

How much work makes a workshop work?

A facilitator's guide to inspire the *right* work.

Thirty tips & tools from workshop facilitator Troy Forrest

A 42 **MIGHTY** white paper - August 2012



A note from the butcher's paper scribbler...

In the past 6 years running my one-man sales & leadership consultancy, I've custom-built and facilitated over 400 workshops* for more than 60 organisations in as many industries. From crews of 3 to groups of 200. International leadership teams to long-term unemployed job seekers. Novices and experts from sales, marketing, customer service, logistics, management, technical support, finance, clinical, R&D and innovation teams. We've had collective conversations about beer, drugs, shade sails, advertising, shampoo, trucks, surgical devices, PR campaigns, crop chemicals, resuscitation mannequins, retirement living, union membership, even the power of the sun. Workshop topics have run the gamut. Public speaking. Selling more. Business planning. Dealing with difficult customers. Helping the best customers. Creativity. Leading teams through change. Written words. Having fun. Discipline. Simulation & role playing. Lots of role playing.

Every workshop different. Every framework bespoke tailored. Every event presenting unique challenges and learnings.

This paper serves up the best lessons I've taken from working with these diverse groups. From developing & delivering PowerPoint® spines to releasing interactivity inside a room to covering the butcher's paper in illegible chicken scratch to helping participants ensure their workshop-concentrated wisdom stays alive and gets implemented.

In a neater format than I can manage with a black marker, here's some tips and tools I hope you find useful to create and facilitate a workshop that works for *your* team...

(* My definition of "Workshop" – any interactive forum with multiple participants that generates some work. Hopefully the right work.)



1. Why a workshop?

Is pulling the crew together the *best way* to facilitate the change you're considering? It sounds convenient – one session, one time block, one crack at inspiring and educating and arming. But is it right for the change you want, or for the cross-section of people you're thinking about as change implementers or get-comfortable-with-it impactees?

I've observed that workshops tend to work if;

- They have a clear, realistic, consistent purpose (“To brainstorm ideas for...”, “To develop initiatives that...”, “To create plan frameworks to...”, “To clarify next steps and responsibilities in...”, “To build skills and knowledge about...”)
- The team in the room will benefit from hearing one another’s perspectives, either because they’re in similar positions or precisely because they’re not.
- The workshop is part of a larger, longer-term schedule of works that includes information gathering pre-workshop and post-workshop coaching, implementation support or repeat sessions.
- They are facilitated rather than taught; open rather than didactic; engaging rather than energy-sapping.

In my experience, they don’t work as well when;

- The path you want the team to take is completely pre-defined (then it’s a briefing).
- The outcome you want the team to work to achieve is unrealistic (then they tend to serve as cesspits of demotivation).
- The group is pieced together out of logistical convenience rather than relevance (then they turn off).
- The coordinator doesn’t believe in the workshop’s value or sells it as a box-ticking exercise (the organisers energy levels and enthusiasm are a litmus test that others will naturally emulate).

If you’re considering running a workshop, then the first, most fundamental question you need to ask yourself is “*Is a workshop the right vehicle to support this change initiative?*”

2. The brief

Assuming you’re convinced of the merits of a workshop, it’s important to write yourself a crystal clear brief, whether it’s just for yourself, or for co-developers & facilitators, or, if you’re outsourcing the session, for the hired gun. If you’re not completely sure and you’re bringing in a consultant to help you design a forum, let them ask you questions and develop a draft brief that you can then correct or shape. Be optimistic, but specific and realistic. Consider the different outcomes you might want to achieve around;

- Goal setting
- Plans & action step development
- Participant skill, experience, knowledge & perspective sharing
- Team bonding
- Aligning thinking and activity plans with greater organisational goals or cultural pillars
- Staff engagement / re-engagement & invigoration

Briefs also need to take into account logistics (who, when, where, how long, budget) and ‘must-do’s (fit with company policy / values, give rise to specific documents / plans etc.)

It’s your workshop – what do you want it to achieve? And keep the brief *brief* - clear, realistic and worthy of effort.

3. Take the temperature

Some teams come to workshops full of wild-eyed enthusiasm and a zeal for change; others drag their heels and sassafras at being pulled away from their day jobs. Where’s your team at? On the topic of *this* workshop?

The tone, exercises and level of interactivity you build into a workshop will be influenced by;

- where a team’s thinking, attitudes and skill set is at
- the level of cohesiveness of the group
- how frequently they’re exposed to workshops or professional development forums

- how familiar participants are with one another's perspectives
- any cultural or change 'waves' the organisation might be riding
- maybe most important of all, how behind their boss they are.

I've found a good rule of thumb is that the less engaged or uniform a group is in coming to a workshop, the more you need to build interactive exercises that live on neutral, non-threatening ground. Hypotheticals and creative scenarios where people need to apply problem solving skills or diverse perspectives (and that don't let them get caught up in real life political conversations that might be the source of their displeasures) are a useful vehicle for calming the collective disgruntlement while ideating or educating. The challenge is then inspiring individuals with their own motivations, roles and challenges to translate these broader learnings to their specific situations.

It helps greatly to know what the looks on the faces and the thoughts running through heads are likely to be before you design the workshop.

4. Clarify the time home

Different topics and audiences lend themselves to different time homes – dedicated moments in the day. Breakfast forums can be great kick-start sessions for peoples thinking and motivation, but they're often tougher to get lots of interactivity and innovative thought from (not everyone's a morning person). Similarly, 3pm slots, while useful to bring the current day's experiences into the conversation, can get mired in 'way-we-do-things-around-here' tired thinking that comes towards the end of long days. A lunch session can work well, but you better feed them, and beware the lunchtime audience being nibbled away at with phone calls, urgent emails or "can only stay for a sandwich" interlopers.

How long your workshop should run for is something that needs great thought. While 2 hours sounds great from an efficiency perspective, by the time you let people get their chests unburdened and begin sharing perspectives, have you got sufficient time to scratch beneath the surface or let their brains go free-reign a while on idea generation? Day long sessions, even two days, can generate a lot more traction, commitment and detailed plans, but you need to be aware you're competing with people's heads screaming "*I've got to get back to my real work, it's piling up!*", opportunity cost arguments, and by the end, general workshop fatigue can result in a lot of group head-nodding in a collective effort to get the session finished.

The time home you choose and the duration of your workshop will heavily influence the tone, level of interactivity, requirement for ideas or plans or commitments, and the work you as a facilitator will need to do. And vice versa.

5. Your space

The boardroom? The lunchroom? Offsite in a paid-for facility? Over a few drinks at the pub? Sitting in the grandstand of your local football oval being inspired by the hard trainers (or watching the grass grow)? What's going to be most conducive to the group, the format, the desired outcomes you're working with?

Creative workshops (which I think all workshops should be) benefit from creative spaces and stimuli. Rooms with windows and views and the ability for participants to step outside, breathe fresh air and take their in-pairs exercises under a tree or at least into a lobby work well. Stick up some posters, use the whiteboard and butchers paper and get colourful. If your workshop is dealing with a somewhat more prosaic topic ("*Review of General Accounting Principles for Salamander Farmers*"), a standard classroom environment, even sans windows, might be fine. But at least bring a Salamander for interest's sake...

Some workshops benefit from clustering people into subgroups (such as table groups or department teams), but be aware that subtle divides can build in a room. Be strategic in who you stick on which table. If you choose not to use

place cards and your room is set up in rows or a u-shape, be prepared to work a little harder to break up cliques or extract perspectives from the wallflowers that will find a nice hiding position towards a back corner.

I've found that the more open, warm and inviting the space - one that's relatively free of barriers between the participants and the facilitator - the more conducive it is to people being willing to contribute. You still have to pull a little, but when a critical mass opens up, you're away and the process becomes more enjoyable for all.

Choose the space that's going to give you the open-ness or focus you're after, rather than for its convenience. Convenient spaces aren't always inspiring or conducive to great work.

6. Be realistic

When you're putting together your workshop, be it the agenda, the exercises you'll have people partake in or the PowerPoint® framework you'll operate off, avoid the temptation to try killing 42 birds with one stone. If like me you have a natural tendency to try jamming too much in, be OK with the fact that you'll likely only get through around 2/3 of what you think fills the time-home you've allocated (and that's if you're lucky). I'm yet to run a session where, if we've covered the workshop material in full and there's a little time to spare, the audience didn't appreciate the extra time to flesh out some ideas or for general conversation time in a fenced-off space. By all means be conscious of the fact that you've got the group together for a finite period and there are some key things you want to achieve, but for maximum engagement, err on the side of under-filling rather than jam-packing. (I've found you often need a little extra time at the end of a workshop to press people for specific commitments and work through any barriers to workshop output implementation).

The other 'realistic' to be mindful of – trying to please and engage all of the people all of the time. You just won't. Get over it. Aim for quorum engagement rather than outliers. Individuals will make personal choices as to whether or not they'll try to get something from your session. Set it up in the best way you know how with values and noble ideals in mind, and be OK with the one person sitting up back with arms folded, looking like they sucked a lemon.

7. Simple first, simple second, simple last

The workshop creator and facilitator (clever pedestal-sitting sages that they are) loves little more than showing off their cleverness and the complexity of their understanding. (Yawn!) Boring. Usually counterproductive.

The most powerful workshops I've experienced and delivered have been the simplest in their structure. A clear set of goals, a framework that doesn't let people languish in complicated thinking or technicalities that are best dealt with outside the workshop, and a tempo and tone that kept everyone focused on the overarching themes of the session.

Be mindful of the fact there's a difference between 'simplicity' and 'superficiality'. Simple workshops can certainly deal with detailed technical topics without unduly glossing over them. They just don't allow 'domain experts' to spend hours delving into niche topics or what should have been pre-reading or requisite knowledge or day-job stuff. Swimming around in circles in deep data is for analysts, not workshops. Great workshops also don't ask people to jump from one complex topic into another without creating pause moments for 'higher level summarising' of workshop sub-points, so that people can wrap an outer layer on the complex segment before moving forward.

Great workshops keep it simple. Easier to remember. Easier to engage with. Keeps the tempo and enthusiasm up.

I've found that the rule of 3 is powerful in workshop framing and delivery. It can be applied in numerous ways;

- **Contact with the audience** – send them pre-work, run their workshop, then send a follow-up note / call
- **Breakdown of workshop topics** – cover no more than 3 major themes / goals for the session
- **Workshop exercises** – explain it, then let them do it, then have a little feedback / exercise wrap-up session
- **Overarching workshop structure** – use an introduction, a body and a conclusion / next steps

- **The continuum of your workshop** – deal with ‘the ghosts of Xmas past, present and future’ (particularly useful for business planning workshops, where you deal with what you’ve done, what you’re doing and what you’re going to do.

Simple. Simple. Simple.

8. Drafts

Even professional writers and line dance choreographers aren’t enamoured with the process of having to create and then rebuild and then rebuild again.

But drafts pay off.

If you want it to be great, be accepting of the fact that the first frame-up will be rough and have plenty of ugly bits. But it’s important to get it all down on paper or PowerPoint slide deck in thought-vomit form first. It’s much easier to prune and polish frameworks than it is to get it perfect during phase 1 construction.

With your first draft of key points, data, exercises, challenges, theming ideas and rough-cut timing done, a critical step is to then go back to your brief and goals and say “*will this give participants what they’ll need to achieve their goals?*” Now you can start going through it with a razor and some gap filler. What’s missing? What’s self-indulgent and superfluous? What might be ‘nice to do’, but will eat up valuable time real estate that could be better used to flesh out ideas or thinking about a key topic? Going to town to remodel your plasticine baby is tough but essential.

As your draft framework comes together, you can start to pass it through progressively finer filters. Will it meet the time requirements? Is there the right balance of interactivity and valuable information sharing? Are there sufficient mental pause points? Have I got the tools to support the exercises? Is the format of the workshop / presentation sufficiently engaging? Will I hold the hearts and minds of the key people because they can see how it’s relevant to them? Am I touching all learning styles with this framework? Have I got the right stories in there to keep it real and enjoyable? Are there multimedia tools I can use to add to (rather than distract from) the uptake of the message?

At some point, it’s vital to share your framework with another – a key stakeholder, a co-facilitator, your boss, even a trusted workshop participant whose championing of the success of the workshop outweighs the fact you’re stealing a little of your own thunder in showing them. (Remembering that it’s not *about* your thunder is pretty important too.) Ask them if it makes sense. Look for the scrunched up looks on their faces. Ask them if there are any glaring omissions in your thinking (so easy to do). Let them put their fingerprints on it, then take it away and polish it again.

You’re getting there.

9. Exercise / structure / goal synchronicity

Fun interactive exercises are great, but if they’re not relevant to the goals of the workshop or fit with the tone of the forum, they won’t have the impact you’re after. After you draft your workshop structure and exercises, take a step back and ask yourself “*what would someone realistically get out of doing that exercise? Does it reinforce the message / thinking / action steps we’re aiming for? Does that help us achieve the overarching workshop goals?*”

(Creating great workshop exercises is a whole other whitepaper, even a book in itself. But here’s five things I’ve observed that might help you think about and develop exercises to fit your workshop;)

- **Keep them punchy** – 2, 3, 5 minutes tops. Leave a pair or threesome for too long and they’ll go off message faster than you can say “*Break into pairs!*”

- **Keep them simple** – while it's sometimes tempting to ask people to do a 7-stage activity, it rarely works unless it's really, really simple. If in doubt, aim for 1, 2, no more than 3 things that you have your small groups come out with.
- **Individual exercises are fine** – don't be afraid of silence in a workshop except for the sound of mental cogs turning. Having individuals sit by themselves for a short period of time, pen in hand, and think and sketch and translate their experiences into learnings and action steps can be really powerful, and it's a gift they rarely give themselves.
- **Pairs is generally better than threes.** Three's most often a crowd of two workers and one passenger.
- **Putting a little competition into it can ramp up energy and engagement** – use incentives. And don't be afraid to amalgamate fun with serious. Exercises like *"How would a 5-year old do it?"* or *"Have Q from the James Bond movies rework our product"* or *"Top 3 sales strategies we could employ for under \$5"* will provoke thought, enjoyable banter, and even some foundation themes you might build on later.

Above all, the exercise must have a point. Ask yourself, *"will it help participants achieve something meaningful?"*

10. Their homework

Often, the hard yards for your workshop can be done well before the event. Not just by you as the creator or facilitator, but by the participants too. Sending out a simple 'pre-workshop request' one or two weeks in advance can not only make your workshop more efficient, it's a great way of engaging people in the goals and culture of the session. Consider sending a group email thanking participants in advance for their efforts, explaining the workshop purpose and goals, allaying any fears they may have about what it will or won't involve, and asking them for their help in making the most of the finite time you'll have together by doing just a smidgen of pre-work (10 – 15 minutes tops). It stops a lot of arm folding and quizzical *"why am I here?"* looks early in the piece, it lets you sniff out any early potential obstacles (you're likely to get the odd email saying they're far too busy and can't even see the point...), and you can start the message delivery long before the muster.

A word of warning – don't ask for too much, or you'll set everyone up for failure. Be generous, ask for a tiny amount, be very grateful when they do it, and use it as a springboard into the collaborative work.

11. Your homework

As the person holding the texta and laser pointer, you're a role model for the participants. Not just for enthusiasm and understanding of the topic (even if you're not the domain expert), but for the pre-work you've done. Facilitators get judged all session long, and it starts really early in proceedings (even down to the pre-workshop reading or homework). Do you know the names of everyone who's coming? What they do? Why they're there? What their issues or takes on the issues might be? How long they've been with the business? Have you looked at their Facebook / LinkedIn / Twitter profiles? Googled them? Seen their names in the org chart? If they work for you, do you know what kind of day they had yesterday and how that's going to impact their thinking coming into this forum? Do the research.

Your Homework (part 2) – rehearse the workshop until it hurts. I dry-run my workshops on average 3-4 times. The really tricky ones, 5-6. Out loud, in a room by myself, running through the slide deck and handouts and mentally working through the individuals I know will be in the room. I play with the words, I remember the tone we're trying to convey. It's about developing some form of mental muscle memory to help you when you're standing before the headlights of your workshop participants. Even when you know them – even when they're *your* team – the preparation shows. Lack of preparation shows even more.

Before you walk into the room with the crew, do the diligence. It will become apparent if you have or haven't.

12. The MIGHTY checklist

Because you're busy and juggling lots of balls (this workshop just one of them) you're likely to forget something. Yes, you are. Checklists are your friend in workshops. Consider;

- **Tools** (presentation, data projector, computer, memory stick, internet access, laser pointer, batteries, cables, textas, butchers paper, blue tack, timer, camera, spares of all of these...)
- **Room** (chairs, table set-up, paper, pens, water, coffee, mints / lollies, air con, whiteboard, projector screen, signs, registration form, name tags, handouts...)
- **For the facilitator themselves** (master slide printout, presentation notes, agenda, exercise run sheet, list of participant names, name of your assistant / the IT help person / contact to call if the lights go out, a clock, your opening and closing words, reference books / articles / amusing anectodes or story notes, diary for coordinating follow-up appointments at session end, gifts & reminders for participants...)

These are not exhaustive (*exhausting*, maybe) – what needs to go on your workshop checklist?

13. Let's bring 'em in...

Ready to go? You want to be in the room early – first by a good 15 minutes (30 – 60 minutes even better). The best laid plans are tested when you plug your data projector in and your globe blows, or the laptop and projector don't synch, or the door to the room is locked, or the coffee's nowhere to be seen. Or you leave all your paperwork in the car that's 5 minutes walk away. 15 minutes *minimum*. Even if it's all hunky dory, it takes a while to get your bearings, set up the technology and get your paperwork into the right piles. Then, in peace and quiet, you want to audibly speak your opening words to an empty room at least once. I know you feel silly. It pays off. Check the acoustics (check 1,2...) Seat layout right?

Finally, when you're happy that the setup is under control, that your notes and slides and exercises are in the right place and your checklist is checked and all you need now is some bodies to start filing in the door...

...take one more moment to stand at the front of the room, breathe deeply (3 times, the experts tell me, in for 5 seconds, hold for 5 seconds, out for 5 seconds...). Fall in love with the space you need to own for the next 1, 2, 8, 24 hours. It's your platform for facilitating change. Be one with it. Ommmm.

When the doors open and the nervous first attendees arrive, don't stand at the front like a stunned mullet. Go shake hands, smile, greet, welcome, be enthusiastic, make people a cuppa if the facilities are there – they're your guests. They've given themselves over to your facilitating hands... make them feel like they made a great choice.

When you're 5 minutes from starting, let them know – *"We'll be kicking off in 5 minutes sharp everyone – final loo stops and coffee top-ups"*.

When you're 2 minutes from starting, start asking people to grab a seat, turn off their phones and laptops.

When you're 30 seconds from starting, tell them you're starting now. *"OK everyone, let's kick off!"*

When you're on the starting time.... **start** *. If the room's not full, use the words *"we've got a couple of others who'll join us shortly, but because your time is valuable, we're moving now. So **WELCOME!**..."*

(* there is always a frustrating caveat to this – it's when the boss / big cheese / wallet holder or star pupils that simply *must* be in the room are the late ones, or when the boss is in the room but asks you to hold a bit longer just to show their clout. The wise counsel is that they're paying for it, so you're under an obligation to follow their lead,

but don't be shy in being provocative - they've asked you to run a workshop from 8 to 5, remind them of the power of sticking to promises. Test the friendship a little... then make little timing tweaks to accommodate.)

14. Involvement without fear

The workshop's begun and you can see it in their eyes. The beads of sweat forming on their upper lips. The body language screaming "MAKE ME INVISIBLE!" And the sadist in you just wants to call on them... Even if you're not a mean bean (and you do need to feel for these people, they really *are* afraid, and that's no fun), you need to involve everyone at some point. So how to get the petrified wallflowers talking?

One way I've found useful to kick off interactivity is calling directly on the bolder members* first up (they're easy to spot). Going straight for selected audience members sets a clear precedent, rather than just calling for volunteers (which often leads to stum silence followed by individuals you may or may not want leading the conversation piping up and the wallflowers retreating further).

With a 'calling on people' pattern established, you've made it clear that everyone has to contribute at some point, so the quiet ones start to muster some courage (but are still largely distracted by their fear). Put them out of their misery pretty early in the peace. Be 'cruel to be kind' and free up a more interactive flow for the remainder of the session. You can buffer the first interplay by giving them a relatively innocuous, specific, factual 'leading witness' question to start with. "*Belinda, I know you work in xxx department, where Hugo's told us one of the key issues is yyy. In your role, what's the biggest zzz that results in?*" OK, it can be a bit sexier than that, but the point is to allow people a measure of comfort in opening up before the group by being allowed to start with something well within their expertise domain, something that's already been identified in a broader way by another team member, and that isn't asking for anything that her colleagues probably aren't already aware of. Don't be mistaken - you're going to need to ask these individuals to progressively brave-up as the workshop persists, but nipping "fear - part 1" in the bud is a useful way to help them avoid a stress ulcer and actually benefit from the workshop rather than drowning in worry for the day.

(*The other fear that runs through a group is that said bolder members will dominate the conversation. The fear is not that others want their talking time - it's that everyone already knows the bolder members perspectives on everything already and they're worried that this will just become a wasted exercise dealing with the squeaky wheels of the squeakiest wheels. Facilitator mantra - **all participants are equal**. Make the point 42 times throughout the session that one of the benefits of this forum is *listening*, that it's about sharing *diverse* perspectives, and that *all* must contribute equally. You'll still find yourself looking for a muzzle for the opinionated, but generally it's manageable. And when it's not - you've got to call the chatters on it. A little back-in-their-box embarrassment for one is outweighed by the sense of relief and opening up of every other participant).

15. When fear works

Never.

Not externally-driven fear anyway. Not in the room. You might provoke a little "*oof, I better get the homework done lest I look incompetent*" thinking before the event, but if you're relying on a stick to get people motivated to learn something, contribute something, do something for you or change their ways, then I think you're a monty to fail. Maslow's lowest rungs are physiological needs and security needs. We have to feel safe. If we don't, we turn our brains off to the idea of socialising and learning and contributing and growth.

If your workshop is predicated on scaring people into action, please save your time, money and effort. Send it as a memo. At least you won't have spent anything.

16. Presenting data

Data doesn't have to be the enemy of an engaging or effective workshop, but if it's not handled correctly, it has the potential to bog it down and distract from decision making and next-step planning.

Consider;

- Does your PowerPoint framework REALLY need those 47 pie charts and histograms?
- Can the most important data be set as pre-workshop homework and made 'assumed knowledge'?
- Is there a simple way to conceptualise complex data sets that need to be discussion topics?
- Have you, as the facilitator, developed a clear, efficient way of introducing & summarising the data?
- Can pictures, metaphors, representative case studies, be used in place of spreadsheets?
- When the conversation does get bogged down in statistics and historical artefacts, will your workshop framework allow you to pull the conversation buggy out quickly without leaving people behind?

By all means use the data that will support the goals, facilitate the right conversation or shift perspectives, but make sure you've planned to keep the conversation moving forward and focused on what people can do from this point (not just wallowing in details of the past).

17. Stories

"I remember running this one workshop – it was a hot summer's afternoon and we handed out lemon icy poles....."

Stories are the counterpunch to deep data dives. They can be powerful grabbers of attention, effective metaphors for ideas you're trying to get across and even a way to get people seeing a point via relaying their *own* experiences around a particular topic. There's a few things I've discovered about the use of stories as a workshop vehicle;

- **They've got to be real** – "*Don't ever let the truth get in the way of a good story*" might work in the front bar, but it's a pretty sure-fire way to lose an audience's respect when you get caught extending the truth (and you'll always get caught). If you're using others' stories, just give them the credit. Telling porkie pies and being busted kills credibility and loses the group.
- **They've got to be relevant** – I'm sure the tale about the time you worked in your Grandfather's radio repair workshop when you were nine and discovered you had a rare talent with a soldering iron is a really interesting story.... but what's it got to do with *this* conversation? Just because a story is engaging, heart-warming or going to get a few laughs doesn't mean it's a great fit for the workshop you're in. As ad guru David Ogilvy said, "*The temptation to entertain rather than sell is contagious*". You designed your workshop to sell an outcome – the creation or acceptance of an idea; to plan for or act on some change. Probably not just for a few laughs. If you're got a cracking tale, make sure it's got a point, and the point sufficiently correlates with one you want discussed in the workshop. If it does? Fire away!
- **They've got to be clear** – as a facilitator, workshops fly. The clock hands seem to spin ridiculously quickly, and before you know it... thanks for coming. So if you're going to use stories, my suggestion is that they be as punchy as you can make them. Can the slowest person in the room get what you're talking about, and quickly? Can they see the tie-in without having the punch-line explained to them? Waffle and elaboration might make you feel you've delivered a more complete picture, but you need to ask yourself if the opportunity cost is worth it.
- **Pause a moment at the end** – you told a story to get people to think, to see something in their mind. Give them the chance to see it fully before whipping their attention away to the next topic. Many a great story's point is lost because we move too fast to a new topic. Plan a pause point. Consider. See it? Great.

Now continue.

18. Flow

I think of a workshop as a mental train journey that participants are taking. The workshop is full of distinct 'stations' – activities, points or exercises – and they need to be visited in the right order to get the right outcomes. There's also the linking stuff – the conversation tracks you take them along, the smoothness of the ride, the scenery you choose to point out en route – that's important to progress the session forward and make it enjoyable.

(Ahh, the power of metaphor... 😊)

When putting a workshop together, I'll assemble the 'stations' first – the key points or topics in the workshop – and run through them. Are they in the logical order? Am I putting carts before horses? Does one section rely on another section being done first? When I'm confident the order is correct, I build the 'linking stuff' – how can I start the journey between "Hi and welcome" to the first station? What examples, stories or exercises will help people traverse the mental pathway to the next important point with minimal fear and maximum engagement? What 'scenery' do I want them to take in along the way? (Anecdotes, quotations, case studies, Youtube clips, open conversation forums and butchers paper sessions can all be used to facilitate flow between stations).

With the framework together, run your eyes over it once more. Does it make sense? Go back to your brief / goals. Does the framework do what you need it to do? Does it inspire the conversation, the work it's supposed to? Could an outsider with little to no understanding of what your workshop is about 'get it', even if they don't understand some of the nuances? Check that you've got a workshop framework that can flow like a glorious steam train chuffing through the countryside.

19. Multimedia

Having read what must nearly be every anti-PowerPoint point there is to make (and having suffered my fair share of death-by-it's myself), I have a public declaration to make.

I love PowerPoint.

Like anything, it's subject to horrific misuse. I won't subject you to the common do's and don'ts you've heard already and have your own ideas on. But from observation, trial-and-error and workshop participant feedback, I've discovered a few things about this much maligned facilitator's helper;

- **Pictures are brilliant.** The **bigger** and **bolder** the better.
But they've got to be the right pictures.
And they've got to fit with the flow.
And they've got to inspire you to think.
- **Avoid the temptation to flog a dead horse** and use too much of a good thing, and take care that you're not going to offend anyone (that rarely leads to good workshop outcomes). But don't be afraid of being a little provocative in your slides and imagery.
- **Words are subject to the law of diminishing returns.** The more you use, the less they mean. We turn off. Big words, few words, appropriate font, and questions provoke more than statements (would you agree?)
- **The PowerPoint slide deck can be the spine of your workshop** - an effective facilitators prompt and a neat roadmap for your conversation. Use it to remind you when to put morning tea in and when to engage the audience with interactivity and when to summarise and move forward. But there's a catch - to do this well, you need to have rehearsed it like no-one's business (or it looks like you're reading from the screen).
- **Slides carrying pictures embedded with hyperlinks** to downloaded YouTube clips or podcasts are a great way of using multiple media to engage all different learning styles in the group. Ask a techie for help.



Legal caveats and commercial confidentiality aside, sharing your slide deck with the audience post-workshop is a great way of continuing their thinking & activity on the topic. (The fear most people have of this – “*someone might rip off my work!*” My personal perspective - get over it. Most people are too busy and preoccupied. Be smart - take out the commercially-sensitive stuff and save it as a slide show or a .pdf before sharing. And on the off chance your slide deck is so good that the competitors would actually run through it or borrow from it? I’m hoping your own thinking and workshop frameworks are moving forward, making your old show quickly redundant. Judge the risk for yourself – I’ve found erring on the side of generosity and sharing has many more upsides than down.)

The other consideration around multi-media is the technology itself. What do you need in the room?

- A computer, data projector and screen? With spares of everything breakable? Or a flat-screen TV?
- Internet connectivity (are you sure it’s reliable and won’t drop out? Really? Fast enough to show the YouTube clip?)
- Audio speakers? Microphone?
- Speaker phone for remote dial-ins?
- Your smartphone for its timer application or doubling as an alarm or a clock if there’s not one on the wall?

If ever the carpenter’s maxim of “*measure twice, cut once*” was useful, it’s in reminding you to check, and check, and check your technology in situ before you start the workshop. A participant group usually forgive little technical glitches beyond your control, but as a facilitator, they throw your focus and flow right out, and why give yourself an extra hurdle to negotiate?

20. Your speaking voice

The most engaging topic, the fired-up audience and the sharpest PowerPoint framework will be sapped like a marathon runner at kilometre 42 if the facilitator’s delivery is listless, disinterested or droning like a waffling parliamentary question time rebuttal. You don’t need to be a soapbox dynamo or gospel preacher to walk the audience through a great workshop. But there’s a few things I’ve discovered need your attention in advance;

- **The Opening & Closing Ceremonies** – the start is your momentum-generator, the end is your take-home point and activity inspirer. The middle stuff? Sorry. They’ll forget much of it. But begin with a bang. Put extra effort into crafting an opening that you think will engage hearts and minds. Practice it aloud, a lot. Hear your own voice. Play with intonation and volume and pause points and speed. Have you put more energy into it than you’re naturally comfortable with? (What you feel is ‘too much’ is neaarrrlly enough. The facilitator is the ‘choke’ to get the workshop revving nicely. You need a fair whack of oomph in your delivery, particularly to start.) And the close? Be pointed. Be provocative. Be clear and bold-up once more – you’ll have hopefully earned the right. We need take-home messages that resonate. Put the resonance into your voice. It’s your workshop gift to them.
- **Should you sound friendly?** Decisive? Inquisitive? Demanding? Adopting vocal postures consistent with the moment your workshop has reached is important. When you’re aiming for people’s engagement of a new idea, a supportive positive tone might be right. When it’s the 3rd workshop on a topic that no-one’s moving on and you need to inspire some positive guilt, can you be more direct in your delivery? The line between facilitator and action demander is easily blurred. I’ve found the use of appropriate imagery on slides is a good cue not just for the point I’m trying to make, but the tone with which I need to deliver it.
- **Comfort words** – we all have them. Phrases we love and have ingrained into our speech. In conversations with friends, not always noticeable. When facilitating a 20-person workshop for 2 days, they can become distracting, even a bingo-style game for the audience. Be aware of yours (ask someone), then practice some alternatives. Your voice shouldn’t be a barrier to the workshop, merely a transmission vehicle that helps keep their minds on the journey at hand.

- **Names** – write down the participants names, use them as much as you can before the workshop starts, then whenever you're talking to them in the workshop. It's engaging, it's personal, and it assists message uptake.

21. Your writing hand

Note-taking is an underestimated facilitation skill. It's tough to have one part of your head thinking about the flow, pace and key touch-points of your workshop, another on how the audience is responding, and yet another on capturing information that comes from the session. If you're facilitating alone, which sometimes means doubling as 'whiteboard scribe' for interactive exercises, brainstorms or experience sharing, there's a few things you can try to make your life easier;

- **Draw up your subheadings in advance** – If you're using butchers paper or a whiteboard, write down all the prompts you want on the pages in your notepad, then get into the workshop room with sufficient time to translate them onto the larger paper (make sure you've got plenty of paper and that it doesn't 'bleed' ink).
- **Anticipate responses in advance** – if you're asking the group for examples of common objections or road-blocks or success practices, think about what's most likely to come up (brainstorm it first with a learned colleague if need be). Then, when a workshop participant starts describing a particular point, you're pre-armed with a more concise 'summary version' of the point that you can suggest and translate to the board. It demonstrates your understanding of the topic and saves a lot of interpretation time.
- **Your writing facilitates *their* thinking** – as you're capturing something on the board, you're giving the contributor a few extra moments to think through what they're saying. Avoid putting words into their mouth and let them flesh their idea out, but don't be afraid to use questions to clarify or confirm their meaning, or for a galvanising example.
- **Try being neat** – it's fair to say I'm a bit of a shocker at this. My butcher's paper writing looks like chicken scratch. Writing on a vertical wall with one ear on the audience and your mind on the topic is tougher than it looks, and when you're scrambling to capture lots of points coming from lots of directions.... So slow it down. Ask for one at a time. Make sure the words are clear and legible – remember their function on the board as ongoing thought-provokers and reminders for participants. (And I'm trying harder...)
- **Keep parking bays off the whiteboard** – I've never understood why you would stick 'parking bay' topics up where everyone can continually be distracted by them throughout the workshop. The nature of parking bays (the topics that are beyond the scope of the main body of the workshop) means that you need to refer back to them at the end. So write them down on paper on your run sheet, place a slide near the end of your PowerPoint framework that says "Parking Bay", and refer back to your notes at that point. But keep the workshop on message by keeping the visual stimulus focused on the message, not the sideshow.
- **Take photos** – rather than trying to sketch down the whiteboard notes at the end of a workshop or taking home 47 pieces of butchers paper, use the technology in your Smartphone and take photos (similarly, snap away and erase as you go if all you have to work with is single whiteboard).
- **For the ninja facilitators** – at morning tea and lunch breaks, if there's a key learning or point that's been created by the group (new team goals, mission statements, great answers to tricky problems), then take 3 minutes to build it into a slide in your PowerPoint presentation during smoko. You can usually anticipate this, so finding appropriate imagery in advance and having a draft hidden slide ready to go can save you time. When they come back from morning tea and you lead off with a slide that puts up in lights that which the group has just created, the engagement and commitment levels go up significantly.

22. Your listening ear

Part of facilitation is building, part is talking, part is scribing, but the biggest part is listening. Not just to what's being said, but for the unspoken shifts in mood and dynamic. The chin wagers in the group want to know they've been heard, the quiet ones want their opinion registered without having to give you much to work with, and everyone wants the sensation of a group that's driven the conversation instead of the other way around.

To facilitate your listening, here's a couple of tips;

- **Ask for agenda input** - after describing the forum agenda at the start of the workshop, ask if there's anything you've missed, or, that if you cover those areas, confirmation that the participants will have gotten what they want from the session. I've found it's rare for any 'suggested changes', but it's a good double-check, it sets the tone, and it shows that you're joint owners of the success of the session.
- **Prepare questions in advance** – opinion seeking questions are great, experience-sharing questions powerful, and questions tailored to individuals that you know will be in the room are the ultimate.
- **Don't settle for first answers** – go for the second layer of questioning; clarification, paraphrasing and confirmation. Many workshop participants will trot out old chestnuts that they think will please the facilitator and keep the conversation flowing. Don't let them hide behind this cop-out. Dig.
- **Write it down** – what you thought you heard and what they meant can be reconciled by putting it on the whiteboard. They'll pull you up if you've not got it right (and always ask if you've got it right).
- **Be aware of audience tone** – if the audience words are clipped and curt, ask yourself why. Are they bored or feel like this is time-wasting? Do they disagree with the topic / point? Have you inadvertently breached a cultural standard or belief? Don't be afraid to check in with the audience – *"I get the feeling that is that right?"* If you're feeling energy levels lift and contributions becoming more excited, seize the moment and have people hone in on activities that make the most of what they're generating – aim for specificity. Use your eyes and ears to listen for shifts in tone and energy, and make adjustments accordingly.

23. Rules of the house

You told them 8:45am for a 9am start, and it's now 9:05, and there are still people outside on their mobile phones holding an index finger up apologetically at your herding efforts... do you go hard-line, or cut them some slack?

It's important to clarify the rules of the house with all in advance. The use of the word 'sharp' for start and finishing times in pre-workshop communiques not only sets the expectations of the participants, it's a powerful prompt to *you* to deliver on your commitments. If you said sharp, close the doors and start sharp. They'll get the gist, and even if you have to smile when they bundle in apologetically and you spend 20 seconds catching your late-comers up, the rest of the audience is grateful you delivered on your promise, and the punctuality of the group improves.

When it comes to devices – mobile phones, ipads, laptops – it's your workshop and your rules. Unless you're running an IT training session (and even then...), my suggestion is all technology off, closed and away. Build in sufficient breaks so they can race around and check their very important messages if need be. I worked in a team that actually implemented a "10 pushups" rule if a phone went off during the workshop. It might sound extreme, but I only saw 2 people ever do push-ups – nothing like the threat of public humiliation to inspire compliance. However you choose to deal with technology, be clear on your rules and be consistent in asking for people to adhere to them. You're all here to achieve something – don't let easily removable barriers stymie the work.

(And one more thing about 'rules' – if you set them, others will expect *you* to follow them, so don't let them out late for lunch or morning tea, and even if you're 30 seconds late, apologise and commit to doing better next time).

24. Have fun

Keeping the plates spinning at the front of the room can be stressful, but it can be a hoot too – if you let it be. You're up there provoking people to change how they do things – maybe even change their lives. That's exciting! And they've got a day off from the normal salt mine routines, so make the day enjoyable for them too! A few ways I've found you can put a bit of fun in the facilitating;

- **Put colour in your PowerPoint.** Quirky pictures, funny and inspiring video clips (as long as there's some tie-in) and even photos from your own life (showing your personal side makes the event less scary for everyone. Just not the one where you're at the party with a lampshade on your head...)

- **Speak like you speak, not like a speech-giver** – don't put a plum in your mouth in an attempt to impress people with your linguistic prowess. Be real. Use the type of phrasing and words you'd normally use. I'm not advocating a swearing contest, because there's the potential to offend and it's not necessary, but the occasional colloquialism or (audience-appropriate) bawdy tale can defrost the session.
- **Give away prizes.** Coffee cards. Chocolates. Give everyone a little showbag of goodies. Even a book.
- **Be a little self deprecating.** Aussie culture loves someone that doesn't take themselves too seriously. It's not to say the content of your workshop or the outcomes you're striving to help participants achieve aren't seriously important, but if you can make yourself the subject of a little good-natured ribbing, you give the audience permission to relax and do the same. When they're not feeling threatened, their heads and hearts open up a little more to taking the workshop messages on board.

25. Maslow's chocolate

The Psychologist Abraham Maslow developed a 5 layer 'hierarchy of needs' that he postulated human beings seek to satisfy in a particular order. The base level need is 'physiological' – food, air, water. The second layer is 'security' – being in a non-threatening space with non-threatening people. I think offering up chocolate in a workshop helps people tick those boxes (and by chocolate, I mean lollies or fruit or amuse bouches of your choosing). With something in their mouths and stomach, and feeling like a 'welcome guest' at a good party, people open their minds just a little more to the idea of contributing, of connecting, of planning and growing and committing to change behaviours. Showbags, gifts, little unanticipated treats of all types play a similar role.

I've found chocolate in particular is also a powerful study in 'expectations management'. I often use the incomparable Haighs chocolate frogs in my workshops (no contra deal, sadly). If I'm running multiple workshops with the same group over time, woe betide me if one day I don't bring them in. Watch a little air deflate from the group. The flipside to this is you can use the 'holding back of chocolate' for the first 10 minutes of the workshop as a pointed demonstration of how expectation high-jump bars are set, and then pull out the chocolates to show the delight that comes with surprises. This topic tends to fit most workshops... and it involves chocolate, so...

(Footnote – healthy eating habits heartily endorsed by this writer, and there's always someone in an audience that's on a diet or doesn't actually like chocolate, so have your 'alternative treats' package at the ready...)

26. Role model

With the more logical workshop organisation checkboxes ticked, consider one of the more powerful legacies a great facilitator might inspire – the desire of participants to mimic their practices. Be conscious of the fact that, as the person directing traffic at the front of the room, you're on show the whole time, and a good percentage of the time, participants will be mentally putting themselves in your shoes. Could I do what they do? What are they doing that's really impressive? What's lame that I could do better?

Great facilitation should drift into the background of the topic, the group conversation, the energy that's going into participants planning their own next steps in their head. But that 'get out of the way of the workshop' skill is hard to maintain throughout an entire forum. So rather than fight it, choose to use it to inspire practices you know will help participants get more from the session. If your workshop is on business planning, make it quite obvious how well planned the workshop is. If it's on difficult customer conversations, actively seek out the 'troublemaker' opinion that always lives in the room and showcase how you can handle these situations yourself. If it's about time management and professional disciplines, then keep to time, have a summary wrap-up of the workshop notes out to the group within 24 hours and demonstrate a new level of diligence that supports your message and might just inspire others. And if you drop the ball? Show them how to pick it up with grace, humour and get on with it.

The thing I've found most vital to role-model is **positivity**. If the facilitator is flat, or worse, overtly negative to the topic... it won't work. Choosing the most bullish, enthusiastic attitude you can for your workshop will strike a chord

with most and hopefully even bring the professional sad sacks up to a point that they don't deliberately get in the way of the rest of the group.

You're a role model whether you like it or not. Be conscious of it and plan for it.

27. Rehearse everything

Over the past 6 years, I've facilitated an average of 2 workshops a week. On average, I'll rehearse the delivery of the words and exercises and slides for each workshop 3 to 4 times. The tough or new ones? 5 to 6 times. I'll draft up the framework on PowerPoint or as exercise books, I'll close my office door, I'll take my little slide-advancing clicker in my hand, I'll stand before the mirror, then I'll speak aloud and move around the room like I'm there. I'll trip on the words that aren't right, I'll find the thoughts that are in the wrong order, I'll anticipate the timings (which are never perfect), I'll build the 'verbal bridges' to move between one topic and the next, and I'll make the needed changes that only ever become apparent when you role-play. I know I look like a lunatic talking to myself. But I know it pays big time, from a flow perspective, from a staying-on-message perspective, and in the self-confidence I develop that I know participants need from a facilitator.

I've also found that while getting your overall conversation framework right is vital, interactive exercises are particularly important to rehearse. Like working with animals and small children, when you turn control of the session over to a group, you need to know you've got the plan to hold the group on message even when they've splintered off into small groups. Anticipate where you can lose groups by practicing the tricky bits more thoroughly. Write down what you might expect their objections or curve balls will be and practice how you could deal with them. If you're not sure, bring in a collaborator to help you drill. The other important thing to rehearse is the technology, particularly video clips and internet connections. And consider rehearsing plan b – what to do if the power goes out and you have to run the workshop old-school style. It can be done!

(Did I mention that a checklist is a really useful thing to help your rehearsals?)

Moral of the story – professionals practice. Repeatedly.

28. Follow up fast

"Thanks for coming, good luck and have a great evening!" And with that, your workshop comes to a close... congratulations! Your work here is done!

Not quite.

If you made follow-up commitments to the crew (and great facilitators, in my humble opinion, should), then speed is yet one more powerful role-modelling behaviour you can demonstrate. Take your butcher's paper notes or digital photos of the chicken scratch on the whiteboard and, while it's still pretty fresh (and certainly in under a 24-hour time period), use the time slot you diarised in advance to write the summary notes and send a thank you email to the participant group. As a guide, I think good fast follow-up can include;

- **An email** to all thanking them for their participation, their willingness to share, for allowing you into their world and for using the workshop as a launchpad for their 'next steps'.
- **Some form of note capture** – be it a 1-page poster-style summary you put together for them that they can laminate and stick in their cubicle, or a series of bullet points in a short white paper, or even reworked PowerPoint slides. Tidy them up and send them through as an attachment.

- **Optional but impressive** – a .pdf version of your slideshow or the exercises you had them partake in. You might need to first remove commercially confidential material, but the more generous you are in sharing your framework, the more potential there is to reinspire people beyond the event.
- **A reminder** (friendly but pointed) that workshops are just moments in time designed to do something – start, progress, stimulate, empower – that needs to persist beyond the workshop walls. Ask people to be brave and take the next steps and follow through on the commitments they made. Use guilt as your friend.

29. Follow up again

Beyond the first email, you might elect to phone participants 1 – 4 weeks post-workshop, a quick call removed from functional conversations you might routinely have with the participants, specifically designed to ask them, with the benefit of a little hindsight, how they found the session, what they've put into practice, what seemed like a good idea on the day (but if they're truthful, has fallen away), and what they plan to do next. Another email is good, but a call is better. And if you said you'd follow up? Please do. Too many promise and too few do.

The participants paid an opportunity cost to be in your workshop, and if they agreed on taking some great next steps on the day, then the most likely thing keeping them from enjoying the benefits of activity is *remembering* and *holding a disciplined line*. You can help them with that. A quick second follow-up. It's worth the extra little bit.

30. When in doubt, ask for some help

The #1 reason I have a gig as a workshop facilitator isn't because I'm the guru in the topics being workshopped, or that the manager or organiser isn't skilled at running the sessions themselves. It's because they want to be involved in the conversation without the worry of the logistics and cat herding that comes with facilitation. Because they want to be an active participant, contributor or just a fly-on-the-wall. They want to utilise a 3rd party to enable them to be part of the team (rather than the nag at the front of the room).

If not a paid consultant that does this for a living, consider swapping favours with a colleague from a different department – facilitate one-another's sessions. Even someone from a completely different business that you've seen in action with groups – can you come up with a quid pro quo arrangement? Even a member of your team, someone you're helping develop skills in front of groups or that you think has an aptitude for this type of critical work – could you co-deliver it with them?

And of course, you can always call me.... **I love to help** ☺.



I hope you found some useful ideas and practices in here that you can apply to developing and facilitating your next workshop. At the risk of undoing the deeper consideration I'm hopeful this paper provoked, here's the wrap-up for the Twitter generation – a top 5 take-homes...

- Have super-clear goals for your workshop to dictate its construction, facilitation and follow-ups.
- Know your audience's wants, needs and expectations as well as, if not better than, the workshop topic.
- Be brave and bold and colourful and interesting and provocative. Don't bore – inspire. Inspire work.
- The forum itself is just one part of the workshop – pre & post work completes the holy trinity of 'effective'.
- Practice like your life depended on it. It won't look like a canned pitch. You're more likely to get it right.

(But hey, that's just my top five... what do **you** find works?)

42 MIGHTY would love to help you define, create and facilitate your next workshop.

Please let us know if you'd like a hand bringing the crew together to inspire and support the *right* work.

Thanks for reading,

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