



International Association of Facilitators
The Art and Mastery of Facilitation – Worlds of Change
Toronto, Ontario, Canada
April 27 – 30, 2000



World of Professional Discipline

FACILITATORS' SURVIVAL GUIDE, A-Z TECHNIQUES OF THE PROS

(Includes magic tricks, professional secrets, and failsafe techniques)

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Abstract

Professional facilitators need many techniques from which to draw upon, depending on the situations they encounter. The ones that they choose will depend upon the objective of the event, the audience and the client. This workshop explores the tips and techniques that seasoned, experienced pros use. It continues to build upon Dr. Hyland's 1998 and 1999 IAF presentations of The Best Tips and Techniques from Battle-Scarred Pros, adding still more organizational development tools to an expanded selection of facilitation techniques.

Introduction

Every event which we facilitate needs to be prepared with the client, audience and purpose in mind. That means that every event will need to be carefully planned with a mix of facilitation techniques -- all designed to help the client and audience reach their objectives.



When put into the context of organizational behavior and organizational development, these become powerful tools to help people achieve their goals.

We all have our favorite techniques. That's good. Those tricks have probably worked well for us. The danger lies in overusing our favorite technique. You've probably heard some variation of this story, but it illustrates the point so well: If I go home this evening and catch my slacks on a nail protruding from the wall, I will go to the tool drawer in the kitchen and pull out a hammer. Whack! Whack! --with the hammer. Problem solved. Tomorrow, as I work in my home office, I get scratched from a loose screw on my desk. Back to the tool drawer. "Well, that hammer worked well yesterday, why not try it again?" Whack! Whack! whack..whack..whack. I sort of messed up the wood, but the screw is now flush with the wood again. The next day I find the faucet dripping. Back to the tool drawer. "Well, that hammer has always worked, why not one more time?" ... You get the picture?

We much choose our facilitation techniques carefully, just as a physician carefully chooses which medicine to prescribe and in what quantities.

When asked, "How will you facilitate our group?" I always answer sincerely, "I don't know. You must tell me what you want to accomplish, who the audience is, what the interpersonal dynamics are, the history of the group with other facilitators, and where the alligators are hidden. Then, I will develop a plan which takes all of this into consideration." It's stupid to do a facilitation without this information!

Most of us take great pride in our work. Our professional pride (some would say "ego") demands that we do outstanding work for our clients. It isn't easy. It demands a constant retooling of our skills. It demands taking the time to assess the "process" and "content" of the meetings we facilitate. It demands superior people skills. It demands superior organization

skills. It demands the professional discipline of NOT letting our egos get in the way, or our laziness to rage. It demands that we not only have a whole range of techniques to choose from, but also that we know exactly which technique to use.

Finally, most of us want to make as much money as possible. (Ooops! Did I let a secret out?!) Whether it's salaries or fees we charge, top dollar goes to those who stand out. How do we stand out? Since we all have relatively good educations, personalities, and experience, I submit that the one thing that consistently causes us to stand out is our ability to know exactly what to do in a given situation. Rather than us sticking with an old trick that is not quite right (the hammer for the screw) or is definitely outmoded (the hammer on the kitchen sink).

To illustrate this - and to talk about money, I frequently tell this story. [Again, you may recognize it as a badly altered story you've heard or told yourself.] There was a huge ocean liner ready to sail from the Port of San Francisco. The captain was frantic. Something was wrong with the steam-powered engine system. He had his best people trying to fix it - to no avail. Finally, he called in an expert. The expert was a calm, quiet man who methodically walked with the captain through the engine apparatus. Finally, he stopped and opened his tool box. He took out a hammer and Whack! Whack! to a particular pipe. Slowly, they heard the gurgle start. They heard the pipes creak and groan. They knew that it was fixed! The captain was elated. "OK, let me pay you and we'll be off." The expert said, "That will be \$10,000." "\$10,000!," the captain bellowed, "for that price, you should at least give me an itemized bill." Calmly, the expert took a piece of paper and wrote: For hitting the pipe with a hammer - \$1; for knowing exactly where to hit - \$9999.

The following are tips, tools, techniques, and tricks that, in my humble opinion, are the best of the best. I've shared and stolen them with colleagues over the years. Sometimes they



circle back around and I hear them anew, with some slight twist a better facilitator than I put on them. Enjoy and prosper!

The following information will come to life as it is demonstrated in the seminar.

Setting The Stage

There are three questions which everyone (mentally) asks when entering any group:

- Who's here?
- What's in it for me?
- Who am I going to be?

As a facilitator we must get these questions answered for the group, otherwise they will not move forward.

Organizational Behavior/Organizational Development

Facilitation is usually done in the context of organizational development, and takes into account organizational behavior. A facilitator needs to understand fundamentals principles of both:

- Change Models
- Communication Patterns
- Solidarity/integration/connection
- Stages of group development
- Strategic implementation
- Resistance/subversion
- Mediation
- Power and Influence
- Alignment

Involvement

Several of the major components in accelerated learning also can be used very effectively in facilitating:

- Use of the triune brain
- Conceptual/ emotional/ survivalistic
- Use of color and music
- Mindmapping
- Games
- Stories
- Taking roles
- Activity
- Movement

and, Purpose/translation to something the person already knows.

Involvement Techniques

Every facilitator knows that they must keep the participants involved. Some of the favorite ways are:

- Polling - “on a one -to -ten scale, how do you feel about?”;
- Interviewing partners about the topic and then reporting out;
- Debate - where two people or two teams debate the merits of a proposed action or position;
- Rating - giving a numerical or visual (dots) rating to a proposed series of actions, proposals, or topics;



- 3x5 cards - putting each participant's name on a 3x5 card and continually shuffling them to determine who the next person you'll call upon;
- Group projects - having smaller groups tackle a portion of the problem, or simultaneously attacking the problem from different perspectives;
- Performance - showing how it might play out;
- Role playing - with the facilitator taking an alternate role to demonstrate a position;
- Games - using a "game" format to tackle an issue, such as redesigning the organization;
- Questionnaires/quizzes - to capture a sense of the group's position or direction;
- Critical incidents - taking an important event, analyzing it and then determining what we can learn from it;
- Flashcards - having participants create flashcards with questions on one side and answers on the other, then giving to other groups to play with;
- Cartoons - such as posting a Dilbert cartoon and asking what it means to the group;
- Stories - having the group tell war stories which illustrate the point you're trying to make, or having them create a story about the issue;
- Tag - having the person talking "tag" the next person of their choice to talk;
- Movement - having participants take different chairs for different topics or moving people from one group to another;
- Posting Agree/Disagree/Strongly Agree/Strongly Disagree signs in the four sides of a room and then making statements that invite participants to go to "their" side of the room and create a dialogue with each other;

- Writing intensive - having everyone take a blank sheet of paper and write furiously for three minutes about everything they know or suspect about the topic/session of the day, then debrief to get a sense of where the group is starting from;
and, Evaluations - having participants evaluate their progress several times during the day, what's working and what could be improved.

Logic

Many groups have not been schooled in the use of logic. Every facilitator knows how this can throw a group in to a heated debate about what everyone "feels" about a situation.

Feelings are not bad. For a group to move ahead, they just need to be balanced with logic. The group can be shown or taught to use:

- Flow charting - graphically displaying a process to determine any changes/additions/deletions which they want to make; process evaluation - drawing a line down the middle of the paper and on one side listing "what's working," and on the other side, "what could be improved;"
- Force field analysis - drawing a line down the middle of a paper which represents the status quo of a situation, with an arrows from either side pointing to this center line, listing on the left side "forces which are propelling us forward" and on the right side "forces which are holding us back;"
- Multivoting - giving people so many "votes" on a subject which they can distribute between the issues on the board;
- Interrelationship diagraph - a graphical representation for illustrating the most critical decision in a series of decisions;



- Fishbone cause and effect - a graphical representation in the form of a fishbone which guides the group to determine what is the core cause of an action;
- Tree diagram for determining a flow of events; and,
- Radar chart - a graphical representation that represents a current state of affairs within the group or organization.

Intuition

Logic can be balanced by intuition. Most groups actually bring both to a session. The problem is that the group, by its makeup and preferred decision making style of the participants, may overuse either logic or intuition. So, whichever they overuse, we must bring in the balancing force in order for it to be the best possible decision.

To have participants use their intuitive skills, several techniques are helpful:

- Pro/con/gut - in which a person writes the pros and cons of an idea, then on the other side of the paper, writes what their “gut” says...followed by a discussion;
- Jan. 1, 200X - in which an individual or group projects out to a future date and sees the issue from a bigger perspective;
- Data bank exercise - where people frantically list all the information and thoughts which come into their heads regarding an issue, followed by a discussion;
- Personal signal exercise - where people are taken through body-awareness imagery and they locate the place in their body which always signals that they should be paying attention, for example, if they get an upset stomach about something; and,
- Triune brain - using a technique to take into the emotional, subconscious part of the brain to see what information is there.

Managing Conflict

At one time or another, most groups must experience conflict. A good facilitator must manage this. Some of the best techniques are:

- Pacing - speeding or slowing the pace until the dynamics change;
- Mirroring - displaying similar body language to the person who is emotionally charged (this does not mean raising fists, rather it's conversation body language which shows empathy);
- Stating the obvious or "naming the behavior" - simply telling the truth about what you're observing that is going on;
- Overarching goals - continually returning to the points of agreement so that you have a foundation from which to rebuild from the conflict;
- Process/content weaving - facilitating in such a way that when the group gets stuck in its "process" that you focus on the "content" and vice versa; Positioning - having people take mental or physical positions other than their natural position and have them talk from that "place;"
- Circle the table exercise - where the issues/positions are displayed graphically on the table (slices-of-a-pie shape), then each person adopts a position, after everyone has a turn talking from this "position" they rotate to the next one and discuss, then again; and
- Five Why's - where you ask them to reflect on the "why" of their issue/ position/ stance by asking them "why" five times to get the real core of the issue.

Personality/Working Styles

Whether a facilitator simply knows the models of personality and working styles, or we use them to move a group along, these models are invaluable. The ones which work really well:



Carlson Learning's DISC - where there are four working styles which are obvious to everyone; CARE - which illustrates people's preferred roles in a group; Listening Profile - which illustrates people's preferred listening styles. Then there is Gardner's eight intelligences (his original seven, plus his new one) - which highlight how people learn/think/and act; the enneagram - the explosively growing and popular nine-pointed personality system which focuses on motivation vs. behavior; and the logic/intuition inventory - which identifies what mix of intuition and logic people use to make decisions.

Conclusion

“It feels good!” When we facilitate a meeting, particularly a tough one, and it turns out well, we feel good. We are blessed with a profession that allows us to make a difference in people's lives and we enjoy not only the economic benefits, but also the psychic ones. We get to experience power and influence, conflict and coming together; resistance and action; despair and elation...when it all comes together.

I hope that these techniques, which are collectively ours as facilitation professionals, help you feel good after your next meeting.

Author's details

Dr. Bruce Hyland is a training and organizational development specialist, author, and former university professor. Bruce holds a masters degree in business administration and a doctorate in organization and leadership. He primarily works for the Federal Reserve Bank in San Francisco conducting training and providing organizational development services, but maintains a few private clients “for the fun of it.”

Prior to joining the Fed, he was professor and program director of management studies at City College of San Francisco. He is the senior author of three books *Reflections for Managers*,

McGraw Hill 1994 - now in ten languages; and *More Reflections for Managers*, McGraw Hill 1996, *Reflections for the Workplace*, McGraw Hill 1997.

Before his academic tenure, he was the senior organizational consultant with Mathis and Associates, a west-coast consulting firm. Earlier in his career, he was a divisional manager with American Express.