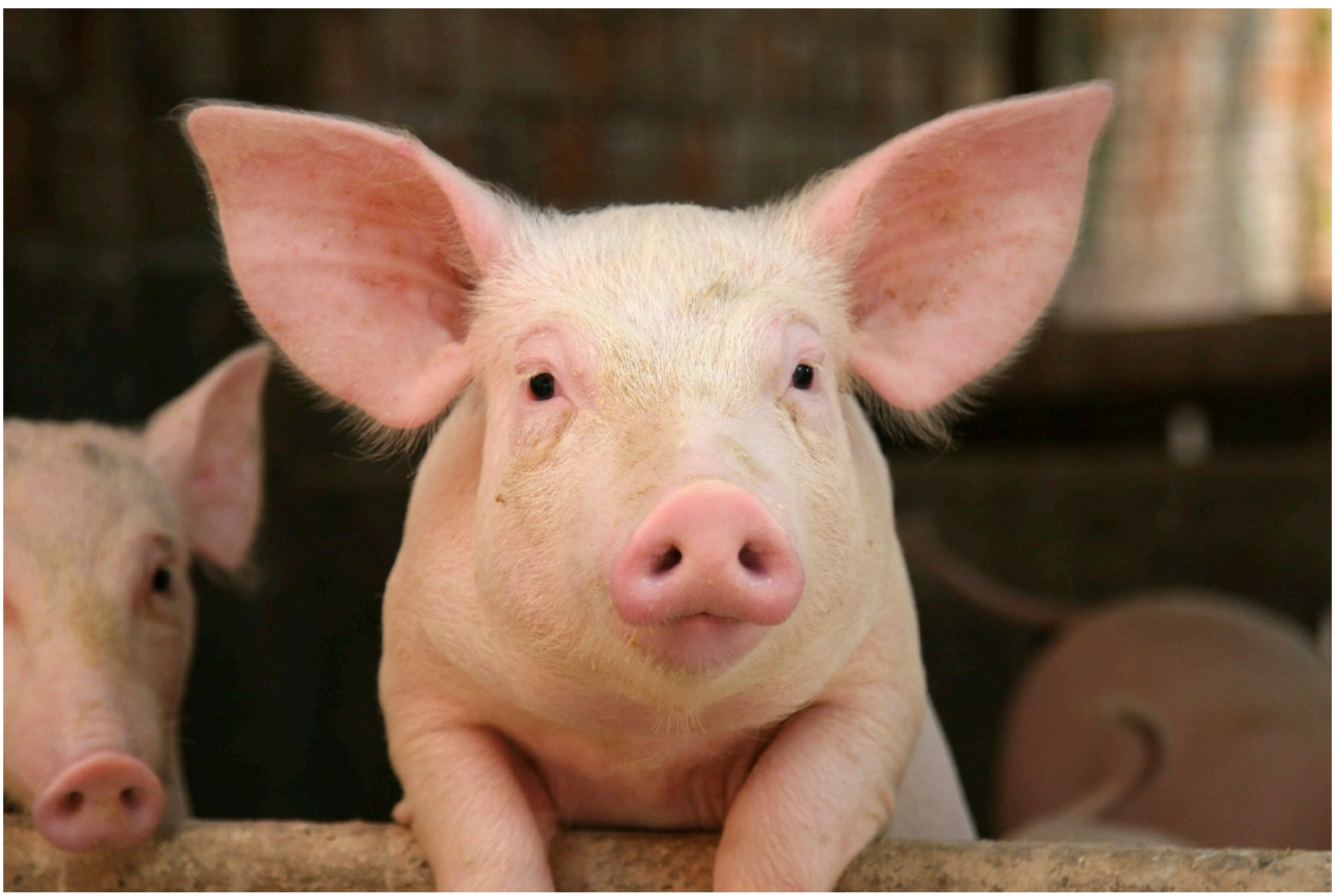
A Guide to Effective Facilitation



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Introduction

By definition, a facilitator is someone who skillfully creates and implements a plan that progresses a group of people through identified goals and learning objectives. A facilitator takes an unbiased approach to these goals, making it possible to achieve consensus during times of disagreement and refocus the group on the common goals.

A trainer, however, does not take an active role in the attainment of goals, but rather takes the lead in providing a body of knowledge for a group.

These two distinct forms of presentation hold utmost value in the world of professional development and increase of productivity and profitability.

As a trainer, or "Sage on the Stage," you have the responsibility of divulging new information that will be utilized for the betterment of your participant. As a facilitator, or "Guide on the Side," you will be accountable to working with your participants to find the route to better productivity.

Without knowledge, there can be no action. These two roles are dependent on one another. When training and facilitation have been practiced well, the participants will take ownership in the decisions made and goals that are determined.

Have you ever participated in a training program that left you feeling more confident and competent – one in which you really got a lot out of the learning experience? Or, have you ever taken a workshop that left you disappointed, confused or maybe even angry? What makes for a great presentation, training program or learning experience? The answer to that question could be a lot of things – the content, the learning experience, the participants in the class, etc. However, if you think back to a class or workshop that you truly enjoyed, the quality of the facilitator is probably one of the reasons why you liked it.

For a facilitator to be great, he/she must understand how adults learn. To assist you in this process, participate in this learning example.

Learning Example:

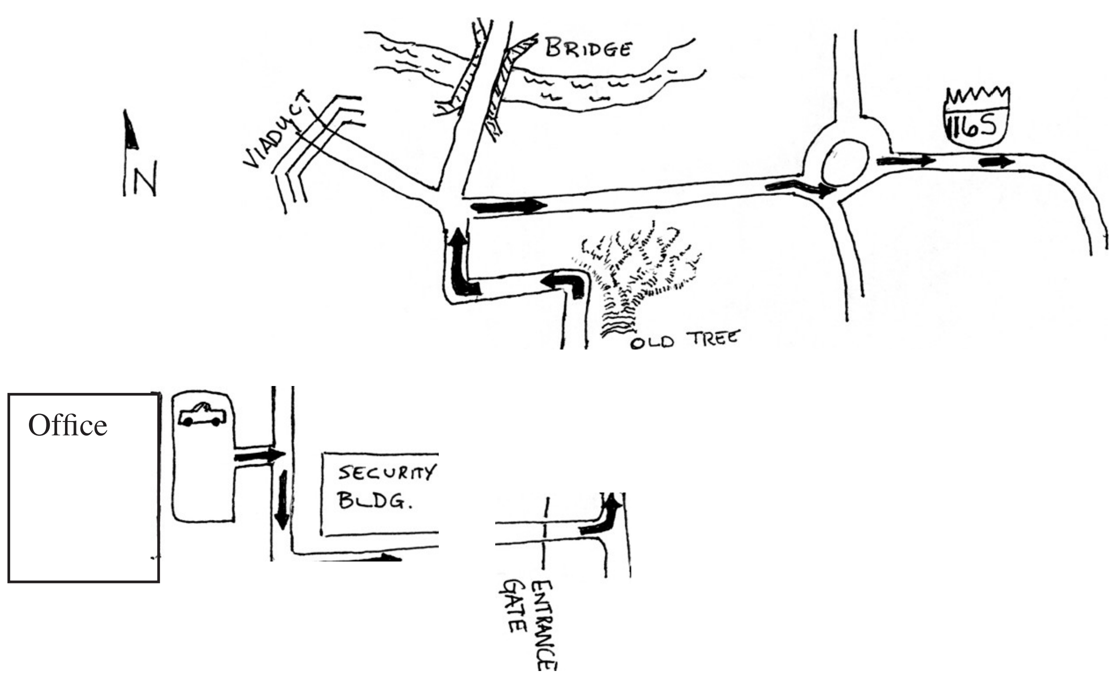
Below are the directions from an office to a house. Read through the directions and study them for 20-30 seconds only. Then, cover the note with a separate sheet of paper and answer the questions on the next page.

From the office, take the road that leads out of the parking lot and follow it right, out past the security building and the gate until it comes to the first "T". Turn left, by a big tree, it veers left again, then, you will come to a triple fork. If you go straight, you will go over the bridge – don't do that. If you go left, it will take you under the viaduct and towards the lake, that's the wrong way. Take the right branch and, at the next branch, take another right around the roundabout where you go to the second road. That's 116 S. It says south, but it really goes east. Stay straight on this road and when you get to the end; my house will be on the left.

Answer the following questions:

1. Where is the parking lot?
2. What do you have to pass to get out of the office complex?
3. What do you see just before you get to the second fork?
4. Do you go over or under the viaduct?
5. What highway do you take?

Now, study the map for 20-30 seconds. Then, cover the map and answer the questions on the next page.



Answer the following questions:

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2. What do you have to pass to get out of the office complex?

3. What do you see just before you get to the second fork?

4. Do you go over or under the viaduct?

5. What highway do you take?

How did you do? If you are like most people, you found the second set of directions easier to follow.

The same information, presented in different ways, has a significant impact on learning. As a facilitator, you control how the information in your session will be presented. Understanding some basic learning principles will help you present your content in a way that will have a positive impact on learning for your participants.

Understanding Learning Styles - Who Are My Learners?

Although every person has an individual style (or learning modality) for organizing and understanding new information, most people have similar preferences for acquiring and learning new information. Most individuals prefer to learn through one of the following three channels:

- Seeing — visual learner
- Hearing — auditory learner
- Touching/Doing — kinesthetic learner

As facilitators, it is our job to utilize these modalities to engage our learners. This can be done in a variety of different ways. The two forms we will look at here are:

1. Room set up and facilitator movement
2. Language use and activity design

Room set up and facilitator movement

The diagram below explains how the modalities are generally used by a facilitator just by how he/she sets up a room and moves from place to place in a room while facilitating.

Projector Screen		**Visual Area**- The facilitator uses large gestures to point and model, a PowerPoint or visual is often used, and voice is increased so participants tune in.
Podium		**Auditory Area**- The facilitator does most of the lecturing and speaking to the audience in this area.
Participant Tables Participant Tables	Participant Tables Participant Tables	**Kinesthetic Area**- The facilitator guides discussion and participant activities in this area. It is where participants get to experience the content and actively process the information through movement with manipulatives, modeling experiences, and facilitator guided questioning and discussion.

Language Use and Activity Design

No individual is solely one type of learner. Rather, they are a combination of all three. However, most learners have a preference for acquiring information through one channel. Therefore, as a facilitator, you must try to engage all three types of learners in your programs because each audience will be made up of a combination of participants that prefer each style. Each learning style is unique, and each person is often a combination of styles, it is important to understand the strengths and weaknesses of all three types of learners. Let's check out some tips of how to speak and actively engage each learning modality.

Visual Learners

Visual learners learn best by seeing new information. Visual learners may prefer verbal information (i.e., reading information or seeing words) or nonverbal information (i.e., pictures or graphics that help represent the information).

Visual Learner Learning Style Clues	Learning Style Teaching Tips
• Need to see something to truly understand it • May have trouble following lectures or spoken directions • Often misinterpret words • Have strong sense of color • May have artistic abilities • May say, "It looks good to me"	• Use graphics to help reinforce key learning concepts • Color code sections to help organize content • Provide written directions • Use charts and diagrams when possible • Encourage learners to imagine concepts or "see" ideas in their heads Use word or cues like: "picture this", "imagine", "envision", "look at/looks like"…

Auditory Learners

Auditory learners learn best by listening to new information.

Auditory Learner Learning Style Clues	Learning Style Teaching Tips
• Prefer to get information by listening — need to hear information to understand • Sometimes have difficulty understanding written information and expressing themselves through writing • Unable to read body language and facial expressions well • May have trouble following written directions • May say, "It sounds good to me"	• Explain information orally rather than relying on learners to read and synthesize directions or charts • Encourage open discussions and orally sharing outcomes of exercises Use voice fluctuations when appropriate to emphasize a key fact, or element to remember Use verbal repetition on key points to allow auditory learners to hear and process the information more than once Use call backs - a call back is a technique where the facilitator asks participants to verbally respond with a specific phrase cued word or question. For example: "when you hear VCPR, you say Relationships" Use words or cues like: "tune in", "listen up", "sounds like", "take note"…

Kinesthetic Learners

Kinesthetic learners prefer hands-on experience to learn and acquire new skills or information.

Kinesthetic Learner Learning Style Clues	Learning Style Teaching Tips
• Prefer hands-on learning • Often don't need to read directions to assemble something • May have difficulty sitting still and focusing • Learn better when physical activity is involved • May be very well coordinated and have good athletic ability	• Engage in active learning by using manipulatives (making models, doing label work, role playing, etc.) • Take frequent breaks • Use computer or models to reinforce learning through sense of touch • Incorporate activity to demonstrate abilities Change the physical state of the person often purposefully through activities (move them around) Let them share about an experience or task they physically have done Use verbs, or action words/phrases, when describing things like: "jump in", "kick out", "run up", "hit it"…

To aid in preparing for your next training session, take a moment to consider how you might address the different learning styles in your audience.

I will engage visual learners by:

I will engage auditory learners by:

I will engage kinesthetic learners by:

From Concept to Understanding – The Experiential Learning Cycle

Each participant in a workshop brings their own unique understanding of the world around them based on the experiences they have acquired in their lives so far. This preconceived understanding effects how they perceived all new information. We cannot control that, but we must manage their thought processes during our time together so each participant leaves the workshop with the same understanding of the concepts being shared.

PhD. David Kolb designed the model on the left to explain how people take a concept and turn it into working knowledge by moving through four quadrants. A person may enter this cycle at any stage with a specific concept. Kolb (1984) notes that “Learning is the process whereby knowledge is created through the transformation of experience. Knowledge results from the combination of grasping experience and transforming it.”

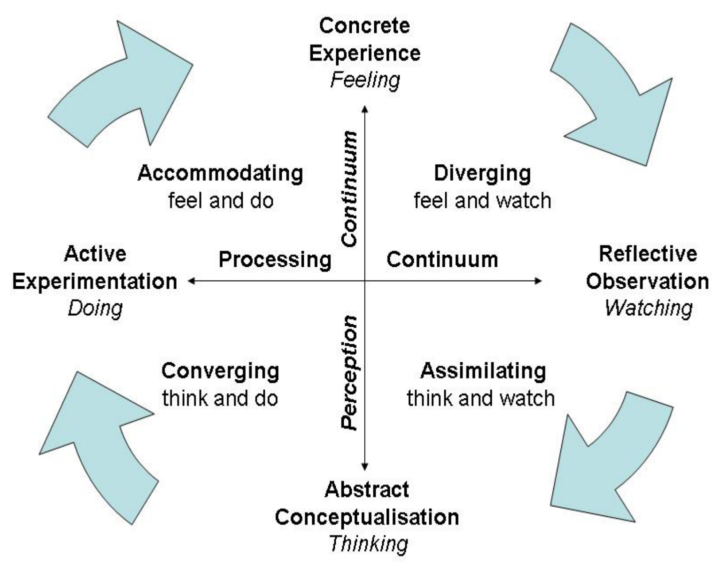


Image from: http://www.nwlink.com/~donclark/hrd/styles/kolb.html on December 11, 2012

A learner will gain the deepest understanding if they move through all parts of the model. For example, learning to teach may flow through the following experiences:

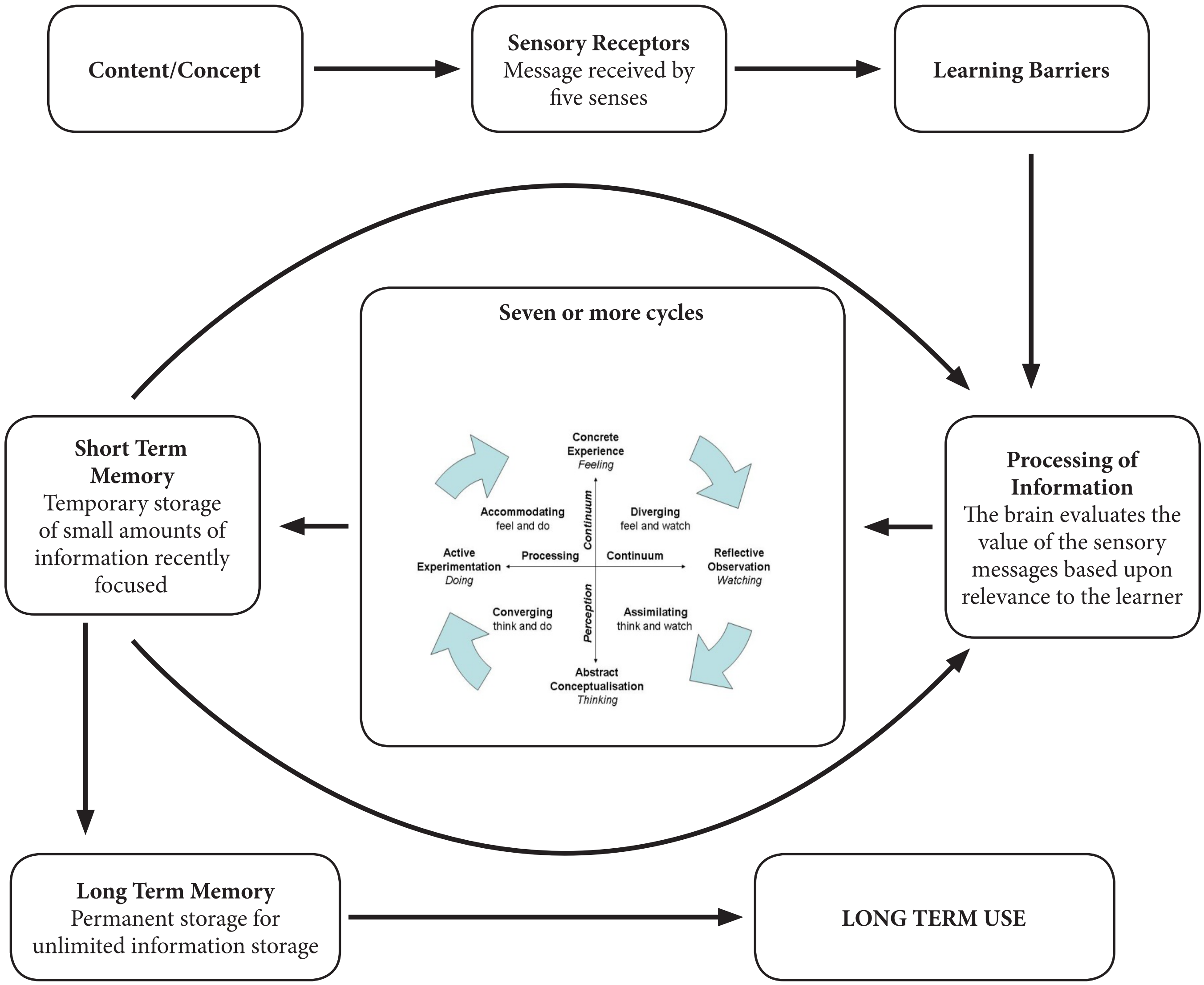
- Concrete Experience/Feeling - Having an experienced teacher guide you as you teach someone else.
- Reflective Observation/Watching - Observing how other people teach.
- Abstract Conceptualization/Thinking – Gaining knowledge on and thinking of different methods of teaching.
- Active Experimentation/Doing – Using your own gained skills to achieve your own teaching style.

Use the chart below to help guide how you will move your participants through the four quadrants of the learning cycle to increase their likelihood of understanding?

Concept to turn into knowledge:	
Feeling	I will…
Watching	I will…
Thinking	I will…
Doing	I will…

From Concept to Understanding- How the Brain Processes Information

Now that we have an idea of how a learning cycle works, let's look at how this fits into how the brain processes information. For a piece of information to reach long term memory use, thus creating a desired thought or action, it must be processed by the brain a minimum of seven times. The schematic of the flow of knowledge to understanding looks like this:



The next few pages explain each part of this flow chart in more detail.

Sensory Receptors

Every day your five senses receive hundreds of thousands of bits of information and data. This information is passed to the brain for processing.

Barriers to Learning

As the brain processes information, several factors can create barriers to learning. These include:

- Emotional Barriers –Needs, attitudes and emotions that get in the way of communication. For example, suppose a participant has had an argument with his/her spouse prior to coming to the session. He/She will be more focused on reliving the argument than they are on your presentation. Or, if previous training experiences have been "painful" or unproductive, they are likely to come in with negative expectations, which will impede future learning.

- Physical Barriers –Several environmental factors can also impede learning. The temperature of a room, extraneous noise, sitting too long in one position, and outside distractions are all examples of physical barriers to learning.

Effective facilitators analyze their target audience and facility before a session begins to both identify and remove potential learning barriers.

Processing of Information

Much of the information the brain receives is not important to an individual. As sensory data is received, the brain evaluates it for relevance and value. Information that is not deemed as valuable or relevant is not likely to be retained.

Short Term Memory

Short term memory provides temporary storage of small amounts of information on which you have focused. This is the memory storage you use when you look up a phone number and remember it just long enough to press the buttons on the phone. After a minute or two passes, you forget the number.

Short term memory can only hold about seven to nine bits of information at a time. However, short term memory will also let you store information in chunks. Chunking will allow participants to increase the amount of information they can briefly retain.

For example, if you were shown this list of letters and numbers for ten seconds and asked to remember it, you probably couldn't... there is too much information for your short term memory to hold:

229FBISTAFFDID7SETSBY9

However, if you split the data into chunks, you can assign some sort of meaning to each group, and you may be able to retain this larger amount of information in your short term memory.

229 FBI STAFF DID 7 SETS BY 9

Long Term Memory

Information from short term memory is transferred to long term memory by focusing our attention on it, thinking about it, considering its meaning, and relating it to other information already stored in long term memory.

The brain can store information in its long term memory indefinitely.

Things that can **improve** the storage and recall of information in long term memory:

- When introducing new concepts, relate it to other concepts with similar meanings. The brain seeks to make sense and "organize" new information by comparing it to similar concepts you have already learned. The use of analogies is an effective way to communicate complex ideas.

- Present information using multiple modalities (auditory, visual, and kinesthetic). Learning occurs by the encoding of new information in permanent long term memory. According to a theory called Dual Encoding, content communications with text, graphics and activity sends multiple "memory codes". Having two opportunities for encoding into long term memory increases the likelihood that content will be retained and remembered.

- Practice! Provide participants with opportunities to use the information you have given them. The more they use the information in relevant situations or simulations, the more likely they are to retain it.

To open the mind to the learning process, information must be more important or relevant than the barriers that inhibit learning. Not barriers we are able to control. Conveniently though, there are a number of barriers we as facilitators can control. In the table below, list all of the potential barriers your audience members may experience prior to and during your session. Then, working in pairs, generate a list of things you could do to break through these barriers.

Potential Barriers to Learning	Things I Could Do to Break Through These Barriers
1.	
2.	
3.	
4.	

Stimulating Adult Learners - What's In It For Me?

Adults don't learn the way children learn. Teaching adults as if they are children in a classroom is not only ineffective, it also is counterproductive because:

- Adults are mature — they don't have the desire to learn just because they are in training
- Adults want to know What's In It For Me (WIIFM) — they want to see how the information you are presenting is directly related to their current, specific needs and concerns
- Adults bring unique experiences to the training — include opportunities that allow participants to share their knowledge and experience. This makes the participants feel invested and valuable to the training.

Therefore, create learning experiences for adults by:

- Engaging the audience in learning and problem-solving
- Offering opportunities for practice, application and discussion

In the space below, brainstorm some WIIFMs (i.e., What's In It For Me) that you can share with participants during the training.

Creating and Using Learning Objectives for Adults

Think about the last time you planned a long driving trip — you probably used a map (paper or virtual) and tried to figure out the best way to make it to your destination. You may have decided to take only highways, to make the trip shorter. Or you may have decided that even though it would take a little longer, it would be more interesting to take a few detours along the way. Despite your decisions, you knew that without your map or GPS, it would have taken you much longer to arrive at your end destination, if you ever made it there.

Learning objectives act much like this map, providing a written description of the path you will follow in helping training participants arrive at their destination of increased knowledge or improved performance.

A learning objective is a statement of what you want the participants to be able to know and/or do differently at the end of the training.

To accomplish this, learning objectives often are written in a format similar to this:

Following today's session, you will be able to:

- Describe the implications of key agricultural trends on your business
- Identify the four types of value
- Create segments of customers based on value
- Quantify the value-in-use of your products and services
- Communicate your differential advantage
- Create an action plan for improvement

Using learning objectives helps the adult learner understand exactly what is expected and sets the framework for what the training will include. Once the objectives are shared, the brain will start to process stored information (or memories) related to the objective and automatically do a self-assessment of where they are compared to the objective.

Using Learning Objectives

Present learning objectives at the beginning of your training to:

- Help orient learners to what you will be covering during the day
- Ensure that all objectives are covered

Regularly refer back to the objectives, to show participants what has been addressed and to do informal assessments to see if the participants are learning what is expected from the training. If many of the participants are not meeting the objectives, perhaps the concept needs to be taught again from another perspective.

Take a minute to consider the following:

1) In one sentence, how would you describe the purpose of an upcoming training you will conduct?

2) What are the objectives for this training? Identify at least 3.

-
-
-

3) What are two strategies you can use to ensure that participants are aware of the objectives throughout the training?

Attention vs. Retention with the Adult Learner

Attention is the mental ability to take notice of something, retention is the ability to process something and put it into memory (Middendorf & Kalish, 1994). Adults can listen for 90 minutes with attention but only for 20 minutes with retention. Why do we forget information? Sometimes we forget new information because it is not useful to us. Other times we forget it because of the way the information was presented to us; we may have been paying attention but not experiencing retention. As a facilitator of information, we must tap into individual learning styles (modalities) and guide participants through the experiential and mental processing of concepts into retained understanding (or memory). Some general rules of thumb to increase retention are to:

- Change presentation techniques every 20 minutes.
- Remember that most adults can only listen with complete attention for two to three minutes. Ask for participation every few minutes.
- Make sure participants see real-life value in everything you are presenting.

Implement experiences that target all three learning modalities (visual, auditory, and kinesthetic).

Try to gives participants' experiences that allow them to engage fully in the learning cycle (feeling, watching, thinking, doing).

Repeat key concepts with different perspectives multiple times (remember, the brain typically has to process information at least 7 times for it to become long term memory).

Strategies for Retention - How Will I Make This Training Stick?

Think about important skills you have either learned, or haven't learned so well, over time. For the skills or information that you remember, what about your learning experience helped you retain this information? For the information that you can't remember as well, why do you feel that it didn't "stick"?

Even the best-written training programs about the most important topics can be a waste of time if the participants don't remember the information. Incorporating activities that stimulate different types of learners and keeping in mind the learning cycle are key to helping participants retain information. Below are some principles of adult education to keep in mind to help participants retain information.

1. Think in Pictures

If someone says the word "apple," what comes to mind? The letters a-p-p-l-e? Or a picture of a ripe, juicy, delicious apple with a leaf still attached to the stem?

- Show diagrams, pictures, and illustrations of major points in your presentation.
- Share stories that help customers visualize the problem and the results.
- Take participants into the field or show a video for a "live" demonstration, if possible.

2. Make It Relevant

- Training or facilitating is about delivering information that is usable by the audience.
- You have to be audience focused. Gear your information towards what is most beneficial to them.
- Give them a reason to listen. Use examples that specifically relate to their experience level.

3. Emphasize Key Points

To make sure participants remember key points:

- Review or re-state key points at least seven times for maximum retention.
  For example: Cover key points in your introduction, during group discussion, when explaining an activity, when debriefing the activity, and when summarizing the training.

- Present the most important information first, last, or first and last.
  Problems, questions, discussion, and exceptions should be handled in the middle of the presentation.
- People remember things that are outstanding or different.
  Find a way to emphasize key points with a hands-on experience, a field visit, color diagrams or a team problem-solving exercise.

Take a moment to think about an upcoming training. Create a list of strategies you could apply to help retention of the main concepts and identify where you would apply the strategy. The more thought and preparation a facilitator puts into the training, the more likely it will be viewed as a success by the audience.

Retention Strategy	Where applied

Six Basic Facilitation Principles

1. For learning to occur, learners or participants must perceive information by using their five senses. Each of our senses has different processing capabilities. Almost 95% of our sensory input is provided by sight and hearing. However, the more senses we engage, the more we perceive.
   <u>Facilitation Principle</u>: Direct your instruction at more than one sense at a time.

2. Once information is perceived, it must be processed by our brains. The short term memory capacity of the brain is limited. Therefore, the brain can process only five to nine items at a given time.
   <u>Facilitation Principle:</u> Limit the amount of information you provide to participants. Focus on the critical content to facilitate the information processing.

3. In a given day, our senses are bombarded with thousands of pieces of information. Our brain and nervous system automatically select what is relevant to us. Information that captures our attention and is relevant is more likely to be processed and moved into long term memory.
   <u>Facilitation Principle:</u> Create messages that capture participants' attention and are relevant to their needs. Use examples and analogies that relate to the participants' previous experiences.

4. Our long term memory has almost limitless capacity. As we perceive information, our brain begins to organize and try to make sense of it. However, we cannot always retrieve information we have processed.
   <u>Facilitation Principle:</u> Organize information you present into meaningful bits or chunks. Use strategies which require participants to link new information with prior knowledge. Use metaphors, graphs, tables and images to encourage this process.

5. The more participants interact with the information; the more likely it is to be remembered.
   <u>Facilitation Principle:</u> Provide plenty of opportunities for your participants to "practice" using new information by creating activities for key concepts and letting participants discuss the content.

6. Three internal factors influence how well we learn: 1. Our prior knowledge (previous background, experiences and education), 2. Our ability (general intelligence, learning ability and performance outcomes of a specific skill) and 3. Our motivation (how much value do we attribute to learning and what are the benefits of learning it).
   <u>Facilitation Principle:</u> Assess the knowledge, ability and motivation of your audience. If your audience has limited prior knowledge, organize it into usable "chunks" and explain concepts using easily understood analogies and examples. Provide plenty of opportunities for participants to practice using the information. Motivate participants by showing them the relevance of the information you are sharing and explain how it will benefit them.

Improving Facilitation Skills - Physical Delivery

Use Gestures - should help make a point, not distract. Do not pace or stay in the same spot. Taking a step can help to emphasize a point.

Limit Distractions - monitor your movements. Make sure you are not doing something distracting (tapping a pen, playing with change in pocket, etc.).

Tone and Pace

- Projection – make sure the person in the back of the room can hear you.
- Speed – people hear faster than we speak so talk at a good conversation pace.
- Fillers – watch for "ahs" and "ums".
- Direction – Talk to the audience, not the visual aids.

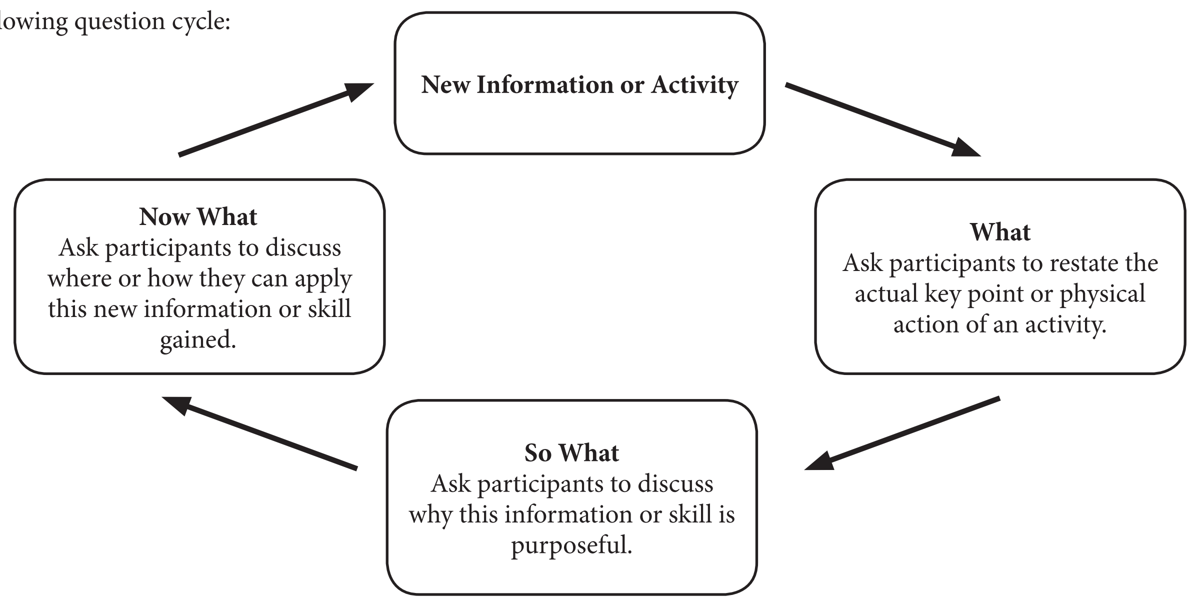
Enthusiasm

- Creates mood and atmosphere. If you do not get excited about the topic then don't expect your participants to!!
- Practice, Practice, Practice! Make sure you know what you want to say and how long it will take you to say it. No one likes when training sessions run long.

Despite the best planning and preparation for a training, it can fall short if the facilitator fails to prepare and plan for the actual presentation of the training.

Facilitating Discussion & Handling Questions

Following how the brain processes information and Kolb's learning cycle, discussion too should guide the participants' thought process through a series of steps that lead to new or deeper understanding. A purposeful discussion will flow through the following question cycle:



Discussions can be very valuable, because they allow participants to share and build on their own experiences. If carefully crafted, they can be very rewarding and purposeful for the training. Here is a simplified guide to creating discussion:

- Start by introducing a "What" question and flow through the question cycle.

  When asking the "So What" questions, listen for a responses that leads the discussion to the key point that you are aiming for and ask "Now What" questions off of that response.

- If responses are shouted from the audience, acknowledge the speaker, summarize the statement, and write it on the flipchart.
- Seek group input on the comments — do they agree or disagree?
- Ask for specific examples to support — or share your own.

Make sure to use a variety of different questions to generate a variety of responses. Three common types of questions include:

- **Open questions** have no right or wrong answer. They encourage the participant to get involved in the topic. For example: "How do you feel about the relationship with your veterinarian?".
- **Closed questions** have a factual answer. They are often a short answer, rather than the explanation you ask for in an open question. For example: "What are three benefits of having a professional working relationship with your veterinarian?"
- **Clarifying questions** ask for examples of the topic you are presenting. For Example: "When would you contacted a veterinarian about a question related to animal drug use and withdrawal times?"

As a facilitator, the key is to guide the discussion through a series of questions that help the audience "think through" concepts and apply them. If a discussion should lead to a change in thought or action for participants, be sure to check-in and allow participants to process how they implement the new information. Keep a keen eye out to watch for understanding. The following are some cues to look for:

- Do the participants seem engaged or do they look disconnected?
- Are they doing other things…making their "to-do" list due to boredom?
- Signs of understanding – Are they staying engaged in the discussion and nodding with understanding of the information?
- Signs of confusion – Are they trying to see where you are in the printed information or looking at other participants trying to get clarification? Sometimes, participants may get off on a tangent that you have not planned on, but that is very important.
- Ask participants if they'd like to continue the discussion.
- If time is tight; suggest putting the issue in the "parking lot."
- To refocus energy, look for a segue way into the next topic to be covered.
- However, don't end a good discussion just to stay on time. Rather, encourage participants to decide what information they might like to condense so they can continue.

Often, particularly during a discussion or lecture, participants will have questions about the material. Some presenters believe that if the audience has questions, the material wasn't covered effectively. However, if participants are truly engaged, they should have questions! To handle questions:

- Confirm you understand the question
- Respond directly
- Admit if you don't know the answer/tell them you will find out
- Encourage others to contribute

You can draw in your audience, or turn them away simply by how you handle the first question.

Think about the next training session you need to lead. Generate a list of open, closed and clarifying questions you could use to improve interaction within your program.

Question Type	Question Samples
Open	
Closed	
Clarifying	

Growing as a Facilitator

Many people believe that a person is either born with good presentation skills or they aren't. And indeed, some people are naturally more enthusiastic and engaging than others and some of us have to work at it. Either way, training that is delivered well, is delivered by an individual who is aware of the basics of good presentation skills.

Think about one of your best training or educational experiences.

What made this experience so outstanding?

What did the facilitator/teacher do or say that made the experience positive?

Each training experience is unique, as is each facilitator's natural and trained ability to deliver information purposefully to an audience. You may have noticed, among an assortment of other skills, good facilitators focus on the learner and incorporate a variety of different training techniques to teach.

Focusing on the Learner

Learner-focused training seeks to get learner buy-in throughout the training.

- Share the significance of the information you are providing (i.e., remind them "What's In It For Me?").
- Create an environment where participants want to learn:
  - Ensure physically comfortable conditions
  - Help participants "save face" by avoiding potentially embarrassing activities and comments
  - Encourage collaborative rather than competitive activities
- Position yourself as a co-learner.

Incorporating Training Techniques

One of the greatest challenges of using new and different training techniques lies in figuring out how to best incorporate these techniques. We have talked about many technical aspects of adult learning and facilitation in this guide so far, and it may seem overwhelming to think about incorporating them all. You will grow as a facilitator with each training you do. Take it slow and incorporate new techniques one at a time. Once comfortable with a technique, add another, and so on. From a big picture view point, here are a few facilitation hints to keep in mind as you guide an audience through a series of information:

1. When asking questions of the group, mix up the kind of response process you want to use. You can ask them to respond spontaneously, in writing, or give them a time limit. Again, your choice of response mechanisms should depend upon the type of information you are trying to gather.
2. Vary the kind of discussion techniques you use. Do some large groups, some small groups, and maybe some pairs. Each method has value; it all depends on what you want your final outcome to be.
3. Use flip charts to capture ideas generated from your discussions. These charts can begin to collect information that will be valuable throughout your training or for post training actions.
4. Don't let one participant monopolize the discussion. Encourage others to share. Call on those who haven't contributed much. Most of all make the group comfortable enough so that sharing their ideas is a positive experience. Remember, your ultimate goal is to get everyone as excited as you are about your training topic.
5. Be prepared for negative comments or disbelief about some of the information you will share. First and foremost, take a breath and think before you respond. Dissenting opinions aren't bad; if handled well, they can make for some interesting discussion. Remember that everyone is entitled to an opinion, even if you don't agree.
6. Prepare follow-up questions that get people thinking when the discussion isn't moving forward. It is very difficult to generate ideas when no one is talking.
7. No matter what you do, vary your facilitation techniques and your style. Remember, if you are bored, so are they.

Platform Delivery Skills

The final component of good delivery lies in the actual platform delivery skills, or the way the information is actually delivered. Keep these tips for effective delivery in mind.

- Speak slowly, clearly, and loudly.
- Speak conversationally. Think of yourself as having a personal conversation with every person in the room.
- Let your physical delivery help reinforce your training.
  - Rather than roaming around, stand in a few spots. Move into a new spot when you incorporate a new training technique, address a new topic, etc.
  - Use your gestures to emphasize key points. Keep your arms at your sides and use them to highlight important information.
- Keep your eyes on the audience. You should maintain eye contact for at least 80% of the presentation.

    - Use notes as a prompt. Keep them close, but not in front of your body.
    - Talk to the audience, not your visual aid. Use your visuals to stay on track, but don't read from them!
- Exude enthusiasm. The audience will only be as excited as you are about the topic.
- Share reference handouts as needed. This prevents participants from flipping ahead. If you want participants to reference the material, then you will need to pass the materials out before the training. However, try to keep the number of handouts passed out to a minimum, as passing out papers can be distracting.
- Avoid a podium. It puts a barrier between you and the audience, and tempts distractions.

Preparing for the Presentation

No matter how exciting or timely the concepts you are communicating, the delivery will determine the impact. Therefore, experience indicates the following rules to implement before the training to maximize success:

- **Effective facilitation means adequate preparation.** Spend time becoming familiar with the subject matter and the materials that support your presentation. Customize the materials to address those issues that are unique to your organization. Do a "dry run" to help you feel comfortable with the materials. This goes a long way in establishing yourself as a credible information source and competent presenter.
- **Review the group activities and the procedures for each.** Based on the aforementioned items (agenda, number of participants) identify any activities that may be inappropriate and substitute with a more appropriate activity that will accomplish the same results. Decide how you will assign particular jobs, or roles, within the activities that each group will complete.
- **Identify the necessary materials** (e.g., paper, pens, markers) for each and every group activity that may take place during your presentation. This preparation allows for smooth transitions from training to facilitating group activities.
- **Choose and design the right timeframe for your group session.** You may be able to cover your content in a few hours, or you might need an entire day. If you have a lot of content to cover but find it difficult to find large chunks of time, space it over several days. Choose a time of the day that fits the flow of your business and the schedule of your participants.
- **Create a positive learning environment.** If you are facilitating these materials at your own location or off-site, make sure the environment is as distraction free as possible. Ask participants to arrange not to be interrupted by phone calls and other day-to-day issues. Make sure you have all materials lined up and readily available to set the expectation that you have come prepared to facilitate and they should be ready to learn.

If working with a colleague, clearly identify the role of each presenter. Go through and identify which person is responsible for each part of the presentation, as well as who will be responsible for which role during group activities.

- "If you feed them, they will come" is an old presenter's adage.

    Providing refreshments may be helpful to keep your audience focused. A break table in the back of the room, with plenty of coffee, tea, and juice is always a good option. If your session will be more than a few hours, snacks are a good idea. Keep it something simple and easy to set up. If your session is all day, definitely make refreshments part of your plan.

    Being (and appearing) prepared is the single most important factor to how successful the training will feel for both the participants and facilitator. Prior to your next training, take some time and create a chart as follows to help visualize and plan what the training will look like. This exercise also helps point out what learning styles you are teaching to during the training.

Materials needed:			
Timeline	Content/Concept being taught	What am I doing?	What are the participants doing?

Adapting an Activity that "Bombs"

Not every activity will go as planned, no matter how much preparation you made. Thus, it is key to be able to modify or adapt to the group if an activity fails. Below is a list that can be used to help trouble shoot issues with an activity:

- If the structure of the activity is too loose, do a walk-through of the activity, modeling the methods to attain the desired outcomes.
- If the structure is too tight, use a debriefing session after the activity to create a learning experience, even if the confines of the activity itself did not allow for it.
- If the pace of the activity is too slow, reduce the time limits. This moves the pace along forces all groups to focus and hopefully accomplish the task in a timely manner.
- If the pace is too fast, place minimum time requirements on each part of the activity, forcing the participants to focus on the instructional message of the activity.
- If the participants are getting bored, change the rules to create a more competitive atmosphere. Make sure to keep the instructional message in mind, not just competition.
- If the competition becomes too intense, de-emphasize the scoring atmosphere and emphasize hard work and good critical thinking. Avoid comparing individual participants. It is also possible to give each individual a different goal for the activity, thus eliminating the competitive nature of direct goal achievement.
- If the participants are having too much fun and not accomplishing anything, halt the progress of the activity and do a "mid-point" discussion, refocusing the group on the intended outcomes of the activity.
- If you are intruding in the activity too much, create an anecdotal record of the individual's behaviors during the activity, thus making yourself an observer only.
- If you are being ignored by the participants, become a participant yourself and make a specific announcement to each group as you enter the activity.

Handling Disruptive Participants

Most of the fears that surround the facilitation of professional meetings are focused on the management of the participants and not the execution of the materials. The next few pages will focus on some of the major forms of disruption during presentations and offer a few strategies for overcoming the interference.

Handling Disruptive Talking Behaviors

- The participant talks too much.
  - Call on others
  - Interrupt the person with a question directed at another participant
  - Acknowledge the comment and involve others. "Jay, that was quite insightful. Matthew, what are your views on this issue?"
- The participant does not talk.
  - Direct a question to the silent participant or ask him/her to summarize the comments of another participant.
  - Have comments directed in smaller groups, like at a table or to a neighbor.
  - Have participants write responses on an index card and facilitate the discussion through the use of the cards.
- The participant talks in technical jargon.
  - Compliment the participant on his or her expertise and request a simplified version, in "laymen's terms."
  - Ask the other participants to explain the response to you, ensuring that everyone in the group will get a reasonable understanding of the response.
- The participant uses excessive humor.
  - Thank the participant for adding a light touch to the discussion, and request that comments directly relate to the topic.
  - Ignore the humorous comment and follow it with a serious remark.
- The participant talks in an excessively serious fashion.
  - Bring in a light tone to the conversation directly after the participant's comments.
- The participant talks to someone else on the side.
  - Politely request that the comments be shared for the benefit of all.
  - Ask one of the participants to make a direct comment about the previous remark that was being ignored.
- The participant talks only to the facilitator or trainer.
  - Emphasize that the meeting is a dialogue among all participants.
  - Avoid eye contact and move away from the participant.
  - Avoid commenting on the participant's remarks and wait for someone else to comment.

Handling Time-Related Disruptive Behaviors

- The participant behaves impatiently, not wanting to "waste time" in discussion.
  - Be specific in the time allotments for each portion of the discussion.
  - Involve the impatient participant in the discussion by soliciting his or her comments on the topic.
- The participant wastes time on off-topic discussions.
  - Ask the participant a new, directed question.
  - Ask specific questions of the other participants to redirect the discussion.
- The participant arrives late and leaves early.
  - Avoid summarizing what was missed as this only rewards the tardy nature of the participant.
  - Start on time and end on time.
- The participant is interrupted by messages, phone calls, or pages.
  - Emphasize that common courtesy would allow us to deactivate devices that will inhibit the others in the group.
  - Provide appropriate breaks for activities such as checking messages or returning calls.

Handling Disruptive Interpersonal Issues

- The participant constantly seeks attention.
    - Ignore show-off comments and behaviors.
    - Interrupt the person and ask for comments or remarks from other participants.
- The participant challenges others' statements.
    - Thank the participant for playing "the devil's advocate." Suggest that he or she take on the advocacy role from time to time.
    - Draw attention to the criticism of the process not the person. Shift from personal attacks to attacks of the solution or the process.
    - Assign roles of "positive" and "negative" for the discussion and shift them every few minutes.
- The participant refuses to participate.
    - Divide the large group in to smaller groups and request that everyone take turns in the smaller groups sharing his or her comments.
    - Use index cards to elicit responses and facilitate the sharing of each person's comments.

Hopefully through employing the strategies for preparing, executing, and handling the disruptions during your presentation, you will provide a truly valuable learning experience for each participant of your presentation.

Facilitating Webinars

Enhanced technology means that we now have the capacity to deliver training via webinar or web-conferencing tools. However, there are unique considerations that should be taken into account when conducting a training session via the Internet. The following are facilitation tips to consider before, during and after a webinar.

Pre-Webinar:

- Decide ahead of time if the training session will be entirely Web-based or if you will have some participants meet face-to-face. Often, meeting coordinators try to have at as many people as possible meet face-to- face with the rest participating via web meeting. This may make those who phone-in feel like "second-class" citizens and cause them to disengage. Keep in mind, they may miss a gesture or facial expression that the others see or they don't see a whiteboard that everyone else can.
- Survey the attendees ahead of time in order to determine what type of Internet connection they have (high-speed or dial-up) and ensure that participants have the technology required to participate.
    - If a participant has dial-up, the webinar software likely will not work well. In this case, be sure to send the documents before the webinar, and have them follow along on their computer by referring to page or slide numbers.
- Make sure participants know which time zone the session is using.
- Distribute all needed materials to participants ahead of the webinar. Be sure to allow several days lead time so participants won't have to wait for large files to arrive or download. Be sure to distribute the training purpose, agenda, ground rules, PowerPoints and other documents that may be referenced during the session.
- Log on to the webinar program you will be using and load all documents that may be used during the training ahead of time. This will avoid delays as you move between documents during the training.

Effective Ground Rules for Webinars

Establish and distribute a set of ground rules before the training. These ground rules might include:

- Log on 15 minutes before the start of the meeting, since some online products require downloads and installation.
- Review all meeting documents prior to the start of the meeting.
- Preparation is key to a successful Web-based meeting. Be sure to have all necessary documents downloaded, reviewed and easily accessible before the meeting begins.
- Find the 'Mute' button on your phone. You will want to place your phone on mute anytime you are not speaking. Phone microphones can be very sensitive and pick up sounds that you may not realize.
- Log in to the WebEx meeting Web site before calling in. This will allow your name to be associated with the phone line you are calling in on. WebEx also has a feature that will have the system place the call directly to call you. Simply log in to the meeting, then follow the on- screen instructions that appear.
- Be aware of and avoid background noise. If at all possible, find a quiet area to conduct the call. It is also helpful to mute the phone line when not speaking during the call.
- Never put the phones on hold. This may inadvertently create constant background music, a beeping sound or other distracting noises for the other participants.
- State your name when you speak. Not all meeting participants can easily distinguish between the sound of your voice and that of others.
- Speak as clearly and precisely as possible. While a land line is often more reliable than wireless service, speaking clearly can help others understand no matter what type of phone device you are using.
- Avoid checking e-mail during the meeting. If you catch yourself multitasking, refocus and be responsible for your full participation.
- Turn off cell phones and other electronic devices that are not needed for the conference call.
- Construct an agenda that encourages participant input. Assume that participants will start to get distracted after 10 or 15 minutes, or after three presentation slides, then design into your agenda ways to engage participants (with questions, online idea generation, visualization exercises, etc.) more frequently than you might in a face-to-face session. Test the technology an hour before the meeting.
- Remind participants to log in to webinar software first, then call in to the meeting or utilize the calling feature to have the system place a call directly to the participant. This will associate the phone line to the individual's name.

During the Webinar:

- Try to call in or log on a few minutes early to ensure that the technology is properly set up and working.
- Start the session with a quick check-in so that everyone attending knows who else is there and that the connections are adequate.
- Unless this is a small meeting where all participants are well acquainted, ask participants to identify themselves every time they talk.
- Make the session visible: share PowerPoints or other documents.
- Always keep in mind the fact that you will not have the benefit of seeing the attendees. If there are questions or concerns about an item, you will need to ask questions or create a process that gets to them without relying on facial expressions or body language.
- Speak and instruct others to speak as clearly and precisely as possible.
- Use pauses and questions to verify your understanding of what the participant is saying, as well as their understanding of what you are saying.

- Recap and summarize often.
- Use electronic tools only as necessary and not because they are fun to play with.
- Refer to slide number or page number if you are using a previously sent presentation.
- Change the way you ask for feedback. Ask “What questions do you have?” instead of “Are there any questions?” Watch out for questions like, “Does everyone agree?” Remote attendees can’t answer easily without stepping over each other’s responses. Webinar software often includes polling features that can help you solicit feedback.
- Encourage participants to utilize the chat feature. Conduct a quick demonstration so that participants are familiar with how to use it.

Post-Webinar:

- Post follow-up materials, meeting minutes and any other documents discussed during the meeting in a location for all participants to access them, or send them out via email.
    - Some webinar tools allow you save a recording of the meeting for later playback, should you choose to do so.
- Be sure that all participates have access to follow-up materials before leaving the call. If possible, conduct a quick demonstration of the site so that participants know where to find documents, as well as how to use various features of the site.
- Wrap-up by expressing your appreciation to participants, as well as providing information on when they will receive training documentation or follow-up.

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