

Fearless Facilitation!™

How to Lead Effective Training

Facilitator Guide

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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.

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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.

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

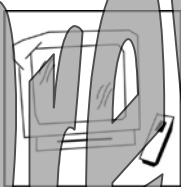
What you will need:

- 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

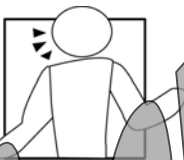
What it is about: Video demonstration of a facilitator setting up for a training session, debrief of the video presentation, discussion and exercise concerning tactics employed by facilitators when preparing for a training session, setting up on the day of a session, and greeting participants as they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

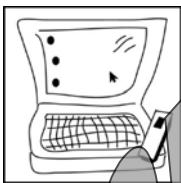
Time it takes: 120 minutes

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.**

Welcome to Training!

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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

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