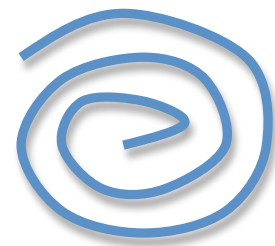


# Making It Happen

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Facilitating Intentional Experience





# Making It Happen

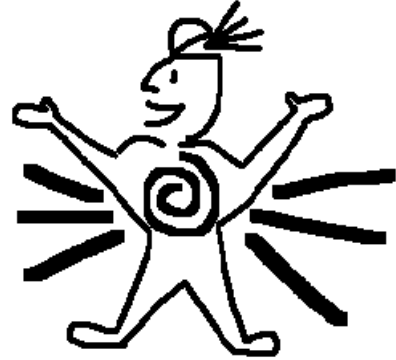
## *Facilitating intentional experience*

The role of a facilitator is complex. You serve as a guide to ensure a smooth process, a coach to provide motivation and direction, and a mediator to establish group dynamics. When you serve as a facilitator, you create conditions designed to meet everyone's individual goals (even when they don't have one).

### Intentional Experience

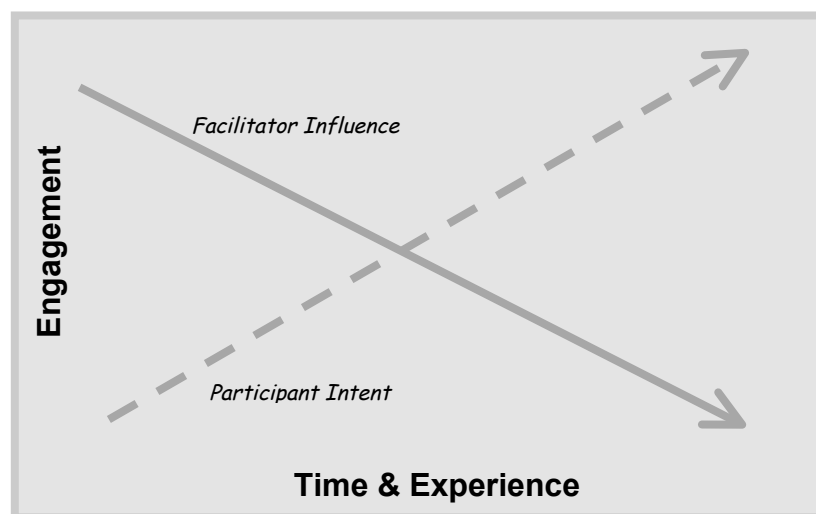
Facilitate literally means *to make easier*. There are many things you can do to help others engage in an experience, which makes it easier to get things to happen.

The first question a facilitator should ask is “what do you want from this experience?” In a group experience the answer may have multiple layers, so it is important to move the accountability for achieving the goal away from the facilitator and toward the participants by helping each person uncover his/her individual intentions. That way you can serve as a “conductor” providing direction, emphasis, and tempo, but not actually producing an effect.



At the core of making any experience easier is a clear goal. Once the goal is established, barriers can be removed and supports can be added to make progress toward the goal happen more quickly and more effectively.

The ultimate goal of a facilitator is to shift intention from him/herself to the participants in the experience. This provides opportunity for many people to achieve individual goals simultaneously and intensifies the value & impact for everyone.



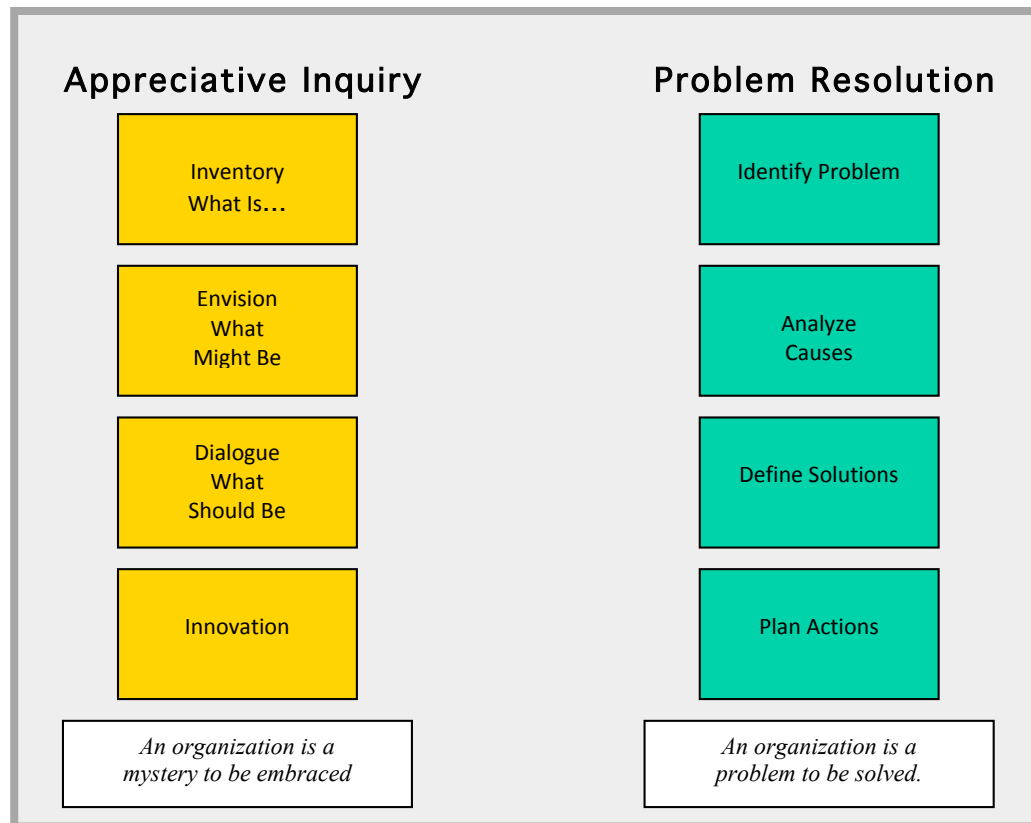


## Appreciative Inquiry

Most groups don't move directly to their objective. It is more realistic to assume you will spiral around your objective moving closer and closer to exactly what everyone wants from the experience. It is however, important to keep checking back with the objective or you can end up spiraling OUT instead of IN.

Expecting to be moving around the objective allows you and the group to have a process that includes their needs, which often develop into unexpected issues and a productive, purposeful task drive. Often times, process and task are presented as opposite forces—a paradox. Appreciative inquiry provides a paradigm that includes both forces as essential elements, working together so that both perspectives can be included in your facilitation strategy.

Appreciative Inquiry assumes an organic, evolutionary approach to working together. Most business environments are more familiar with a mechanical, problem resolution approach. Appreciative Inquiry works with the end in mind, while Problem Resolution works with the past as a benchmark. Neither is a “better” process, but Appreciative Inquiry is usually more suited to a learning atmosphere. Either way, you should be clear which process you are following or your group will become confused with the demands on their involvement.



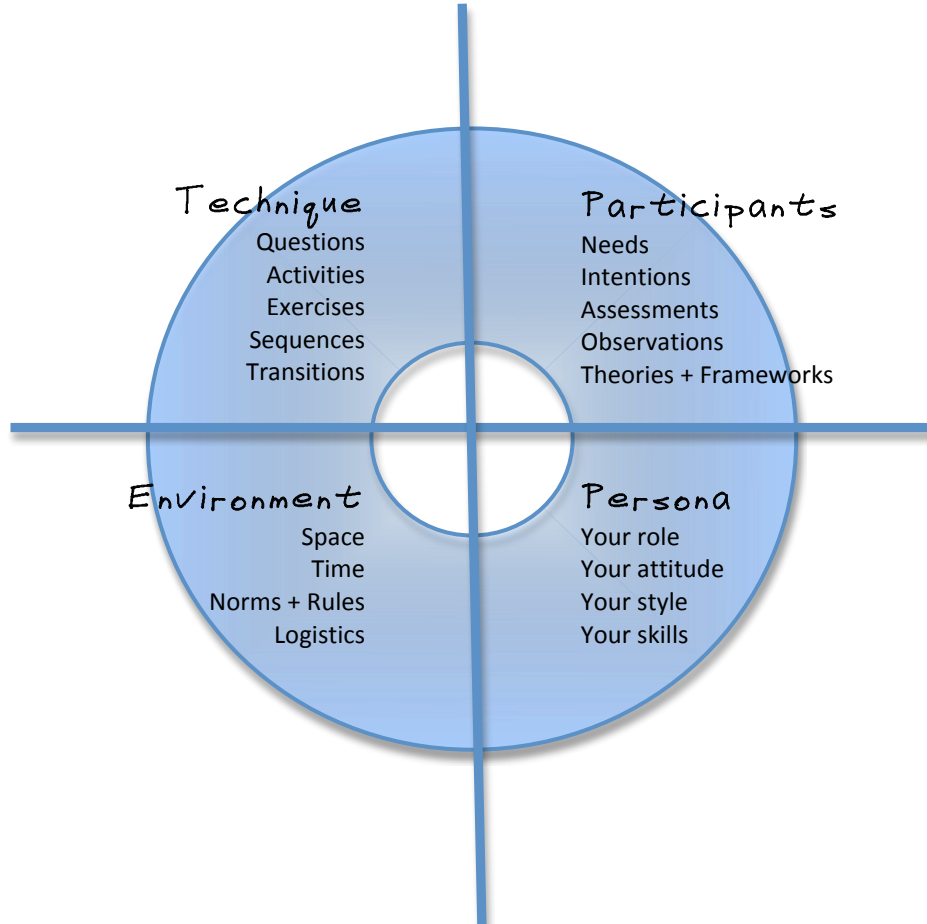
RESOURCE: for an in-depth review of *Appreciative Inquiry*, see [The Thin Book of Appreciative Inquiry](#) (Hammond).



## Multitracking

For any facilitator there are literally millions of options and decisions that can be made in any situation; and frequently there are dozens of different “decision tracks” that must exist simultaneously in order to make a group experience run smoothly. Think of facilitation like listening to a cassette tape with a symphony playing Mozart. The music is recorded on 16 tracks that exist parallel to each other on the surface of the tape. If there is any damage to the tape, one track may disappear, leaving a hole in the sound produced. In facilitation, you need all tracks playing simultaneously in order to produce a harmonious experience for everyone.

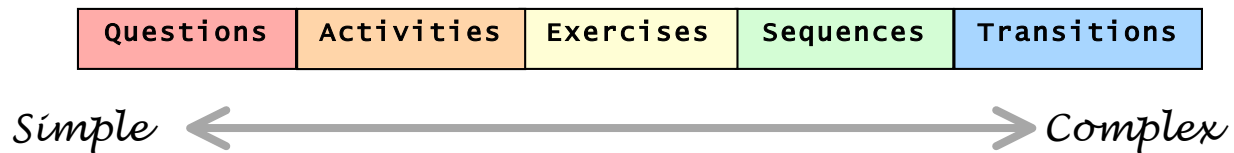
The multitracking model below provides four areas for attention, each with many possible diagnostic or decision tools, each must be considered in the context of the others in order to make things easier for the participants to achieve their goals.





## Technique

Often referred to as a “bag of tricks”, facilitation technique takes time and experience to develop. There are five areas of technique to study and evolve. They can be arranged on a continuum to show how they relate to each other on an axis of difficulty for the facilitator to accomplish.



## Questions

Questions are the basic tool of facilitation. Nearly everything you say can and probably should be presented in the form of a question. When a participant asks you to answer a question, frequently your best response is a question. Not to appear slippery or evasive, questions demonstrate two things about your role:

- 1.) You aren't the source of answers for them, *they are*.
- 2.) It's okay to “not know” everything before proceeding into the activities.

If you begin with questions you can get started quickly and before anyone knows it, they are engaged in the work of the group, not talking about the work of the group.

Facilitation is about getting the participants to have primary experience to use in the achievement of their objectives. If you're talking, they are not getting primary experience. Simply by answering one question with another such as, “does anyone here know the answer to that?” you shift the experience from you to them.

Another important element of questioning is to not take one answer as enough. If you assume there is more to someone's response, the balance of time spent on you talking versus participants talking will shift to them. A good question to use in your role to shift the balance is, “can you tell us a little more about what you mean by that?” or “does anyone else have similar or different perspective on that?”

Sometimes the group looks to you to resolve conflicts based on a person's certainty or stubbornness. When you engage that scenario, a good question is, “would you mind



sharing how you came to that conclusion?” Finally, a “silver bullet” question to resolve strong opinions that seem to bog the group down is, “can you share an example of where that has happened?” In both cases you and the group can *learn more* about the person and find opportunities for agreement and misunderstanding that will help you resolve the conflict. This works much better than trying to over-power or convince the person to change his or her opinion.

RESOURCE: for more in-depth reading on the use of questions explore the concept *dialogue*. A good start is the book [Getting To Yes](#) (Fisher & Ury).

## Activities

The use of activities for group experience is the primary difference between presentation or instruction and facilitation. The result is more active involvement by the participants and the creation of direct experience versus secondary experience. It is through activities that you shift the intention from the facilitator to the participants as described in the role of a facilitator earlier in this guide.

Activities can be anything that gets you to stop talking and gets the participants *actively* involved in reaching their group objective. That means a well constructed Q&A session, a panel discussion, a problem-solving initiative, a metaphorical game, a research experiment, or a small group discussion can all be considered an “activity”.

RESOURCE: for lots of ideas about activities see [Quicksilver](#) (Rohnke), [1001 Ways to Energize Employees](#), and [New Games](#)

## Exercises

Exercises take many forms just like activities. The difference is that exercises are complex, self-contained “packages”. Examples include business simulation games, third-party presentations, courses, and tours. In each case, there is a complete set of objectives, ground rules, and resources. Exercises can be inserted into a group process to enrich the experience with content and social interaction; or they can be processed in a “book-ends” fashion with pre- and post- meetings conducted by you as the facilitator. In the latter case, there is no sequence to the design, the experience consists entirely of the one exercise.



## Sequences

The sequence of activities and exercises followed by a group has a great impact on the clarity and impact of an experience. There is a strong link with the *Participant Track* in this technique because your choices should be driven in part by the assumptions and observations you make about your group.

Sequencing is a holistic view of your session that takes into account the nature of each activity and how they play off each other. In other words you can increase engagement in a group by “mixing it up” a little using different types of activities and exercises. In this case, there is a strong link the *Environment Track* as you influence a group atmosphere that supports the objectives of the experience. It is important to provide a sequence that works on many levels of technique—not just to be different from the previous activity so people don’t get bored.

## Transitions

Ramping and Leveraging are two key principles to facilitating transitions in intentional experience. *Ramping* allows you to use one exercise or activity to prepare for another at a later point in your session. This makes it easier to cover complicated topics without long explanation or monologue statements on your part. You can refer to the previous experience in shorthand language and quickly move into the new activity. Furthermore, ramping allows you to help a group warm-up and prepare for advanced activities.

*Leveraging* is the opposite of ramping. By working backwards in a process, you can simplify a conflict in understanding or agreement by using only a shared experience to negotiate the impasse. With leverage, you take away outside influences that cannot be quantified in the present, thereby limiting the influence of one member of the group over another. To avoid appearing manipulative, you should “plant seeds” in your agenda that create permission and readiness in the group for you to use this technique.



## Participants

Understanding the responses and actions of the people in the room can be the difference between a great plan and a terrible fiasco. The nature of intentional experience and appreciative inquiry is that the plan is not the path you will follow. The participants will be the “drivers” who make the choices; you can only provide advice and insight to help them decide responsibly.

## Intentions

People come to meetings with all sorts of reasons; most have nothing to do with the stated purpose of the event. If you expect to transfer intent from you to them, it pays to spend time clarifying the reasons why people have arrived. This is no easy accomplishment, especially if there is an air of impatience to “get started” in the environment. If a straightforward review of objectives and validation by the assembly is not appropriate or effective, you may have to circle back by weaving *checking questions* into your process. This allows you to clarify intent “on the fly” with the group and avoid what feels to them like a process-bound waste of time. Once you feel comfortable that everyone has a valid reason for attending and working toward the shared objectives you can have more confidence in the application of your facilitation technique.

## Assessments

Taking surveys either with paper and pencil, electronic voting software, or simply “a raise of hands” provides you with real feedback on specific questions. This can be done casually with eye contact and a nod of the head or more formally with data everyone can share. You can also conduct interviews and use pre-existing data to build your understanding of the participants you will facilitate.

The more homework you do the more sure you will feel when you design a sequence, lead and activity, or facilitate a discussion. Sharing nuggets of your knowledge about the group also increases your credibility and adds value to the process of the group.

## Observations

Live, in-the-moment observations are what makes facilitation an art, and very difficult to teach. Furthermore, if you are not comfortable with all of the issues in the Environment Track, you will spend more time resolving seating arrangements, temperature problems, and dietary requests. The goal of good facilitation is to have everything else taken care of so you can *pay attention* to what’s happening in the experience.

Good observation requires you to remove yourself from the action so you can get a perspective that nobody else has in the room. During activities, facilitators are tempted



to conduct other business and to take care of logistical issues. Don't. Sit with small groups and listen to their conversations. Ask more questions when the process bogs down. Watch the dynamics between individuals and adjust the process to make things easier.

Observations can lead you to interventions if you can connect them to patterns you've observed in other groups or if you attach them to the logic of a broader theory on human behavior.

## Theories

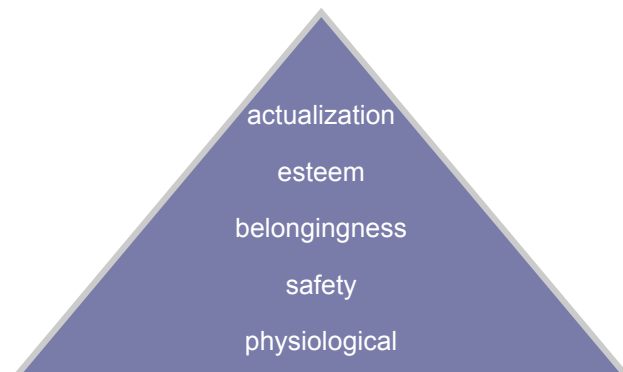
There are hundreds of theoretical models you can use to diagnose & understand human behavior. Some are more accurate than others, and you'll find that a small set work best for you. The point is you need to have a small set that you use consistently to hypothesize about your assessments and observations.

Without analysis and hypothesis you are simply an observer of the process. Facilitators need to actively influence the process of the group to make it easier for them to achieve their goals. With theories it is helpful to work from an *attitude of wonderment*, not certitude. These are only possibilities with nice logic and predictable patterns, they are not the facts.

Facilitators need a point of view on human behavior in groups, in businesses, and in any other relevant environment to develop accuracy and comfort with the wonderment approach. The following suggestions are by no means necessary or sufficient; they're just a start...

### Maslow's Hierarchy of Need

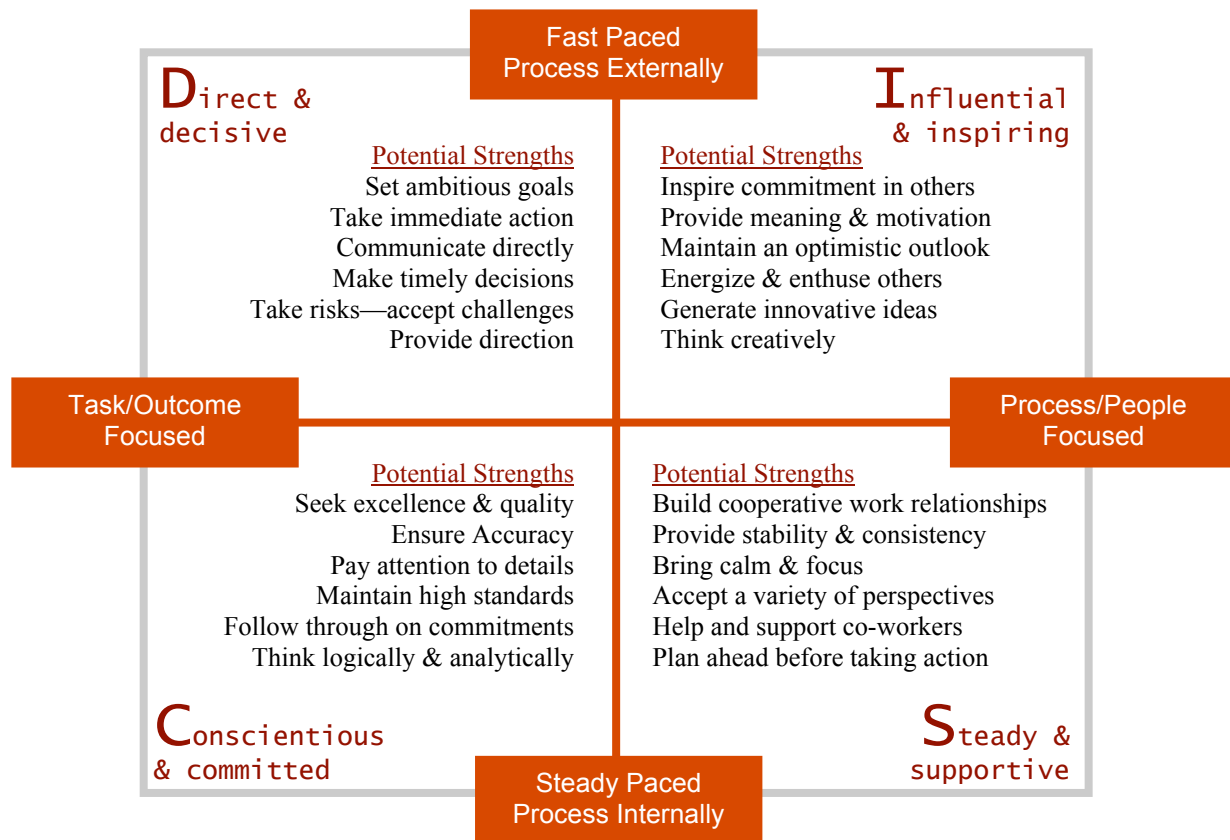
The basic premise of this theory is that all people seek to grow as their highest purpose in life. It is human nature to grow, because it ensures the survival of the species. The problem is there is a hierarchy of needs that must be met before a person has free energy for the exploration and risking that is necessary for learning & growth. Since nobody ever stays at the highest levels all of the time, it is helpful to wonder if "negative" behaviors might be symptoms of an unmet need lower on the pyramid, and then to make activity choices that will solve for that need.





### DiSC Social Style Inventory

There are dozens of “quadrant” based theories of human behavior. The DISC model is simple and useful in understanding specific behaviors in a social context. It is not a personality typing instrument like the Myers-Briggs Type Indicator (MBTI). The DISC model provides two lines of comparison which create four styles.

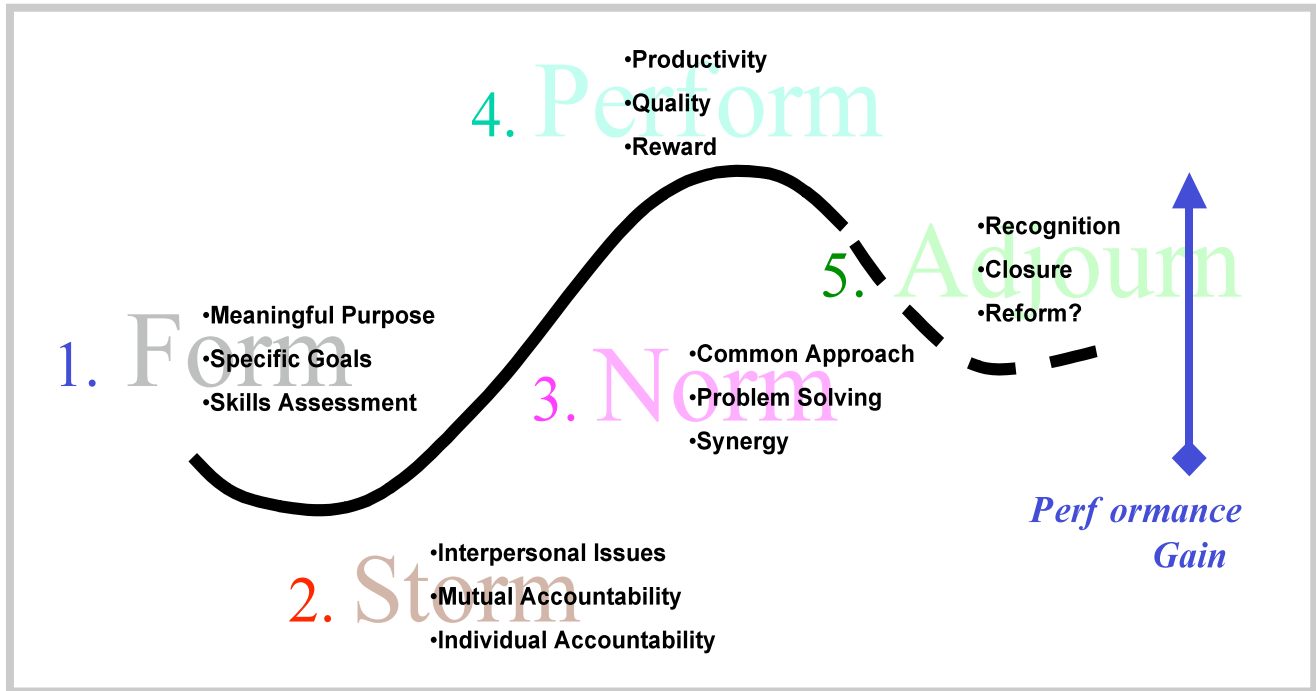


RESOURCE: for tools & resources on the DiSC instrument, see Inscape Publishing Company/Carlson Learning on the web for a distributor near you.



## Tuckman's Stages of Group Development

This model follows a simple rhyme to identify a predictable process that most groups follow. It is useful to help people get past some of the social barriers that are common in group activities. These stages provide only a guide and your assessments and observations are the only data you can rely on to determine where you are in the process.



The only trick to the model is the common reluctance in adult groups to invest in the emotional energy it takes to move through *Storm* and into *Norm*. Frequently people will comply with each other rather than develop authentic commitment. Many groups never achieve the *Norm* or *Perform* stage. This is not a problem unless goals are set with the expectations of high interdependence and synergy. The key to this model is to set appropriate goals for the level of development the group has attained (*i.e. if a group is in Storm, they probably can't get as much done as a group in Perform*).

RESOURCE: for an in depth review of team behavior, see: [The Wisdom of Teams](#) (Katzenbach & Smith).



## Environment

The field of ergonomics provides focused study on the interaction between people working and the physical environment around them. There is a huge effect created by the atmosphere of an environment and the focus, productivity, and mood of the people within it. There are reams of research supporting this connection, and facilitators can sometimes make the biggest difference making things easier by taking factors out of the equation that will hinder the group.

Think of it like being an excellent “director”. Directors set the stage and arrange the props to create the biggest impact in a play or film, and facilitators “set the stage” for intentional experience.

Just as you send a message by being you, the room, materials, atmosphere, and logistics surrounding participants send messages too. To enhance the power of the environment and to capture it as a tool for your use be creative and spend the time and energy necessary to arrange things in a manner that sends consistent messages to the group.

### THINGS TO CONSIDER:

- Room location
- Chair style
- Temperature
- Windows
- Wall style
- Audio-visual aids
- Writing utensils
- Gifts
- Distractions
- Food
- Bathrooms
- Group experience together
- Recent events effecting mood
- Corporate styles & norms
- Rituals and traditions
- Time available
- Pressures on arrival & departure
- Future meetings
- Past meetings
- Work-in-progress
- Other priorities
- Special needs (ADA)
- Reputation of significant players



## Persona

The focus of this track is your self. Persona is the Greek word for mask—the meaning here is that you can choose how you will appear to the group and you should. How you dress, talk, move, don't move, etc. all have an effect on the people you are with. Depending on your previous experience with people in the group you are facilitating, you have reputation and credibility issues to resolve or utilize. The more you know about your own style, preferences, and skills the more you can neutralize or enable them. It is unreasonable to assume that you can play a role that does not affect the process or outcome of the group. Under this principle, it is in their best interests to apply your persona to the best of your abilities.

## Self-Awareness

There are many tools and instruments you can access to get a good picture of yourself. Many of these have already been described in the *Participants Track* section of this guide. It is irresponsible of you in the role of a facilitator if you have not conducted recent self-awareness exercises in preparation for your work with a group. If you were to choose only one lens to view yourself, the various instruments for Emotional Intelligence (EQ) provide the best, most relevant information.

RESOURCE: for an in-depth review of EQ, see [Working With Emotional Intelligence](#) (Goleman). Also, explore the Harvard Business Review for other articles and recent innovations in the use of EQ.

## Influence

The core skills of influence are positioning & presence. Taken from Sales Professionals, these skills involve understanding how others see the world and identifying with their needs and desires. *Positioning* involves highlighting the aspects of a situation that agree with the stated requirements of others. Once agreements are established, it is usually easier to resolve any differences that remain. Frequently, people are willing to proceed if some of their needs are satisfied without having to spend time on the differences. This gives you considerable influence over the outcome of the process.

One way to demonstrate connection with others is to manage your *presence*. Your presence is the way you dress, where you stand, the volume of your voice, the expressions on your face, and personal props you carry (or don't). Maintaining and effective presence increases your influence based on personal connection with the participants. Frequently you can use your presence to influence others without even speaking.

RESOURCE: for more detail on influence from the perspective of the Sales Profession, see [Stop Telling, Start Selling](#) (Richardson). Also see: [You Are the Message](#) (Ailes).