

Facilitation Mistakes

Great facilitators are a wonder to watch. They keep a meeting or training event lively and productive even as they effortlessly fend off efforts from participants to take over the meeting, derail the positive mood, or otherwise disrupt a successful event. You may have thought to yourself, “How do they do this? I am actually enjoying this meeting!”

Although this chapter does not promise to teach you how you can develop into a world-class professional facilitator, it does reveal 21 of the most common mistakes that most experienced facilitators and trainers would agree could sink any meeting or event no matter how well it is going.

These mistakes span the facilitation blooper landscape from using inappropriate humor to ignoring obvious tension in the room to ending late. Successful facilitation is a delicate balance of keeping a strong hand on the proceedings while understanding and using human psychology to your advantage. Some mistakes you will recognize immediately as something you have experienced, whereas others may confirm what you already know through experience. Others may come as surprise because you’ve seen so many trainers and speakers incorporate them in their delivery. As you read the mistakes along with Jim’s Gems, determine which miscues you must eliminate from your training repertoire to create more spirited, successful, and productive sessions. The exercise at the end of the chapter will help you begin that process.

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Mistake #1:**Not opening the session in a strong, memorable way****Jim's Gems:**

- ◆ Whenever possible, avoid waiting for people. If you must wait a few minutes (never more than 10), give your learners a brief content-related activity.
- ◆ Because a solid opener is extremely important to getting your session off on a positive and inspirational note, consider telling a story, sharing a powerful quote, or facilitating a get-up-out-of-your-seat activity, or sharing a surprising, related, powerful statistic.
- ◆ Put on a skit with your co-facilitator highlighting your expectations for the session. Have some fun with it. Poke fun at some of the ups and downs you've experienced when conducting this session in the past. The key is to pretend that your audience members are not in the room.
- ◆ Pique the learners' curiosity with table props and an empowering room setup.
- ◆ Create connections and conversations by putting your participants in activities where they have to share learning goals, expectations, questions, and get-to-know-you information.
- ◆ Pay a candid compliment, share your enthusiasm and experience, or ask a challenging question.
- ◆ Facilitate an activity in which the learners take personal responsibility and accept accountability and ownership for the learning objectives.

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Lead an assessment activity that allows you to assess the participants' readiness, their knowledge base, their experience, their buy-in, and so forth.

Highlight the objectives they have the most interest in and develop questions pertaining to the objectives to encourage them to share the actions they will take to get the most from the day and support each other's learning. Consider pairing participants with learning partners to share their goals and expectations.

**Mistake #2:
Using inappropriate humor****Jim's Gems:**

- ◆ Simply put, don't tell jokes or use inappropriate humor; somebody in your audience will be offended.
- ◆ When attempting to be funny, poke fun at yourself with self-deprecating humor.
- ◆ Simply smile more often; don't take yourself too seriously.

At all costs, avoid using humor related to race, ethnicity, gender, sexual orientation, physical ability, and other diversity-related dimensions; someone in your audience will be offended.

**Mistake #3:
Repeatedly calling on the same people during the session****Jim's Gems:**

- ◆ Constantly scan the room to make sure you are looking for people who have not participated. Repeatedly calling on the same person will cause others in the room to check out or sit back and move into passive participation. It can also have a negative effect on their self-esteem.
- ◆ Direct certain questions to table groups or people who have not participated much. When you do call on them, make sure your first question is not extremely challenging or they may be reluctant to participate again.
- ◆ Rotate group leaders to get more people involved as leaders.
- ◆ At the workshop's outset, remind the participants that for them to achieve the workshop results they desire, everyone (trainer and participants) has to put some skin in the game. Suggest that they are very much responsible for their personal takeaways and outcomes.

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- ◆ During breaks, speak to people who have not participated; make sure that they are with you and that nothing else is weighing on their minds.
- ◆ Even if someone is contributing great answers or if you have a quiet group, don't play favorites. Repeatedly calling on the same person will lessen the likelihood of someone else volunteering his or her thoughts. The others in the room will just sit back and watch you and your favorite deliver the workshop.

Mistake #4: Not asking participants to repeat their questions when they ask them

Jim's Gems:

- ◆ When a participant asks a question, ask him or her to repeat it so that everyone in the room can hear it. This technique also can buy you some time if you don't have an immediate answer.
- ◆ If possible, record participants' questions on a flipchart. Just make sure to get back to them.
- ◆ When establishing ground rules, inform the participants that you'd like them to signal you if you fail to repeat a question so that everyone can hear it. The signal could come in the form of someone saying, "I'm sorry, I did not hear the question." Another signal could be someone raising his or her hand.
- ◆ Ask other participants to repeat the question or to paraphrase it. This also offers an opportunity for your learners to answer each other's questions.

Mistake #5: Not providing real-life examples or anecdotes

Jim's Gems:

- ◆ Come to every presentation or workshop with real-life current examples and anecdotes to drive home your learning points. Your examples will also give your session more color, energy, and an application focus.
- ◆ Ask colleagues, friends, and family members to share their experiences with you.

Record your everyday experiences. You can write them in a book geared specifically for anecdotes, illustrations, and metaphors. If you carry a voice recorder, you can record them immediately. You can also call your voicemail and leave a message highlighting what you just experienced.

- ◆ Keep a personal journal and review it frequently.
- ◆ Observe others performing the job that you're going to speak about. For example, to acquire some examples, you could go on a sales call with a sales rep or monitor a customer service rep's calls.
- ◆ Attempt to provide at least one anecdote or example every hour. Vary the length. Participants love to hear sincere, real-life examples.
- ◆ To obtain more real-life examples and to see how others cleverly share anecdotes and illustrations with audience members, observe other trainers, speakers, comedians, and others who present on television shows, sports shows, infomercials, and the like.

Mistake #6:**Promising to close the presentation or workshop, then not closing*****Jim's Gems:***

- ◆ When you tell the group you're going to close or wrap-up, do so. If you don't, you will cause the participants to become restless and they will mentally check out.
- ◆ As you're closing, don't apologize for forgetting some material. In most cases, your audience members will never know you forgot some material.
- ◆ When you're closing, avoid saying, "Oh, one more thing I meant to mention..." Such a statement could prolong your wrap-up, and the participants are very unlikely to retain something you throw in at the last moment when they've probably mentally disengaged anyway.
- ◆ Depending on the length of your session or presentation, you should ask for final questions at least 15-30 minutes before its end. Leave yourself enough time to share your final call to

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action. Besides, ending the session by answering or being unable to answer questions is not a powerful way to close.

- ◆ Don't belabor the close. If you feel the energy in the room has disappeared for good, end the session early. You should always leave your audience members wanting more rather than leaving them feeling as though they had too much.

Mistake # 7:**Going off on a tangent when responding to a question*****Jim's Gems:***

- ◆ When you are asked a question, stay on point! Don't attempt to answer multiple questions at once. Your learners will mentally abandon ship if they sense you are getting up on a soapbox. You generally shouldn't take more than a minute or two to answer a question thoroughly.
- ◆ Look for the participants' reactions to your comprehensiveness. Their body language is often a clear indicator if you have beaten the topic to death.
- ◆ As you cover the ground rules, establish a "gone off on a tangent" signal that either the facilitator or participants can use. When someone goes off on a tangent, people can hold up a prop (for example, a hammer or clock) to suggest that it's time to move on.

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Provide discovery moments for your learners. Refrain from telling them everything. Hold some information back for later in the session. Ask more open-ended, application-based, probing questions. Keep in mind that the session is for the participants. It's not a forum for you to show how much you know.

- ◆ Ask other participants to attempt to answer the question before you do.
- ◆ You can provide one answer and then look for others to elaborate on your thoughts.

**Mistake #8:
Distributing reading materials or other handouts well before
you're going to use them**

Jim's Gems:

- ◆ Only give participants reading materials when you want them to read or review it. Avoid situations where they are reading the material well before you want them to. Once they receive the material, immediately begin to review it or introduce an exercise that allows them to skim it quickly.
- ◆ When it's time to distribute the handouts, ask for volunteers to come up to your trainer's table to get materials to distribute to the rest of the group.

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When you do distribute handouts or participant guides, introduce them with power and purpose. Give your materials special significance.

**Mistake #9:
Not providing smooth transitions or clear segues
between learning modules**

Jim's Gems:

- ◆ To avoid losing or confusing your participants during transitions between learning modules, you can tell a story, conduct a question-and-answer session, move the group into an activity, ask for volunteers to share their thoughts or observations, or tie the information you just covered into one of the course's learning objectives.
- ◆ When you're going to move to the next topic, review then preview; that is, tell them what you just told them and tell them what you're going to tell them next.
- ◆ To make a transition, ask the participants if they know how the material you just covered builds on the information you're about to review.
- ◆ To segue to the next topic, ask the participants how they're going to apply their new learning back on the job.

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**Mistake #10:
Facilitating or presenting during distractions****Jim's Gems:**

- ◆ When a distraction occurs, give your learners an assignment to work on at the team tables. You can then go and address the distraction.
- ◆ If you think the distraction is going to be brief, ask the group to stand to take a quick stretch break. While they're standing, thank them for the work they've done up to that point and encourage them to maintain their focus. You can also stimulate conversation that does not directly pertain to the content.

When a distraction occurs, pause, stop facilitating, and wait for the distraction to end. Distractions always prevent learners from paying attention to the material. Plus, if you pause, you will not have to repeat what you've already presented.

- ◆ Depending on the type of distraction that's occurring, let the participants know that you're going to wait until the distraction or disruption goes away before you begin facilitating.
- ◆ Move away from the distraction, perhaps to the opposite side of the room, to take the participants' eyes and attention with you.
- ◆ During the distraction remain calm; don't raise your voice or try to talk over it.

**Mistake #11:
Refusing to defuse the tension in the room****Jim's Gems:**

- ◆ Call attention to the tension. Inform your participants that, as an experienced facilitator, you would be doing them and the organization a disservice if you did not mention that there was tension in the room and say that you won't move forward until the tension is addressed; next ask for their input for how they would like you to address it. When there is tension in the room, learners focus on the tension rather than on the material.

Depending on the kind of tension or distraction, put participants in small groups and have them think of ways to defuse it; record and then discuss their answers.

- ◆ Make sure to thank them for their participation in helping to relieve the tension.
- ◆ If they have concerns regarding the content, assure them that the workshop objectives will address their concerns. Also, tell them that they can speak to you during the break or after the session if they still have concerns.
- ◆ Remind them that, depending on the situation, some tension can be good because it can move people out of their comfort zones.
- ◆ Share a story about a time when early tension in the workshop helped lead to great problem solving, breakthrough thinking, or a sensational session with improved results.

Mistake #12: Facilitating only from the front of the room

Jim's Gems:

- ◆ Purposefully move around the room periodically as you facilitate but without overdoing it. At some point, every participant should feel as though he or she is sitting at the front of the room. This helps you to better connect with and engage your learners.
- ◆ To switch things up, try initiating the session from the back of the room. You can also try this location after breaks to regain the learners' attention.
- ◆ Facilitate different modules from different parts of the room.
- ◆ Sit on a barstool during debriefing moments; do this from different parts of the room too.
- ◆ Have participants get up and move with you to different parts of the room for your facilitation (this is called changing the venue within the venue).

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Mistake #13:**Failing to get the group's attention or get them to quiet down or regroup after a high-energy activity*****Jim's Gems:***

- ◆ To get learners' attention immediately use a chime or an instrument that has a distinct sound.
- ◆ Inform the group that the last one to take his or her seat after the activity will be the first volunteer to review what he or she learned during the activity.
- ◆ Avoid shouting at the top of your lungs, "Please take your seats!"
- ◆ Provide a reward for the table group that returns to their seats first and comes to attention.
- ◆ Use a timer projected onto a screen that serves as an activity countdown.

Before the activity begins, let the group know the signal for reassembling and coming to attention. You could blow a whistle, sound a chime, rise to your feet from your seat, clap your hands, turn the music up or down, or snap your fingers, for example.

Having a plan helps you appear like a leader and a polished professional rather than a stressed parent attempting to calm down out-of-control children.

Mistake #14:**Not tapping into the learners' five senses or the variety of learning styles in the room*****Jim's Gems:***

- ◆ During your session, alternate between lecture and activity to promote total audience engagement and increased retention.
- ◆ To tap into the participants' sense of smell, use scented markers as you write on flipcharts or have them use the markers at their tables.
- ◆ To tap into their sense of hearing, use music.
- ◆ To tap into their sense of touch and to engage the kinesthetic learners, have them take notes during the session or provide

training props and objects (Koosh balls or stress balls, for example) for them to handle.

- ◆ Provide group problem-solving activities.
- ◆ Provide brainteasers and activities that require focused thinking.
- ◆ To tap into the participants' sense of sight, use multiple visual media, such as flipcharts, PowerPoint slides, videos, wall charts, floor charts, handouts, Post-it notes.
- ◆ Use activities designed for individuals, pairs, small groups, and large groups.
- ◆ Make sure to allow quiet reflection time, especially during action planning.
- ◆ To tap into the learners' sense of taste, put candy, chocolate, nuts, fruit, pretzels, or other treats on their tables.

Mistake #15:

Not returning to the learning objectives at the session's conclusion

Jim's Gems:

- ◆ Plan and facilitate an activity that takes your learners back to the learning objectives as you're wrapping up. Do this without saying, "Let's review the learning objectives." Why? Most participants would rather eat dinner outside during a thunderstorm than hear that they're going to review something they've already discussed—especially at the end of the day. Moreover, your objectives lose their significance if you do not repeatedly refer to them.
- ◆ During the opening objective's review, have participants think of questions they want answered relative to the course objectives. Have them write the questions in their workbooks or on the back of their name tents. As you're wrapping up the session, spend time reviewing their questions and answers.

A nice touch at the end of your session is to have past participants come in and discuss how they've incorporated the workshop's learning objectives into their jobs.

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- ◆ Near the close of the session, have participants work in small groups to revisit the learning objectives. Instruct them to develop an action or application “next step” for each one.
- ◆ Close the session the way you began the session and provide a strong call to action. Refer to the learning objectives in your call to action.

Mistake #16:
Not closing the session in a strong, memorable way

Jim’s Gems:

- ◆ Because a strong closer pulls everything together and sends participants off confidently looking forward to applying their workshop learning, consider facilitating a high-energy review activity but without saying, “Let’s review....” For example, you could suggest a gallery walk during which the participants create and post their action plans, top challenges, or best practices flipcharts and then walk around surveying or analyzing others’ work. Other possibilities include partner sharing, a game of Koosh ball toss, or a team challenge contest using workshop content as the test categories.

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Ask them how they’re going to adapt, adopt, or apply what they’ve learned back on the job.

- ◆ Tell a story.
- ◆ Have the participants list on a flipchart or in their workbooks what they are going to stop, start, and stay with (or continue doing) because of what they learned.
- ◆ Provide time for reflection.
- ◆ Close the session the same way you opened the session.
- ◆ Facilitate an activity that encourages participants to share their best ideas.
- ◆ Provide encouraging words that get them looking forward to incorporating their new skills and sharing their thoughts with management.
- ◆ Avoid closing with questions and answers. The wrong question can sour the atmosphere, leaving a bitter closing taste. Moreover,

you might run out of time without thoroughly answering the question.

- ◆ Share an article relative to industry trends.
- ◆ Challenge them to take what you've given them to improve both organizational and individual results.
- ◆ Ask them to complete a self-addressed envelope and to enclose a short list of ideas and to-do items they would like to be reminded about in about a month. You then would mail the envelopes in 30 days.

Mistake #17:**Too much telling, not enough asking (using all lecture and PowerPoint slides) during the session*****Jim's Gems:***

- ◆ Because too much telling creates passive learning and relies excessively on one-way communication, at the very least incorporate as many question-and-answer segments as you can. Look for ways to reframe or rephrase the questions you ask.
- ◆ Use sneaky mini-review activities that the participants won't readily recognize as ways of reviewing the content.
- ◆ During your session, watch videos and have them experience simulations.
- ◆ Employ teach-back segments so that you can determine how much the learners have retained.
- ◆ Have the participants test each other to determine how much they've learned and to see if they can use their reference materials to find the answers.
- ◆ Provide true/false group quizzes.
- ◆ Have the participants develop and make group presentations.

Use role plays and case studies to provide feedback; have select participants take on the judging personas of the "American Idol" judges: positive, lukewarm, and constructive-critical.

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- ◆ Provide reading assignments to help individuals process the information they've learned.
- ◆ To change the workshop's pace, provide quick, fun, spirited activities with wholesome competition.

Mistake #18: Failing to teach in chunks

Jim's Gems:

- ◆ To increase learner retention, break your material up into 20-minute chunks. During a 20-minute chunk, use the 3M approach: Material (provide the information or materials), Marinate (give them time to process the information and make it their own), and Memory (check to determine if they are retaining the information). Approximately every 20 minutes, transition the content or your approach to the content. For example, you could facilitate a sneaky review activity, give participants time to solve a problem, give participants time to share their views or perspectives on the content, give participants reflection time, change your or their positioning, or lead a mini-review discussion.
- ◆ To maintain the participants' attention, give them a brain-body break every 90 minutes.
- ◆ Employ the 3M approach when showing a video or leading a PowerPoint presentation too.
- ◆ Avoid rushing through information or trying to cover too much at one time. Provide links from one module to the next.

Mistake #19: Failing to send them and get them back from breaks in an inspiring, motivational way

Jim's Gems:

- ◆ Preview the information you're going to cover upon their return prior to sending them off.
- ◆ Assign volunteers to make sure their group gets back on time.

- ◆ Promise to offer special information that doesn't appear in their workbooks for those who get back early.
- ◆ Have an engaging, powerful session up to the break time.
- ◆ Have them move around during your session; don't let the break be the first time they're up and around.
- ◆ Provide rewards for the first teams to return after breaks.
- ◆ If you have created an ongoing competition between teams, take points away from latecomers.
- ◆ When possible, conduct one-on-one meetings after you've taken several minutes to regroup.
- ◆ Offer more but shorter breaks.
- ◆ Give the breaks titles, for example an "email break," a "break to take care of three items on a to-do list," or "a break to check in with one person."
- ◆ Provide brainteasers and other trivia activities during the break to encourage people to return quickly.
- ◆ Provide questions that will be on the test for the people who get back first.
- ◆ Thank them for what they have contributed up to that point.
- ◆ Highlight how much they've covered up to that point.
- ◆ Facilitate a fun, ongoing, building game. For instance, you can distribute poker cards to the people who get back early. After every break, they receive cards to strengthen their hand. At the end of the workshop, you give a gift to the person who has the best hand.
- ◆ Lead special segments during the break during which participants may ask you anything about the content.

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*Have latecomers lead
 review segments by
 sharing their key
 learning.*

Mistake #20: Ending late

Jim's Gems:

- ◆ Reward learners who arrived on time by starting and ending the workshop promptly.

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To avoid ending late, make sure to get the session off to a quick start and stay true to the break times given. Don't allow participants to compromise the break time.

- ◆ To avoid ending late, inform the participants you will be available for 15 minutes after the session to answer additional questions.
- ◆ Post a parking-lot flipchart or ask-it basket flipchart for participants to post their questions. Quickly follow up within the week with answers to the questions that were not addressed during the session.
- ◆ Set a personal end-of-content-dissemination time, usually a half hour before the workshop is supposed to end for a full-day session. Use the final half hour to first facilitate 10 to 15 minutes' worth of questions followed by 10 to 15 minutes' worth of closing activities.
- ◆ Avoid preparing too much content for the time allotted.
- ◆ Do not overstate your points. Pay attention to your learners' nonverbal messages and energy level. The information you fail to cover can be emailed or sent to them. You can also personally follow up by phone.

Mistake #21:
Failing to see the entire group as your customer

Jim's Gems:

- ◆ Because it is imperative that your learners believe that you are adding value, facilitate, train, teach, or present to express, not impress.
- ◆ Take on the role of coach, guide, facilitator, not expert. You should provide information and customer service.
- ◆ Work to create an environment where your participants leave the session with confidence, energy, and conviction.

- ◆ Create plenty of content discovery moments.
- ◆ Ask probing, results-oriented, and discovery consulting questions.
- ◆ Shift your mindset; train to change behavior and improve results, not to get good evaluations.
- ◆ Be authentic, intentional, and consistent.
- ◆ Connect with the group.
- ◆ Create follow-up opportunities.
- ◆ View the entire experience as more than just a training event. Look for methods to help your learners transfer their learning back on the job after the session.
- ◆ Gather as much information as you can about your group before the session. Know their business.
- ◆ Provide plenty of feedback and reassuring words.

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View your participants as the most important people in the room. Put your ego in check.



In the Trenches

I had observed Roz facilitate a number of times. Each time, I walked away shaking my head. We worked for the same consulting firm and sometimes facilitated sessions together and other times observed each other presenting new material. I often thought while watching her facilitate, “How could someone in such an important position of leadership be so clueless about her audience?” Her three favorite words were “me,” “myself,” and “I.” She was a one-dimensional trainer. Everything always had to go her way. If someone tried to provide coaching or feedback, it fell on deaf ears or was met with patronizing replies.

Roz typically began sessions by stating what *her* ground rules were. She wasn’t interested in the participants’ ground rules. She would then move into her lengthy credibility soliloquy, consisting of 10 pompous minutes on why she was the best trainer to ever sniff a Mr. Sketch marker. Next, she would authoritatively tell her audience members what they were going to learn without ever asking for their input. She would then rifle through the content, occasionally pausing to send

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participants off to a late break or to answer a question or two. I'd cringe watching her, wondering how long I could stay in the room with her if I weren't getting paid.

On this particular occasion, Roz decided to kick it up a notch. It was a rainy Friday, and management was going to be in the room. Roz was also the project leader for this new client. She was bent on showing them how articulate and polished she was. Beginning in typical Roz fashion, she blew through the ground rules, participant introductions (except, of course, her own), workshop objectives, and the agenda. I was sitting in the back of the room wondering if she knew how she was coming across. I could sense the participants' frustration starting to mount already. "Where did they get her?" I heard one participant ask. "We have to deal with this all day?" "Does she think we're little kids?"

Whether she did or didn't, Roz was in Frank Sinatra's "My Way" form. She talked and talked and talked and talked. They were 15 minutes late in getting to the first break, and then she shortened their break time. During the break, she made small talk with the management team, specifically commenting on how well she thought the session was going.

After the break, the assault continued. Ten-minute modules turned into 40-minute modules. Forty-minute modules turned into 60-minute modules. The class broke late to get to lunch, and Roz suggested that they have a working lunch. Management declined, but lunch was shortened by 15 minutes. The afternoon started much like the morning began. It was the "Roz Show" starring Roz. She purported to know everything about everything. She topped every participant's answer. She always had to get the last word in. She finished their sentences. Her stories and anecdotes droned on interminably.

With less than a half hour remaining in the session, she moved into another activity. I knew at that point that the workshop was going to end late. Sure enough, we finished at 5:30 p.m. instead of 5:00 p.m. People were frustrated. I was annoyed. The rain even seemed to be coming down harder. Roz, however, was unphased, believing she did a commendable job. Afterward, a few management members mentioned to Roz that they were disappointed to be getting out so late. Feeling as

though she did the appropriate thing, Roz commented that she wanted them to see the entire program so she didn't think letting out a little late would be a problem.

After that particular session—surprise!—the client requested other facilitators from our team to lead the training.



**Building Your Action Plan:
Facilitation Mistakes**

My top three mistakes are:

- 1. _____
- 2. _____
- 3. _____

My action steps to correct these mistakes are:

- 1. _____
- 2. _____
- 3. _____

I'm committed to correcting these mistakes because:

