DYNAMIC FACILITATION

Become a masterful facilitator using proven approaches

KLM Group Accelerated Ventures New Reality Leadership

Dynamic Facilitation

Are you able to keep a training class engaged for an entire day or week? Are you able to smile and relax when you face a resistant participant or group? By using thing guide, you will learn to get comments like:

- This is the first time I wished training had not ended
- I could not get in front of anyone and talk. Now I do this for a living
- I no longer fear the expert in the room or those who challenge me. The tools create confidence that I can handle any situation
- Training used to be tedious, but now I love it and so do my participants

Training that does not result in a change of behavior and increase knowledge is usually a waste of resources. This book contains the clever approaches we used to help facilitators transform ineffective training into ones that created a positive impact on the participants' learning and performance. These approaches are based on the theories of adult learning, Bloom's Taxonomy, and other training practices. They are methods that can be applied almost immediately and each approach only takes up a couple of pages, so in no time you can have our secrets too!

Contents

Facilitation Foundations

1. Active Learning

There are many books and even degrees in active learning and instructional design and with good reason. It is one of the most effective tools for engaging participants and promoting learning. We will highlight what active learning is and then show why it is powerful for creating an enjoyable experience *AND* how it helps participants ***learn and apply the content toward meaningful outcomes.***

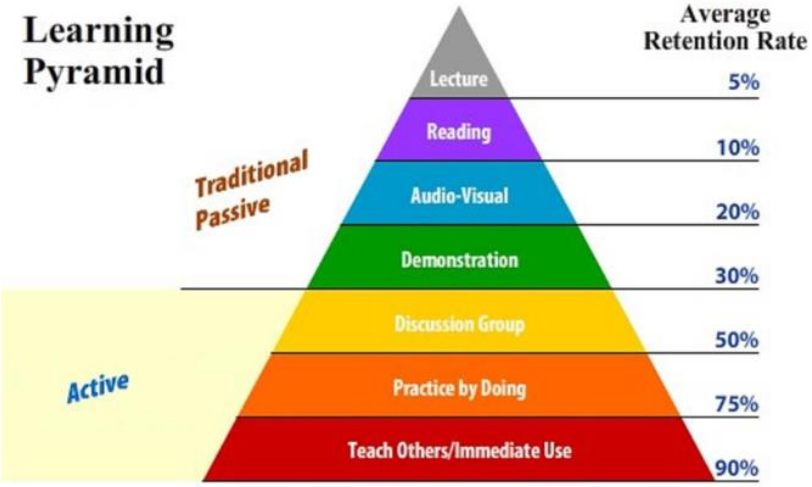
Be Prepared to swim in a different direction

We will be swimming against the

Recognizing the differences in passive and active learning is essential for understanding the approaches found in this book.

Passive Learning is a one-way presentation from an instructor to participants. There are times to use this approach, but it does not have to be the only choice, even in large lecture halls.

Active Learning involves the participant's directly in their learning process. It causes them to use critical thinking skills and apply the learning to their needs.



It takes more energy to create an active session than a passive lecture, but the results are worth the investment.

Most corporate training follows a passive model. However, exceptional training use both active and passive approaches. This book will share how to shift activities into the active approach so there is a good balance. We will show approaches to insert active activities into training.

Most training within a company is not given by professional trainers. They are often from technical experts in a field who need to share knowledge but don't have formal facilitation training. It takes

significant effort to develop professional trainers and designers, but the following approach will help ordinary people to be effective in training design and facilitation.

Think of a recent course you attended. What is one thing you remember? Was it useful information?

What percent of that training was active and passive?

As you read the approaches on the following pages, think about how some of the passive sections could be adjusted to be active.

2. Keeping Attention In Large Groups

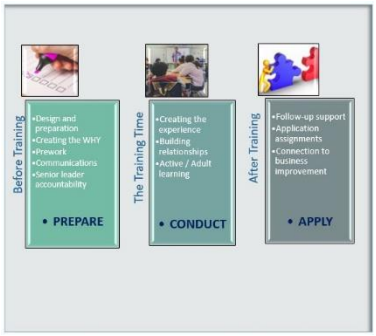
It is easier to keep the audience's attention in smaller groups. Is it possible to do a full lecture for an auditorium and keep people engaged for 45 minutes? While it is harder, try these approaches:

- Intersperse the session with 2 or 3 stories. Start the session with a compelling story but leave the audience hanging of how it ends until later.
- Provide a roadmap of the session and keep the audience aware of where you are on the roadmap.
- Use a few objects that connect to parts of your session. Have them on stage on a table near you but don't explain them right away.
- Use one or two relevant video clips.
- Use PowerPoint but mostly to accentuate your session with pictures or diagrams. If you need to share technical data, focus on a few slides at a time and then shift to something else to keep their focus high.
- Use music when they come in to break the tension
- Have quotes on slides playing before the session
- Give a trivia quiz. List ten trivia questions on the screen and provide paper for the audience to answer. Periodically throughout the session, get someone in the audience to give the answer to the group.
- Do the same with pictures. Have ten pictures of somewhat recognizable places in the world and ask the group to see if they can identify them.
- Move away from the podium. Or, if you can, do not use a podium. Have a flat table. Move around the stage purposefully but not too much.
- Move into the audience and engage a couple of willing participants to help you with a part of the session.

- If you take a break, provide something that will create anticipation for the participants to return. News channels apply this technique well.
- Conduct short quizzes along the way to keep the group focused.
- Use technology with phones like Kahoot poll and get audience participation.
- Provide several questions to the group before a session so they can focus on the topic. This approach assumes you have contact information and know who is coming.

Organizing the Learning

3. The Three-Stage Approach



In traditional training, there is usually some preparation the facilitator does beforehand. They may prepare slides and activities. Then the training happens where a majority of the learning takes place. Finally, the participants receive a certificate or credit for attending the course, and it stops there. These items are essential, but we have found that there are two additional components needed to create successful training that has an impact on outcomes and performance.

Before a Session

Preparing for a learning event enhances learning and application. In your design, consider what communications or activities that can take place before the training that will prepare the participants to be ready to learn when they walk in.

The goals of pre-session activities:

Build connections from students to facilitators and students to students. People tend to be anxious when walking into a class where they don't know anyone.

Suggested approaches:

Send a note to participants

Give them the logistics and goals for the session. This include times, locations, objectives, and other details such as lunch and break times. If a person gets lost or cannot find the room, they will be stressed upon arriving, which reduces their focus on the learning. If you plan to use post-session assignments, explain the scope and time commitment so participants are clear on the overall efforts and time they need for the experience.

Call participants

A short pre-call or video conference with all of the participants allows them to meet the facilitators and begin to break the ice. It also gives them a chance to meet other participants. This type of communication reduces the anxiety of the group.

Reducing anxiety and building a trust and comfort level accelerates the participation, which accelerates the learning process.

Send appropriate prework

Consider using prework to enhance learning. People can learn concepts independently, and then the facilitator can help the participants apply the learning during the session. Ensure that the prework is not too extensive and is directly related to the topics in the training.

Use prework to build excitement using techniques to hook the audience. There are ways to create curiosity and value for the time the learners will spend, which is vital since people want to know the training is worth attending. See section 6 for "How to Start a Session with a Bang."

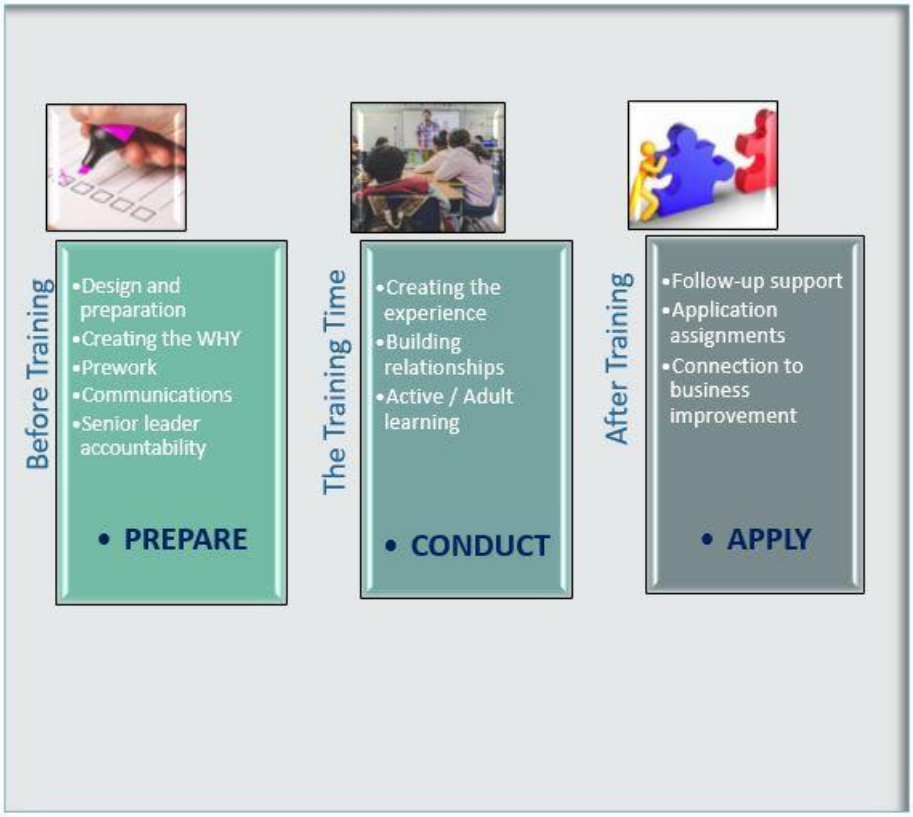
After a Session

In many sessions, participants get a certificate for attendance and that ends the learning time. In our experience, the event is the beginning of the learning and the follow-up application provides the methods and tools to ***cement the intended learnings***. This segment is often not part of a design but it can provide as much as 40% of the learning process.

Suggested approaches:

- At the end of a session, compile an action plan with clear actions and timing
- Show the participants the additional resources they can use to continue the learning
- Describe the practice and application that will best improve the intended knowledge or skill

To Visualize this design approach



The visual emphasizes that both the participants and facilitators have responsibilities before and after a training event to produce successful learning. Most training designs consider just the event, and even then, most of the burden falls on the presenter when the event takes the form of lecture and PowerPoint Presentations.

In every step of the design, focus on connecting the goals of the training to the training activities. Determine:

- What do we need to accomplish with the training?
- What are the best ways for the audience to learn the intended outcomes as quickly as practical?

Once these areas are determined, choose prework, training activities, and post-session applications that align with these goals.

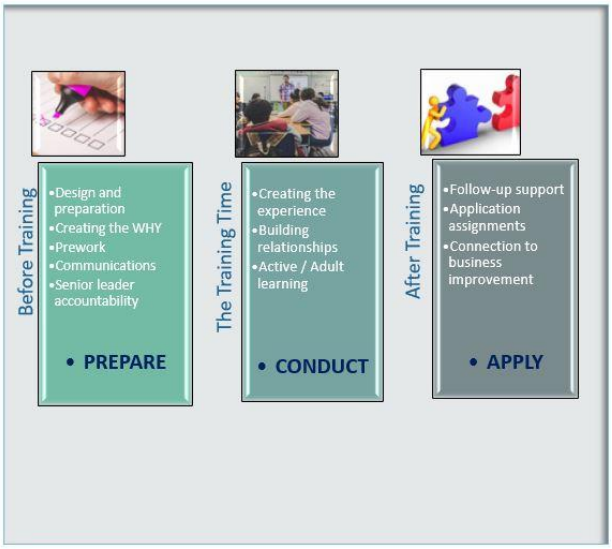
Think of a recent course you attended or facilitated. Did it apply the 3 Stage approach?

If so, what was one approach used before and after the session to enhance the learning?

If the 3 Stage approach was not used, what suggestions could you add that would enhance the training?

Illustration

A golfer shoots an average of 98 per round but would like to average 87. The 87 is now a performance goal.



Before the Lesson

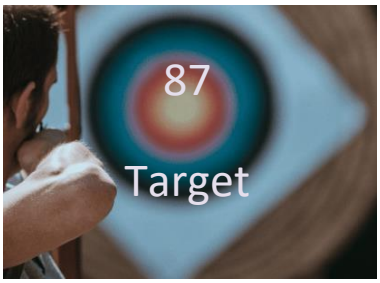
- Before the lesson, the golfer meets with the pro and they chat about the 87 target. The pro describes what the overall learning and practice need to be to get to that point.
- The pro has the golfer read chosen golf articles of how others have achieved this improvement and watch selected videos.
- The pro spends time before the lesson observing the golfer's swing and looking at previous scorecards to understand how to focus the learning and practice.
- The pro sees that the golfer's drives are good and consistent but the short game of pitching and putting are not strong. He designs his first lessons for these improvements.
- They agree on the time and effort it will take to achieve the goal.

The Lesson

- They conduct the lesson on chipping and putting
- The pro gives the golfer practice assignments for the next two weeks.

After the Lesson

- The two meet again and play several holes focused only on chipping and putting.
- A subsequent lesson focuses on sand traps and they continue the same process.
- The golfer plays once a week and spends 90 minutes a week, specifically practicing chipping and putting.



4. Room Setup

In the section called 20-minutes before and after, we talked about practical ways to set up the room so it is inviting for the participants. Here is a small bit of theory why this is critical:

My wife is a music therapist and works with older clients that have dementia. She is skilled in knowing what helps or hinders group sessions and can tell when clients are at ease or tense. She:

- consciously minimizes distractions.
- sets the room up so that it is inviting and free of clutter.
- faces the group away from other activities.
- builds excitement and anticipation using a few props or objects

Even though the clients cannot articulate why they are agitated or distracted, they will be if the room, temperature, and general ascetics are not right.

The same is true of training sessions and meetings. Facilitators can make the room inviting and even exciting as participants walk in by having it neat and orderly, all materials in place, lighting and temperatures set correctly. A full trash can, paper on the floor, or wires running through the room distract learners. The goal of the facilitator is to establish a first great impression that becomes the springboard for learning. A neat and inviting room tells the participants that the facilitator has taken time to make it pleasant for them, which builds the relationship and trust within the group.

5. 20-Minutes Before and After

As Participants Arrive

A training session or webinar starts when the first people arrive in the room or on the phone. Most participants will arrive with a level of stress. One role of a trainer is to make participants comfortable and reduce their anxiety. To create a dynamic start to your session, consider:

- Many trainers greet the participants and then complete their prep work. Instead, complete all preparations before anyone arrives. Fully focus on the participants when they enter.
- Make the room set-up inviting. Provide learning resources, markers, a welcome note on a chart, some drinks or snacks, and comfortable temperatures. Ensure the room is neat and orderly.
- It is often awkward when people arrive. They have to find a seat, talk to the facilitator, and meet other participants. Provide an activity that gets people doing something together as they arrive. This approach breaks the tension for the participants and the facilitator, and it increases the energy in the room. Examples:
    - Allow people to get something to eat or drink and ask them to go to a chart in the room. They can put their name, location, and role (or other information) on the chart. The first four to arrive go to the first chart. The second four to the next chart, etc. That helps the participants build relationships, which reduces tension.
    - To supplement the above, cut out interesting pictures from magazines. Ask participants to pick an image that represents an interest, accomplishment, goal in life, etc. Have them put the picture on the chart next to their name.
    - Use upbeat music, but not loud or heavy music.
    - Provide a fun quiz for them to answer. Pick a puzzle or trivia quiz on the internet. Put those around the room and folks can work in small groups to solve as they wait to begin the session.
    - Put quotes on slides related to the topic of the day. Have the slides scroll through every minute so folks can see the various quotes.

Create curiosity in the room by having some mystery objects that get the participant's attention. Connect the objects to the session and when you start, explain that each object has a connection to a topic. For example, if you are doing a course on stress, you might have rubber bands at each person's seat, stress balls around the room, etc. Tie these together throughout the day to build anticipation.

The First 20 Minutes *after* Starting a Session

The first 20 minutes of the session can make or break a training event. Your goal as a facilitator is to accomplish several things in that timeframe to jumpstart and energize the group.

Your first activity must begin to let the participants see the value for the time they are spending there. Often, facilitators start with an agenda and learning objectives. These items are important but may not make sense if they are the first things the participants see. Start the opening with three focuses:

The **WHY** and **Value** for participants
WHAT they will do
HOW they will accomplish it

Keeping this order in mind will help you create a powerful opening. You will see that this approach applies to several areas of effective facilitation.

In the WHY, choose a story or short activity that builds value. If you are talking about overcoming fear of speaking in front of people, open with a story like:

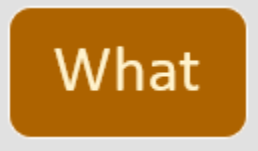
"We had a participant recently who absolutely could not stand in front of a group. Today, she is in a full-time training role traveling to other locations and has no fear. What did she learn to make such a drastic turnaround? In our first module today, we will share what she learned."

If you were doing a session for new frontline leaders, you could start with:

During the last year, we promoted two new supervisors. One was very successful in engaging their team while the other one struggled and could not gain credibility. There were three differences between the two. In our session today, we will provide you with the factors the successful one used so you can apply them to your own leadership approach.

Another example: If you were doing a class on time management, have the participants work in small groups to create a list of frustrations they face at work. Provide two or three minutes for each group to get 3-5 examples. Chart a few from each group. You will see a connection between their frustrations and time management and can explain that the topics covered will address many of these issues.

One technique to reduce the ***facilitator's*** fear and reduce the pounding heart is to '**Throw the Monkey**.' Get the monkey off of your back by doing something at the beginning to get the group talking or in an activity. The approach allows the facilitator to relax and increases the energy in the room. The Frustration activity above is one example. You could also have a nerf ball and throw it to a participant. Ask them to share one work frustration they experience and throw it to another person. You or a cofacilitator can chart the responses. Explain that they will gain ideas to solve many of the issues.



The WHAT involves describing what they will accomplish by the end of the session. This step includes the course objectives and what they will walk away with by the end of the process.

Ideas:

- Provide 3-6 objectives rather than many. You can break these down in specific modules since participants have a hard time translating objectives and finding a connection. Here are creative ideas rather than just reading them:

    - Let the group observe the objectives for a minute. Ask them for words that stand out to them. Use the words to help them get a deeper understanding of the goal. If you told a story related to that objective, let them know you will show them what happened. Or, if you have an object in the room related to the objective, tell them they will find out the meaning of the object then.

    - Ask the participants to look at the objectives and share which one will help them the most. Ask for 3-5 responses. If an objective is not mentioned, explain it more and ask how accomplishing the objective will help them.

The HOW includes the Agenda or roadmap. This part shows -the participants how they will learn the objectives. It gives them a sense of direction and what to expect during the day.

The HOW also includes an overview of how you plan to run the session. You can share that the session will be interactive and include the types of learning methods used, such as powerpoints, video, case studies, etc. Include details about breaks, lunch, safety, restrooms.

Some sessions include a Code of Conduct or Ground Rules. This discussion provides guidelines on areas such as cell phones, participation, use of computers, etc.

Asking participants for their expectations is another potential activity. Ideally, they understand the scope of the course before they come so that they are not surprised. If a person lists an expectation you do not plan to cover, let them know.

How have you seen or done a startup for your sessions compared to this principle?

What aspect of 20 Minutes Before and After could you add?

6. Open and Close with a Bang

Grabbing the curiosity of your participants at the beginning of a session increases their willingness to go on the learning journey. It helps build relationships, which improves participation, and therefore the learning increases. It creates the WHY of the session. An excellent example of this is how newscasters hook the audience at the beginning of a commercial break and keep the viewers anticipating what comes next.

Opening

Build this energy before a session begins and then to use the 20 Minutes before and the 20-minute after the Start.

- Tell the start of a compelling story but leave the group hanging for the ending, which you finish within the session.
- Use objects that connect to a subject and place those around the room to build curiosity
- Use a Nerf ball for introductions. Throw it to one person, have them introduce themselves and then they throw it to another participant.
- Have participants come in and pick a picture from a table that connects with your workshop. A hobby, passion, favorite vacation, what they are proud of, etc. Use that with the introductions or have a few people share along during the session.
- Play music as they enter
- Have colorful charts on the walls.
- Have participants put their name on a tent card and also draw a picture that represents something about them - Sports, music, travel, pets, etc. This technique helps build relationships.
- On name tags or charts, have participants put their name, location, and something else of interest. Post the sheets on the wall so participants can refer and remember names and interests
- Get copies of books or other items to use as a raffle. Pick a couple of names after breaks and allow the winner to pick the prize.

Fun and energy at the start breaks the anxiety and tension → **Relaxed students participate more and have a higher trust level of the facilitator and participants** → **Trust and participation accelerate the learning process**

Closing

"*Well, that is all I have for today. Please sign the sheet and have a nice day".* That is how many sessions end, which may leave the participants hanging and confused.

Ideas to create a purposeful and impactful ending

- Review the objectives.
    - Ask participants to look at the initial goals, objectives or outcomes and think of one learning they had and connect that to one or more objectives
    - Ask participants to pick out a key word in an objective and tell what they learned that relates to the word.
- If you created charts and hung them on the wall, ask participants to find a chart that relates to a significant learning and stand by it. Once all of the participants find a chart, have each one share why they stood at the chart and what they learned.
- Use the Nerf Ball and have each person share one learning and then throw the ball to another person.
- Create an action plan to ensure participants know what to do next in the learning process.
- Create a way to celebrate, especially for multi-day sessions.
- Hand out something as a gift that will help as a reminder for the session. If you did a session on stress, you could do a stress ball.
- Conduct a review competition. Divide the class into smaller teams, ask questions, and have the teams discuss and provide an answer.
- Have participants work in small teams to create a colorful, creative chart on an aspect of the session. They can use pictures, words, or other items. Each team can explain their chart, or they can see if the other teams can decipher their work. You can also use large butcher paper.

- Pick out several quotes that relate to your session. Share those and ask participants how the quote connects to the session or let them work in smaller groups to discuss one quote and then share their ideas with the others.

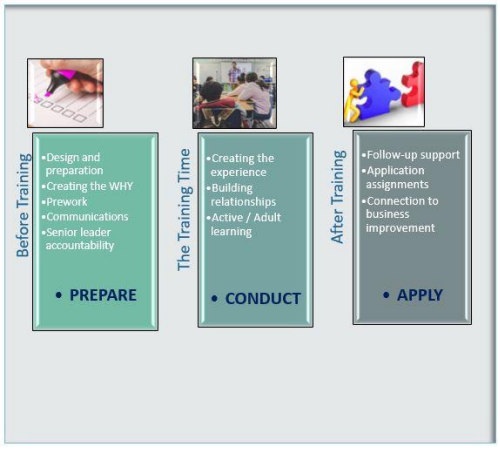
Describe how you or someone else have used a *bang* in the beginning to get people's attention and how they ended with a *bang* to make it memorable.

List one idea you can use or suggest going forward

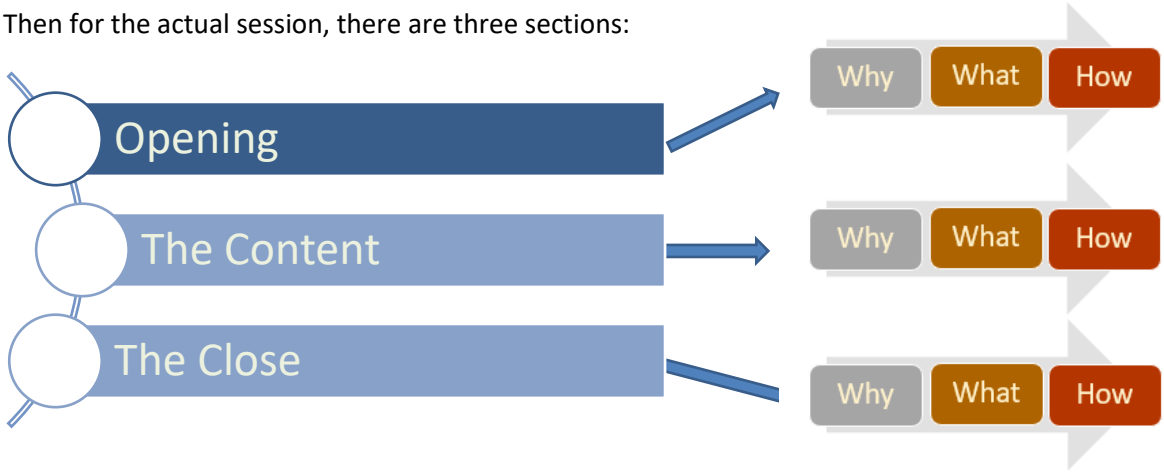
7. Divide Session into 3

In each part of your design and facilitation, think in 3's.

The initial design there is a 3 Stage approach:



Then for the actual session, there are three sections:



We discussed the importance of the Why, What, and How in our opening. The same is true for each module and activity in the Content. If you have 5 modules in your session, each module should have a short opening and closing that follows this approach. Within a module, if you watch a video, conduct an exercise or other activity, it should also follow the Why, What, How.

Initially, it will seem like overkill, but once you understand and practice it, the participants will not recognize what you are doing. It will keep them engaged and increase their learning capacity. There are explanations of this approach for the exercises and closing in the next sections.

8. Postwork

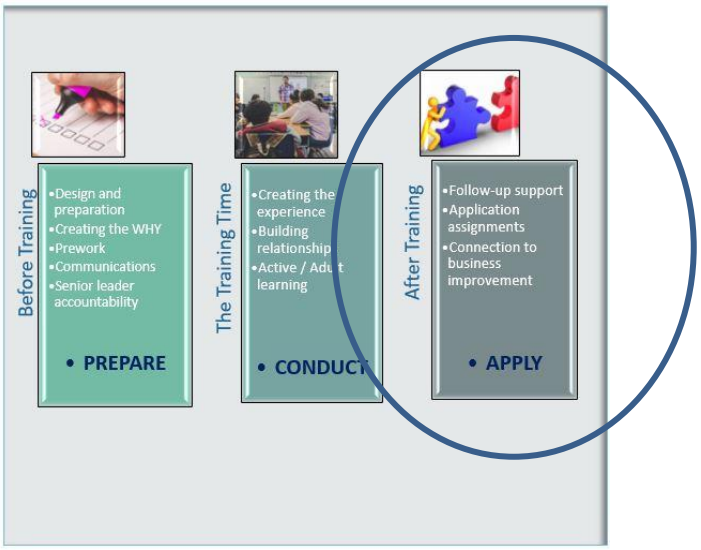
Driver education classes provide a model for learning. The goal of the training is to help a person operate a car safely. Suppose the learners went to a four-hour powerpoint lecture on the aspects of driving and received a certificate indicating they had attended the class and were ready to drive. We would be concerned.

However, often that is what training does. Our objective in business is to make a profit. If we do not do that, we cannot do much else. Training must help employees maximize their skills so they can contribute to the business' success. Therefore, when we design training, we need to think of what the learner must know and be able to do to be successful. There is a place for a classroom-type training. Often we need to practice after the learning. Postwork assignments provide the avenue to help he learner achieve the intended performance.

In our golf analogy, the golf lesson is the classroom session. After the session, the teacher provides specific drills, readings, and videos to watch that have been proven to improve performance. The pro becomes a coach and mentor during the post-lesson sessions. When ready, the student takes another lesson and the postwork provides the ways to apply that learning.

In your training design, provide ways for students to apply what they learn. While you may not have the authority if you are not their manager to ensure they complete the tasks, you can still provide the right approaches. Many effective training processes enroll the leaders before the session and let them know their role in following-up with support and coaching.

What ideas do you have for post-work in your sessions?



Using Media and Activities

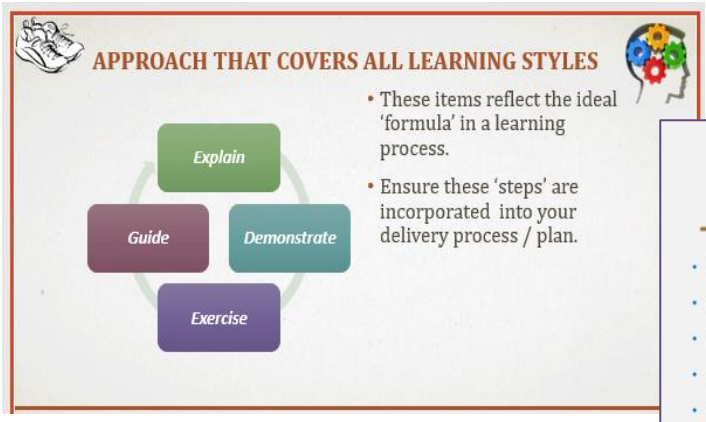
9. Transforming a PowerPoint

PowerPoint was designed to *guide* learning sessions. However, it is commonly used as the main teaching tool. Trainers tend to put every word they want to say on the slide so they do not forget anything. We have listed guidelines for effective slides and examples of how to transform slides so they are valuable for the learner.

Guidelines

- Keep words to a minimum. As a *guide*, keep lines to about six or less and no more than about six words per bullet.
- Include a graphic or picture for most of the slides
- Use a couple of colors but not too many
- Do not use a lot of animation
- Use charts to provide exercise instructions, pictures or diagrams, or key points
- Reduce the number of slides by using other facilitation methods such as an exercise, video, pair-up, or case study.

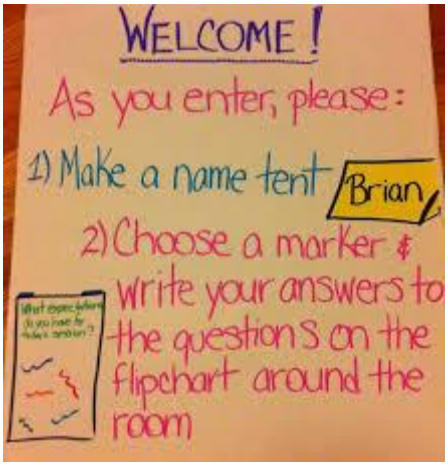
Better Examples



Take one PowerPoint Slide and transform it based on these guidelines.

10. Charting for Non-Charters

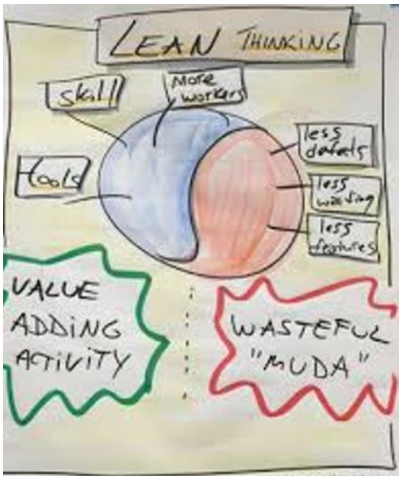
Many facilitators avoid a flip chart because they are not artistic or do not have good handwriting while others can produce works of art. If you struggle with charting, try these tips to make your charts stand out.



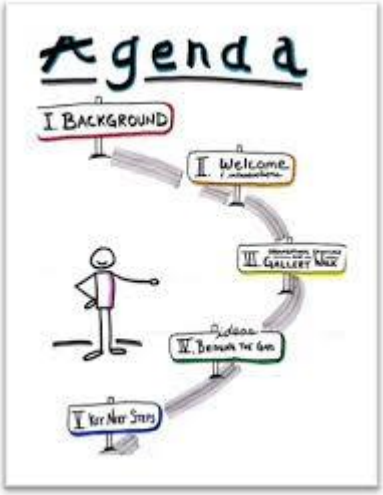
- **2 to 3 colors**
- **Darker colors for words**
- **Lighter colors for accents**

- **Simple pictures**
- **Boarder or line to separate header**
- **Outline words and fill in**

- 3 Colors
- Very basic drawings or symbols



- Boxes or squigglies around words
- Several colors



- Agenda that resembles a roadmap
- Basic symbols
- Bold words
- Color shaded boxes

11. Conducting Sections without PowerPoints

Presenters tend to use a PowerPoint Slide for each activity or discussion point. Think of ways not to use PowerPoints where appropriate.

If your projector broke, could you do the session without PowerPoints? Asking this question helps you to think of different ways to facilitate a session.

From Passive to Active

Just because an activity uses PowerPoint doesn't automatically mean it is passive, but a lot of the time it is. What percentage of your slides are passive slides, meaning that the facilitator is doing the talking and the audience is listening?

See if you can transition a few slides from a passive to an active approach. Then ask if you need a slide at all.

Passive Approach: A slide lists 10 Safe Driving Habits with the facilitator talking through each habit.

Active Approach: Ask the participants to write one safe driving habit on a post-it note. Provide 30 seconds for them to list the item and then ask them for their response. Have someone chart the items and then hang the chart on the wall.

Passive Approach: A chart showing reasons for employee's resisting change.

Active Approach: Have participants work in small groups at a chart to list reasons their teams resist change

Asking questions, allowing participants to work at charts, conducting case studies and other interactive approaches will enable you to shift from passive learning to active learning.

Pick one activity that currently uses a PowerPoint. Hide the slide and determine a different way to conduct an active learning segment.

12. Orchestrating an Exercise or Activity

The way a facilitator sets up, conducts, and debriefs an exercise can make or break its usefulness. Often, a facilitator will say something like, "Okay, let's all get up and do an exercise." Or, "We are going to watch a little video now and then talk about it."

Participants want to know WHY they are doing each activity in a workshop and how it connects to the learning objectives. If we tell them to go to a chart or watch a video without context, they may have confusion, anxiety, or a lack of motivation.

Using Why, What, and How, we provide the ***context*** of an activity and build the ***value*** needed for the participants. It is crucial to list the WHY first to create the value. Then the WHAT or final output, and finally, HOW to get to the output. Many facilitators list the HOW first.

From saying this:

We are going to go to the charts in small groups to list the reasons we face resistance from our employees.

To

As leaders, we have all faced resistance from employees at some point. There are three practical approaches we can incorporate as leaders to reduce this resistance.

Let's create a list of the types of resistance you face and then we will discuss how to use these three approaches to address those challenges.

Work in your assigned groups at a chart and list three examples of resistance you have faced. When you are done, I will show you the three approaches and we will match them to your specific challenges. Take 10 minutes to create your charts.

From

Let's take a moment to watch this video…

To

In our prework assignment, you all mentioned that it is hard to not use filler words such as um, you know, ahh. That is one of the biggest challenges for any speaker or facilitator.

There are many ways to address this issue but there are three specific things you can do to reduce these filler words by 80% immediately.

Watch this two-minute video clip and identify the three things this speaker does to eliminate most of the filler words. I have the three items listed under this chart but we will see if you can discover them first.

Giving instructions for activities that are clear is difficult. One option: create a slide or chart that uses the Why, What, and How steps as listed above. That way, you see the right order and full instructions.

Debriefing the Activity

Another challenge of an exercise or activity is how we process or debrief it. There should be a specific intent for each activity done in a training session, and the participants need to understand what it is so they can apply it to their situations.

For the exercise on resistance, the end goal is for the participants to understand the three approaches to address resistance AND for them to apply those approaches to their situations. The intent for the filler words is that the participants have a process to reduce filler words.

Effective Debrief Guidelines

- Get the group to provide the key messages from an activity vs. telling them what they should have seen or learned.
- With effective debriefs, 90% of the explanation comes from the participants. The role of the facilitator is to ask questions to ensure the participants get the intent and then at the end, to add any missing information.
- Avoid filling in the missing information too quickly. Give participants time to think and ask the right probing questions.
- If you see confusion and people miss the key points, the activity may not be right or the instructions may not have been clear.
- If the activity requires significant energy and thinking, allow small groups to work together and then share their insights. A case study is one example of a challenging exercise that required a deeper level of critical thinking.

LET THE GROUP SHARE WHAT THEY LEARNED AND HOW THEY CAN APPLY IT VS. TELLING THEM

Set up one activity such as an exercise or video using the Why, What, How approach. You can put it on a slide if desired.

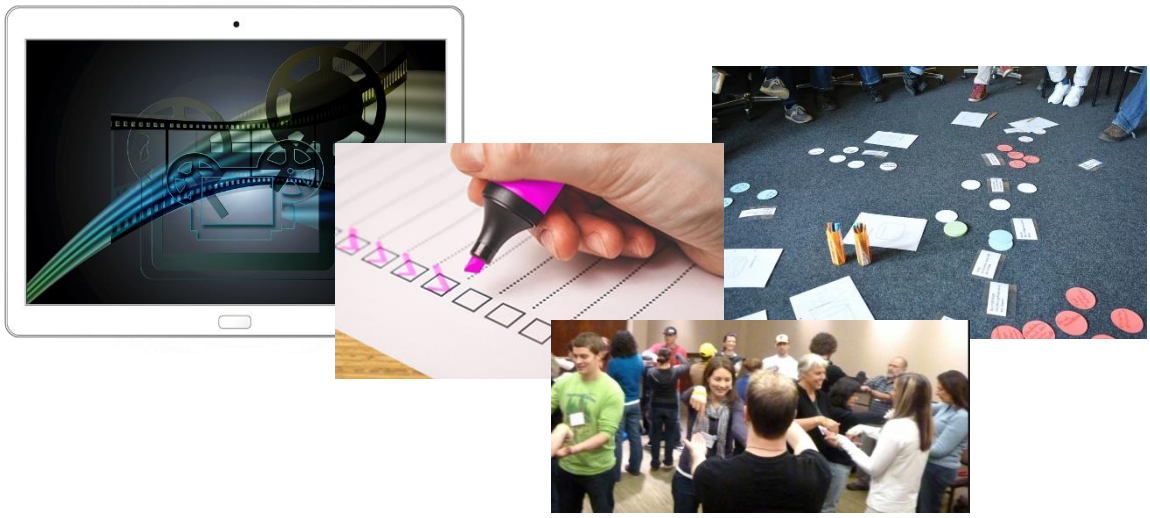
13. Diversify Types of Activities

As mentioned, an overused presentation tool is PowerPoint. PowerPoint has a purpose but it is not intended to be used alone or as the main teaching tool. We listed options to complement or reduce the dependence on slides. In the design, do not just use a variety of methods just to make the session enjoyable, but select methods strategically to achieve the intended outcome.

One way to reduce the dependence on PowerPoint is to create a session that does not use slides. How would you get your points across or engage the participants for the learning? Then, add slides to guide the session, provide exercise instructions, show charts, pictures, and some teaching.

Consider these facilitation methods

- **Ice breakers**
- **Stories**
- **Chart exercises**
- **Pair ups or trio discussions**
- **Asking questions**
- **Competitions**
- **Object lesson**
- **Assessments**
- **Case Studies**
- **Videos**
- **Brainstorming**
- **Games**
- **Experiential activities**
- **Role Plays**
- **Prework or postwork**
- **Social media**



14. 40/60 Facilitation Balance

40/60

Balance

Many training sessions are mostly lectures using PowerPoint. People have short attention spans and mentally drift during longer lecturing sessions. A facilitator's role is to keep the attention of the participants so they learn as much as possible. Transforming learning from a ***passive*** mode to a combination of ***active*** and passive is essential for improving the learning process.

The 40/60 numbers provide a picture of the balance of how much a facilitator talks or presents to the amount they engage the audience in the learning process. Lectures are closer to 90/10. By incorporating ideas from this book, there is a natural shift that involves more input from the group.

Why the Shift in Balance?

- Attention spans drop quickly during lectures, which decreases learning.
- Many participants have a level of knowledge already. If this is the case in a lecture, they are likely to check out. Engaging them for their ideas increases interaction, which improves learning.
- Recall improves with varied learning approaches, especially ones that require action from the participant

Using techniques such as breakout exercises, case studies, videos, etc. provides the avenue to shift from lecture to engagement.

In the last training session you attended, what balance did the facilitator have?

If you facilitate training, what balance do you use?

List one thing you can do to shift toward 40/60.

15. 20-Minute Guide

Similar to the 40/60 guide, the 20-minute guide suggests that most training segments should be around 20 minutes long. It is not exact but activities that go too long may lose the participant's attention. If sections are too short, there may not be enough content to achieve the learning objective.

A module or substantial topic may be an hour, for example, and have three activities within that time. You may have several segments such as PowerPoints, a pair-up discussion, a question where the facilitator writes answers on a chart, or a short video clip.

Example: Changing a Tire
1 hour total

First 20 minutes – Safety Factors

- Video of a person changing a tire unsafely
- Discuss the 3 common injuries from changing ties

Second 20 minutes – Demonstrate how to change a tire

- Ways to use different car jacks
- Securing the car
- Removing and putting on the new tire

Third 20 minutes – Practice changing a tire

- Break the group into small groups at different cars
- Have each group demonstrate each step of the tire change

Application Ideas?

16. Hit the Sweet Spot

A trainer developed a one hour webinar on battery disposal. Standard webinars were at least one hour so he created enough slides for that time. When we discussed his objectives and the audience, he determined that they did not need that level of detail. He reduced the topic to 15 minutes and combined it with other training. As a guide, determine your goal and the intended outcome of the training before you design it. Create a session that is balanced and provides enough for the learners but not so much they lose the focus.

Operators spent hours in a classroom learning how to assemble a piece of equipment. The trainer created a one-page guide, which ended up being enough for the operators to complete the task. Sometimes, simple approaches are all that are needed to achieve the learning objectives.

- **Material is covered too fast**
- **Not enough practice to absorb it**
- **Not clear on the purpose**

- **Right mix of learning activities**
- **Enough time to process and apply**
- **Appropriate follow-up support to master the intent**

- **Too much time on the topic**
- **Covering unneeded content**
- **No connect to the outcomes or application**

List a section of a workshop that hit the Sweet Spot and one Opportunity to improvement the balance?

Personal Facilitation Effectiveness

17. Learning Preferences

In this section, we will highlight a couple ways that people can learn.

- People learn differently so our training needs to consider those differences.
- Some people like a lecture and passive learning; some like interactive sessions. Tailor the session to meet both needs
- All learners need to see where they are going in the training session. Agendas or a clear roadmap is essential for all courses.
- Technical roles typically like less experiential training. They tend to like direct learning and hands-on practice.
- Participants like to learn at different paces and content levels. Some like the highlights only and others want to go deeper and discuss the theory for understanding.
- Newer generations like technology. Often they can read or review a topic on their own and then process it quickly in a classroom or webinar session.
- Some people know the topics already or can learn them quickly. Enroll these folks to help teach part of the sessions or allow them to share their experiences.
- If a person is not participating, they may have checked out, but they may also be a reflecting learner. They process information before reacting. Checking with quiet learners helps you determine appropriate facilitation adjustments.

Bottom Line

- Learning is hard
- People learn differently
- Using a combination of Active and Passive approaches increases your chances of meeting most learners' needs

In a past session you attended, describe how the facilitator applied one or more of the above techniques or list an opportunity they could have used to improve the session.

In your training, check off what you have done and circle opportunities for your next session

18. The Dreaded Silence

Most speakers face the total silence and stares of the participants and hope that someone will rescue them. Say good-bye to silence by using these approaches.

1. After asking a question, learn to be comfortable with up to 8 seconds of silence. It seems like a lifetime, but participants need this wait time to process their thoughts. Look around the room so you do not focus on one person. If needed, turn around and walk to another part of the room while they think.

2. Ask a question and have the participants use a post-it to write an answer. Give them a few seconds and then ask for responses. This removes the awkwardness and gives them time to think. You will almost always get a response. You can also call on a person easier and say, "Juan, what came to mind for you with that question?"

3. Use a pair-up for the participants to answer a question. Provide the question and ask them to chat for a moment. This approach is helpful for questions that required deeper thought. It also takes the pressure off of the participants since an answer is a group answer as opposed to an individual response.

4. Ensure the question is clear. If needed, write the question on a chart or the slide. If there seems to be confusion, restate the question.

5. Affirm the answers. If you thank the participant for the input they will continue to engage. If you have no response or one that indicates the person was wrong, they may hesitate in subsequent discussions.

   Positive affirmations:

   Thank you, Anne. Your answer is insightful in helping us see a deeper view of this issue.

   That is perfect, Dan. Dan highlighted a point that I did not think about but is very powerful.

   Responses that may shut down future participation:

   Ok. Does anyone else have a response?

   I am not sure that is right. Who else can try?

6. Ask Open or Probing questions vs. closed questions.

   The question, *Have you ever had a bad experience on an airplane*? will only get head nods. Changing this question to an open-ended question will get responses.

   What was your worst experience while flying?

7. If you talk for a long time, participants will shift to a passive mode. If you do ask a question, their minds will not be in a mode to participate right away.

   Ensure you insert an active segment into a longer section of talking. Ask a question, have them write something in a workbook, or have them pair up for a minute to reflect on the content.

   If you do have a longer lecture segment:

   Rather than ask, "*Does anyone have a question*"?

   Try:

   "We just processed a lot of material in the last 20 minutes. Look at your notes or workbook and write down one thought that comes to mind". You can then ask for a couple of comments and have a high probability of a response.

8. A Masterful Technique that will keep everyone's attention even in a lecture

   Assign participants numbers from 1 to 4 or 1 to 6.
   Tell the group you will go over several concepts in the next 15 minutes. After that segment, you will pick a number. If I call your number, your job will be to explain the main point of the last section.

   You will find people taking notes, asking questions, and being laser-focused.
   Don't overuse, but applying this technique several times in a day works well.

Pick one technique to try at your next workshop.

19. Lead At Ease

Newscasters spend years learning how to move, speak, use hands, and adjust their voice. They go through regular reviews to sharpen their skill. If you have time for that level, that is great. If not, here are a few things you can do to look professional and put you and your participants at ease.

Hands

- For most speakers, the hands are challenging. Where do I put them when speaking, how much do I move them, can I put hands in pockets or cross them?
- If you are charting, hold a marker
- Rest your elbows on your hips and touch fingers together.
- Use hands expressively at appropriate times but not so much that distracts the group.

Moving

- Learn to move a few steps purposefully and then plant both feet. Keep weight even for both legs.
- Move over time to various parts of the room. Use the left side and right side. If possible, move among tables or into the U if you are using a U-shaped setup.
- Remove barriers from you and the audience. If you need a place for notes, put them on a table of to your side.

Eyes

- Scan the room and don't fix eyes on any one person for too long unless they are asking or responding to a question. Keep eye contact for 2-3 seconds with any one person max.
- Throughout each topic, try to obtain eye contact with all participants if possible.

Voice

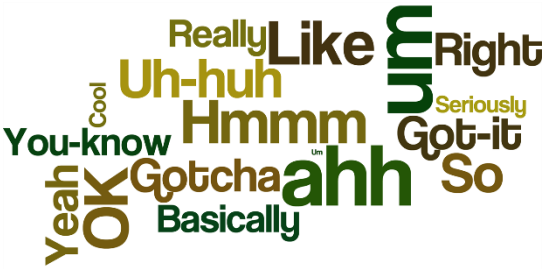
- Project voice so those in the back can hear.
- Vary the pace and intensity of your voice. Speed up and slow down slightly to emphasize points.

What is one thing you would like to try?

20. Speak with Authority by Reducing Filler Words

Filler words are a challenge for most speakers and facilitators.

- **Ah, Um**
- **Sort of**
- **Ya Know**
- **Some**
- **Really**
- **Kind of**
- **Like**
- **So**
- **Little**
- **Right**



These words have minimal value and diminish the message. The best facilitators use filler words, but they apply techniques to reduce them.

- Be aware of the ones you use most either by listening to a recording or having someone observe you and list the ones used most.
- In subsequent sessions, pick one filler word and have a co-facilitator list the times you use the word. Don't be too conscious about it initially. If you had 15 'ums' in session 1, set a goal to get to 10 in session 2.
- Practice on your own and record the section. Consciously practice eliminating that word.
- After a sentence, *close your mouth consciously* for a second.
- Practice saying the initial intended word without a filler. If a speaker is uncertain about what they will say next, it is common for them to start a new sentence with Ah, So, Ya Know. A short, silent pause between sentences is a powerful way to reduce extra words and increase the effectiveness of your statement.
- If nothing else, get rid of the word 'LIKE' in all conversations.

Change from
So, one thing that we *kind of* do when driving is get distracted by signs.

To
When driving, we often get distracted by signs.

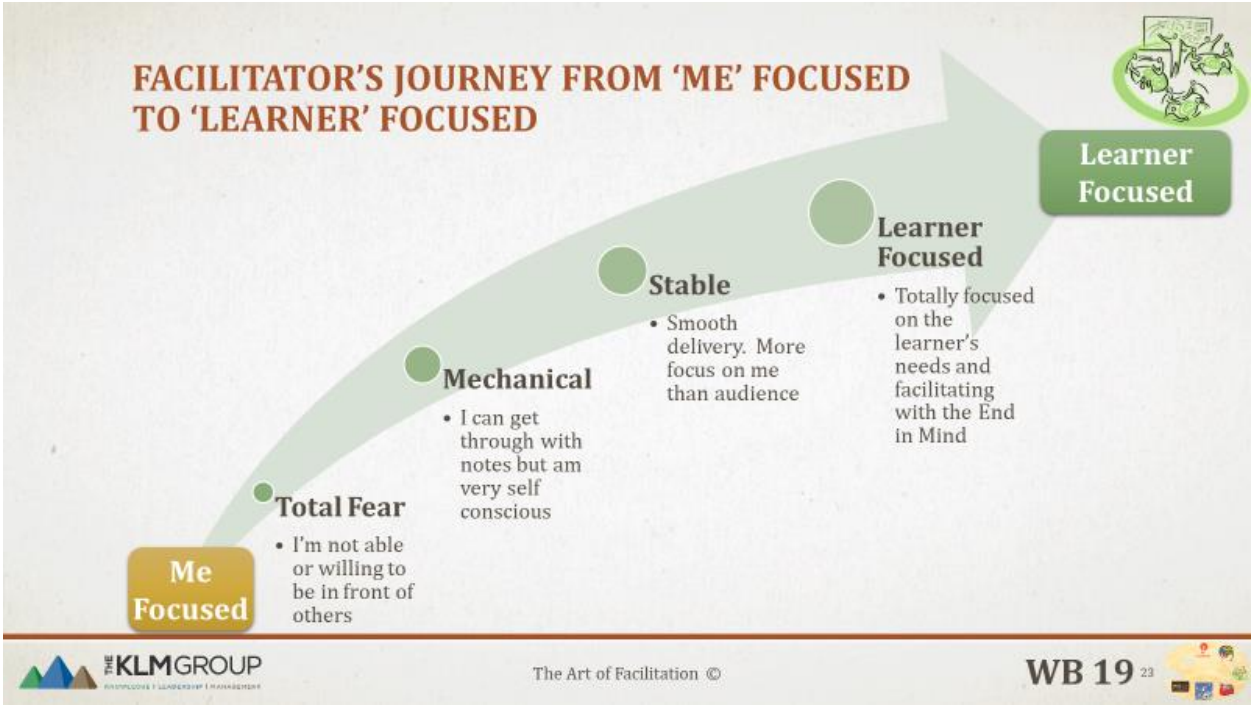
From
So, Um, now we will watch a *little* video and talk about it.

To
Watch the video and identify three ways the leader gives feedback.

Uncovering Facilitation Inhibitors

21. Breaking the Fear

Many people have a fear of getting up and talking or facilitating in front of others. The techniques in this book have helped hundreds of people overcome the fear and look forward to each session. We have observed many people moving through this progression and becoming dynamic facilitators.



By following the approaches in this book, everyone we worked with got to at least the mechanical stage and a few jumped to the Stable stage. It is a journey to get to the learner-focused stage. In this stage, you know your content and know-how to manage the room and engage the people. You can adjust on the fly based on the group's needs. You can be confident even when facing challenging participants or groups because the session is not about you as the facilitator. Still, you are focused on serving the participants in the best way possible.

22. Minimizing *and* Maximizing Resistance

Trainers and facilitators often face resistance for several reasons, including…

- Learners may not have the time to devote to the learning
- They may be forced to attend
- The training is not relevant to them
- They do not trust the leaders or facilitators

Creating the best possible training but having distrust and resistance inhibits the learning process. We have discovered approaches that have had amazing results in reducing resistance, building trust and creating fully committed learners.

I was teaching a leadership workshop at a plant site. On the first morning, John arrived a few minutes early, but sat in the far back of the room and turned his chair to scowl at the back wall. I introduced myself and offered him coffee. He said he was required to come to the training, and only knew it was something about leadership.

He said, "No offense to you, but I have been a supervisor for twenty years. What are you going to teach me in three days I do not already know?"

I had to think fast but my 45-second answer changed not only his attitude but my entire coaching and teaching approach.

I told him that I was not a teacher but a facilitator. I did not have all the answers and I counted on experienced leaders sharing ideas and life learnings in the session to help the newer leaders. I asked if he would see himself as a coach in the next three days rather than a learner and share ideas when appropriate. He grunted, and I moved on to meet the other twenty participants.

When I started the class, I noticed he was in the front and the scowl had softened. Over the three days, the change in his demeanor was noticeably different. He was engaged and enthusiastic and added stories and insights along the way.

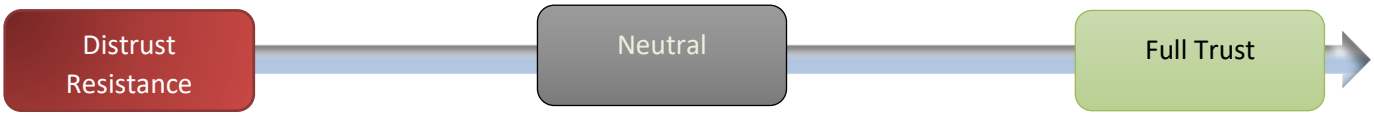
When we closed the session, each person provided a closing comment. Here is what he said:
"I did not want to be here, but this was the greatest experience of my career. I did not realize I could learn so much. I only have two years until I retire, and I was coasting to the finish. Now, I see a new mission for the two years. I understand how I can coach and mentor newer leaders to grow and take this site to the next level. I am excited and plan to learn, develop and help others for these next two years and then I have a longer-term mission to help my grandkids grow and learn similar leadership characteristics."

An incredible turnaround in 45 seconds.

Here is the secret: As a leader, you don't need to act like you have all of the answers. When you have a resistant employee or student, make it clear that you value their experience, expertise, or input. Enroll them as coaches to help others. The quicker you can relay that you value the employee, the easier it will be to overcome their resistance.

Amazing Trust

Building trust seems nebulous. Participants tend not to trust facilitators until they prove trustworthy. In the case above, John was at a total distrust of leaders and the facilitator. An initial goal is to provide credibility for the person to become neutral and go on the learning journey. That foundation provides the way to incredible trust.



For John, he shifted from distrust to neutral when I affirmed his skills and asked him to be a mentor and coach as opposed to a student. He was neutral and watching me closely in the first hour to see if I would actually enroll him in the process. Within 30 minutes, a younger leader asked a challenging question about an issue he was facing. I looked at John and said, "John, you have been here for a long time. Have you faced that issue and do have advice?" John provided an insightful answer and his trust factor moved to the right. During the three days, he contributed appropriately and also learned new ways to apply his skills. He moved from Distrust to Full Trust during that time.

Emma was told to attend a class to improve her facilitation skills. When she learned that part of the course required her to give a 90-minute training session in front of everyone, she went to her boss and told him she was dropping out. He told her this was part of her new job and had to go. She was so distraught that she told him she would resign before taking the class. The boss could see the anxiety and fear so he said to attend, and if at the end, she could not do the practice session, he would excuse her.

She showed up but was tense. She told the facilitator that there was no way she could do the 90-minute practice session. The facilitator listened to her and seeing the fear, explained that she would not have to do the session. He assured her that the skills she would learn would help her and that they would chat along the way to help her.

She relaxed and participated in the discussions and exercises but was still not ready to lead. When she saw our approach of interactive training and how she did not have to present for 90 minutes but facilitate using a variety of approaches, she got up the nerve to at least try when it was her time. Not only did she do a great job but it transformed her entire training approach and she went on to do this type of work more broadly. Through this training she was able to go from total fear to joy in four days. What did she say got her over the hump?

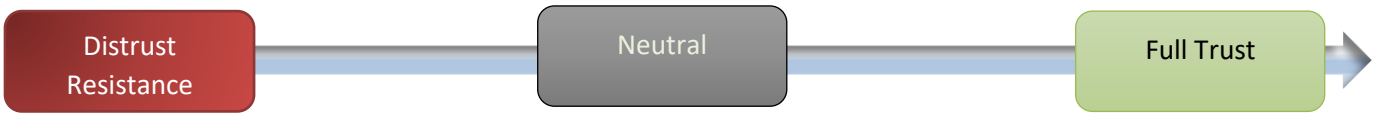
- The facilitators built a relationship with her and the class.
- The facilitators showed that they were there to help and serve the participants.
- The facilitators helped the participants become comfortable with each other to reduce the tension. They removed the fear that they would be judging each other on the presentations.
- Building this trust helped each participant trust the process.

We also built trust by conducting a conference call we held a couple of weeks before the session. We introduced ourselves, provided the course outline and expectations, and answered questions. The first person to join the call asked how long the call would be. He said he did not have value for all of this and had a golf match to get to. I asked him some questions about his golf and asked him to share his best two holes with me when we did the session. On the first day of the session, he arrived first and told me about his two best holes. He still did not want to be there but he was willing to go on the journey and his trust of us shifted toward neutral.

We realized that none of the participants wanted to be there but during the several-day session, they went from resistance to fully engaged. They came in gloomy on day one and at the end of the day, they had hope. They arrived on day two with anticipation. At the end of the session, we asked participants to rate on a scale of zero to 100 how they felt coming in compared to the end. Almost all of them were at zero coming in, and some even said negative numbers. In the end, they were all at 100 or more and ready to move to the next steps. Emma's life changed and she saw possibilities she never thought she could do.

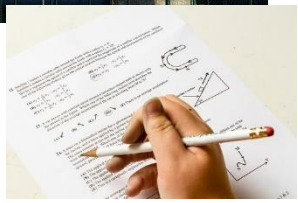
Using the methods, we reduced the fear, distrust, and resistance and created a team of energized trainers.

A Facilitator's Role is to Build Trust



- Build relationships even before the session
- Listen first
- Open with why, what, and how
- Show value for the participants
- Make it about them
- Acknowledge and value the knowledge they bring to the session
- Reduce fear
- Make good first impressions in introductions and room set up
- Be a facilitator vs. “The Trainer”
- Be willing to adjust approaches when necessary
- Don’t defend resistance. Use it as a springboard to understand the issues
- Value their learning approaches and provide various activites to keep them engaged
- Throw the Monkey vs. having to be the expert
- Connect the training to the vision of the organization
- Make the value to the participants clear

Validating the Learner's Knowledge



I was responsible for training operators on several pieces of machinery. I created computerized tests that operators took as part of their qualification.

I was working in my office and a person named Big Jim barged in, threw his test and notes on my desk and said, "I'VE GOT A PROBLEM. Your training and tests are terrible! I took a test and I got all the right answers, but the computer failed me. Now I have to do the entire thing over. I QUIT!"

This person was bigger than I and stood towering over me. While he had a gruff exterior, I knew he was a genius and learned quickly. I had to think swiftly.

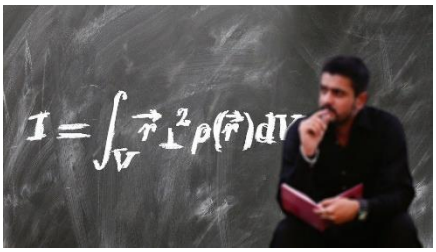
I told Big Jim that I loved problems and asked him to show me the issue. I logged into the test and he showed me the question he got wrong. I had programmed in the wrong answer. He was right, but the computer marked him incorrectly. The question was also confusing. I asked him for a suggestion to improve it and we rewrote it together.

I also asked him to critique other test questions and materials for improvements. He had a perplexed look on his face and said thanks and left.

A half-hour later, I had to go out to his operating area and I saw two younger operators doing their training. I asked them if they had been to lunch and they said that they had not. Big Jim came out and said they were not allowed to go to lunch until they completed the next module, indicating he had been working with them to complete their training successfully.

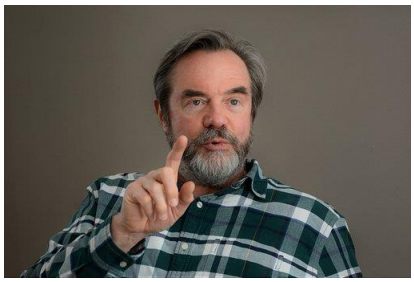
A two-minute conversation with a resistant person helped to transform him into an engaged proponent of the training approach. Big Jim was influential. He advocated training to others and accelerated the learning in our building. Being open to his ideas improved the training and most people enjoyed the experience.

The bottom line? Don't get defensive when you are faced with a resistant employee or participant. Quickly turn the situation around by getting their opinion. Value their input and expertise and build an advocate instead of fighting an adversary.



At one plant, a group of engineers was also college professors who had to go through the facilitation training. When they arrived, they asked me why they had to attend this class rather than teach it. After all, they were college professors and some had taught for years. They were polite but there was initial resistance and distrust of our skills and approach. I told them that we had created a group learning approach, and rather than we teach them, we all would be teaching each other to apply the concepts. I asked them to take notes on what worked well and what they would change in future sessions. Once they saw that we accepted and valued their input and ideas, their trust level rose. By the first half day, they were neutral. By the end of the day, they were all in. They could see that we were all in this together. We completed the session and everyone told us they wish they had this approach 20 years ago. They would have done things much differently.

Handling a Resistance Participant



I had one person who kept challenging me and asking difficult questions. I knew he knew the answer but wanted to trip me up and show he was just as good of a facilitator as I was. It was annoying but I could relax and smile with this challenge because I knew if we genuinely applied our principles in this book, things would change.

I used a process to deflect his question that took it off of my shoulders and on the class's shoulders. Rather than answering it directly, I would use phrases like:

> *Bill just brought up a good point and a challenge many of us face. Who has faced this type of challenge, and what did you do?*
>
> *Thanks, Bill. You brought up a point I had not considered. Have you dealt with that before? How about the rest of the class*.

If it were a significant issue, I would say:

> *This issue is significant to you all. Let's take a few extra minutes. Talk to your neighbor and brainstorm ideas for how we should handle this issue.*

As the facilitator, I do not have to answer every question. I can use the group to help. This approach builds the value of the participant. By the end of the session, he knew that I acknowledged his expertise and he no longer had to show others, so his resistance dropped. This approach is an example of 'Throwing the Monkey' on your back and putting it back on the participants.

Minimizing Resistance Before a Session

If you know a group is coming in resistance and with minimal trust, there are ways to acknowledge their issues upfront to reduce the resistance. Building trust may take more effort and feel like you are trying to break into a fortress.

I attended a four-hour session of operators in a plant site I was visiting. I was observing the course to give feedback to the facilitators. I sat with the operators and introduced myself to those at my table. I asked them if they knew the topic, and they replied that they did not. They were told to show up. I looked around the room and everyone had folded arms and blank stares.

The trainers started the session enthusiastically but provided no agenda or context for the session. The topic was "Becoming a World Class Operation." The participants kept challenging the facilitators because they had no trust that the site leaders cared about improving the site. It took an hour for the complaining to stop and no one in the room participated for the rest of the evening.

After the session, I chatted with the facilitators to see if they could identify the reasons for the resistance and lack of trust:

- The supervisors of these operators did not tell them why they had to come or why it was necessary.
- Some supervisors attended but sat in the back. They also were not sure of the value.
- They started the session with the content and no setup, objectives, or WHY built into the opening.
- They showed pictures of world-class manufacturing sites, while their site was in disrepair, and even the training room was old and in need of work.

We redesigned the class for the next session

- Before the session, we had the leaders get the group together to show the intent of the planned changes. The leaders admitted to the employees that the site did not meet the criteria shown in the training and it would take time to change.
- The facilitators shared the goals and objectives of the training ahead of time.
- The facilitators touched base with the participants to see what concerns they had before the training started so they could sense any issues from the participants or questions.
- We redesigned the opening:
    - The class worked in small groups to identify a frustration or waste in their area.
    - The group wrote those comments on a chart
    - They shared the objectives of the session and made a connection between their issues and how this training would be the foundation to reduce the issues.

The leaders and facilitators eliminated a lot of resistance before the session. The initial exercise allowed the participants to voice their concerns. The group was now neutral and the session was more productive than the first one.

Following the listed guidelines improves the probability of success. There will always be the really tough participants or groups and a deeper level of intervention may be needed. Attached is a one-page checklist to prompt ideas to reduce potential resistance.

Minimizing Resistance

Use this checklist to reduce resistance

Before a Session

Work with leaders and those who are accountable to ensure they are supportive and understand the expectations and time needed for employees to attend.	
Ask leaders to send a note to participants explaining how this training will help them and help improve the business.	
As facilitators, design ways to meet participants before the session. Send emails, conduct a video call, and send appropriate prework or other information so they are clear on the focus and their expectations. Build relationships as possible during these activities so participants feel more comfortable coming.	
Ensure participants have all the logistics, locations, and directions.	

During the Session

Have room set up, inviting, and organized	
Greet and talk to participants as they enter	
Get participants doing an activity when they arrive if appropriate	
Ask a leader to kick off a session	
Have the class create some ground rules you can use to guide expectations	
Build the WHY in the front so participants see what is in it for them	
For challenging participants, have the group answer some questions	
Keep the session interactive. Use the 40/60 and 20-minute guides	
Check in with quiet or challenging participants during breaks to see if they are ok	

After a Session

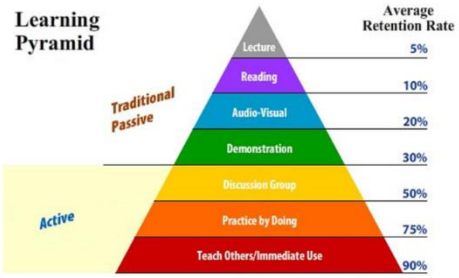
Send a followup note to participants	
Be available for questions or support	
Work with the accountable leader to follow up and support the post-session assignments	
Thank participants for any upgrading feedback and tell them how you will incorporate that in the next session	

Using the techniques in this book helps all facilitators look professional. Where are you in your facilitation journey? What are several tools or methods you can apply to shift you toward Learner Focused?

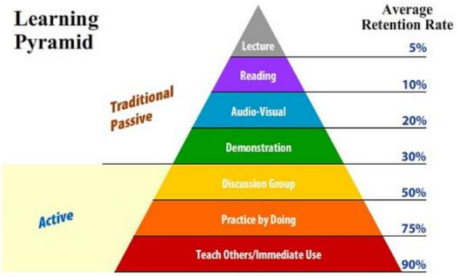
If you are accomplished and Learner-Focused, how can you coach others to shift?

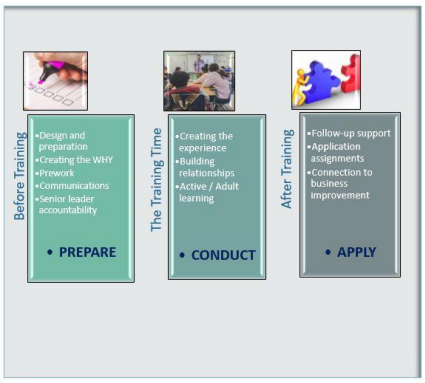
Dynamic Facilitation Checklist

There is a combination of active and passive learning approaches	
The 3 Stage Approach: We considered before, during and after the session	
We have a plan for the 20 minutes before and after the start of a session	
Our PowerPoints meet good practices	
We have some activities that do not use PowerPoint	
Our session and activities are divided into 3s Why, What, and How	
Exercises have clear instructions and questions for the debrief	
We have a way to begin and end with a bang	
Overall, we are close to the 40/60 Facilitator/Participant interaction balance	
We considered the 20-minute guide and used activities to keep participants engaged	
We considered the Sweet Spot to provide the right balance of content	
We considered ways to reduce silence and increase participation	
We have a few colorful charts with at least basic pictures	
We are focusing on one or two improvements for our eyes, movement, hands, and voice	
We have a plan to reduce filler words	
Our session has a variety of activities in the design	
Our activities vary so that we address different learning styles	
If applicable, we have post-work activities included in the design	
Our room set up is inviting, exciting, and organized	
Keeping Attention in Large Groups	
We considered ways to Minimizing and Maximizing Resistance	



Describe the Facilitation Connection for Each Picture

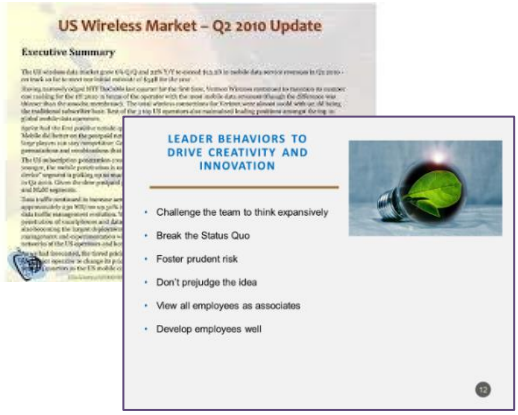


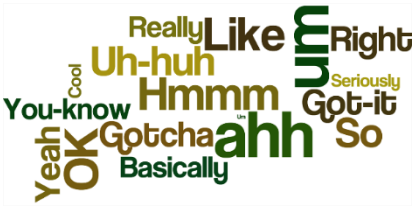


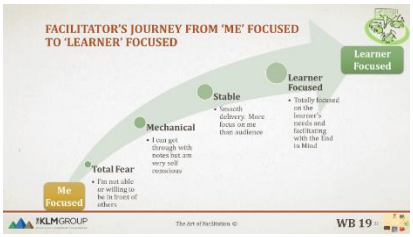
40/60

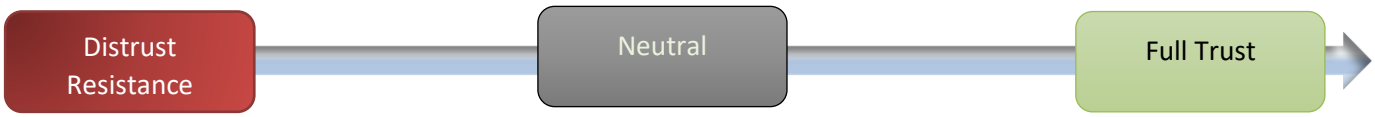
Balance


WELCOME
TRAIN-THE-TRAINER
WE WILL BEGIN AT:
10:00

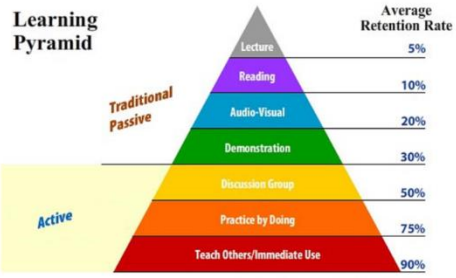

US Wireless Market – Q2 2010 Update
Executive Summary
LEADER BEHAVIORS TO DRIVE CREATIVITY AND INNOVATION
Challenge the team to think expansively
Break the Status Quo
Foster prudent risk
Don't prejudge the idea
View all employees as associates
Develop employees well

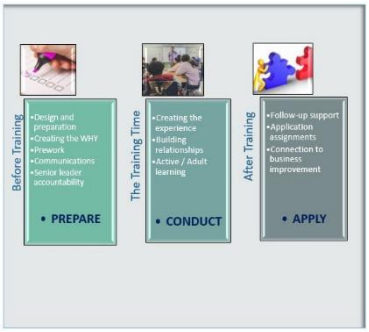

Really
Like
Right
Uh-huh
um
Cool
Seriously
Hmmm
Got-it
You-know
Gotcha
ahh
So
Yeah
OK
Basically

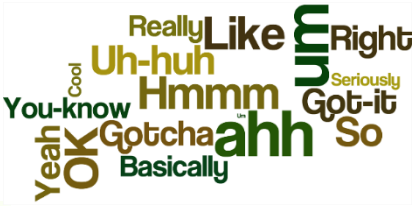

FACILITATOR'S JOURNEY FROM 'ME' FOCUSED TO 'LEARNER' FOCUSED
Me Focused
Total Fear
• I'm not able or willing to be in front of others
Mechanical
• I can get through with notes but am very self conscious
Stable
• Smooth delivery. More focus on me than audience
Learner Focused
• Totally focused on the learner's needs and facilitating with the End in Mind
Learner Focused
KLMGROUP
The Art of Facilitation ©
WB 19


Distrust
Resistance
Neutral
Full Trust

Dynamic Facilitation



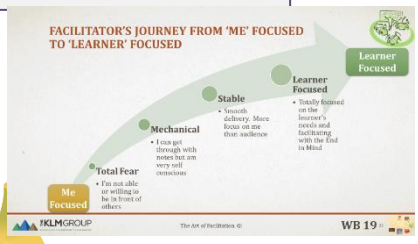


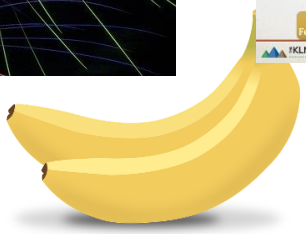


40/60

Balance

Why | What | How





Distrust Resistance → Neutral → Full Trust