Facilitator, what did you do well?” (at least three responses)</i> <i>“Participants, tell [facilitator] what else he/she did well.”</i>
<b>Improve</b>	<i>“Facilitator, what would have made it better?” (no more than three responses)</i> <i>“Participants, tell [facilitator] what else would have made it better.”</i>

7. **Start a new person every \_\_\_\_\_ minutes.**



# Exercise 4: Dysfunctional Behavior (Continued)

<b>Sample Exercise Responses (Problems and Root Causes Section)</b>	
<b>#1 Human Resources (HR)</b>	<b>#2 Sales &amp; Marketing</b>
<ol style="list-style-type: none"> <li>1. Position descriptions take too long to write</li> <li>2. Department wants greater involvement in selecting finalists</li> <li>3. Money wasted placing ad for positions filled internally</li> <li>4. Resumes of good candidates not saved previously interviewed</li> <li>5. Overall process takes too long</li> </ol>	<ol style="list-style-type: none"> <li>1. Customers complain that it can take several days for sales rep to call</li> <li>2. Some customers call back when they have not been contacted in a week</li> <li>3. We are losing sales from customers who don't receive timely follow-up</li> <li>4. We are expecting too much from the sales force</li> </ol>
<b>#3 Customer Order Processing</b>	<b>#4 Bakery Production Process</b>
<ol style="list-style-type: none"> <li>1. Customer orders can take up to a week to get out the door</li> <li>2. Customers are upset when they are called back and told the product is not available</li> <li>3. Ship-to addresses are often wrong</li> <li>4. A product available when customer calls may not be when order hits warehouse</li> <li>5. Current systems don't commit inventory</li> </ol>	<ol style="list-style-type: none"> <li>1. Defects in packaging materials causes down time and rework</li> <li>2. Mechanical down time delays production and decreases efficiency</li> <li>3. Significant time is required to make adjustments to product ingredients to achieve correct blend</li> <li>4. Too many buns end up like pancakes or marshmallows, decreasing yield</li> </ol>
<b>#5 Park Cottage Reservations</b>	<b>#6 Accounts Payable (AP)</b>
<ol style="list-style-type: none"> <li>1. Staff spends a lot of time answering questions related to the cottage reservation (e.g., "How's the fishing?")</li> <li>2. No central, toll-free number</li> <li>3. Unable to refer customers to other parks</li> <li>4. High call volume on 1st of each month due to policy</li> <li>5. Policies may be limiting revenue generation</li> </ol>	<ol style="list-style-type: none"> <li>1. About 10% of vendor invoices receive late payment charges</li> <li>2. Responding to vendor calls almost requires a full-time position</li> <li>3. Misfiled payment requests take too long to find</li> <li>4. Early-payment discounts offered to vendors are not being utilized</li> </ol>



# Exercise 4: Dysfunctional Behavior (Continued)

<b>Sample Exercise Responses (Potential Solutions Section)</b>	
<b>#1 Human Resources (HR)</b>	<b>#2 Sales &amp; Marketing</b>
<ol style="list-style-type: none"> <li>1. Scan resumes into computer to permit search on skills and evaluation scores</li> <li>2. Permit departments to be involved in screening process at their discretion</li> <li>3. Publish interview schedules and allow department personnel to sign up</li> <li>4. Track interviewer's comments and ratings</li> <li>5. Place ads only after positions remain unfilled for 45 days</li> </ol>	<ol style="list-style-type: none"> <li>1. Have computer track time call received and automatically assign sales rep by ZIP code</li> <li>2. Add a sales support position who takes all calls when sales person is not in</li> <li>3. Have sales support determine if request can be addressed without the sales rep</li> <li>4. Report statistics on sales rep responsiveness</li> <li>5. Report any caller not contacted within one week</li> </ol>
<b>#3 Customer Order Processing</b>	<b>#4 Bakery Production Process</b>
<ol style="list-style-type: none"> <li>1. Enter inventory receipts into computer</li> <li>2. Check inventory availability when customer calls; commit inventory when order placed</li> <li>3. Track product location and automatically create pick list</li> <li>4. Update inventory with each shipment</li> <li>5. Track backlogged items</li> <li>6. Have data entry check for current address</li> </ol>	<ol style="list-style-type: none"> <li>1. Track number of failures by type of failure; identify improvements for common failures</li> <li>2. Implement better measurement devices to improve accuracy of the amounts used for each ingredient</li> <li>3. Utilize two vendors for packaging materials; set specific criteria for performance</li> </ol>
<b>#5 Park Cottage Reservations</b>	<b>#6 Accounts Payable (AP)</b>
<ol style="list-style-type: none"> <li>1. Provide single, toll-free number</li> <li>2. Centralize computer reservations</li> <li>3. Eliminate reservation restrictions</li> <li>4. Survey customers</li> <li>5. Get input from park staff</li> </ol>	<ol style="list-style-type: none"> <li>1. Dept. personnel enters check requests; dept. head authorizes on computer</li> <li>2. Computer rejects unauthorized requests</li> <li>3. AP clerk enters payment date; computer generates checks five days in advance of due date</li> <li>4. Status of payments available to vendor through Internet with proper ID and password</li> </ol>



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# Exercise 4: Dysfunctional Behavior (Continued)

Plan Start: _____	Agenda Item:
Actual Start: _____ Actual End: _____ Basis: ____ (intro) + ____ (units)@____ + ____ (addtl) = ____	
<b>What to say</b>	
<b>What to do</b>	



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# Exercise 4. Dysfunctional Behavior Feedback

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

Facilitator's Name: \_\_\_\_\_

<b>Getting Started</b>	<b>Comments</b>
+ Inform, Excite, Empower, Involve * + Session Purpose, Agenda * + Ground Rules, Parking Boards * + Recharge *	
<b>Body</b> + Opening Moves * + Animation * + Movement * + Gestures * + Eye Contact * + Smiles *	
<b>Voice</b> + Animation * + Volume * + Speed * + Clarity * + Warmth * + Filler Words, Self-talk *	
<b>Focusing the Group</b> + Checkpoint * + Warming Up the Group * + PeDeQs, Examples *	
<b>Power of the Pen</b> + Writing 1st/Discussing 2nd * + Writing What Is Said * + Asking Versus Telling * + Avoiding Lulls While Writing * + Writing Clarity * + Chart Labeling *	
<b>Questioning</b> + Starting Question * + Direct Probe * + Indirect Probe * + Redirection * + Playback * + Leading Question * + Prompt Question * + Tag Question * + Float an Idea *	
<b>Information Gathering</b> + Listing * + Brainstorming * + Grouping * + Ranking *	
<b>Group Management</b> + Keeping the Group Moving * + Keeping the Group Focused * + Keeping the Energy High * + Recognizing Dysfunction * + Handling Dysfunction * + Consensus Check * + Control of Group * + Praise and Empathy *	

(More space for comments on next page)



## Comments



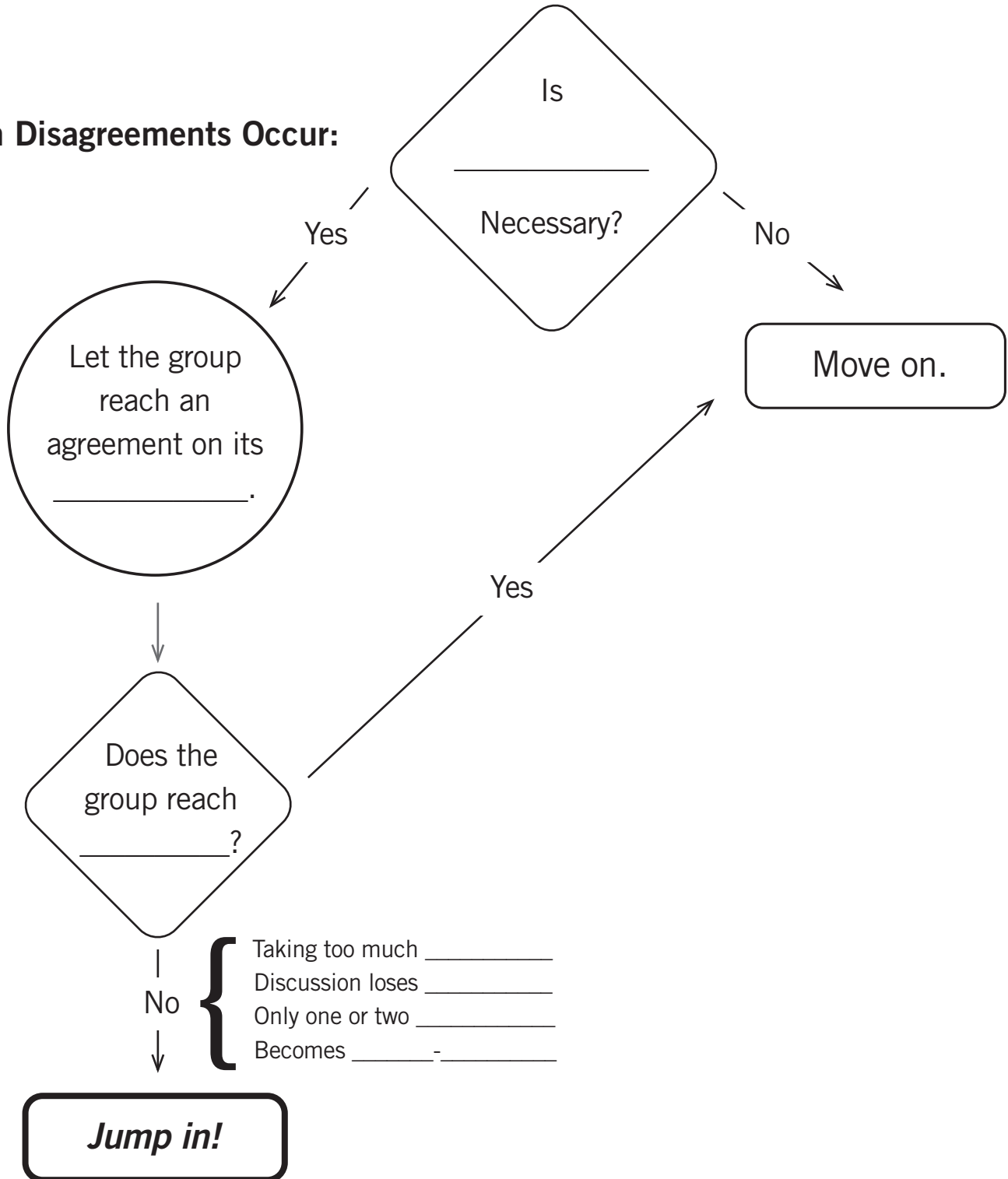
# Homework Day 2: Consensus Building

1. The objective of this homework assignment is to familiarize yourself with the information in **Principle 7**, “Consensus Building.” We will be reviewing this principle in detail on the morning of the third day.
2. The following two pages will serve as your guide while you review Principle 7.
3. Read Principle 7 in the course section. As you discover responses during your reading, fill them into the Flow Template. We will be reviewing the flow Template in class on Day 3.



# Homework Day 2: Consensus Building

When Disagreements Occur:

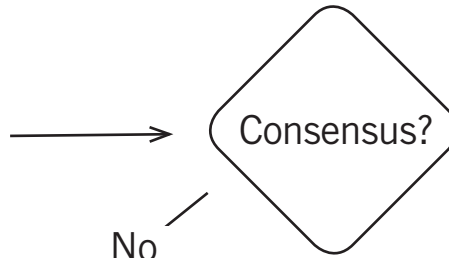


# Homework Day 2: Consensus Building (Continued)

Start with \_\_\_\_\_

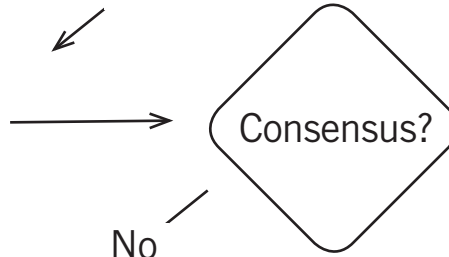
## Consensus Building Strategies

1. \_\_\_\_\_  
the alternatives.



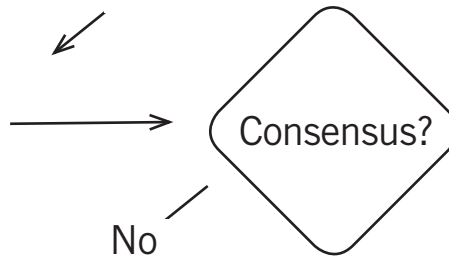
— Yes →

2. Identify \_\_\_\_\_  
and \_\_\_\_\_



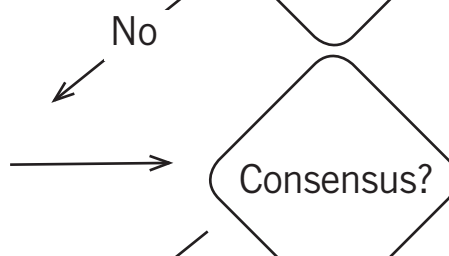
— Yes →

3. \_\_\_\_\_  
to create a 3rd alternate.



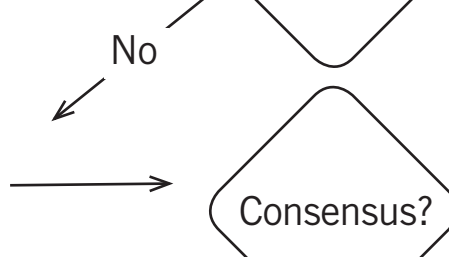
— Yes →

4. Use \_\_\_\_\_  
\_\_\_\_\_

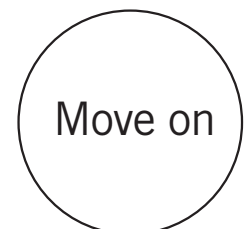


— Yes →

5. \_\_\_\_\_  
on a consensus solution.



Yes/No →



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# Exercise 5. Consensus Building

1. The objective of this exercise is to provide you practice in getting a group to consensus. You will be working in groups of up to six people.
2. Two facilitators will be assigned to each of the issues on the next page. The first facilitator will delineate the alternatives. The second facilitator will identify strengths and weaknesses and merge alternatives.
3. Two other people will **support** the different alternatives related to the issue. The other people in the group should **participate** in the session, supporting whichever alternative they prefer. For example, if there are six people in the group, the assignments for each issue will be as follows:

	<b>A. Lease or Buy Auto</b>	<b>B. Drive or Fly</b>	<b>C. Pilot or Rollout</b>
Person 1	<b>Facilitator 1</b>	Participant	Support Alternative 1
Person 2	<b>Facilitator 2</b>	Participant	Support Alternative 2
Person 3	Support Alternative 1	<b>Facilitator 1</b>	Participant
Person 4	Support Alternative 2	<b>Facilitator 2</b>	Participant
Person 5	Participant	Support Alternative 1	<b>Facilitator 1</b>
Person 6	Participant	Support Alternative 2	<b>Facilitator 2</b>

4. Take 10 minutes to review the process for gaining consensus, and prepare your templates.



# Exercise 5. Consensus Building

## (Continued)

5. The first facilitator should start with agreement, confirm the source of the disagreement, and begin the delineation. Be sure to end with a consensus check. Example:

*“We seem to all agree that... However, Tony and Roger seem to be disagreeing on how to best... Is that right? Tony, tell us first what your alternative is....And, Roger, your alternative is... Okay, Tony, let me ask you, how would it work? What are the steps?”*

*“Now, Roger, how would your alternative work? What are the steps?”*

*“Roger, based on what you said, let’s summarize — how much, how long, who/what’s involved?”*

*“Tony, based on what you said, let’s summarize — how much, how long, who/what’s involved?”*

*“Let’s check for consensus. How many are for...?”*

6. The second facilitator should start with a checkpoint, then begin the strengths and weaknesses process, and then merge the alternatives.

*“We have just... Our next step is to... This will help us....Let’s focus on alternative 1....”*

7. Before you begin, announce to the group what facilitation skill you will be focusing on improving. Each person will have \_\_\_\_ minutes to facilitate, followed by a \_\_\_\_ - minute debrief. Start a new person every \_\_\_\_ minutes.

8. **When the facilitator is done**, the entire group applauds and holds a debrief led by another facilitator. The Facilitator records the feedback on his/her Exercise 5: Consensus Building Feedback form below.

Done well	<p><i>“Facilitator, what did you do well?” (at least three responses)</i></p> <p><i>“Participants, tell [facilitator] what else he/she did well.”</i></p>
Improve	<p><i>“Facilitator, what would have made it better?” (no more than three responses)</i></p> <p><i>“Participants, tell [facilitator] what else would have made it better.”</i></p>

9. **Start a new person every \_\_\_\_ minutes.**



# Exercise 5. Consensus Building

## (Continued)

### Issues and Sample Answers

Below are sample answers supporters and participants can provide.  
**Please be creative and provide additional responses as needed!**

#### A. Lease vs. Buy an Automobile

Should our next automobile be a lease or purchase?

	Lease Auto	Buy Auto
<b>Delineation</b>	<ul style="list-style-type: none"> <li>• Amount due at time of lease: \$2,290</li> <li>• 36-month lease with monthly payments of \$249</li> <li>• 12,000 miles/year with \$0.25/mile for miles over 12,000</li> </ul>	<ul style="list-style-type: none"> <li>• Purchase price is \$21,680</li> <li>• Loan rate of 1% APR for five-year loan term</li> </ul>
<b>Strengths</b>	<ul style="list-style-type: none"> <li>• Enjoy driving a new vehicle every three years</li> <li>• Fully covered maintenance/warranty during term of lease</li> </ul>	<ul style="list-style-type: none"> <li>• Ownership at end of purchase</li> <li>• Can continue driving with no additional payments after five years</li> <li>• Have kept prior cars in the past for between five to nine years</li> </ul>



# Exercise 5. Consensus Building

## (Continued)

### B. Annual Family Vacation: Drive or Fly to Beach Destination

Should our family drive to the resort destination or fly?

	Drive	Fly
<b>Delineation</b>	<ul style="list-style-type: none"> <li>• Trip is 800 miles each way</li> <li>• Typically takes two days for the trip (each way) requiring a hotel room one night each way and six meals for the family (family of four)</li> </ul>	<ul style="list-style-type: none"> <li>• Airline tickets are \$550 per person</li> <li>• Need to rent a car for local transportation while at the beach</li> </ul>
<b>Strengths</b>	<ul style="list-style-type: none"> <li>• Do some siteseeing on the drive</li> <li>• Family gets to spend time on the drive</li> </ul>	<ul style="list-style-type: none"> <li>• Save three to four days of vacation</li> <li>• Faster travel in terms of time and convenience</li> </ul>



# Exercise 5. Consensus Building

## (Continued)

### C. CRM Software: Pilot or Rollout

Should we conduct a pilot program or simply roll out a new Client Relationship Management (CRM) system?

	Pilot	Rollout
<b>Delineation</b>	<ul style="list-style-type: none"> <li>• Two districts in the pilot with nine reps and one district manager in each district</li> <li>• License fees are \$1,250 per rep per year with maintenance costs of 15% of total license fees after first year</li> </ul>	<ul style="list-style-type: none"> <li>• Get the payback of automation sooner</li> <li>• 500 reps provides license discounts of 15% immediately and a reduced maintenance rate of 10% of total license fees after first year</li> </ul>
<b>Strengths</b>	<ul style="list-style-type: none"> <li>• Identify any issues in a smaller sample and address as part of rollout</li> <li>• Minimize disruptions as we learn with fewer people and leverage their learning</li> </ul>	<ul style="list-style-type: none"> <li>• CEO has mandated automation for improved client relationship management and client satisfaction</li> <li>• Not including corporate in the pilot does not test the interfaces and other non-sales/marketing acceptance of the solution</li> </ul>



# Exercise 5. Consensus Building

## (Continued)

Plan Start: _____	Agenda Item:
Actual Start: _____ Actual End: _____ Basis: ____ (intro) + ____ (units)@ ____ + ____ (addtl) = ____	
<b>What to say</b>	
<b>What to do</b>	



# Exercise 5. Consensus Building Feedback

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

Facilitator's Name: \_\_\_\_\_

	Comments
<b>Getting Started</b> + Inform, Excite, Empower, Involve * + Session Purpose, Agenda * + Ground Rules, Parking Boards * + Recharge *	
<b>Body</b> + Opening Moves * + Animation * + Movement * + Gestures * + Eye Contact * + Smiles *	
<b>Voice</b> + Animation * + Volume * + Speed * + Clarity * + Warmth * + Filler Words, Self-talk *	
<b>Focusing the Group</b> + Checkpoint * + Warming Up the Group * + PeDeQs, Examples *	
<b>Power of the Pen</b> + Writing 1st/Discussing 2nd * + Writing What Is Said * + Asking Versus Telling * + Avoiding Lulls While Writing * + Writing Clarity * + Chart Labeling *	
<b>Questioning</b> + Starting Question * + Direct Probe * + Indirect Probe * + Redirection * + Playback * + Leading Question * + Prompt Question * + Tag Question * + Float an Idea *	
<b>Information Gathering</b> + Listing * + Brainstorming * + Grouping * + Ranking *	
<b>Group Management</b> + Keeping the Group Moving * + Keeping the Group Focused * + Keeping the Energy High * + Recognizing Dysfunction * + Handling Dysfunction * + Consensus Check * + Control of Group * + Praise and Empathy *	

*(More space for comments on next page)*



## Comments



# Exercise 6. Extended Session Preparation

1. The objective of this exercise is to provide you practice in developing a detailed agenda and executing a facilitated session.
2. You will facilitate the opening and two agenda items.
3. Prepare for the exercise by deciding the following:
  - a. What is your subject area (e.g., human resources, accounts payable, planning a vacation, opening a restaurant)?
  - b. What is your agenda model (e.g., strategic planning, process improvement, project planning)?
  - c. What is your point total?
  - d. What is your preferred time slot?
4. If you are not going to follow one of the suggested topics, talk with the instructor; create a handout for the group if necessary.
5. Title and prepare all your virtual charts during the preparation time.
6. The instructor will create one set for the group of ground rules, parking boards, and consensus.



# Exercise 6. Extended Session Preparation (Continued)

## Planning

Below are some recommended sample agendas:

<b>Strategic Planning</b>	<b>Project Planning</b>
A. Introduction	A. Introduction
B. Develop Vision	B. Define the Project Purpose
C. Define Goals	C. Establish Objectives
D. Identify Critical Success Factors	D. Identify Critical Success Factors
E. Develop Strategies	E. Develop Overall Approach
F. Review and Close	F. Review and Close
<b>Issue Resolution</b>	<b>Basic Improvement</b>
A. Introduction	A. Introduction
B. Alternatives Specification	B. Business Activities and Processes
C. Summary of Strengths and Weaknesses	C. Problems and Root Causes
D. Evaluation Criteria	D. Potential Improvement
E. Weighted Score	E. Prioritized Improvements
F. Review and Close	F. Review and Close



# Exercise 6. Extended Session Preparation (Continued)

- 1. Develop a strategic plan for any one of the departments in the sample standard case studies.**
  - Focus on the vision, goals, critical success factors and strategies of the department.
- 2. Design a program to present recommended changes (from any one of the case studies) to management for approval.**
  - Focus on the purpose and objectives for the presentation and the critical success factors and approach.
- 3. Design a project to implement the recommended changes.**
  - Focus on the project purpose, objectives, critical success factors and approach.
- 4. Resolve issues related to any one of the case studies. (Below are suggested issues.)**
  - **Human Resources (HR)**

Should the department (greater dept involvement) or HR (better control and efficiency) perform initial interviews?

Should ads be placed when a job first becomes available (faster receipt of resumes) or only after suitable internal candidates can't be found (reduces expenditures on unnecessary ads)?



# Exercise 6. Extended Session Preparation (Continued)

- **Sales & Marketing**

Should customers continue to be referred to the sales rep (more control of territory, more knowledgeable response), or should the receptionist attempt to respond to customer inquiries (faster response)?

Should sales reps be asked to report bi-weekly on the status of all customer requests (better management of responsiveness), or should only the sales reps who have complaints from customers be asked to do so (doesn't force paper work on good reps)?

- **Customer Order Processing**

Should the work done by the inventory clerk and the warehouse clerk be combined so that one person selects requested items and boxes for shipment (eliminates need for two people to handle merchandise), or should the responsibilities remain separate?

Since the new system will be implemented in phases, should the first phase focus on giving the customer service reps a system for determining if a product is in inventory (better customer service), or should the focus be on automating the inventory tracking and reordering process (less inventory costs, more efficient warehouse operation)?

- **Accounts Payable (AP)**

Should we pay invoices as soon as check requests are submitted (avoid late payments and misfilings) or continue to file them and pay them just before they are due (gain interest by delaying payment)?

Should we not accept calls from vendors and, instead, insist that they contact the responsible dept. (reduce our workload), or assign one person from AP as the contact for all vendor calls?



# Exercise 6. Extended Session Preparation (Continued)

Plan Start: _____	Agenda Item:
Actual Start: _____ Actual End: _____ Basis: ____ (intro) + ____ (units)@____ + ____ (addtl) = ____	
<b>What to say</b>	
<b>What to do</b>	



# Exercise 6. Extended Session Preparation (Continued)

Plan Start: _____	Agenda Item:
Actual Start: _____ Actual End: _____ Basis: ____ (intro) + ____ (units)@____ + ____ (addtl) = ____	
<b>What to say</b>	
<b>What to do</b>	



# Exercise 6. Extended Session Preparation (Continued)

Plan Start: _____	Agenda Item:
Actual Start: _____ Actual End: _____ Basis: ____ (intro) + ____ (units)@____ + ____ (addtl) = ____	
<b>What to say</b>	
<b>What to do</b>	



# Exercise 6. Extended Session

(Continued)

Plan Start: _____	Agenda Item:
Actual Start: _____ Actual End: _____ Basis: ____ (intro) + ____ (units)@_____ + _____ (addtl) = _____	
<b>What to say</b>	
<b>What to do</b>	



# Exercise 6. Extended Session Feedback

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

Facilitator's Name: \_\_\_\_\_

<b>Getting Started</b>	<b>Comments</b>
+ Inform, Excite, Empower, Involve * + Session Purpose, Agenda * + Ground Rules, Parking Boards * + Recharge *	
<b>Body</b> + Opening Moves * + Animation * + Movement * + Gestures * + Eye Contact * + Smiles *	
<b>Voice</b> + Animation * + Volume * + Speed * + Clarity * + Warmth * + Filler Words, Self-talk *	
<b>Focusing the Group</b> + Checkpoint * + Warming Up the Group * + PeDeQs, Examples *	
<b>Power of the Pen</b> + Writing 1st/Discussing 2nd * + Writing What Is Said * + Asking Versus Telling * + Avoiding Lulls While Writing * + Writing Clarity * + Chart Labeling *	
<b>Questioning</b> + Starting Question * + Direct Probe * + Indirect Probe * + Redirection * + Playback * + Leading Question * + Prompt Question * + Tag Question * + Float an Idea *	
<b>Info Gathering</b> + Listing * + Brainstorming * + Grouping * + Ranking *	
<b>Group Management</b> + Keeping the Group Moving * + Keeping the Group Focused * + Keeping the Energy High * + Recognizing Dysfunction * + Handling Dysfunction * + Consensus Check * + Control of Group * + Praise and Empathy * Review, Evaluate, Close	

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# Guidelines for Extended Sessions

1. During the prior person's debrief, you should open the virtual charts for your session; be sure to order your virtual charts as you will use them.
2. The instructor will introduce you.

## **Suggestions for Facilitating Your Session**

- Start with your opening statement. When you review the session purpose, expound on it; don't just read it. Be sure the purpose is visible on the screen.
- With the participant key topics, ask first person, record the response. Pretend this answer came from the last person. Thank the last person. Be sure the list is visible as you record.
- Review the full agenda. Remind people of the work that has been done before. Be sure to have the agenda visible on the screen as you review it.
- Check each key topic against the agenda to ensure it will be covered. For those that will not be covered, ask the group to describe the action needed to be placed on the Actions List Parking Board. The Instructor will add to the Actions List for you.
- Have the ground rules on the screen as you review them. Ensure to use the platform to get agreement on the ground rules.
- After your introduction, take a checkpoint and start your first agenda item using either warm-up or PeDeQs. Remember: use examples and great starting questions.
- Consider reading or having others read each of the items coming out of the last agenda topic.
- Start on the next agenda item by doing a checkpoint.



# Guidelines for Extended Sessions

## (Continued)

3. You can conclude an agenda item early and move on if you would like to get to additional items.
4. You will have \_\_\_\_ minutes to facilitate.
5. The instructor will advise you when there are two minutes left. After the two-minute warning, you should go into a partial close, assuming that the group will come back the next day to complete any unfinished items.
6. Once you are done, we will clap, and you will have a \_\_\_\_ minute group debrief.
7. During the session, all participants should have a feedback form in front of them so that they can review the person.
8. **Note:** Throughout the day, each person has one opportunity — and only one — to be dysfunctional. Once the facilitator addresses the dysfunction in any way, resume functional behavior. It is considered cruel and unusual punishment to be dysfunctional during someone's opening statement. Please don't do it.



# Exercise 6. Facilitated Session Feedback

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

Facilitator's Name: \_\_\_\_\_

<b>Getting Started</b>	<b>Comments</b>
+ Inform, Excite, Empower, Involve * + Session Purpose, Agenda * + Ground Rules, Parking Boards * + Recharge *	
<b>Body</b> + Opening Moves * + Animation * + Movement * + Gestures * + Eye Contact * + Smiles *	
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<b>Focusing the Group</b> + Checkpoint * + Warming Up the Group * + PeDeQs, Examples *	
<b>Power of the Pen</b> + Writing 1st/Discussing 2nd * + Writing What Is Said * + Asking Versus Telling * + Avoiding Lulls While Writing * + Writing Clarity * + Chart Labeling *	
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(More space for comments on next page)



## Comments

