



# TALK ACTION



**Experience Learning for Change**





# Facilitation Training Tools and Techniques

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Getting the best out of working with  
people

# Facilitation

- Facilis (Latin) = Easy (English)
  - Facilitation is about making work by a group easy
- 
- Because sometimes it is difficult!

# Today's course...

**... is about:**

- **Facilitation: face-to-face and on-line** (this afternoon)
- **Designing and running meetings for different circumstances**
- **How you deal with problems**
- **How you work towards success**





**First some key points for any facilitation**

- *Listen!*
- You are there for 'them': their successful working is your main objective
- Know who 'they' are – get as much information as possible in advance
- No-one really wants to waste their time
- Be clear on the purpose (the desired aims) of any facilitation work in advance



A crossword puzzle is the background, with a pair of glasses and a pen resting on it. The puzzle has some words filled in, including 'SWORD' and '30-MINUTE'. The text 'So why facilitate (and what can go wrong)?' is overlaid in a white box in the center.

# So why facilitate (and what can go wrong)?

...ities knowing so much about them. But, for many ordinary users such recognition can be appreciated, even if it does not come with special gifts or benefits. The question is how to distinguish between the two groups. The answer should be simple. Ask the facilitator: "How may we use the information you share with us, or how do we receive from services like yours?" The problem is most often that they prefer not to raise this issue; they would rather let sleeping dogs lie.

What these companies must recognise is that if they are not able to survive the steady stream of privacy gaffes, which is the result of their own mistakes, they are guilty by association, and constantly changing rules. (In this sense, Facebook is a rare exception.) While it may require a little more effort and awkwardness to find out what customers want, companies that do so in a straightforward way will benefit in the long run.

...ated or un... same time, they... presented as being... they are. Otherwise... tations will exceed... npany can deliver.

There is one more implication: some people seek "privacy" from themselves. These are the kind of people who sport comb-overs, insisting to everyone — including themselves — that they are not balding. A salesperson once told me that many people, despite being willing to share their weight with a willing partner, do not want to look at the numbers themselves. The concreteness of the data scares them. Another example: to commemorate Facebook's 10th anniversary, Time offered to assess people's news feeds to estimate how much time they had wasted on the site. While many were curious, many preferred not to face the facts. Privacy is personal. By using a

...based financial controlled... these, has significant... l, the most... suming a... ip. ... appoint-... onexecutive... ed to Martin... of property... npany... Monex, in... s a major investor... op... the well-known... d Canal Walk... Town. Monex was... ewarding experience... With Century City and... Cap... walk (now the gem of... prop's property portfolio) initially attracting much scepticism over whether returns would justify the development cost. That's never helpful when a large development company is lumbered with significant debt. To cut a long story short, these assets were let go of too early, and (way) too cheaply.

With hindsight, one might argue that Wragge's vision was ahead of its time, given the value Hyprop now accords to the vibrant Canal Walk and the new developments undertaken by the Rabie Group at Century City. So the big question at this juncture is whether Wragge — to Chinese offering his expertise — is going to play a meaningful role in guiding Tradehold's property development endeavours in the UK. Judging by

## Let's consider:

- The good things that can come from a good meeting / process
- **The problems that may arise**
- The confusions and questions that you may have



# So why facilitate (and what can go wrong)?

***Working in groups:*** - Please agree a note taker.

Given that this is a short exercise please simply record ideas on paper and be ready to report back verbally.

# REVIEW 1

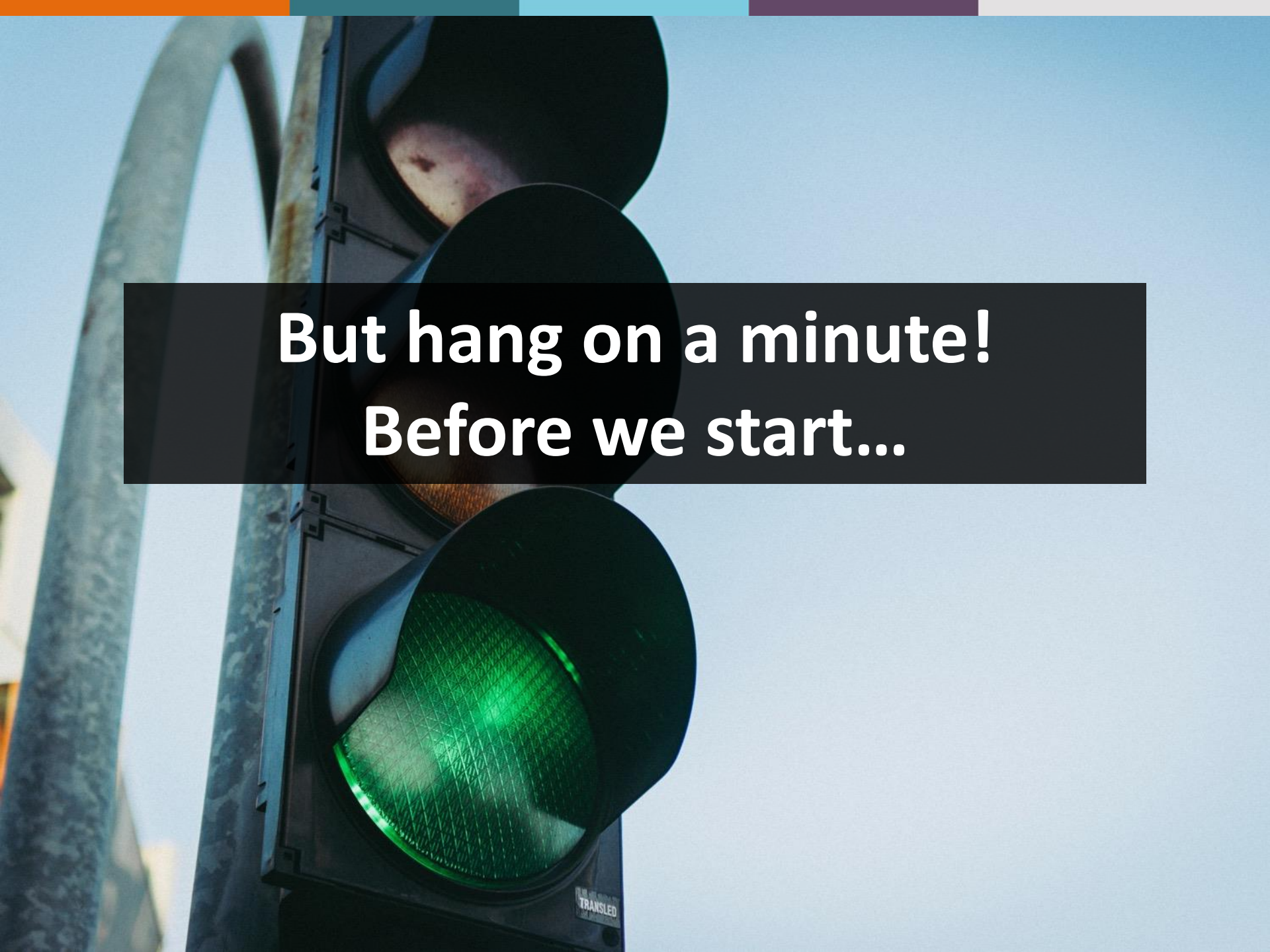
We just used a technique  
**'One-minute wonders'**

A focused form of 'brain-storming'

**So:**

- What are the good points / problems?
- Where's it useful?
- Different on-line!





**But hang on a minute!  
Before we start...**

# 'Ways of working' & 'Ground rules'

- What should they be?
- What are the advantages?
- When might you not use them?

**My advice: short and simple!**



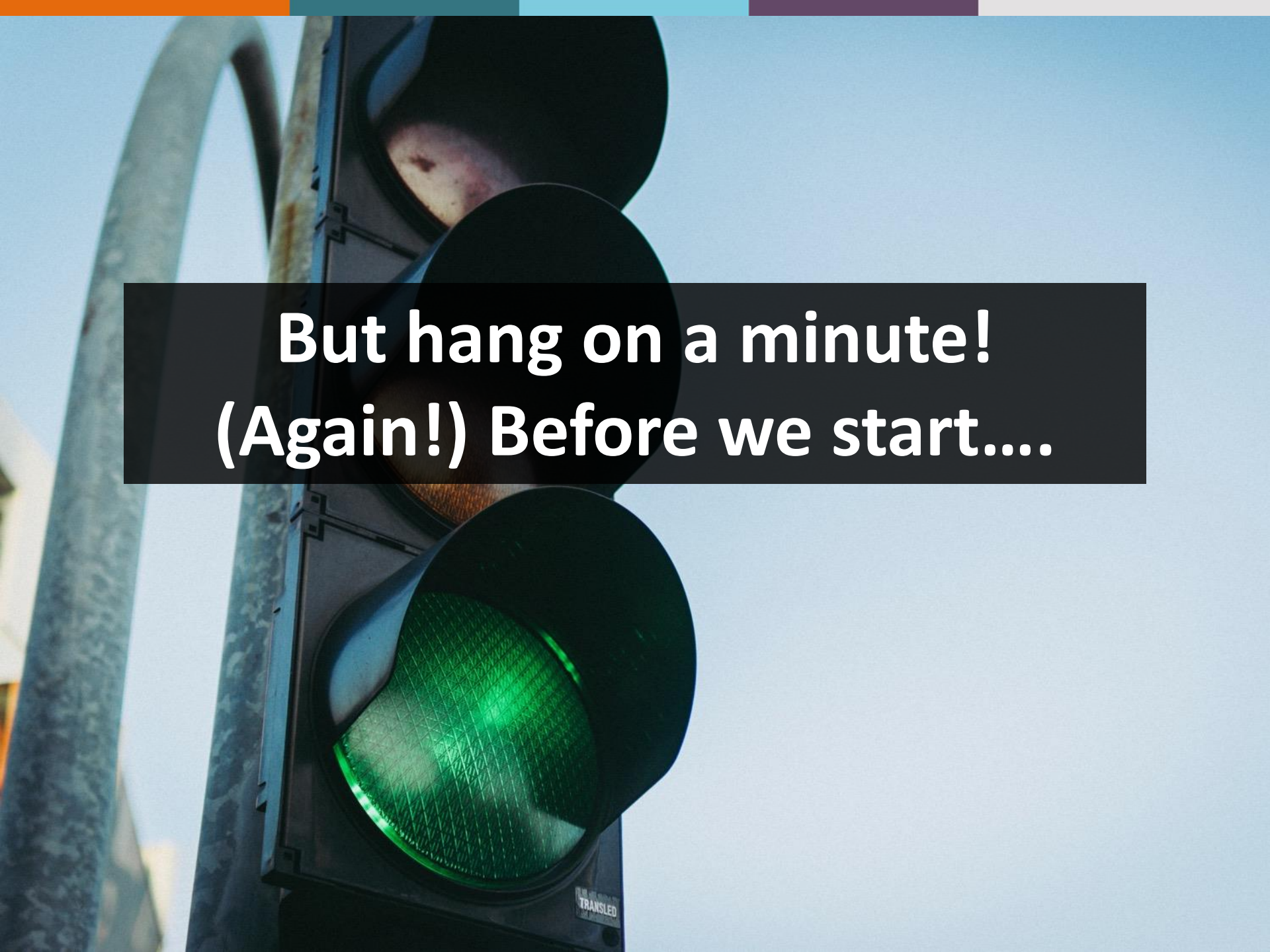


# Three Core Rules:

**Respect each other (listen without interruption)**

**Help keep to time**

**Phones on silent**



**But hang on a minute!  
(Again!) Before we start....**



# Getting to know each other: 'breaking the ice'

There are many techniques...

**One key question?**

Where does the 'ice' come from?





# Ice-Melting face-to-face and online

The purpose is to get people ready, happy and **confident** to talk and engage

It also helps to know who's here  
**On-line can make this harder!**

# Ice melting – getting people talking

People on your team / in the meeting  
need to feel **comfortable** with your  
choice of questions

You need to be **sensitive** to their  
situations



# Ice Melting – Getting people talking

If we know who's here, then simply  
**check-in**

A simple **open question** can work well...

# Ice Melting – Getting people talking

In one word, how would you describe the past week?

What was your personal highlight of the past month?

How would you rate last week on a scale of 1 – 10?

How are you feeling (on a scale? In one word?)

# Ice-Melting face-to-face and online

## Doing it right – some pointers

- **Exercise sensitivity** - It's meant to be fun and interesting not cringe-making! (Design it for the team)
- **Have a backup plan:** If it doesn't work, move on
- **For larger meetings consider breakout groups**
- **Don't do icebreakers for every meeting!**

**If people know / trust each other the ice should melt...**





**TIME  
FOR A  
BREAK!**



A photograph of four people standing in a grassy field. From left to right: a man in a blue checkered shirt holding a sign with a green checkmark; a woman in a striped shirt; a woman in a white shirt holding a sign with a green checkmark; and a man in a brown shirt holding a sign with a green checkmark. A large orange semi-transparent box is overlaid in the center, containing the text 'Facilitating Online & Face-to-face'.

# Facilitating Online & Face-to- face






We've learnt a lot about virtual meetings...

They are **VERY** different than face-to-face meetings

**In groups:**

**What are the best two things and the worst two things!**

A wide-angle photograph of a vast, flat landscape. The foreground is dominated by a field of dry, brown grass and soil, with a dirt road curving from the left towards the center. The middle ground shows a large, open field of tilled earth, with visible furrows and a dark, rich brown color. The horizon is flat and distant, with a few small structures or trees visible. The sky is a vibrant blue, filled with numerous white, fluffy clouds of varying sizes. The overall scene is bright and clear, suggesting a sunny day.

# Planning your work

There are two key tasks:

**1. Understanding the context**

**Who are you facilitating?**

**What kind of activity are you facilitating?**

**2. Planning the session**

# Who are you facilitating?

## The Questions to ask:

- Who will be the 'audience' / attendees?
- Why do they want a facilitator – or are you the organiser AND facilitator?
- What do you or those asking you expect from this session?
- Are there any 'Unexploded bombs' – major problems?

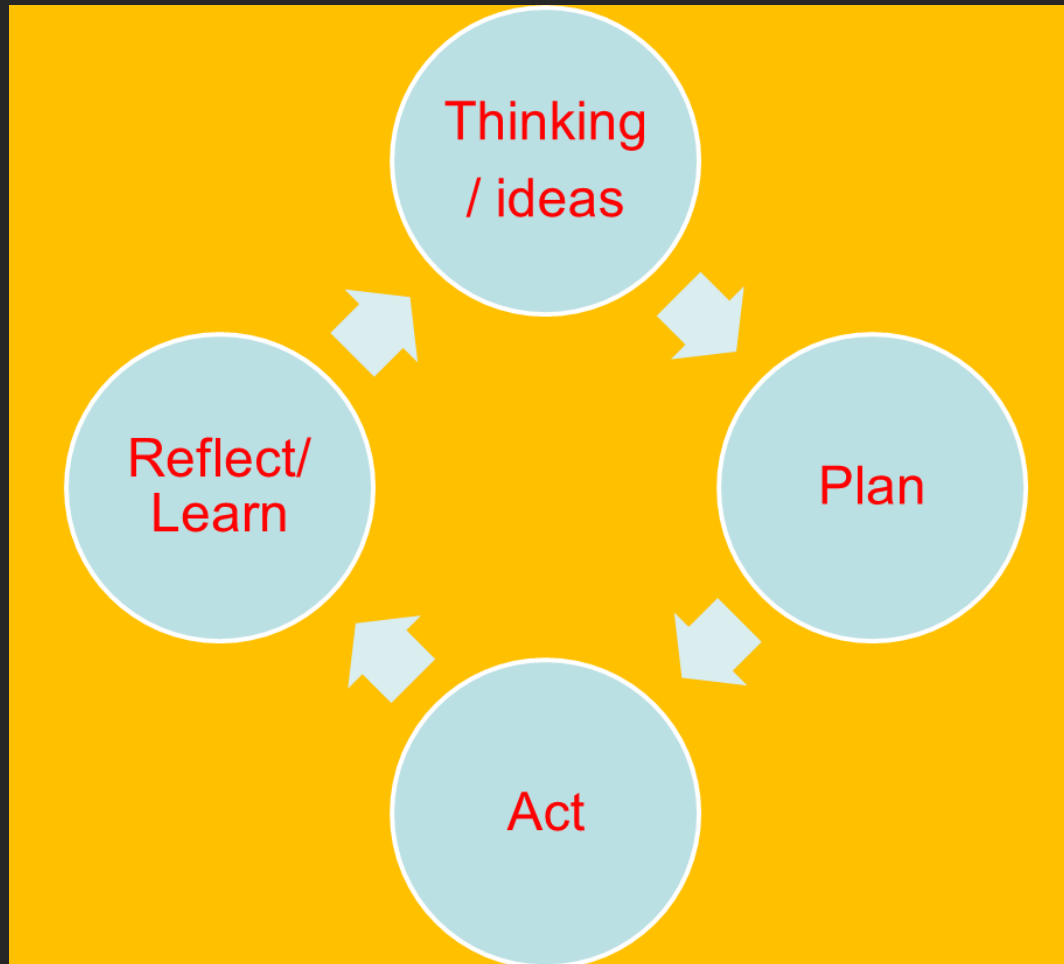


# What kind of activity are you facilitating?

Facilitation work might be:

- a regular/weekly meeting
- an activity day or similar
- a group of people reflecting
- an overview session that may lead to new plans
- an introductory talk

# Consider this project cycle



# Planning your session

Always be clear on:

- What are the specific objectives?
- What is the session meant to achieve?

Write them out:

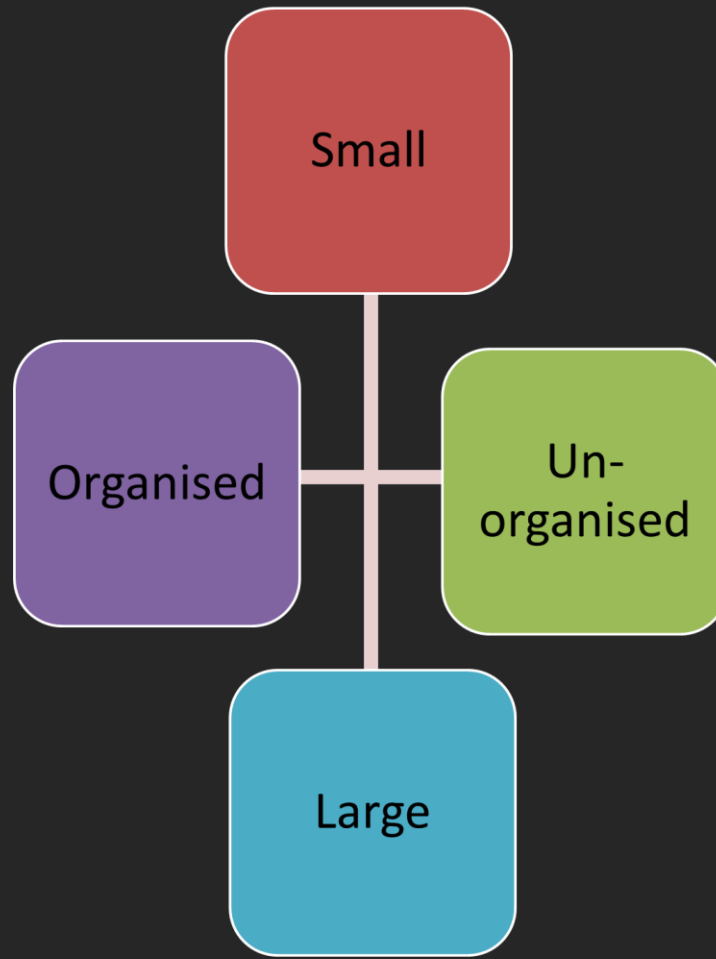
*By the end of the session those involved will have: .....* (ideally four or five)



**Who are we Facilitating?**



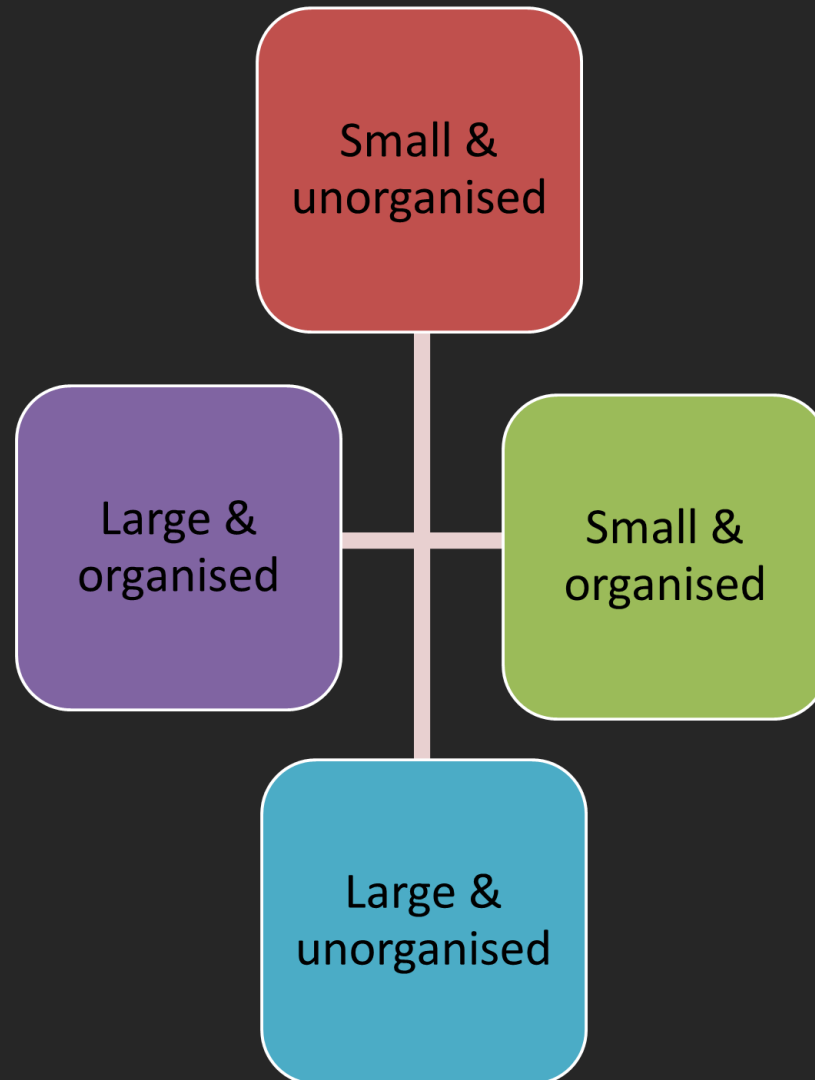
# The people we work with come in many different groupings:



**Each has its own opportunities and problems!**

So, let's consider...

What are the issues for:



# So now let's consider the issues around **engagement**

**For each grouping** - using the white board  
write down:

- **Some examples of groups in this category**
- **The issues you might face as a facilitator**



# Carousel Variations





# This technique can be very adaptable

- **‘Accompanied carousel’** – one person moves with the sheet to explain it
- **‘World cafe’** - sheets stay on a table and people move around
- **‘Progressive world cafe’** – as people move so new questions are asked
- **Walking carousel** – posters on the wall

## Review 3

We just used a technique – *'The Carousel'*

It enables everyone to add their opinions  
and to learn from each other

**So:**

- Was it useful?
- What are the good points / problems?
- When could it be useful?



# Your Personal Practice

He who ignores discipline comes to shame, but whoever heeds correction will prosper.

The road to success is always hard, but the road to failure is always easy.

Do not be afraid to accept what you can do better than it does to.

—W. SOMERSET MAUGHAM

- **Listening and responding**
- **Being inclusive**
- **Stimulating responses**
- **Not ignoring dissent**
- **Empowering others**
- **Keeping things moving – you are in charge!**

**Stay within limits – know what you can deliver and don't build false expectations**



# One person – many roles

**Referee?**

**Teacher?**

**Ringmaster?**

**Chair?**

**Coach?**

**Conductor?**

# Getting people working together

So... How big is your group? We can work:

- As one group
- In small groups
- In pairs
- Individually

**In groups, suggest one case for each of  
the above**

# When facilitation goes bad



**What would worry you?**

**Think for a minute or two – write down the issues / activities/ situations that would worry you (one per note)**

A hand is holding a black rectangular sign with the words "LUNCH TIME" written in white, bold, sans-serif capital letters. The sign is positioned in the center of the frame. The background is a rustic wooden table with a dark, textured surface. In the upper right corner, a silver knife and fork are laid out. The lighting is soft, highlighting the textures of the wood and the metal of the cutlery.

**LUNCH TIME**





# Tackling the Problems

Let's consider what we came up with



# Problems

Lack of  
engagement

The 'expert'

Hostility from the  
group towards you

Tiredness  
(yours)

Running out of  
ideas

Hostility from  
one person

Conflict/ disagreement/dissent within the group



# Involving Everyone

**Of course...!**

**Why do people not get involved?**

- **Personal? Confidence?**
- **Boredom (uninteresting)**
- **Cultural?**
- **Organisational?**
- **Structure / process (that's you!)**

**Weak involvement of some people can make existing inequalities / problems worse.**

A man in a dark suit, light blue shirt, and striped tie is pointing his right index finger directly at the viewer. The background is a blurred, warm-toned interior. A black rectangular box is overlaid across the middle of the image, containing the text "Dealing with Hostility" in white, bold, sans-serif font.

# Dealing with Hostility



**You are likely to meet with some hostility at some point,**

**SO...**

- **Watch for it and spot it early**
  - **Let people vent**
    - **Change pace or format**
      - **Take a break**
        - **Use the break to talk**
- **End the session if problems/risks increase**

# Facilitation and Energy

- **Keep moving!** (If you put the energy out other people (probably) will as well)
- **Don't let silences stretch** (know when to move on)
- **Use humour (carefully)** – self deprecation can be useful but don't overplay it!
- **You have an agenda** (but don't be afraid to deviate)
- **Keep people moving** (when appropriate)



# Effective Online Facilitation

- **The aims are the same:** People need to work / think together as well as talk together
- A lot of people find it a lot harder to really engage.  
**Short sections: necessary info only!**
- **Set the agenda:** try organizing this as a set of questions to be answered (rather topics to be discussed)
- Once the questions have been answered, you know when to end the meeting **Set time: 15, 20, or 25 minutes? A little time pressure may mean more focus.**



# Making online meetings work well

## Start the meeting well

Your mood matters – it sets the tone (the first two minutes!). Smile, thank people, show energy, appreciation, and gratitude

## Use a mini ice-melter if appropriate

*You can increase the chances of a more positive meeting mood, which promotes more creativity, listening, and constructiveness*

# Making online meetings work well 2

## Actively facilitate.

- This is critical for on-line meetings!
- Draw in virtual attendees (“Sasha, please share your thoughts”)
- Be sure all voices are heard (keep a list)
- Avoid general questions like “Any comments?”
- Keep your eye on the agenda / question. Don’t let people go off course; kindly interrupting...

**It’s your job as the facilitator to help people use the time well**

# On-line tools

***Tools are to make life easier!***

- Silence does not indicate understanding or agreement
- There are many online tools – Slido has a set that integrate well with PowerPoint – quizzes, surveys etc.
- Breakouts rooms are easy to use in Zoom or Teams

**Have a person to work with you if possible**



**Developing a meeting plan**



- Understand the 'audience' and everyone involved
- Manage the publicity (if there is any) – know what people are expecting
- Plan activity to fit in the time-frame
- Allow for 'over-runs' AND 'under-runs'
- Be clear on how you finish **(and achieve the objectives)**

# Planning a session

- What are the specific **objectives**?
- What is the session meant to **achieve**?

**Write them out:**

*By the end of the session those involved  
will have... (ideally four or five)*

# Planning your work

An example from a year planning full-day session

By the end of the session those involved will have:

- Identified the major successes and problems faced over the last year
- Discussed and agreed priority areas for development in the coming year
- Devised a range of possible activities to take these areas forward and prioritised a small number
- Identified who will lead on what and any resources that will be needed

# Achieving your objectives

Many workshops / seminars follow a common process:

**1. Confirm the starting point**

**2. Generate relevant ideas**

**3. Develop the ideas and prioritise**

**4. Identify / prioritise points to take forward**

**5. Plan the actions / next steps**



# Achieving your objectives

- **Confirm?** *Information, introductions*
- **Generate?** *Open session, mind map*
- **Develop?** *Small groups – details*
- **Prioritise?** *Groups / plenary (sticky dots!)*
- **Plan?** *Who does what? Resources?*

*An action point can often be starting point for repeating this process at a 'micro' level*

# Ending meetings well

The last few minutes can be crucial!

- Watch the clock in the background
- With a few minutes left, move into review / next steps
- Clarify the action points and takeaways
- Identify the people directly responsible for each action item
- Be clear on next steps and next meeting.
- Ask for feedback

*Don't let anyone leave your meeting wondering what was accomplished or what the next steps are*



# Keep it Flexible

**Shorter exercises can be a useful way to change the tempo or move in a new direction.**

A person is lying face down on a wooden table, with their arms and legs extended. A stack of several books is placed on their back, with one book open on top. The person is wearing a green t-shirt and white socks. The background is a plain, light-colored wall. An orange banner with white text is overlaid across the middle of the image.

**So, what could go wrong?**

# Another way to approach projects:

**You are a group of people planning a big meeting**

This is to kick off a community improvement project that involves upgrading a neighbourhood centre (with some disruption for users)

**How can you make sure the meeting is a complete failure?**



# Team Building

You may be less worried about the outputs – more about the process.  
So, let's look at a **team exercise**

**We're all going on a coach trip to the seaside** – about 20 of us.  
When you get off the coach do you :

- A. Head off to the beach or a café with a couple of friends?
- B. Find the tourist info centre and make sure you know all the things that you and others could do?
- C. Check that everyone is happy and that no-one's left anything behind and knows the return time?
- D. Suggest a great thing for people to do and encourage them to take part?



# The Types!

A: **The do-er!** (energetic, individualist, but may feel held back by the team)

B: **The investigator** ( good at finding things out, but may not be such a doer)

C: **The monitor** (focusing on the process is important, but may lose sight of the goal)

D: **The shaper** (creative and positive, but may not listen to other people)

*We're all a bit of each!*

Check 'Belbin Team Roles' for more on this

# Facilitation – long term skill building

**Much of this is about your own personal practice**

**Everyone facilitates in slightly different ways**

**The best way to build your skills is to learn from your own work (and from pretty much every other meeting!)**

**There are many web sources of further information**

# Action Planning

- Get there **early** (map, Zoom / Teams set-up, venue)
- Check the **technicals** (IT, flip charts etc.)
- Set the event **as you'd like it...**
- Who's the **chair** / introducer / tech support
- Talk to **people** beforehand
- **W I W O...**



# Evaluating Events

- The feedback form
- The feedback flipchart
- Moving around (vote with your hands or feet)
- A closing statement from everyone

*I have just three things to teach:  
simplicity, patience, compassion.  
These three are your greatest treasures.*

*Lao Tzu*

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# TALK ACTION



Thank you