

The Seven Secrets of Facilitation

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One busy Thursday afternoon a few years ago in the office of a large organisation I worked for at the time, an all staff email was despatched. It had been an extremely busy week with a major project that had consumed much of the senior resource; so many of us were trawling through the sea of emails we had neglected in the previous days and weeks. This particular email was from the Managing Director, so despite it's chronological order being way behind many other emails, I of course opened it immediately.

I could tell everyone else in the office opened it simultaneously. You could actually hear the collective groan of disappointment and exhaustion as we read individually yet responded as one.

The boss wanted to have an Away Day. A Brainstorming Retreat. A Strategic Planning Session. A Horizon Audit to ensure we had clear direction for the future. A Team Building Session to maximise the linkages of the organisation and break down the silos. An Executive Retreat to discuss the barriers to improved performance. A Future Focus Forum to identify key trends.

The entire of office read platitude after platitude of what the MD hoped to get out of the day. Vision, empowerment, ownership, motivation, enthusiasm, passion, performance, direction.

But between the lines they felt with certainty that this meeting would be a jabberfest like all the others they had attended in the past. Where there would be a lot of talk about the issues, but no path forward. Where a facilitator would lead them through a series of exercises but not make concrete conclusions about what they had to do differently to achieve a result. Where they would have to work extra hard the day before and the day after to clear the decks to be able to spend a day outside the of office – only to be rewarded with a boring, lowest common denominator agenda that failed to challenge the status quo. And worst of all, to watch everyone nod their heads and agree that they would do things differently, drink copious amount in the bar or over dinner and then return to work the next day and change precisely nothing....

It was pretty much there and then that I decided there had to be a better way to facilitate meetings. A better way to harness the brainpower of intelligent and passionate individuals to achieve outcomes that are actually productive. I'm all for spending time in the

bar – but hey, let's take some real, actionable steps first in the limited time that a dedicated group has together. So I've been facilitating meetings and running workshops now for over 15 years, primarily in the area of marketing and branding. It has taken some time to dawn on me that good facilitation is an acquired skill. It is actually quite a challenge to be a good facilitator, and many people have asked me what I think the basic secrets to facilitation are. So here with my compliments are my Seven Secrets of Facilitation. Some of them may be quite contentious, and not all of them will suit everyone's personal style. But I have found them really useful and I hope you do too.

1. Good facilitators deliver output. Great facilitators deliver outcomes.

The days of what I call lazy facilitation are over. Particularly in the area of marketing and branding, the wastage of the entire team heading off on an Away Day to brainstorm possible trends and issues and return with reams of butchers paper output but no productive action plans is no more. Whilst it may be tempting to navel gaze and hide behind the 'blue sky thinking', your role as Facilitator is to ensure that your clients come out of a session with a productive outcome. A clearer direction and a set of action plans than they had when they went in. It is why my business is called Essence – because it gets to the heart of the issue quickly and provides real, actionable, outcomes that can be readily implemented.

To ensure your session delivers usable outcomes a number of things must happen. As part of your pre workshop meetings with your client I would expect you would sort through the basic issues of the objectives of the session, what it is they want to explore, and who should be there to do the exploring. It is clearly imperative you understand that context before the workshop begins.

Clearly you will have an agenda, some exercises and maybe even a hypothesis about what action items you think will evolve. However, the biggest enemy of usable outcomes in a facilitated session is lack of clarity and increased confusion. There is a strange dynamic that often overtakes groups in a facilitated session that results in more questions rather than answers! I like to think of it as convergent/divergent thinking.

Instead of sifting through all of the information to identify what is most important: funnel down to what is most important.

A facilitated session often loses clarity by getting bogged down in the bottom half of the process: take what is simple and expand to confusion.

So your role as facilitator is to always ensure that the group is in the top half of the thought process – explore all the options and get all the information, but funnel it down to the key outcomes and action points that will be of value.

I reckon as you go through the workshop there are three key questions you need to keep a mental track of in order to ensure usable outcomes.

- What exactly is the problem or issue?
- Why do we have this problem?
- What outcome will address this problem?

Quite often in a workshop I will allow the group time to navel gaze, free form ideas and generally get issues off their liver. But if I can't see how the introspection will help me and the group understand the problem, understand why we have the problem, and what outcomes will address the problem – then I draw a halt to the discussion and refocus the team.

Actionable outcomes are your responsibility as Facilitator, not the organisation. It is their job to implement the outcomes – and your job to help identify them. But beware, it is human nature to make the simple complex, to confuse rather than clarify. Great facilitators are like expert sheepdogs. If you allow one of the sheep to stray they will take off and potentially take half the flock with them. (It is an extraordinary sight to see sheep after sheep repeat the behaviour of the first one, even when that behaviour is as futile as head-butting a fence. Not dissimilar to many corporate behaviours I've found!). A great Facilitator will round 'em off at the pass, keep the group moving forward, together. Where relevant a short diversion can take place to rethink where we are headed – but always with an eye of the outcomes for the business.

2. Force participants to invest.

What's worse than a whole lot of egos in the room that are fighting for attention? A room full of people that are too apathetic to care about the outcome at all.

I'd rather have the difficult sheep who really challenge my ability as facilitator than the glass eyed ones who simply baa in corporate unison and follow the leader.

I think it is the role of the Facilitator to force people to commit emotionally to the process. You want participants to invest some of themselves in the outcome, because it will inevitably lead to greater success back in the real world. Why? Because they have ownership of the outcome!

But this is hard to do. I think back to how jaded I felt heading off to our MD's Away Day. My strategy in sessions like that was to adopt what I like to call my 'hollow body'. Like I'm there... but I'm not really there! I'm sitting there allowing the conversation to flow over me and observing things cerebrally without really engaging with the discussion. I was pretty good at it though, I knew I had to throw in a few well-timed hollow comments from my hollow body so it looked like I was there. But I wasn't really there.

Sound familiar? How many of your people are just hollow bodies in a workshop?

So I use a variety of techniques to force participants to invest. For example, I assign some pre-session homework. Not difficult and time consuming homework because if you do that it just doesn't get done so you start the session on the back foot. Just homework that starts to force involvement. I might send the same trashy women's mag to each of the participants and ask them to choose three pictures that represent where the brand, company, team or organisation is now, and three pictures that represents where they want to be in the future. This is an excellent icebreaker that instantly puts everyone on the same level, from Managing Director down. I ask people to share their pictures with the group and justify why they chose them.

Or I'll send them a page of 200 adjectives and ask them to indicate three adjectives that reflect where the brand, company, team or

organisation is currently and three for where they want it to be. Again, with the purpose of forcing participants to take a position and then explain that position to others in a non threatening way. Techniques like this are simply designed to de ate the hollow body, to bring people into the discussion and force them to invest a sense of their emotional self into the outcome of the session. It is small subtleties like this that will make the difference between a session that is conveniently forgotten, and one that is acted upon back in the real world.

3. Not everyone will like you and that's okay.

I am not a facilitator that adheres to the convention that says the best facilitators put everyone at ease, and ensures everyone feels comfortable and happy to naval gaze and contribute naturally in their own way.

Bollocks to that! As far as I'm concerned, there's not a lot that is natural about the process of a whole lot of people getting together to design a future strategy for a brand, organisation, service or marketing exercise. The whole process of marketing is by design and therefore fundamentally unnatural. People in the real world don't spend anywhere near as much time thinking about their behaviour as we spend thinking about their behaviour!

So whilst I believe it is certainly important that a facilitator puts participants at ease, I also believe it is their role to gently challenge the group to really explore the issues. You don't want to dumb the process down to the lowest common denominator so that whilst you haven't offended anyone – nor have you actually touched them into action!

I'm proud to say that not everyone in my workshops like my somewhat bossy style – but even my most ardent detractors will attest to the fact the approach gets greater traction. Which leads me to a critical element in facilitator success in my opinion, and that is the presence of intuition.

It's hard to write a tip about intuition, because if you don't have it, I think it's almost impossible to learn. But a great facilitator can live 'in' the session, but also 'on' the session. Whilst they facilitate towards a productive outcome, they can also sense the pace of the group, the

flavour of the room, and whether the group is progressing or floundering. I have said there are many who think I am bossy. So do I challenge, push and cut people off at times? Certainly! Am I aggressive, do I alienate and are people overwhelmed into silence? Rarely. (I would love to say never but hey, personality clashes are inevitable). Sometimes the only difference between pushing a group to deliver focus and intimidating a group into silence is your intuition, and how far you push. I think it is good that people feel uncomfortable sometimes. I think you need to feel that sphincter tightening moment occasionally, because that's when real challenges start to occur and the group starts to think differently. But only your intuition can judge when and where that invisible line is.

If a facilitator aims in workshops to make everyone happy and not challenge some of the elephants in the room, then the status quo will remain. If you always do what you've always done, you'll always get what you've always got. Which is ne if you're absolutely happy with the status quo – but more often than not I've found that the MD calls a Planning Meeting because he or she wants something different to happen.

4. Focus on the future and work back from there.

I often like to say if you don't know where you're going, any road will take you there. Whilst the future is an uncertain beast, I find you have a much better chance navigating it if you at least have an idea of which direction you are headed.

So when great facilitators head into sessions they at least have some idea of where they will end up. Of course, they have to be flexible enough to change mid stream, to be open to other approaches and conclude in a completely different spot if that is the will of the group. But it is difficult to moderate to a successful outcome if you haven't the faintest idea of what that outcome might look like.

So how does this work if you are facilitating a session in a market or company you have had no experience in? My view is that the competency a good facilitator provides is not expert knowledge on the organisation or market. After all, how can you possibly provide more expertise than the senior people in the room who will have had

years of experience?

No, the facilitator core competency is to understand what will and won't work in a real life application, and be able to mount a cohesive and logical argument on the spot to bring the group around to a more actionable way of thinking. For example, I once facilitated a session with a prestigious major university's senior professors in the establishment of a Future Pod that was going to be a centre of excellence in future trends.

I felt a tad overwhelmed going in to be honest, in the presence of these quite famous and ridiculously intelligent people. I would be a mere gnat in the intellectual swamp of the room. And it was really daunting – one of them actually quoted Plato at me, can you believe that? It was extraordinary. But I stuck to my future focus that knew with absolute clarity that we needed to find a way to articulate what this quite nebulous Pod was going to deliver. We didn't need to get bogged down in the intellectual argument of methodology or process, the machinations of the university, and the personalities of the room. We needed to move from complexity to simplicity, confusion to clarity, and distraction to focus. Once we knew where we were going, all those other complexities would naturally start to dissolve into a meaningful strategy.

We got there eventually. Although boy, was it slow and painful. But as Plato did in fact say... "Never discourage anyone... who continually makes progress, no matter how slow."

So I ensure that participants talk only briefly about where we are now – and in much more detail about where we want to go. If you don't talk about the future vision at these kinds of workshops, when will you? And if you clearly articulate the future direction, then you will find the road map of how to get there will naturally fall out of the session, and the team together can be guided as to the best way to get there. Knowing roughly where you want to go before you start is imperative.

5. Expose hidden agendas.

More than once in my early days I got tripped up by not having completely got all the agendas out on the table early on in the workshop session. This can spell death to a session, particularly if it is the CEO or someone suitably senior who is in fact the one harbouring the agenda and chooses not to reveal it until the end.

Great facilitators find a way to expose the hidden agendas early on, and then deal with them within the session. And that can be tricky, because the thing is, people are not honest. They don't deliberately tell lies in a workshop environment, the same way they don't deliberately tell their best friend that the new outfit she just spent a considerable amount on makes her bottom look fat. The reality is in a workshop session you are often on show to your colleagues and superiors. So people frequently give a response they think you (or others) want to hear. If the issue is innocuous it doesn't matter. But if it is important and material to the future direction it will substantially disrupt the process and come back to bite you in the end.

Great facilitators have ways of exposing agendas. First, I try and meet with as many participants as possible prior to the session for some solid one on one time, and get their assessment of where they think the road blocks will occur. A kind of off-the-record, heads-up as to the productivity of the session.

Second, I use the all-important intuition I referred to earlier whilst I am in the session to glean whether anyone is harbouring a view that needs to be talked through. You have to deal with the individual involved carefully in order to get the agenda on the table, and not have them retreat or bury their issue even further. But exposing it if it is relevant to the future focus is imperative.

And finally, I use certain tools to help expose agendas. As I referred to earlier, the picture clip is a great tool to determine how cohesive the workshop participants are. For example, I once conducted a workshop for an alcoholic drink whose sales had been flagging. There had been much discussion amongst the marketing team and difficulty gaining agreement on which particular direction they wanted to go. No-one seemed to be able to put their finger on the problem, but the brand was stalling and there was a lack of clarity about what to do to reverse the situation.

I asked the group to source some pictures of who they thought a typical CURRENT buyer/drinker of the product was. Each person was asked to bring the picture to the session, and sharing the pictures was the first task we performed.

Of the dozen people in the room, 11 of them chose very similar imagery. They clearly felt the product had a bit of a down-market image, and many of the pictures looked like the one below, flannelette shirts and underage drinkers in unpleasant surrounds.

And then it came to the twelfth person in the room. Who happened to be the Managing Director? And do you know who he thought was a typical drinker of his product?

This guy: Yes, Pierce Brosnan, the suave and sophisticated James Bond. He was the MD's idea of who drank the product, whilst everyone else's idea was an underage skanky.

I'd say that was a bit of an agenda that got exposed, don't you? Perhaps we need to spend a bit of time on who we all agree is our current target audience....

I don't mind people having agendas, we all have them and it can be a sign of strongly held views, a characteristic I also admire. But if those views are pertinent to the future direction and are not aired and uncovered then they will seriously derail a productive session.

6. Invest some of yourself- train as you facilitate.

I consider myself to be a business marketing professional who happens to have strong facilitation skills, not a facilitator who dabbles in marketing. So many of the clients I deal with have serious organisation and marketing issues without the dedicated marketing resource to address them. They are intelligent visionaries who know what they want – but are less practised at articulating the notion in a manner that is truly engaging to the key stakeholders. Which is basically what good marketing is about.

So I find I like to get down and dirty and really impart the discipline of marketing where it makes sense, rather than just apply the detached approach that many facilitators favour. I appreciate that a sense of distance can be very helpful in seeing the wood for the trees –

detachment is in fact a discipline

I apply constantly. But when you are a facilitator responsible for delivering outcomes that are actually usable and implementable, and you are the most experienced marketer in the room, I believe it is incumbent on you to train the participants concurrently to facilitating them.

I think it's a bit like a doctor who first must diagnose his patient and second is responsible for outlining the treatment that will be self administered by his patient in order for them to maintain optimal health. As I have said before, you must be able to be 'in' the session as well as 'on' the session. To be working towards an outcome of a successful diagnosis whilst listening to the symptoms and drawing out all the facts that help you understand the problem in the first place.

And then, your patient has the best opportunity for ongoing health if they take responsibility for that health, and implement the actions to maintain it. I don't believe that an external consultant can manage important cultural and marketing change processes from the outside; it MUST be managed and driven internally, and generally from the top down. But in most cases they are not skilled to do so – so the role of facilitator becomes part trainer as you help guide them to the path of better health.

7. Get 90% there in 100% of the time.

One of the more striking attributes we know of human nature is our resistance to change.

Generally we dislike change and wait until the last moment before we consider changing behaviour. I was reminded of this a decade ago in a hospital Emergency Department with my father, who had suffered his first heart attack. Dad had been a life-long smoker and drinker, and was lucky this attack was a mild one. He was actually in quite good spirits as the nurse filled out his health status form – name, age, sex, etc. She got to the box of 'Smoker – YES/NO' to which my father replied

'No'. 'Dad!' I admonished, 'You are so!'

Ruefully he looked at me and said 'I just gave up'.

And that is often the way of it. You don't give up smoking until you're being wheeled into the cardiac ward. You don't seek marriage guidance counselling until someone is sleeping on the couch. You don't make the house look absolutely fantastic, the best you could ever dream of, until you're about to sell it.

In every case, being forced to make a stand delivers a better, more comprehensive result than allowing yourself to languish and consider every possible alternative before you take action.

General George Patton once said words to the effect that a good plan violently executed tomorrow is better than a great plan perfectly executed next week.

I think there is great merit to be had in forcing your team into getting an answer in a condensed period of time. Don't let them have hours to think about it – give them 20 minutes and ask them to come up with three different alternatives and a rationale as to which is their preferred approach.

Better still, tell them they have a defined period of time but that you're NOT going to tell them exactly how much and you will simply call a halt to proceedings at an undetermined time, at which point they will need to present their findings.

These tactics are employed by great facilitators to sharpen the minds and deliver results that are generally 90% there. The last 10% can be crafted afterwards (and in my experience, many organisations spend more time on the last 10% than the workshop did getting the first 90%. Old habits die-hard!).

So get tough, shorten the tightframe, lead with an iron fist, apply some pressure and challenge the status quo. Then sit back and be amazed at what a really engaged, empowered and passionate group of people who know where they want to go and how they will get there can achieve.

Summary

- 1. Good facilitators deliver output. Great facilitators deliver outcomes.*
- 2. Force participants to invest.*
- 3. Not everyone will like you and that's okay.*
- 4. Focus on the future and work back from there.*
- 5. Expose hidden agendas.*
- 6. Invest some of yourself- train as you facilitate.*
- 7. Get 90% there in 100% of the time.*

I suppose if I have to leave you with one final thought about great facilitators it would be that they clearly exhibit a distinctive personal style. Many of the tips I have discussed in this article can be learned, they reflect principles that many may disagree with and many may appreciate. But the key to great facilitation is a genuine desire and interest in your client and the outcomes they wish to achieve.

I find that easy because I am fascinated by human behaviour. I am equally fascinated with workshops I have conducted on Generation Y as I have been on religion and spirituality. As captivated by the sport of horse racing as I am about breakfast cereal choices. As challenged by inspiring more sustainable environmental behaviours as I am about raising the profile of a professional peak body. Every workshop receives the same approach of genuine interest and desire to simplify, clarify, focus and implement.

In so doing my personally style is clearly conveyed and the client gains confidence that real outcomes will be delivered – not just mediocre outputs.

So get interested in your clients problems, lose yourself in the issues, but keep a sight of where you want to go. And last of all, have fun doing it! There can be no greater high than helping guide a group of intelligent, passionate individuals to more productive outcomes.