



Facilitating Effective Situations & Role-Plays

*We are what we repeatedly do.
Excellence, then, is not an act,
but a habit.*

—Aristotle

An effective training method to use when facilitating team learning is role-playing, where learners take on the role profiles of specific characters or organizations in a simulated setting. Role-playing allows participants to play out relevant scenarios and improve their decision making abilities and interpersonal skills in a safe, risk-free environment. These types of relevant simulations utilize real world scenarios that enable participants to sharpen listening skills, manage conflict, analyze potential problems, develop teamwork and overcome objections in a low stress atmosphere.

By simulating relevant work scenarios, learners use these exercises to build confidence, work at problem solving and develop camaraderie with other participants. But simulated exercises and role-plays are only effective if executed properly. This requires specific set up, careful managing and thorough debriefing by the instructor or facilitator running the simulation.

To get the most out of your simulation or role-play, follow these guidelines:

1. **Create a safe environment.** When setting up a simulation, it is your responsibility as facilitator to establish a relaxed and supportive atmosphere so participants feel comfortable taking risks and challenging themselves by stepping outside of their individual comfort zones.
2. **Make simulations relevant.** To get the most benefit from a simulation, make sure you that you are simulating a relevant situation for the participants in the exercise. If possible, do the exercise at the person's work desk, on a phone, or in a setting that is closest to the real thing.
3. **Keep simulations short.** It doesn't take a lot of time for learning to take place during a simulation, so once you feel a point has been made or audience members have observed enough, feel free to stop the exercise and begin a discussion. In most cases, simulations don't need to last longer than 5-7 minutes.



4. **Clearly set the context.** Before any simulation begins, make sure that the 5 Ws (who, what, when, where and why) of the specific scenario are established so all participants are on the same page and in agreement. Also, when partnering participants, make sure you do so strategically, taking into account each person's experience, role and knowledge to maximize learning.
5. **Stress active listening.** Like actors improvising a scene, it is important to emphasize the importance of actively listening for each participant in a simulation. Learners in an exercise should only respond to what is being said or offered in the moment. Make sure participants are being present in each "scene" and are not preplanning answers or responses.
6. **Pinpoint intention and objective.** Have participants clearly identify any intentions and objectives that they are pursuing in their simulations. By understanding their specific wants or needs—and how they are going to achieve them—the simulation will go more smoothly and be more effective.
7. **Encourage specificity.** When setting up a simulation, the more specific the details of scenario and circumstances are, the more beneficial the exercise will be for participants. Help participants avoid vague requests or general details. For example, instead of a participant saying she is going to simulate an angry customer, encourage her to be more specific, perhaps citing the reason the customer is angry and what details led to this moment and these feelings.
8. **Require commitment to the simulation.** Before the simulation begins, encourage participants to stay in the "scene" until the facilitator ends the simulation. Learners should not stop to comment on what is happening in the moment; they should be in the moment. There will be time to debrief once the exercise is complete. Encourage participants to avoid saying "no" simply to say no. Make them be specific in their challenges or objections.
9. **"Live coach" if necessary.** If rules are not being followed or the simulation is not achieving its objective, feel free to stop the exercise and offer coaching or tips to get it back on track. Keep the live coaching short and specific so as not to ruin the momentum of the exercise itself.
10. **Debrief properly.** Once the simulation is over, it is important to take a few moments to debrief and discuss what worked and what didn't. It is often helpful to use a flip chart to capture comments and reactions from both the participants themselves as well as the audience members who observed the exercise from the outside.