

Facilitation Techniques



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Session Description



- Get the techniques and tips you need to facilitate a meeting or requirements workshop. Learn how to build trust across your stakeholders, uncover and resolve requirement conflicts while in session, and help get buy-in for a recommended solution with all parties. You will also learn how an annotated agenda can help you successfully plan the workshop to the right level of detail. Do you need skills on how to manage a difficult group or get them to a decision? We will cover a few of those too.

Today's Agenda



- Why a Facilitated Session
- Scope, Goals and Objective
- The Participants
- Conflict
- Decision Making and Problem Solving
- Group Dysfunction and Difficult People
- The Agenda
- Tips and Tricks

Why a Facilitated Session



- **A facilitated session**
 - Structured process of collecting information from the diverse members of a group and have the group synthesize and validate the gathered information
 - The facilitator guides the process
 - The team is responsible for the results
- **Characteristics of a facilitated session**
 - There is no generally agreed upon outcome
 - Input is needed from several sources
 - There is a sponsor
 - The facilitator does not have a vested interest in the outcome
- **Role of the Facilitator**

Planning the Session



- 5 Essential Steps
- 1. Plan and Prepare
- 2. Open the session
 - intros, ground rules, logistics, review agenda
- 3. Conduct the Session
 - manage process and discussion, move group towards objective, confront group dysfunction, control own behavior
- 4. Close the Session
 - review session and products – what's next – thank you's
- 5. Post-Session Follow-up
 - evaluate and action items

Facilitator Styles



- **Controller**
 - tells and thinks
- **Persuader**
 - tells and feels
- **Analyzer**
 - asks and thinks
- **Reflector**
 - asks and feels

Scope, Goals and Objective



- **Scope**
 - What's in; what's out
- **Goals**
 - What are you trying to accomplish
 - What is the end state – how do you know if you are done?
- **Objective**
 - What are you going to do in this session(s)
- **Approach**
 - How are you going to do it?
 - ✦ Brainstorm
 - ✦ Affinity
 - ✦ Context Diagram
 - ✦ Team building
 - ✦ Strawman
 - ✦ One or more sessions
 - ✦ Risk analysis
 - ✦ Decision making models

The Participants



- Who is participating
- Where are they
- What do they know
- What do they need to prepare
- Who are the decision makers
- What role will they play
- How will they interact
- What are their agendas

Conflict



- Conflict is good
 - If everyone agreed, you wouldn't need a session
- Different opinions, expertise
- Manage the conflict

Decision Making – Problem Solving



- Model
 - Consensus
 - Executive with input
 - Executive
- What information do you need to make the decision?
 - Right people
 - Right data
- Gather data
- Organize it
- Make the decision

Group Dysfunction and Difficult People



- **Assess existing dysfunctions**
 - Plan on it
 - ✦ Ground Rules, Facilitator style
- **Make sure you're not the difficult person**
- **Types and Symptoms of Dysfunction**
 - Group has difficulty working together and/or is not achieving results
- **Types of difficult people**
 - Hostile/Aggressive
 - Know it All
 - Super Agreeable
 - Negativist
 - Silent/Unresponsive
- **Introvert versus extrovert**
- **Different org levels**

The Agenda



- Your plan
 - Participant agenda
 - Facilitator's annotated agenda
- What you are going to do, in what order, for how long
 - Pre-work
 - Logistics
 - Introductions
 - Wrap-Up
- When it goes wrong

Tips and Tricks



- Remote participants
- Technology and tools
 - Don't let them get in the way
- Tolerance for Silence
- Public Scribing
- Logistics
- When not to do a facilitated session

Thank You!



- Questions?