Lesson 3

Using Expert Facilitation to Guide Successful AI Solutions

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Learning Objectives

By the end of this lesson, you will:

► Show how facilitation uncovers hidden risks and ideas, preventing AI initiatives from stalling in the POC graveyard

► Create psychological safety so every stakeholder feels safe voicing concerns.

► Use powerful questions, paraphrasing, and visualization to surface hidden constraints and ideas.

► Regulate energy, timeboxes, and conflict so discussions stay constructive, and momentum isn't lost.

► Summarize agreements, assign owners and next steps on the spot, and turn dialogue into action

WIIFM: Facilitate productive workshops that surface real risks and drive clear decisions.
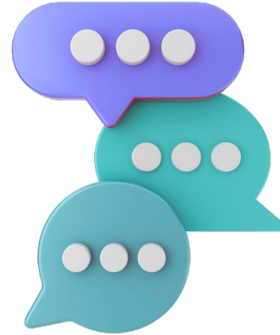
What Makes Meetings Frustrating?

5 min

Group Discussion

► Think about the most frustrating planning meeting you've been in.

► At your table, share: What made it so frustrating? What was missing?

The Business Case for Facilitation: De-Risking Your AI Investment

► **The Crisis:** 80% of AI projects fail, largely due to a single, preventable issue.

► **The Cause:** Research identifies the **"most common reason"** for failure as *"misunderstandings and miscommunications about the intent and purpose of the project."* This translates directly to wasted engineering hours, blown budgets, and delayed time-to-market.

► **The Mandate:** The report's top recommendation is to *"ensure effective interactions between the technologists and the business experts,"* stating this can be the difference between success and failure.

► **The AI-Native Change Agent's Goal:** Creating these "effective interactions" is your core work as a facilitator. It is the vital skill needed to solve the primary driver of project failure.

(Source: RAND Corporation, "The Root Causes of Failure for Artificial Intelligence Projects")

Techniques for Effective Facilitation

1. Managing Diverse Stakeholders
2. Creating Psychological Safety
3. Leverage Facilitation Frameworks and Techniques
4. Architecting Your Meeting for Time & Energy
5. Navigating Productive Conflict
6. Making Decisions in Uncertainty
7. Managing the Risk Radar
8. Leveraging AI as a Force Multiplier

Managing Diverse Stakeholders

You can't facilitate effectively until you understand who's in the room and what drives them. AI projects bring together people with vastly different perspectives, fears, and success metrics.

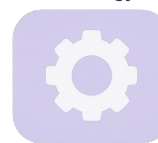Groups with unique perspectives and drivers include:

► Investment & Strategy

► Solution Delivery

► Platform & Enablement

► Governance & Adoption
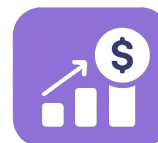
Investment & Strategy

Solution Delivery

Platform & Enablement

Governance & Adoption

Managing Diverse Stakeholders: Investment & Strategy

► **Who:** Sponsors, Finance, Strategy, CDO, Marketing

► **What drives them:** ROI, competitive advantage, strategic alignment, budget optimization

► **Their AI fears:** "Will this deliver measurable business value?" "Are we investing in the right AI initiatives?"

► **Success language**: Revenue impact, cost reduction, market positioning, portfolio performance

► **Red flags:** Vague ROI projections, no clear success metrics, disconnected from business strategy

WHO · WHAT DRIVES THEM · AI FEARS · RED FLAGS

Managing Diverse Stakeholders: Solution Delivery

► **Who:** Product, Engineering, UX, SMEs, Data Engineers, IT Architecture

► **What drives them:** Technical feasibility, user experience, system reliability, delivery quality

► **Their AI fears:** "Can we actually build this?" "Do we have the right data and infrastructure?"

► **Success language:** Performance metrics, user satisfaction, technical debt, delivery velocity

► **Red flags:** Unrealistic timelines, poor data quality, insufficient technical resources

WHO · WHAT DRIVES THEM · AI FEARS · RED FLAGS

Managing Diverse Stakeholders: Platform & Enablement

► **Who:** DevOps, Platform Teams, SREs, Operations, Security, Data Owners, Support Teams.

► **What drives them:** System stability, security, scalability, operational excellence.

► **Their AI fears:** "Will this break our systems?" "Can we support this at scale?"

► **Success language:** Uptime, security compliance, scalability metrics, operational efficiency

► **Red flags:** Security gaps, scalability concerns, operational complexity

WHO

WHAT DRIVES THEM

AI FEARS

RED FLAGS

Managing Diverse Stakeholders: Governance & Adoption

► **Who:** Legal, Compliance, Ethics, Audit, Privacy, IP, Change Management, Training, End Users

► **What drives them:** Risk mitigation, regulatory compliance, successful adoption, ethical AI

► **Their AI fears:** "Are we compliant?" "Will people actually use this?" "What are the ethical implications?"

► **Success language:** Compliance metrics, adoption rates, risk mitigation, user satisfaction

► **Red flags:** Regulatory uncertainty, poor adoption planning, ethical blind spots

WHO

WHAT DRIVES THEM

AI FEARS

RED FLAGS

Start With Creating Psychological Safety

People won't share real concerns, challenge ideas, or admit confusion unless they feel safe. Without safety, you get compliance, not collaboration.

Lead Out Loud	Surface Others' Concerns	Reframe Blame into Curiosity
Acknowledge what you don't know	Actively solicit concerns	Reframe accusations as questions
Share genuine concerns openly	Accept all input without judgment	Ask: 'What other factors are at play?'
Follow through on commitments	Identify themes and risks as a team & Discuss	Explore possibilities, not fault
	Leverage Paraphrasing	

Your First Step: Start small. Instead of a full 'round-robin,' try asking just one quiet person, "What's your perspective on this?" Safety is built with small, consistent actions, not grand gestures.

Gauging & Maintaining Psychological Safety

Gauging

▶ **Questions being asked:** People feel safe admitting what they don't know.

▶ **Disagreement being voiced:** People feel safe challenging ideas.

▶ **Mistakes are acknowledged:** People feel safe admitting errors. Ideas are built upon—People use "Yes, and..." instead of "Yes, but..."

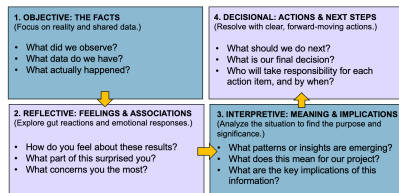### Maintaining

▶ **Opening Check:** "What's one thing on your mind as we start?"

▶ **Energy Check:** "How's everyone's energy for this discussion?"

▶ **Concern Check:** "What's one worry you'd like us to address today?"

▶ **Key Principle:** Safety is built through consistent small actions, not grand gestures.
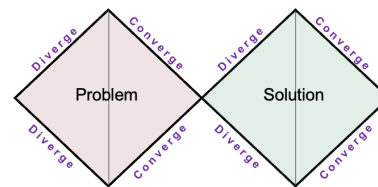
Leverage Facilitation Frameworks and Techniques

► This section aims to build your facilitator's toolkit. We will introduce several powerful tools. Focus not on mastering each one today, but on what it is and when you might use it, so you can practice it in the future.

► Let's start with two simple but highly effective tools for productive discussion.
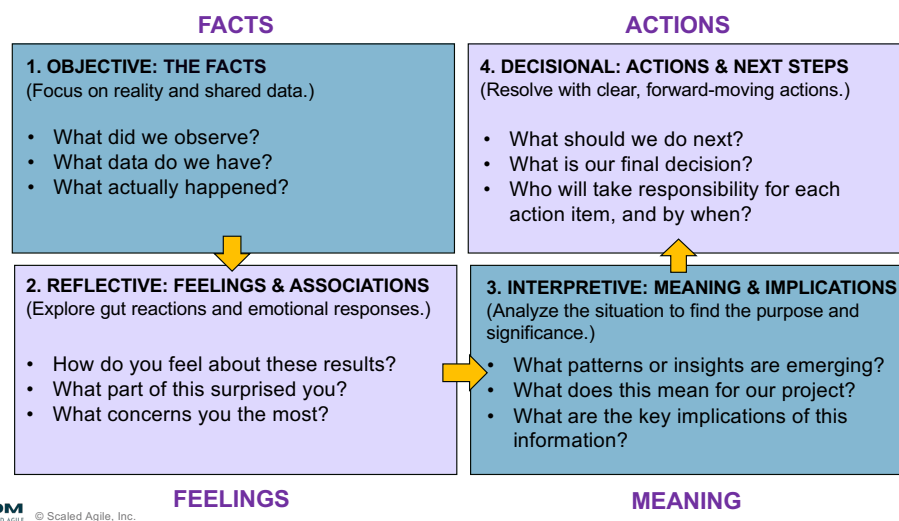
The ORID Method: A Framework for Focused Conversation

1. OBJECTIVE: THE FACTS (Focus on reality and shared data.) • What did we observe? • What data do we have? • What actually happened?	4. DECISIONAL: ACTIONS & NEXT STEPS (Resolve with clear, forward-moving actions.) • What should we do next? • What is our final decision? • Who will take responsibility for each action item, and by when?
2. REFLECTIVE: FEELINGS & ASSOCIATIONS (Explore gut reactions and emotional responses.) • How do you feel about these results? • What part of this surprised you? • What concerns you the most?	3. INTERPRETIVE: MEANING & IMPLICATIONS (Analyze the situation to find the purpose and significance.) • What patterns or insights are emerging? • What does this mean for our project? • What are the key implications of this information?

The Divergent-Convergent Process: From Ideas to Action

Diverge / Converge — Problem — Diverge / Converge — Solution — Diverge / Converge

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The ORID Method

FACTS **ACTIONS**

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FEELINGS **MEANING**

The Divergent-Convergent Process

► **Divergent Phase: Generate Options**

  – The aim is to explore broadly and produce many ideas.

  – Techniques: Brainstorming, ideation sessions, "what if" scenarios.

► **Convergent Phase: Narrow the Choices**

  – The goal is to analyze, organize, and refine the best options.

  – Techniques include grouping similar ideas, multi-voting, and prioritization matrices.

► **Decision Phase: Choose the Final Approach**

  – The goal is to commit to one clear path forward.

  – Techniques include building consensus, taking a final vote, or having a leader make the decision.
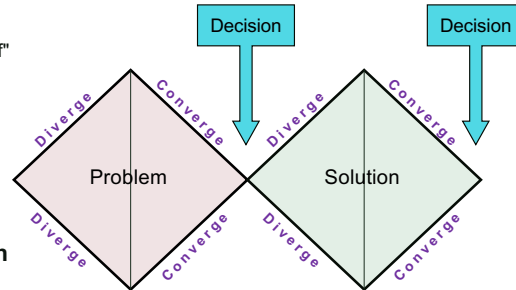
The Art of Powerful Questions

Unsticking Questions

► **"What haven't we considered yet?"**

  – Use when: Discussion feels complete but shallow.

  – Follow-up: "What could go wrong that we haven't discussed?"

► **"Who else is affected by this decision?"**

  – Use when: A broader perspective on impact is needed.

  – Follow-up: "How do we address their concerns?"

► **"What assumptions are we making here?"**

  – Use when: Group seems overconfident or moving too fast

  – Follow-up: "How could we test those assumptions?"

► **"How will we know this is working?"**

  – Use when: Goals or success criteria are vague

  – Follow-up: "What would we measure to track progress?"

Architecting Your Meeting for Time & Energy

► **The Energy Audit:** Match Tasks to the Team's Vibe

- **High Energy Tasks (Do these when fresh):** Brainstorming, complex problem-solving, creative work.

- **Medium Energy Tasks:** Planning sessions, collaborative reviews, open discussions.

- **Low Energy Tasks (Do these last):** Simple information sharing, status updates, administrative items.

► **Time Boxing:** Use the Clock as a Tool

- **Time boxing:** Use a timer for 25-minute focused discussions, followed by a mandatory 5-minute break.

- **Lightning Rounds:** Give each person 1-2 minutes for updates to keep them concise and on point.

- **Proactive Time Warnings:** Announce, "We have 10 minutes left for this topic," to create focus and urgency.

A Four-Step Process for Navigating Productive Conflict

► **Step 1: Name It**

- Acknowledge the tension directly but neutrally.
- "I'm sensing some disagreement on this topic, which is great."

► **Step 2: Normalize It**

- Frame disagreement as a sign of passion and engagement.
- "It's completely normal and healthy for smart people to have different perspectives on something this important."

► **Step 3: Channel It**

- Direct the energy toward exploration, not argument.
- "Let's take a moment to intentionally explore both perspectives. Can you tell me more about your approach?"

► **Step 4: Resolve It**

- Find common ground or a path forward.
- "What common goal are both approaches trying to achieve? What would need to be true for us to move forward?"

Making Decisions in Uncertainty: The Default Decision

► **When This is Your Go-To Tool:**

    – The group is stuck in analysis paralysis.

    – Perfect information is unavailable or too costly to acquire.

    – Time pressure requires forward movement.

► **How to Implement It Effectively:**

    – **Frame the Decision:** "This will be our default decision *unless or until* we learn more."

    – **Set Review Criteria:** "We will formally revisit this when/if we get X new information."

    – **Assign a Monitor:** "Who will own the task of watching for that new information?"

    – **Create an Exit Ramp:** "If circumstance Y occurs, we agree to pause and immediately reconsider."

► **REMEMBER:** Success Factor 3 - Move Fast, Learn Fast requires capturing decisions quickly and clearly during workshops

Risk Radar: Key Threat Areas

The Risk Radar: A structured approach to proactively identify project risks before they turn into crises.

► **Technical Risks: "**What critical assumptions are we making about our technology's capabilities?"

► **Stakeholder Risks:** "Who might resist this change, and what are their underlying reasons?"

► **Resource Risks:** "What happens if our key personnel, budget, or timeline are compromised?"

► **External Risks:** "What market, competitive, or regulatory changes could catch us off guard?"

► How to Use It: Address one quadrant at a time. Use silent brainstorming on sticky notes to gather a wide range of risks.

Technical Risks

- AI Model Accuracy
- Data Quality
- Regulatory Changes
- API Limits
- Executive Resistance
- **External Risks**
- **Stakeholder Risks**
- Competitor Moves
- User Adoption
- Training Needs
- Key Personnel Loss
- Timeline Delays
- Market Shifts
- Budget Overrun

Severity Levels:
- Low Impact
- Medium Impact
- High Impact

Resource Risks

AI as a Force Multiplier for Facilitation

▶ **Pre-Meeting AI Applications:**

– **Stakeholder analysis**: AI-driven personality and communication style evaluation

– **Agenda optimization:** AI recommendations for meeting flow and timing

– **Background research:** Automated briefing reports on participants and topics

– **Scenario planning:** AI-generated "what-if" scenarios for discussion

▶ **During-Meeting AI Support:**

– **Real-time transcription:** Capture every word for later analysis

  • Guardrail: You must have consent from all participants to record and analyze the discussion.

– **Sentiment analysis:** Monitor emotional tone and engagement levels

– **Action item extraction:** Automatically identify commitments and deadlines

– **Question generation:** AI-suggested follow-up questions based on the discussion

AI as a Force Multiplier for Facilitation

▶ **Post-Meeting AI Enhancement:**

– **Meeting summaries:** AI-generated executive summaries and key decisions

– **Action item tracking:** Automated follow-up reminders and progress monitoring

– **Pattern recognition:** Detect recurring themes and issues across meetings

– **Relationship mapping:** Monitor stakeholder interactions and influence patterns

  • Guardrail: Audit outputs for bias and use this information to ensure inclusivity, not to create division.

▶ **AI Prompts for Facilitators:**

– **Meeting preparation:** "Analyze these stakeholder profiles and suggest the best approach for building consensus on [topic]."

– **Difficult conversations:** "Help me prepare for a conversation with a resistant stakeholder about [change initiative]."

– **Decision frameworks:** "What decision-making framework would work best for a group with [characteristics]?"

– **Note: Use AI to inform, not replace, human decision-making**

3.1 Paraphrase vs. React

10min

Group Activity

► **Read the Scenario:** The companion app contains a scenario with a challenging statement from a key stakeholder.

► **Draft Two Responses:** As a group, draft two different ways to **respond** to the stakeholder's statement:

– **A Safety-Breaking Response:** Write a response that is likely to make the stakeholder defensive by judging, dismissing, or distorting their concern.

– **A Safety-Building Paraphrase:** Write a response that validates the stakeholder's concern, accurately reflects the underlying emotion and facts, and encourages them to say more.

► Your goal is to turn a statement of resistance into a moment of connection and clarity.

Companion App

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The Art of the Paraphrase: Debrief

5 min

Class Discussion: Paraphrasing for Risk Mitigation

► We just practiced how paraphrasing can uncover a hidden risk, like skepticism from a past failure.

► Nominate a spokesperson to share your group's "Open Door" paraphrase and be ready to briefly explain why it is more effective. We will hear from a few groups and debrief as a class.

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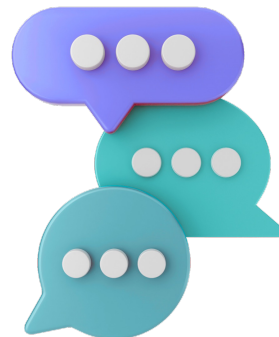
Lesson Review

You can:

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► Create psychological safety so every stakeholder feels safe voicing concerns.

► Use powerful questions, paraphrasing, and visualization to surface hidden constraints and ideas.

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Insights & Action   Post-Class

Reflect

Think about a recent meeting where important concerns went unspoken. Write about how the outcome might have changed if you had used one facilitation technique from this lesson to create psychological safety. What hidden risk or opportunity might have surfaced?

Make notes in your journal

Apply

Ask AI: "I'm facilitating a meeting about [describe your upcoming meeting topic]. Help me craft 3 open-ended questions that would surface hidden concerns or constraints from different stakeholder perspectives. Then suggest how I might paraphrase a resistant response to build trust."

Explore

"ORID Method Guide" - Institute of Cultural Affairs

"What Is Psychological Safety?" - Harvard Business Review

"33 microstructures to enhance group facilitation" - Liberating Structures