

EFFECTIVE WORKPLACE FACILITATION

A well facilitated workshop can be a powerful business technique for generating change, whilst at the same time winning the buy-in of the participants.

The best strategies in the world can be defeated by a lack of buy-in. Having the staff on board, is so much more than a “nice to have”.

Our discussions with corporate managers, service providers, project staff and technical gurus, shows us that, the good intention of influencing, through facilitated workshops, is often undermined by the sub-optimal use of techniques.

We have listed below seven interventions to help achieve better outcomes in workshops:

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1. THE FACILITATOR IS INDEPENDENT.

If you have a vested interest in the outcome, input or content of the workshop, perhaps you should not facilitate. Instead, take a role in the discussion and invite someone with little or no investment in the outcome to facilitate.

The role of the facilitator is to manage the process of bringing the participants to a point of agreement. This includes setting and managing the agenda, enforcing ground rules, managing conflict, ensuring all parties are heard, time keeping, documenting and clarification. It does not include content or opinion. Nor does it include guiding them to a predetermined outcome. This would be “Leading”, not facilitating. Beware of the passive as well as the direct resistance when you start leading.

The facilitator needs to remain independent of the outcome, otherwise some, or all of the participants will become disenfranchised and check out. You will lose their buy-in. As soon as the facilitator gets involved with

adding content or opinion - worse still setting terms - the facilitator has effectively left the room. You would have been better off presenting your predetermined solution. You still won't get buy-in, but at least you won't have alienated your audience with a pretence of taking their input. If you have already decided, then be honest.

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From our feedback, it would appear that this rule is often broken in practice. Typically the most invested manager, or the most involved technical specialist, takes the role of facilitator. They convince themselves that they have achieved their outcomes and included the audience, when in fact they lost their audience quite early on. The cost of an external professional facilitator might at seem prohibitive at the outset. It might turn out to be a drop in the ocean compared to the cost of the initiative getting off on the wrong footing. A lower cost option might be sourcing an internal, relatively disinterested party that has the skills to facilitate.

2. SEPARATE THE GENERATION OF IDEAS FROM ANALYSIS

There is a good reason why professionals apply the rules to brainstorming. They specifically separate the creative idea generation from discussion and analysis. It keeps ideas flowing, it keeps everyone involved. It also builds energy and enthusiasm and helps the creative process of developing new ideas, off the back of existing ideas.

The rules are:

- All ideas are recorded and visible to all
- No priority or order
- No discussion or criticism
- No idea is unworthy
- A defined period for the brainstorming, followed by analysis, discussion, combining, elimination of the unworthy and group agreement.

What often happens in practice, sometimes within seconds of the first idea, is the group is allowed to descend into detailed discussion on every point from the outset. This can quickly disengage those that don't have an opinion on that issue. After this, the groups creativity is diminished, leading to unhelpful discussion and potentially conflict. The more common result, is that the group runs out of time to complete the task.

Post-it notes can offer a useful technique for getting all participants focussed on idea generation concurrently, and is very efficient use of time. It may not fully activate the creative momentum of participants building on the new ideas of others. It is, however a good starting point.

3. BE CLEAR ABOUT HOW THE MEETING WILL RUN, THEN GAIN AGREEMENT.

The facilitator enters the room with no real authority. They can earn that authority by suggesting an agenda and some ground rules for the workshop. They need to explicitly ask the group for agreement, to manage both. Should things subsequently get out of hand, the facilitator can now use the authority, granted to them through that agreement, to bring it back on course. If you have no agreed ground rules or structure, it can be hard to recover if things get out of control.

4. MANAGE TIME OVERTLY

The potential value from the workshop (not to mention the time of the participants) will be wasted, if we fail to get to the point of consensus and documented agreement, to a plan of action. This often occurs when the facilitator fails to manage the timing of each of the steps, of the process. If we have successfully executed point 3 above, then we should be able to proactively manage the time. We can move the agenda onwards, to ensure that we reach the conclusions. We can do this before participants start leaving to catch flights, attend other meetings, pick up the kids, etc.

I'm a big fan of explicitly making it clear that I am managing your precious time. I don't think it should be done by stealth. As such, I have no problem in stating that we have reached our time at each section of the agenda, and now we should move on.

5. THE JOB IS NOT FINISHED UNTIL THE PAPERWORK IS COMPLETED

Documenting the agreed outcomes of the workshop can be critical to their implementation. That is not to say that the facilitator should necessarily be the documenter (nor time keeper, scribe, etc.), but it is the responsibility of the facilitator to ensure that people have committed to the allocated tasks. These should be agreed by, and sent out to, the group involved.

The engagement built with each stakeholder, plus advanced warning of entrenched positions and potential pitfalls, can mean the difference between success and failure for the entire initiative (not just the workshop).

6. TAKE A TIMELY ADJOURNMENT

If things are going badly; discussion becoming overheated; or if the energy has left the room, call a short adjournment. This gives the facilitator as well as participants a chance to settle and regain their thoughts and composure.

7. MEET WITH PARTICIPANTS BEFOREHAND

Meeting the key participants beforehand can be immensely valuable to achieving outcomes. It takes valuable time, so we need to weigh up the "efficiency" versus "effectiveness" arguments.

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We wish our followers every success when they next facilitate. We refrain from wishing you luck - through good technique you will make you're own luck!