

Facilitation
Making it Work
Making it Fun

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Agenda

Why Facilitation?

What do we bring to the party?

Facilitation Techniques

Websites and Resources

Why Use Facilitation?

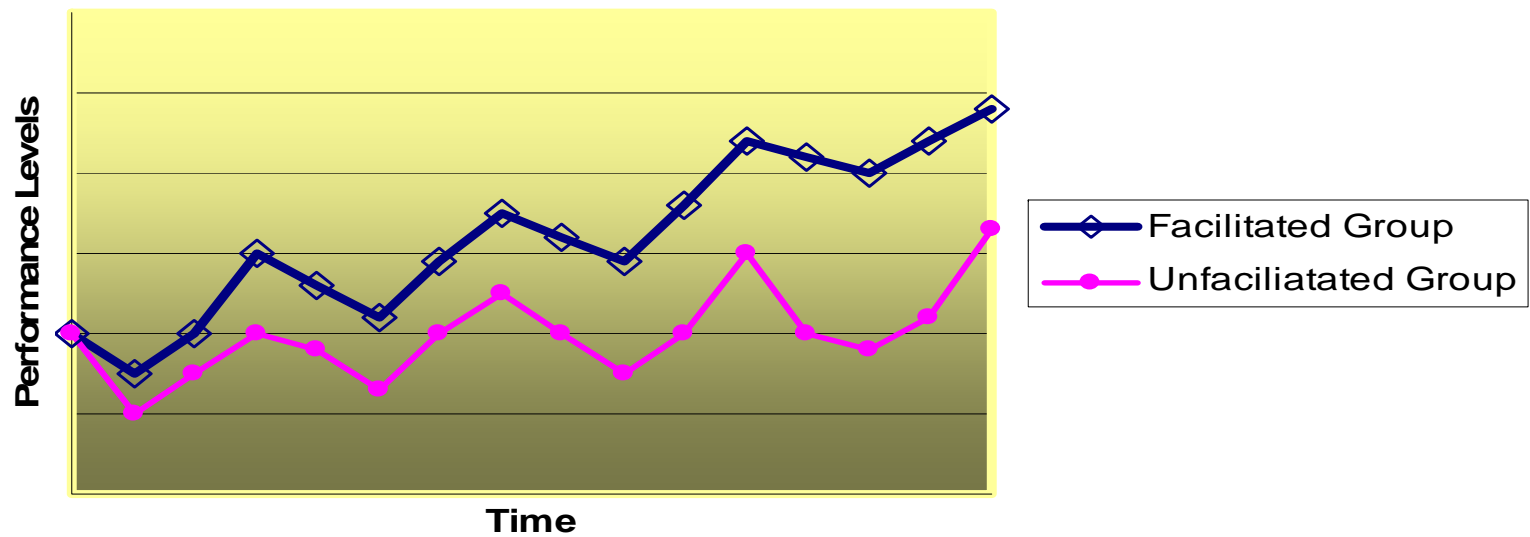
As a PM what are your biggest fears around a project and the team?

- PMBOK – What was the right answer on the test when asked whether you should update the project plan alone in your office or have a team meeting?
- The TEAM “owns” the project plan
 - $ED = RD * CD$ Effective decision = Right decision times the commitment to the decision
- Two heads are better than one
- You can participate as a peer if you use another person to facilitate.

Why Facilitation? Group Performance

- Form, storm, norm, perform

Facilitated Team Performance



What Makes Facilitation Work?

- Facilitator drives the process
- Neutral Party is driving
- Facilitator aims towards a pre-agreed outcome
- Proven process
- Agreed upon ground rules
- All of these alleviate Participant Fears

What IS Facilitation?

- Facilitation: All tasks needed to impartially run a meeting. .. serves the group to encourage, aid, and lead group decision-making.,does not "manage" nor entertain the group but does control the process. Wikipedia. (underline is mine)
- Facilitated Session: “A highly structured meeting in which the meeting leader (facilitator) guides the participants through a series of predefined steps to arrive at a result that is created, understood and accepted by all participants.”
M. Wilkinson, The Secrets of Facilitation

Facilitation Can

- Engage your meeting attendees
- Change the energy in the room
- Allow brainstorming that engages all personality types
- Adds some fun and color to project management

Facilitation Points in PMI Phases

- Initiation – Scope, Cost-Benefit Analysis, High level Requirements List
- Planning – Agreed upon WBS, Schedule, Plan, Risk Assessments, Stakeholder List, Communication Plan
- Execution - Change requests, re-baselining
- Closing - Lessons learned

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What do We bring to the party?

Make sure it's not BAGGAGE - How neutral can I be?

- Our Story about ourselves
 - What happened and what I made it mean
 - Consider other options
 - Self-talk
- First and Other Impressions
- Our Experience and Training

What do We bring to the party?

Thinking Style

- Dot Connector: Linear and logical
- Dot Collector: Appears to be all over the place, puts it together after collecting what look like random dots
- Slow thinkers: need time and/or quiet, good long-term memories
- Fast thinkers: first to speak, may be off track or not, learn quickly and forget quickly

What do We bring to the party? Learning Styles, Personality Types

- Learning Styles
 - Visual
 - Auditory
 - Kinesthetic
- Myers-Briggs - Interaction Styles
- DISC Communication Styles

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Creating Safety - Engagement

- Prepare
 - Interview and prepare the sponsor
 - Know the problem attendees
 - Have a clear agenda and outcome
- Slow engagement
 - Ask for nod of the head about a non-threatening item. Nod or shake your head with them.
 - Ask for a show of hands on the next question.
 - Ask questions to slowly engage them.

Creating Safety - Transparency

- Getting started
 - Agenda
 - Ground Rules that apply to everyone
 - Parking Lot
- Transparency
 - Post it, Post it, Post it – Transparency
 - Record it for ALL to see
 - Come back to it – again and again

Creating Safety - Process

- As you progress, keep the road map clear
- Toast, Whoosh, Check to finish agenda items
 - Hindsight, foresight, whole sight after each topic
- Use the Ground rules & Parking Lot
- Document decisions
- Document Action Items
- Energizer
- Dots, Timers, Bells and Whistles



Imagination – Setting the Stage



Nominal Group Technique

- Participants write one idea per post-it. Everyone has the same color post-its and pen.
- Collect these or have each table (if in tables) collect them and get rid of duplicates.
- List and number all the items on a flip chart
- Let the group discuss each item
- One minute stumping from each person
- Vote with dots or just vote by show of hands.

Delphi Technique and Anonymity

- Delphi Technique - no voting
 - Use experts to give anonymous input, compile it, send it out, let individuals comment on it to you, compile it again, repeating until there is consensus.

Use post-it notes or email to have people give you their input.

Groupthink software.

Windows and Paper instead of Excel

- Use any technique you like to gather your list of project risks or stakeholders.
- Draw a large quadrant on the whiteboard or flip chart. Or on a large window!!!
- Let people get up and place their risks on the quadrant. Group can discuss where they think it belongs.

Advantages of These Processes

- Reduce the FEAR Factor
- Repeatable Steps
- Repetitive Techniques – checking off completed items
- Touch the sticky – tactile, kinesthetic
- Writing – visual, tactile
- Auditory - read the stickies
- Can be linear approach (arrange stickies if it helps you)
- Can be artistic in placing the stickies – create a sense of balance, design, color
- Gets people out of their chairs when you need to change the energy
- Dots create fun competition

Agreement - Consensus

- What is agreement?
 - **Consensus** – I can live with it and support it.
 - Define a voting – thumbs up – Aye early on and have the group practice it.
 - YOU make it fun.

Conflicts vs. Dysfunctional Behavior

CONFLICTS

1. Differing information
2. Differing values or experiences
3. Baggage

DYSFUNCTIONAL BEHAVIOR

1. Prevent
2. Detect early
3. Resolve

Differing Values – Define the costs in time, money, resource hours

- How much
- How long
- Who and what is involved
- Decide if there is agreement at this point.

- If not.....

Differing Values – List the Pro's and Con's

- Write the options on the flip chart – depersonalizes them
- Have Group or party A give the advantages of Party B's solution/idea and B of A's
- Have Group or party A give the drawbacks to their own solutions. Party B does the same.

Differing Values – Strengths and Weaknesses or Merge

- Ask if there are other alternatives
- Get advantages and disadvantages, costs, benefits
- If no consensus, ask if there are other alternatives that build on the strengths of the ones evaluated.

Ranking Techniques

- List the Alternatives
- List Evaluation Criteria and weight them (1,2,4)
- Half the room can list the weighting criteria
 1. Decide which item gets highest weight.
 2. Do any other need to be that high
 3. Decide the lowest criteria item and any that should be as low.
 4. Fill in the gaps.
- Other half of room does the scoring(0-10)
 - Assign highest score first to each alternative
 - If next item is half the cost, it gets score of 5, 1/5 the cost – score of 2, etc.

Ranking Techniques

- If still no clear choice
 - Ask
 - “Who has an issue with this alternative?” , pointing to the one with the most support.
 - “What is the least amount of change we can make to this so you can live with it?”
 - Good for mission, goals, scope statements.
 - Then ask if these changes are acceptable to everyone,
 - Continue or take a break and come back to it later.

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Discussion Questions- Who'd a thunk – a PM needs to facilitate?

- What are your biggest challenges as a PM? Would facilitation help?
- What are any meeting attendees biggest fears?
- What are your favorite facilitation tips/techniques?
- How confident are you in facilitating?
 - Have you taken facilitation training?
 - Offer to facilitate for a fellow PM!!
- Have you used stickies to generate WBS, network diagrams, risk lists and mitigations, stakeholder power analysis?

Websites and Resources

- Facilitation and Communication Sites
 - www.leadstrat.com - great class
 - www.iaf-world.org
 - www.inifac.org
 - www.mid-atlanticfacilitators.net
 - www.vitalsmarts.com
- Books
 - Advanced Team Facilitation – Ingrid Bens
 - Facilitating to Lead – Ingrid Bens
 - The Secrets to Masterful Meetings – Michael Wilkinson
 - The Secrets of Facilitation – Michael Wilkinson



THANK YOU!!!



- Questions??
- Email nk.adams@verizon.net for a copy of this presentation.