

Fearless Facilitation!™

How to Lead Effective Training

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Participant Materials

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Pre-Workshop Assessment

For each statement below, circle the number that reflects the level of your knowledge and skills regarding facilitation. There is not a secret document that has the “right” answers. The “right” answers are what *you* believe your knowledge and skills are.

- 1. I can describe the three primary responsibilities of a trainer/facilitator.**

High 4 3 2 1 Low

- 2. I can explain adult learning principles and their applications.**

High 4 3 2 1 Low

- 3. I can identify and describe the four major adult learning styles.**

High 4 3 2 1 Low

- 4. I know how to ask thought-provoking questions to promote lively and rich discussion.**

High 4 3 2 1 Low

- 5. I am able to make effective transition statements from one learning activity to another so participants see the connections between activities.**

High 4 3 2 1 Low

- 6. I feel confident and competent in my ability to manage disruptive behaviors that otherwise would lead discussions and other activities off track.**

High 4 3 2 1 Low

- 7. I am professionally poised when facilitating training sessions.**

High 4 3 2 1 Low

- 8. I am confident and competent in my ability to lead effective training sessions.**

High 4 3 2 1 Low

Introduction

Fearless Facilitation!™ How to Lead Effective Training builds the confidence, poise, knowledge, and skills demonstrated by facilitators who are exceptionally competent.

Exemplary facilitators are fearless because they prepare thoroughly for training sessions, are organized to the minutest detail, respect the experiences of adult learners, attend to various learning styles, and masterfully draw out the wisdom of participants. Above all, fearless facilitators continuously hone their skills.

The Workshop focuses on your role and responsibilities as a fearless facilitator and develops fundamental facilitation skills, including:

- Generating discussion through effective questioning techniques.
- Making smooth transitions from one activity to another.
- Managing disruptive behaviors.
- Establishing professional presence.

Learning activities in the Workshop give you an opportunity to:

- Assess your own knowledge and skills.
- Discuss and internalize the roles and responsibilities of fearless facilitators.
- Observe video demonstrations by fearless facilitators.
- Practice applying facilitation skills through a variety of exercises and practices.
- Receive constructive feedback from fellow participants and the Workshop facilitator.
- Benefit from the role modeling of the Workshop facilitator.

By the end of this Workshop, you will be prepared to fulfill your organization's expectation for effective and motivating training sessions.

Learning Outcomes

The purpose of the Workshop is to enhance the knowledge and skills required to lead effective training sessions. After completing the Workshop, you will be able to:

- Lead effective training sessions.
- Explain adult learning principles and their applications.
- Describe how to best accommodate each primary learning style.
- Demonstrate fundamental facilitation skills.
- Strike the right balance between purpose, process, and participation.
- Exhibit the confidence and competence of a fearless facilitator.

Agenda

- ❑ Introductory Activities
- ❑ Roles and Responsibilities of Fearless Facilitators
- ❑ Preparation, Set-up, and Greeting Participants
- ❑ Generating Discussion
- ❑ Making Smooth Transitions
- ❑ Managing Disruptive Behaviors
- ❑ Professional Presence
- ❑ After a Session
- ❑ Next Steps and Wrap-up

Ground Rules (or "Agreements")

- Stick to the topic and the agenda.
- Participate actively in discussions and exercises.
- Encourage others to share their ideas and opinions.
- Listen to and respect the ideas and opinions of others.
- Do not interrupt others when they are speaking.
- Return on time from breaks and lunch.
- Turn off pagers and cell phones.
-
-
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-
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Make amendments, additions, or deletions as decided in the discussion about the Ground Rules listed above.

Observation Notes for Video: Preparation Pitfalls

1. What did Clara do, or not do, to effectively prepare for her training session?
2. How might Clara's preparation (or lack of preparation) affect her credibility as a fearless facilitator?
3. How might Clara's preparation (or lack of preparation) impact the quality of the training session?
4. Reference the flipchart titled "Characteristics of Fearless Facilitators" that was developed during introductions. Which of the characteristics does Clara fail to exhibit?

Key Tactics:

- ✓ Ask Polling Question
- ✓ Ask Open-Ended Questions
- ✓ Ask Building Questions

Types of Questions

Type of question	When is it best used	Examples
Polling		
Open-ended		
Close-ended		
Building or Networking		

Exercise: Questions Only, Please!

1. Select a topic for discussion from the list of topics, or use a topic of your choice. The topic should be one that everyone will feel comfortable discussing. Avoid topics that might evoke strong feelings or disagreements. The purpose of the exercise is to practice asking questions, not to provoke a heated debate.
2. The purpose of the exercise is to lead a discussion of your topic in which you ask questions only. You may not make statements (other than very brief acknowledgements).
3. If you make a statement instead of a question, your fellow participants will immediately hold up a piece of paper on which is written the word TELLING.
4. When it is your turn to lead the group discussion, introduce your topic with a question; for example, "How many of you have a favorite vacation destination?" Or, "Do you enjoy shopping for a new car?" You certainly can think of different ways to open a discussion with a question. Be creative!
5. Continue the discussion with questions that are based on responses you receive; that is, do not ask a series of prepared questions that may have no connection to or follow-up on responses given. Try to use a mix of open-ended, close-ended, and networking questions.
6. Your goal is to keep the discussion going for two minutes without getting a TELLING message.
7. Take turns leading a discussion.
8. When every group member has led a questions-only discussion, we will debrief what you have learned from the practices.
9. Now take three minutes to select a topic and to prepare a few opening questions.

Time for the Exercise:

- **Preparation: 2 minutes**
- **Discussion of a topic: 3 minutes per person**

Total time for the Exercise: 20 minutes

Observation Notes for Video: Generating Discussion: The Question that Stumps You

Ed (facilitator) is in a training room with the following participants: Greg, Lee, Erin, and Mariam. Ed is just finishing writing a point on a flipchart, when Erin poses a question. As you observe Ed, jot notes in response to the questions below. We will stop the tape to give you time to reflect on question 1. Then we will continue with the remainder of the demonstration. At the conclusion of the demonstration, we will discuss your observations concerning questions two through five.

1. If you were Ed, how would you respond to the question Erin asks?
2. What questioning technique(s) did Ed demonstrate?
 - Polling
 - Open-ended
 - Close-ended
 - Networking or Building
3. What did you find especially effective about Ed's techniques in asking questions and involving all the participants in the discussion?
4. Ed transitioned from the discussion/questions to the next activity. Do you recall the words (in general) he used to make the transition?
5. What fearless facilitator characteristics did Ed exhibit?

Key Tactics:

- ✓ Ask Polling Question
- ✓ Ask Open-Ended Question
- ✓ Ask Building Question

Facilitating a Session - Generating Discussion

Why the responsibility is important.

Participants in your training sessions come with a collective storehouse of knowledge, experiences, and wisdom—all of which will be mutually beneficial when shared. But, you have to ask them to share what they know! Asking them to share, however, is more than simply firing off a series of questions that lead to nothing more than a rambling discussion without direction or cohesion. Your questions need to provide a structure and a framework through which participants can build cumulative knowledge and understanding of a topic or issue under discussion. You do that by asking thought-provoking questions, different types of questions, and questions that invite everyone to join in on a discussion. When done well, questioning techniques are the most powerful skills you have to inspire participation and increase the value of training.

Nineteen Tactics for Generating Discussion

1. Be as energetic and involved as you want participants to be!
2. Speak in a conversational tone.
3. Exhibit confidence and ease with a group.
4. The less you talk, the richer and more valuable discussions will be! Aim for a 60% participant-talk, 40% facilitator-talk ratio.
5. Afford participants ample opportunities to voice *their* ideas and opinions.
6. Once you get a discussion rolling, chime in only if a key content point is contradicted or discussion begins to lag and needs a boost to get it moving again.
7. When participants are in discussion with one another, move out of the center of the room so participants will not perceive that you are the conduit through whom all discussions must pass.
8. Ask open-ended questions to get expanded responses. For example:

What are examples of good customer service you have received?

In the video demonstration, Gina helped Tom clarify options available to him. What did you like about Gina's approach?

9. Ask close-ended question when you want a response such as a “yes” or “no.” Use close-ended questions when you wish to bring a discussion to a close, summarize the discussion, and move on. For example:

Are we all in agreement on the next step Gina should take?

10. Ask polling questions when you want to check on possible differences of opinion participants might have or to assess knowledge. For example:

Let's see a show of hands. Who agrees with Gina's approach? Who disagrees?

11. Ask “networking” or “building” questions when you want participants to expand on their responses or get differences of opinion. For example:

You've described an interesting situation, Kay. Tell us more about it.

Kay's advice is that we should (do such and such). Would any of you take a different approach?

12. When asking questions, give participants time to formulate their responses. If participants do not respond immediately, do not jump in with your own response. That robs the session of valuable participant input. After asking a question, count silently to ten, and if participants still have not responded, it may be because they do not understand the question. You may have to rephrase the question.

13. Do not risk embarrassing participants by calling on them directly.

- Call on specific participants only if they give you a verbal or non-verbal cue that they are willing to respond; for example, eye contact or a head-nod.
- Use polling questions to identify participants who indicate that they have an idea or opinion on a topic. For example:

How many of you think that Ed asked questions effectively? How many of you have suggestions for ways Ed could improve on his questioning techniques? Mary, you had your hand up for thinking that Ed could use improvement. What improvements would you suggest?

- Call on a participant who you know has certain expertise; for example:

Kay, you have a great deal of experience dealing with problems of this type. What advice would you give?

14. Get everyone involved in discussions quickly and often. The longer you allow participants to sit in silence, the more difficult it will be to get them involved.

15. Acknowledge and thank participants for their responses. This can be as simple as "Thanks, Paul." Or, "Good answer, Laura" (as in *Family Feud*). You also acknowledge participants when you remember what they have said; for example:

Earlier today, Paul, you said that (summarizing what Paul said). Your comments at that time seem to be very much in line with what we're talking about now. Do you agree?

16. Minimize expressing your own ideas and opinions. Your focus and attention are to manage the process of a training session and to encourage participants to express their ideas and opinions. Offer your ideas and opinions selectively if asked by participants. Or, if your input would help participants if they are stuck in their thinking during discussions and exercises.

17. Clarify and summarize key ideas.

18. Keep principles of adult learning in mind and think about how to generate discussion in a way that respects adult learning principles:

- Adults are autonomous and self-directed.
- Adults have accumulated a foundation of life experiences and knowledge.
- Adults need to participate voluntarily in the learning experience.
- Adults demand relevant practical application.
- Adults require a respectful environment in which all individuals and ideas are valid and valued.
- Adults enjoy collaboration.
- Adults need to integrate new concepts with prior knowledge.
- Adults are goal-oriented.

19. Recognize the importance of accommodating preferred learning styles of participants and adjust activities to include everyone. Keep in mind:

- **Visual Learners** learn by seeing; benefit from demonstrations; form mental pictures; become impatient if extensive listening is required.
- **Auditory Learners** learn through verbal instruction; think problems through verbally; become impatient waiting to talk; are bothered by conversations that go into long detailed descriptions.
- **Kinesthetic Learners** learn by doing; benefit from hands-on involvement; need to understand the big picture before applying the details; have to work hard at listening effectively.

- **Conceptual Learners** enjoy knowing the big picture and how each activity relates or connects to the overall purpose of the training session and to their responsibilities back on the job.

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