

Fearless Facilitation!™

How to Lead Effective Training
 How to Lead Effective Meetings

NEW RELEASE ON: Fundamentals of Facilitation, Professional Presence, and Communication Skills
TARGET AUDIENCE: Anyone who leads training and/or meetings

Whether you are leading a meeting or training session, this program is a perfect foundation for building fundamental facilitation skills.

About How to Lead Effective Training

How to Lead Effective Training builds the confidence, poise, knowledge, and skills demonstrated by facilitators who are exceptionally competent. Participants will learn how to generate quality discussions, make smooth transitions between activities, and manage disruptive behaviors. Organizations will benefit by having facilitators who increase the value of their training sessions, thus building the skills of associates.

Key Learning Points

- Lead effective training sessions
- Explain adult learning principles and their applications
- Describe how to best accommodate each primary learning style
- Demonstrate fundamental facilitation skills
- Strike the right balance between purpose, process, and participation
- Exhibit the confidence and competence of a fearless facilitator

About How to Lead Effective Meetings

Designed to build confidence and competence in leading effective meetings, *How to Lead Effective Meetings* will teach meeting leaders how to achieve desired results and manage relationships and process at the same time. By focusing on the roles, responsibilities, knowledge, and skills of a fearless facilitator, participants will learn how to increase the value and outcomes of their meetings, yielding wise decisions and actions.

Key Learning Points

- Lead effective meetings
- Prepare meeting attendees to participate effectively
- Make optimal use of people's time and talents
- Strike the right balance between purpose, process, and participation
- Exhibit the confidence and competence of a fearless facilitator

Complete Training Kit Components:	Pricing: <small>[subject to change]</small>	
Customer receives two large cases (one for "meetings" and one for "training"). Each case has its respective DVD*, VHS, facilitator guides, and reproducible participant materials.	DVD	VHS*
	FREE	FREE
	\$995	\$795
	\$395	\$235
	\$195	\$160
*DVD includes: <i>Fearless Facilitation!™ How to Lead Effective Training</i> or <i>Fearless Facilitation!™ How to Lead Effective Meetings</i> , SMART-START Motivation, and Bonus Materials.	*DVD options not available with VHS kit	

VISIONPOINT

1985 NW 94th St, Suite C • Des Moines, IA 50325-6933
 Ph: 800-300-8880 • Fax: 515-334-9967 • E-mail: info@visionpoint.com

www.visionpoint.com

Fearless Facilitation!™

Key Tactics

How to Lead Effective Meetings - Key Tactics

Chapter Board Title / Video Observation Form Title	Key Tactics
Preparation Pitfalls	NA
Staying on Track: Dealing with a Difference of Opinion	Acknowledge Concern Ask Clarifying Questions Get Commitment
Staying on Track: Handling an Off Topic Conversation	Recognize Importance Use "Parking Lot" Refocus and Move On
Staying On Track: The Unexpected Departure	Acknowledge Situation Redirect Refocus and Move On
Managing the Process: Brainstorming	Assign Responsibility Refocus & Move On
Reaching a Decision: Consensus Building	Define Consensus Share perspectives Summarize Areas of Agreement & Disagreement Minimize Interruptions Explore Concerns Get Trial Commitment Finalize Commitment

How to Lead Effective Training - Key Tactics

Chapter Board Title / Video Observation Form Title	Key Tactics
Preparation Pitfalls	NA
Generating Discussion: The Question that Stumps You	Ask Polling Question Ask Open-Ended Question Ask Building Question
Staying on Track: Making a Smooth Transition	Summarize Connect Activities -Describe Next Activity -Relate to Previous Activity
Staying On Track: Dealing with Sensitive Comments	Acknowledge Redirect
Staying on Track: Challenge to a Learning Point	Acknowledge Ask Framing Question Involve Group Refocus & Move On
Managing Disruptions: Cell Phones, Pagers, Etc.	Remind About Groundrules Share Impact on Others Get Agreement
Managing Disruptions: Progressive Intervention	1 st Level Intervention (move into space) 2 nd Level Intervention (address entire group) 3 rd Level Intervention (private discussion) -State Situation -Share Impact -Ask Fact-Finding Question -Get Commitment

Trainer Selection Questions

When selecting trainer candidates, it is important to assess the individuals' readiness and evaluate their ability to be successful. Depending on skills and experience, you may need to provide a train-the-trainer session prior to launching a new training initiative. Ask yourself these questions before inviting participants to join in the train-the-trainer experience.

1. What is the benefit to your organization that these individuals facilitate the [name of training or initiative] training program or series to your employees?
2. What are the support systems and resources available to these trainers before, during, and after the training rollout?
3. How much information sharing versus self and group discovery is required for this program?
4. Are you seeking individuals who would excel as technical trainers or group facilitators?
5. What are the characteristics, qualities, and skills that these individuals will need to enable them to effectively conduct the training?

FACILITATOR SELECTION CRITERIA

Facilitation Skills

- Knows key elements of facilitation
- Has good listening skills; clarifies and probes for understanding
- Is able to use a variety of media for delivery of information
- Is comfortable and articulate in front of groups
- Responds non-defensively to challenges
- Exhibits a good sense of humor; can laugh at self
- Is self-aware; can self-correct
- Puts people at ease; creates a comfortable learning environment
- Shows respect for the ideas and opinions of others
- Exhibits an ability to draw out differing ideas and opinions
- Is able to communicate and articulate her/his own and others ideas
- Is able to think quickly, improvise, and adjust to needs of others
- Is not judgmental

Organizational Relationships and Commitment

- Is willing to devote the time required to prepare for training
- Is willing to provide continuous coaching and support for participants after training
- Has demonstrated success in working with groups as a leader or facilitator
- Is able to establish rapport with a wide variety of individuals at all levels of the organization
- Is credible and respected within the organization
- Is considered a positive model for the values being taught, both inside and outside the sessions
- Supports the training initiative and understands why it is important to the success of the organization

For assistance with trainer selection, train-the-trainer sessions, or any question related to a VisionPoint program, contact **TrainerTalk Help Line** at 800-300-8880 x 302 or write to us at Trainer@vppl.com

Workshop Agenda

The agenda below provides you with an outline of the full-day Workshop. Be sure to review this agenda and determine whether you will insert any of the optional activities provided in the Facilitator Resource Section.

Step	Item	Time	Page
	15-minute breaks in the morning and afternoon, and a 45-minute lunch break	75 minutes	N/A
#1	Arrival of Participants	N/A	17
#2	Introductory Activities	40 minutes	19
#3	Roles and Responsibilities of Fearless Facilitators	30 minutes	24
#4	Preparation, Set-up, and Greeting Participants	55 minutes	27
#5	Facilitating a Session – Generating Discussion	45 minutes	32
#6	Facilitating a Session – Staying on Track: Making a Smooth Transition	40 minutes	43
#7	Facilitating a Session - Managing Disruptive Behaviors	120 minutes	49
#8	Facilitating a Session – Professional Presence	20 minutes	59
#9	After a Session	10 minutes	63
#10	Next Steps and Wrap-up	30 minutes	65

Send an Invitation...

A sample invitation is on page 71 in the Facilitator Resource Section.

Fearless Facilitation!™

How to Lead Effective Training

Facilitator Guide

Preview copy only

© 2005 VisionPoint Productions, Inc.

All rights reserved. Unless specifically indicated, no part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior written permission of VisionPoint Productions, Inc.

This publication is designed to provide accurate and authoritative information in regard to the subject matter. It is sold with the understanding that VisionPoint Productions, Inc., is not engaged in rendering legal, accounting, or other professional services. If legal advice or other expert assistance is required, the services of a competent professional should be sought.

Table of Contents

IMPORTANT INFORMATION ABOUT THE WORKSHOP.....	1
Facilitators of This Workshop	2
This Workshop is Designed to.....	2
The Rock-Bottom Benefits of the Workshop are	4
Participants Will Be Able to	5
Participants Will Experience.....	5
ABOUT WORKSHOP MATERIALS	6
The Complete Package Includes	7
Icon Map	8
What Can Be Reproduced and What Cannot	9
PREPARATIONS	10
Refresh Your Facilitation Skills	11
Workshop Agenda	12
Send an Invitation	12
Preparing for Demonstrations	13
Principles of Adult Learning	13
Learning Styles	13
Final Preparation Checklist.....	14
CONDUCTING THE SESSION	16
<u>Getting Started</u>	
Step 1 - Arrival of Participants.....	17
Step 2 - Introductory Activities	19
<u>Laying the Foundation</u>	
Step 3 - Roles and Responsibilities	24
Step 4 - Preparation.....	27
<u>Managing the Process</u>	
Step 5 - Generating Discussion	32
Step 6 - Staying on Track: Making a Smooth Transition.....	43
Step 7 - Managing Disruptive Behaviors.....	49
Step 8 - Professional Presence.....	59
<u>Finishing Strong</u>	
Step 9 - After a Session.....	63
Step 10 - Next Steps and Wrap-up	65
FACILITATOR RESOURCE SECTION.....	67
Know Your Role.....	68
Know How to Connect	68
Roles & Responsibilities of Fearless Facilitators.....	70
Sample Invitation	71
Pre-Workshop Assessment (Facilitator's Copy).....	72
Post-Workshop Assessment (Facilitator's Copy).....	73
Overhead/PowerPoint® Slides	74
Flipchart Masters	89
Optional Activities	96
Workshop Evaluation (Facilitator's Copy)	118
Video script for Fearless Facilitation!™ How to Lead Effective Training	119
DVD Bonus Material for Fearless Facilitation!™ How to Lead Effective Training	132
Suggested Tactics for Managing Disruptive Behaviors.....	133
Suggested Tactics for Managing Excessive Participation.....	135
Suggested Tactics for Managing Aggressive Participation	137
Suggestions for Additional Training to Improve Professional Presence.....	138
About VisionPoint	139

Facilitators of This Workshop...

Participants in the Workshop will expect and deserve facilitators who are exemplary models of confidence, competence, and coaching. Therefore, facilitators should be seasoned professionals with significant and successful experiences not only in conducting training sessions but also in conducting train-the-trainer workshops.

This Workshop is Designed to...

Fearless Facilitation!™ How to Lead Effective Training builds the confidence, poise, knowledge, and skills demonstrated by facilitators who are exceptionally competent. A companion Workshop is ***Fearless Facilitation!™ How to Lead Effective Meetings***.

The Workshop focuses on:

- Roles of fearless facilitators.
- Responsibilities and tactics for meeting responsibilities.
- Development of facilitation skills, including:
 - Generating discussion through effective questioning techniques.
 - Making smooth transitions from one activity to another.
 - Managing disruptive behaviors.
 - Establishing professional presence.
- Video demonstrations, exercises, and practices to reinforce learning.

Exemplary facilitators are fearless because they prepare thoroughly for training sessions, are organized to the minutest detail, respect the experiences of adult learners, attend to various learning styles, and masterfully draw out the wisdom of participants. Above all, fearless facilitators continuously hone their skills.

P a r t i c i p a n t s W i l l B e A b l e t o...

When they have completed this Workshop, participants will be able to:

- Lead effective training sessions
- Explain adult learning principles and their applications
- Describe how to best accommodate each primary learning style
- Demonstrate fundamental facilitation skills
- Strike the balance between purpose, process, and participation
- Exhibit confidence and competence of a fearless facilitator

P a r t i c i p a n t s W i l l E x p e r i e n c e...

- A variety of discussions and exercises that cumulatively build fearless facilitation skills and tactics
- Video demonstrations by fearless facilitators
- Applications of skills and tactics through exercises, practices, and feedback
- Pre- and Post-Assessments of fearless facilitation skills and knowledge

VisionPoint's **Fearless Facilitation!**™ program has two Workshop agendas: one for how to lead effective meetings and one for how to lead effective training sessions.

The Complete Package Includes...

- Two Facilitator Guides
- Two sets of reproducible Participant Materials
- Two DVDs with:
 - Video vignettes
 - **SMART-START™ Motivation** video
 - Overhead/PowerPoint® slides
 - Interview with **Fearless Facilitation!**™ content consultant
- Two VHS videos

For this Workshop you will need this Facilitator Guide, the Participant Materials, and the video (DVD or VHS) for **Fearless Facilitation!**™ *How to Lead Effective Training*.

The Rock-Bottom Benefits of the Workshop are...

For participants:

- Improve knowledge and skills that will enhance training sessions
- Will be perceived by others as fearless facilitators who significantly impact the success of training sessions and, thereby, the success of their organizations
- Acquire new skills that will enhance career opportunities
- Improve job and personal satisfaction

For organizations:

- Enjoy the organizational impact of fearless facilitators who increase the value and outcomes of training sessions
- Enhance corporate success through effective and efficient training sessions that build the skills of associates
- Improve productivity through cost-effective work processes, operations, and decision-making

What Can be Reproduced and What Cannot...

We would really appreciate it if you followed the instructions below for reproducing or otherwise using the materials in this course.

Please do not make copies of:

- The DVD or videotape
- The Facilitator Guide

You may make copies of the Participant Materials.

preview copy only

Roles & Responsibilities of Fearless Facilitators

As a fearless facilitator, it is important to ensure that the following three key points are understood and emphasized.

1. *Manage the environment, materials, and equipment.* Prepare materials and equipment, the physical layout of the room to promote comfort and learning, and all other preparations that are conducive to learning.
2. *Manage the process.* Ensure that activities are delivered as designed for cumulative learning experiences and that key learning points are presented, understood, emphasized, and applied.
3. *Optimize participation.* Inspire participants to share their experiences and wisdom.

The following pages include the first page of each workshop step to provide an idea of what it's about, what you'll need, and how to do it.

preview copy only

Step

1

Arrival of Participants

Time it takes: As much time as necessary to Set-up the room, equipment, and materials prior to the arrival of participants

What it is about: Preparation of the room, equipment, and materials

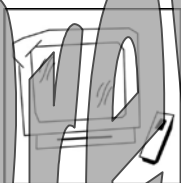
What you will need:

- Overhead/PowerPoint® slide #T-1
- **SMART-START™ Motivation** video
- Name tents
- Markers
- Set of Participant Materials for each participant

How to do it:



1. Get there first to model the responsibilities of facilitators prior to a training session. Also, display overhead/PowerPoint® slide #T-1 (Welcome to Training).



2. Begin playing the **SMART-START™ Motivation** video at least 15 minutes prior to the expected arrival of the first participant. If you are using the DVD, set it to repeat itself. If you are using the VHS, the video should repeat automatically four times. An optional activity to help connect this video to the overall Workshop is provided on page 97 of the Facilitator Resource Guide.

Step

2

Introductory Activities

Time it takes: 40 minutes

What it is about: An introduction of you, a description of the Workshop, a presentation of Desired Outcomes and Agenda, establishing Ground Rules or “Agreements,” and introductions by participants

What you will need:

- Overhead/PowerPoint® slide #T-2
- Overhead/PowerPoint® slide #T-3
- Overhead/PowerPoint® slide #T-4
- Flipchart #1
- Flipchart #2
- Participant Materials

How to do it:



1. Introduce yourself briefly, including your experience as a facilitator.
2. Give a brief description of the Workshop in 50 words or less. Refer participants to their Participant Materials, page 2 (Introduction).

Note: For your description, you might refer to “This Workshop is Designed to” on page 2 in this Facilitator Guide. Keep your

Step

3

Roles and Responsibilities

Time it takes: 30 minutes

Note: There is an optional activity called “Roles & Responsibilities” on page 109 in the Facilitator Resource Section that you may wish to insert prior to or after Step 3. This activity helps participants understand how their role and responsibilities as a facilitator aligns with the role others play to make the learning experience successful.

What it is about: Overview of the primary Roles and Responsibilities of facilitators

What you will need:

- Overhead/PowerPoint® slide #T-5
- Overhead/PowerPoint® slide #T-6
- Flipchart #3

How to do it:



1. Introduce the Roles and Responsibilities of Fearless Facilitators with comments such as:
 - **Facilitators sometimes limit their concept of “facilitation” to that of introducing activities, leading discussions, giving directions for exercises and practices, and other interactions among participants.**

Step

4

Preparation

Time it takes: 55 minutes

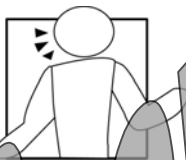
What it is about: Video demonstration of a facilitator setting up for a training session, debrief of the video presentation, discussion and exercise concerning tactics employed by facilitators when preparing for a training session, setting up on the day of a session, and greeting participants as they arrive

What you will need:

- DVD/video
- Flipchart #2
- Participant Materials

How to do it:

1. Introduce Step 4 with comments such as:
 - **We could immediately launch into a discussion of the specifics, but if a picture is worth a thousand words, then a video demonstration of one of the responsibilities is worth a million words.**
 - **Video demonstrations expand our understanding and skill and help trigger discussion, so we'll observe a number of them throughout the Workshop.**
 - **And we'll begin with a demonstration by a facilitator who is setting up for a training session.**



Step 5

Generating Discussion

Time it takes: 45 minutes

Note: There are two optional activities provided in the Facilitator Resource Section that you may wish to insert prior to or after Step 5 that provide more information and opportunity to explore adult learning principles and primary learning styles.

Optional Activity 2, "Adult Learning Principles," is on page 99 and includes a "test your knowledge" assessment followed by a discussion of how adults learn and why it is important for fearless facilitators to accommodate adult learners.

Optional Activity 3, "Learning Styles," is on page 104 and provides mini case situations to afford participants an opportunity to explore how to best accommodate the various learning styles.

What it is about: Asking thought-provoking questions: discussion and practice

What you will need:

- Dvd/Video
- Overhead/PowerPoint® slide #T-7
- Overhead/PowerPoint® slide #T-8
- 8.5" x 11" paper
- Flipchart #4
- Participant Materials

Step

6

Staying on Track: Making a Smooth Transition

Time it takes: 40 minutes

What it is about: The importance of transitioning from one activity to another in such a way that participants understand the sequence and connections between activities

What you will need:

- DVD/video
- Overhead/PowerPoint® slide #T-9
- Three Scoring Cards for each participant (index cards or pieces of 8.5" X 11" paper)
- Flipchart #2
- Participant Materials

How to do it:

1. Introduce the video demonstration with comments such as:

- **Have you ever been confused in training sessions because you don't understand the purpose of an activity, why you're jumping from one activity to another, why you can't understand directions for exercises you are asked to complete—in other words, why there seems to be confusing disconnects in the**

Step 7

Staying on Track: Managing Disruptive Behaviors

Time it takes: 120 minutes

What it is about: Types of disruptive behaviors, video demonstrations of managing behaviors, tactics for managing behaviors, practice in managing behaviors

What you will need:

- DVD/video
- Overhead/PowerPoint® slide #T-10
- Overhead/PowerPoint® slide #T-11
- Overhead/PowerPoint® slide #T-12
- Participant Materials

How to do it:



1. Introduce Step 7 with overhead/PowerPoint® slide #T-10 (Examples of Disruptive Behaviors). Ask participants for additional examples.
2. Remind participants that before launching into a discussion of managing disruptive behaviors of participants in training sessions, we should be aware that *facilitators are often the cause of disruptive behaviors.*

Step 8

Facilitation a Session: Professional Presence

Time it takes: 20 minutes

Note: An optional activity, "Trainers' Toolbox" is included on page 112 of the Facilitator Resource Section. You may want to insert this activity before or after Step 8 to provide an array of basic facilitation techniques used by fearless facilitators to help manage the learning process and optimize participation. This activity is good for people who have already facilitated several sessions and can use the help of increasing their facilitation skills. For brand new facilitators, this exercise may present too many options and may be overwhelming.

What it is about: Tactics for presenting oneself confidently and competently to participants in training sessions

What you will need:

- Overhead/PowerPoint® slide #T-13
- Participant Materials

How to do it:

1. Introduce the topic with comments such as:
 - **Comedians say that telling jokes is all in the delivery. You can have a great joke that falls flat because you deliver it poorly.**
 - **Now, I'm not saying that facilitators should be comedians! Certainly there are times when the use of humor is appropriate and times when it isn't. But, like**

Step

9

After a Session

Time it takes: 10 minutes

Note: You may want to insert the optional activity, “Roles and Responsibilities,” found on page 109 of the Facilitator Resource Section before or after Step #9 (if you have not already inserted it). This activity provides a context for what activities a facilitator is responsible for before, during, and after a training session and shows other people’s responsibilities as well.

What it is about: Tactics for a facilitator’s responsibility after a session has been completed

What you will need:

Participant Materials

How to do it:



1. Introduce Step 9 by referring participants to their Participant Materials, page 37 (After a Session).
2. Give participants a few minutes to highlight items under “Tactics” that they find especially important.
3. Ask several participants for their highlights, and why they find them important.
4. Summarize and transition to Step 10 (Next Steps and Wrap-up) with comments such as:

Step 10

Next Steps and Wrap-up

Time it takes: 30 minutes

What it is about: Summary of the Workshop; comparison of Pre and Post Assessments

What you will need:

Participant Materials

How to do it:



1. Refer participants to their Participant Materials, page 38 (Next Steps) and ask them to complete the form. Allow five minutes.

2. Ask if any participants are willing to share their next steps.



3. Introduce the Post-Assessment with comments such as:

- **Earlier today you completed a Pre-Workshop Assessment of your facilitation skills.**
- **If you now complete a Post-Workshop Assessment, you can compare your ratings with those on your Pre-Workshop Assessment. Hopefully, you'll perceive that the Workshop has enhanced your knowledge and skills about facilitating.**

The following pages are the workshop PowerPoint® slides found in the Facilitator Resource Section. Please refer to the table of contents for a complete list of resources available in this section.

Welcome to Training!

FEARLESS FACILITATION!™

How to Lead
Effective Training

Produced By

V I S I O N P O I N T

Learning Outcomes

1. **Lead effective training sessions.**
2. **Explain adult learning principles and their application.**
3. **Describe how to best accommodate each primary learning style.**
4. **Demonstrate fundamental facilitation skills.**
5. **Strike the balance between purpose, process, and participation.**
6. **Exhibit the confidence and competence of a Fearless Facilitator.**

Agenda

- Introductory Activities
- Roles and Responsibilities
- Tactics for Each Responsibility
- Video Models
- Practice and Application Planning
- Wrap-up Activities

Introductions

Share:

- Name, job title, or responsibilities.
- Think of a fearless facilitator you admire.
- Share some characteristics of that facilitator you want others to admire about you.

The Facilitator Role

Ensure key points are understood and emphasized:

- Manage the environment
- Manage the process
- Optimize participation

Facilitator Responsibilities

- **Manage the Environment**
 - Preparation
 - Setting Up
 - Greeting Participants
- **Manage the Process**
 - Facilitating a Session
 - Following a Session
- **Optimize Participation**
 - Getting the best out of people
 - Staying on Track
 - Managing Disruptions

Ways to Inspire Participants

- Ask thought-provoking questions
- Attend to principles of adult learning
- Accommodate various learning styles
- Make smooth transitions
- Manage disruptive behaviors
- Exhibit professional presence

Types of Questions

- Polling
- Open-ended
- Close-ended
- Building or Networking

Making Smooth Transitions

- Summarize the activity just concluded.
- Briefly describe the next activity.
- Relate the next activity to the previous activity.

Examples of Disruptive Behaviors

- Arriving late to a session – or leaving early
- Side conversations
- Dominating discussions
- Interrupting the ideas and opinions of other participants
- Demeaning the responses of other participants.
- Raising sensitive issues about the workplace or associate
- Verbal abuse of other participants
- Using cell phones, pagers, PDAs, etc.
- Non-participation in session activities

Categories of Disruptive Behaviors

1. Non- or Minimal Participation
2. Excessive or Tangential Participation
3. Aggressive Participation

Challenge to a Key Content Point

1. Acknowledge
2. Reframe
3. Involve Group
4. Refocus and Move on

Fearless Facilitators

- Prepare thoroughly for their roles and responsibilities
- Practice, practice, practice
- Know their lines
- Follow the “script”
- Hit their “marks”
- Know when to be in the foreground and when to be in the background
- Sometimes rely on “cue cards”
- Avoid distracting mannerisms

VISION POINT

copy only

1985 N.W. 94th Street, Suite C
Des Moines, IA 50325-6933

Preview

800-300-8880

www.visionpoint.com

The following pages are samples of exercises involved with putting the responsibilities and observations of the workshop into practice.

Fearless Facilitation!™

How to Lead Effective Training

preview copy only

Participant Materials

© 2005 VisionPoint Productions, Inc.

All rights reserved. Unless specifically indicated, no part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior written permission of VisionPoint Productions, Inc.

This publication is designed to provide accurate and authoritative information in regard to the subject matter. It is sold with the understanding that VisionPoint Productions, Inc., is not engaged in rendering legal, accounting, or other professional services. If legal advice or other expert assistance is required, the services of a competent professional should be sought.

Table of Contents

Pre-Workshop Assessment	1
Introduction	2
Learning Outcomes	3
Agenda.....	3
Ground Rules (or “Agreements”)	4
Observation Notes for Video: Preparation Pitfalls.....	5
Preparation, Set-up, and Greeting Participants	6
Exercise: Tactics for Preparation, Set-up, and Greeting Participants.....	10
Types of Questions	11
Exercise: Questions Only, Please!	12
Observation Notes for Video: Generating Discussion: The Question that Stumps You..	13
Facilitating a Session – Generating Discussion.....	14
Observation Notes for Video: Staying on Track: Making a Smooth Transition	18
Facilitating a Session – Staying on Track: Making a Smooth Transition	19
Exercise: Making a Smooth Transition	20
General Categories of Disruptive Behaviors.....	21
Observation Notes for Video: Staying on Track: Dealing with Sensitive Comments	22
Observation Notes for Video: Staying on Track: Challenge to a Learning Point.....	23
Observation Notes for Video: Managing Disruptions: Cell Phones, Pagers, Etc.	24
Facilitating a Session – Staying on Track: Managing Disruptive Behaviors	25
Exercise: Managing Disruptive Behaviors	27
Worksheet: Non- or Minimal Participation.....	28
Worksheet: Excessive Participation.....	29
Worksheet: Aggressive Participation.....	30
Suggested Tactics for Managing Disruptive Behaviors.....	31
Observation Notes for Video: Managing Disruptions: Progressive Intervention	34
Facilitating a Session – Professional Presence	35
After a Session.....	37
Next Steps	38
Post-Workshop Assessment	39
Workshop Evaluation	40

Pre-Workshop Assessment

For each statement below, circle the number that reflects the level of your knowledge and skills regarding facilitation. There is not a secret document that has the “right” answers. The “right” answers are what *you* believe your knowledge and skills are.

- 1. I can describe the three primary responsibilities of a trainer/facilitator.**

High 4 3 2 1 Low

- 2. I can explain adult learning principles and their applications.**

High 4 3 2 1 Low

- 3. I can identify and describe the four major adult learning styles.**

High 4 3 2 1 Low

- 4. I know how to ask thought-provoking questions to promote lively and rich discussion.**

High 4 3 2 1 Low

- 5. I am able to make effective transition statements from one learning activity to another so participants see the connections between activities.**

High 4 3 2 1 Low

- 6. I feel confident and competent in my ability to manage disruptive behaviors that otherwise would lead discussions and other activities off track.**

High 4 3 2 1 Low

- 7. I am professionally poised when facilitating training sessions.**

High 4 3 2 1 Low

- 8. I am confident and competent in my ability to lead effective training sessions.**

High 4 3 2 1 Low

Introduction

Fearless Facilitation!™ How to Lead Effective Training builds the confidence, poise, knowledge, and skills demonstrated by facilitators who are exceptionally competent.

Exemplary facilitators are fearless because they prepare thoroughly for training sessions, are organized to the minutest detail, respect the experiences of adult learners, attend to various learning styles, and masterfully draw out the wisdom of participants. Above all, fearless facilitators continuously hone their skills.

The Workshop focuses on your role and responsibilities as a fearless facilitator and develops fundamental facilitation skills, including:

- Generating discussion through effective questioning techniques.
- Making smooth transitions from one activity to another.
- Managing disruptive behaviors.
- Establishing professional presence.

Learning activities in the Workshop give you an opportunity to:

- Assess your own knowledge and skills.
- Discuss and internalize the roles and responsibilities of fearless facilitators.
- Observe video demonstrations by fearless facilitators.
- Practice applying facilitation skills through a variety of exercises and practices.
- Receive constructive feedback from fellow participants and the Workshop facilitator.
- Benefit from the role modeling of the Workshop facilitator.

By the end of this Workshop, you will be prepared to fulfill your organization's expectation for effective and motivating training sessions.

Learning Outcomes

The purpose of the Workshop is to enhance the knowledge and skills required to lead effective training sessions. After completing the Workshop, you will be able to:

- Lead effective training sessions.
- Explain adult learning principles and their applications.
- Describe how to best accommodate each primary learning style.
- Demonstrate fundamental facilitation skills.
- Strike the right balance between purpose, process, and participation.
- Exhibit the confidence and competence of a fearless facilitator.

Agenda

- Introductory Activities
- Roles and Responsibilities of Fearless Facilitators
- Preparation, Set-up, and Greeting Participants
- Generating Discussion
- Making Smooth Transitions
- Managing Disruptive Behaviors
- Professional Presence
- After a Session
- Next Steps and Wrap-up

Ground Rules (or "Agreements")

- Stick to the topic and the agenda.
- Participate actively in discussions and exercises.
- Encourage others to share their ideas and opinions.
- Listen to and respect the ideas and opinions of others.
- Do not interrupt others when they are speaking.
- Return on time from breaks and lunch.
- Turn off pagers and cell phones.
-
-
-
-
-

Make amendments, additions, or deletions as decided in the discussion about the Ground Rules listed above.

Observation Notes for Video: Preparation Pitfalls

1. What did Clara do, or not do, to effectively prepare for her training session?
2. How might Clara's preparation (or lack of preparation) affect her credibility as a fearless facilitator?
3. How might Clara's preparation (or lack of preparation) impact the quality of the training session?
4. Reference the flipchart titled "Characteristics of Fearless Facilitators" that was developed during introductions. Which of the characteristics does Clara fail to exhibit?

Key Tactics:

- ✓ Ask Polling Question
- ✓ Ask Open-Ended Questions
- ✓ Ask Building Questions

**Optional
Activity
3**

Learning Styles

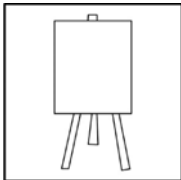
Time it takes: 45–60 minutes

What it is about: Understanding the four main learning styles and how to plan for and manage time, group dynamics, participation, and content coverage to appeal to the various learning styles

What you will need:

- A copy of the *Learning Styles-Real Situations* handout found on pages 107-108 for each participant.
- Flipchart #5

How to do it:



1. Introduce the topic by sharing that although there are several categories and sub-categories of learning styles, there are four main learning styles. Refer to the flipchart (example below) and review the four styles.

Learning Styles Flipchart example:

Learning Style		Learn by...
Visual Learners	→	Seeing
Auditory Learners	→	Hearing
Kinesthetic Learners	→	Doing
Conceptual Learners	→	Thinking

- a. **Visual learners – those people who learn best by seeing and visualizing.**
- b. **Auditory learners – those people who learn best by hearing.**
- c. **Kinesthetic learners – those people who learn best by doing.**
- d. **Conceptual learners – those people who learn best by thinking.**



2. Ask for volunteers to share examples of how a facilitator can appeal to each of the learning styles.

Expected Responses:

For visual learners – show video, use flipcharts, use written instruction, and show demonstrations.

For auditory learners – give verbal direction, repeat instructions, and summarize points verbally.

For kinesthetic learners – use experiential activities (role plays, simulations, worksheets) and allow them to get up and move around.

For conceptual learners – share research, provide connections between material and each activity, and use lots of examples.

3. Review the *Learning Styles* handout reviewing each column and asking for reactions and questions.

4. Ask the group to work in pairs to answer the questions on the *Learning Styles – Real Situations* handout. Allow ten minutes for individual work and debrief by asking for volunteers to share their answers.

5. Conclude the activity by sharing how the Workshop materials provided (facilitator guide, video, exercises, case studies, etc.) are designed to help appeal to the various learning styles. You may consider going around the room and asking each person to share one “aha” they now have about learning styles and to share at least one thing they will now do as a result of this discussion.

Preview

copy only

Learning Styles – Real Situations

Working in pairs, review each situation and answer the questions below.

1. You have just finished sharing a key content point and are about to introduce a skills practice exercise. The participants will be working in groups of three and there are several steps to the exercise.
 - a. What will you do to make sure the visual learner understands the directions?
 - b. What will you do to make sure the auditory learner understands the directions?
 - c. What might you expect the kinesthetic learner to do during the first five minutes of the skills practice exercise?
 - d. What questions do you expect the conceptual learner has and what will you do in anticipation of these questions?

2. You are conducting a training session that is a total of four hours in length. As part of the workshop, there is a 22-minute video that can either be used in its entirety or can start and stop at different points for discussion.

a. What do you think the visual learner will prefer? Why?

b. What do you think the auditory learner will prefer? Why?

c. What do you think the kinesthetic learner will prefer? Why?

d. What do you think the conceptual learner will prefer? Why?

e. What factors will you take into consideration when making your decision?

Optional
Activity

4

Roles and Responsibilities

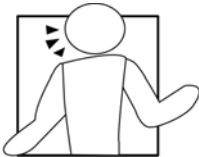
Time it takes: 30 minutes (approximately)

What it is about: Understanding who is responsible for what before, during, and after training

What you will need:

Prepared flipchart as shown below (without the expected responses filled in)

How to do it:



1. Introduce the topic by sharing comments such as:

- **In order for training to be highly effective, there are several things that must be done before, during, and after training.**
- **The facilitator is only one of many people who impact the training experience.**
- **The participants, their immediate supervisors, and the HR department all play important roles.**
- **Senior leadership in an organization also plays a key role.**
- **Let's discuss the responsibilities of each of these important players so we can get a full picture of what will really make training effective.**

2. Facilitate a discussion by asking volunteers to share what types of things each of the roles are responsible for. It is best to conduct this exercise one column at a time (instead of one row at a time). Example: As you begin this discussion, ask the group what types of things the facilitator is responsible for before the training. After receiving several responses, ask what types of things the participant is responsible for before the training. Continue filling in the first column. Expected responses are filled in for your reference.

preview copy only

Flipchart:

	Before Training	During Training	After Training
Learner (participant)	<i>Completing any pre-work; arrange office coverage; right mindset; get plenty of sleep night before</i>	<i>Engage; participate; ask questions</i>	<i>Try out new skills; talk to supervisor about what was learned; apply concepts learned</i>
Fearless Facilitator (trainer)	<i>Know the material; prepare the room; have plenty of handouts, pens, markers, etc.; get a list of participants</i>	<i>Manage the environment; optimize participation; stay on time; answer questions; be flexible within reason; appeal to different learning styles</i>	<i>Follow up on evaluations; adjust material for next session based on learnings; be available as a resource to trainees</i>
Manager (trainee's direct supervisor)	<i>Encourage participation in training; share why the training is important; take an interest</i>	<i>Provide coverage back on the job; don't interrupt training; support the training to others</i>	<i>Be available as a resource; talk about the training experience; encourage application of new skills</i>
HR Department	<i>Make sure the right training is taking place; organize logistics of training; if using internal people, train the trainers; communicate & offer training schedule</i>	<i>Be available to the trainer for questions/emergencies; don't interrupt training; support the training to others</i>	<i>Review evaluations; talk with trainer on how to make the training even more effective; review non-training related issues that may have come up during training</i>
Executive Management/Senior Leadership	<i>Set the vision and communicate that training is important; communicate why it's important; share how they will support training; go through training</i>	<i>Kick off training session (live or via video); support training to others</i>	<i>Follow up with HR on how training is going; review feedback on organizational issues that may have come up during training; expect an encourage managers to support training and its application</i>

3. Conclude the activity by summarizing, or asking a volunteer to summarize, how important it is for everyone to be involved in the training experience. You may want to ask each person to share one action item they will immediately do as a result of this discussion.