

Facilitation - How to get dramatically better outcomes from your next workshop

Our team at Strategic Facilitators are recognised as experts in facilitation, having designed and delivered hundreds of board and executive team workshops.

Based on this experience we have developed a deep understanding of how to get the best outcomes from short, focused executive team discussions.

In this section we provide a number of reflections on frequently asked questions related to the facilitation process.

1. Do I need a facilitator or can I handle it internally?
2. What strategy topics would a facilitator help us cover?
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7. How do I minimise disruption to my team?
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Do I need a facilitator or can I handle it internally?

Executives often wonder if they can both orchestrate and participate in a workshop. As senior executives and facilitators, our experience tells us that this is difficult to achieve.

When balancing both roles, your voice can get lost and may not be heard on important matters. And as a facilitator, who also participates in important discussions, you run the risk of being seen to dominate the meeting if you say too much.

An external facilitator brings no fixed positions to workplace discussions. From an independent perspective, facilitators can see new angles and balance contrasting viewpoints. They can help you to design a workshop agenda, plan sessions and work towards desired outcomes – allowing you to focus wholeheartedly on the matters at hand.

What strategy topics would a facilitator help us cover?

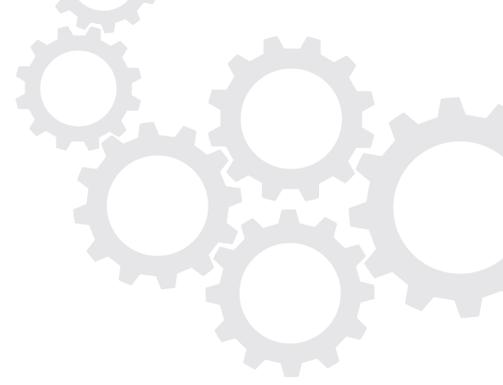
The core of our work at Strategic Facilitators is helping CEOs and executive teams to develop and review elements of their strategy.

Strategy and planning processes typically result in the articulation of a winning approach to tap market opportunities and leverage organisational strengths and capabilities. The process can start with a review of the environmental forces impacting your industry, before focusing on the implications of these forces on your business. Although this is only one entry point to strategy. We work closely with your executive team to develop answers to a small number of strategic questions. We then help your team to develop a galvanising plan that lays out what your organisation will focus on to maximise its chances of success. Explicit in the plan is what the organisation will choose to do, and not do, and how you will allocate resources between key activities.

We frequently work with clients to develop and agree:

- strategy statements
- strategy maps
- strategic initiatives
- measurement, monitoring and review frameworks.

We also have extensive experience in helping organisations develop other company statements including your purpose or mission, your vision, and accompanying values.



How will I select a facilitator?

A confident, well-rounded facilitator is a must. Often the best way to select a facilitator that works for your organisation is to speak with them directly as part of your assessment of their track record and capabilities. To meet your needs, do they:

- Demonstrate deep experience in the design and delivery of strategy and planning workshops? How many workshops have they facilitated, and how often do they work with groups? Can they work with both small and large groups? You should feel confident that their experience and capabilities match the needs and dynamics of your team.
- Communicate well? Can they provide you with a simple and compelling explanation of their practical approach? You should seek assurance that your facilitator is using robust recognised strategy frameworks. This is an opportunity for you to evaluate whether their approach is grounded in both practical experience and theoretical rigour – because you definitely need both.
- Seem engaging? Strategy formulation can be very challenging – for you, your executive and your board – and for this reason you need to feel confident that your facilitator is a capable and engaging individual.

Skilled facilitators will also be very aware of group processes, will keep the discussion on track and will be adept at handling conflict and disruptive behaviour. Look for a facilitator that can think quickly and has the necessary energy to maintain the momentum of a workshop over a long period of time.

What should I expect from a facilitated workshop?

CEOs often seek to achieve three outcomes from strategic workshops: they want to engage their leadership team in developing a strategy or plan they want to prioritise and integrate initiatives, and align the organisation; and they want an opportunity to assess and improve their team's strengths and underlying processes. To achieve these aims, a workshop can be structured to promote structured and creative thinking and to foster interaction between team members, rather than a series of lectures from participants or keynote speakers. There is a place for keynote addresses in workshops, but presentations are best used as a stimulus to group discussion.

What will these workshops actually achieve?

Workshops must achieve outcomes, even if simply to promote interaction and alignment among senior team members. There is nothing worse than investing time and money in workshops that don't produce anything tangible, or end in a laundry list of possible outcomes.

Skilled facilitators are generally very experienced in knowing how to design and conduct workshops to produce outcomes, so test the market. Key questions you should put to your facilitator include: Why are you proposing we do that? What is the benefit of structuring the session in that way? What outcome would we achieve from that session or from the workshop as a whole?

How long does a workshop typically take?

The length of a workshop is determined by the scope of your agenda and the amount of participant involvement you want.

Although it is hard to generalise, you should expect formulation of key elements of your organisation's strategy or plan to take between two to three full-day workshops, including additional between-session work, scheduled over a month or more. Smaller simpler organisations may only require one day, whereas larger organisations we have worked with dedicate more than six full-day meetings to strategy development over a six month period every year.

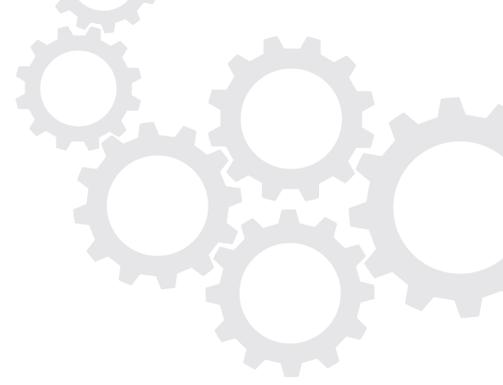
How do I minimise disruption to my team?

It is a good idea to minimise participant travel for single-day workshops. Longer travel times are more realistic for workshops that extend in to a second day. There are a number of purpose-built facilities that cater for longer workshops, and it is important to confirm the quality and availability of onsite accommodation when considering your options.

As with any exercise worth doing, it's worth doing well. With the right preparation and planning any short-term disruptions to the business can be managed for the greater benefit of achieving your desired outcomes.

My team is made up of unique personalities and skills. How will a facilitator manage this?

A good facilitator will have excellent skills in managing group dynamics and processes. It is helpful to brief the facilitator about this prior to the session. Do you want or need your executive to behave as a team? How long has your team been in place and how well do team members know each other? Are there any new members of your team? Does this group of people behave as a team with recognised interdependencies or as a set of individuals? Do they know everyone's responsibilities and do they support each other in achieving common goals? Answers to these questions will inform the approach that your facilitator takes during session. It is important to recognise that matching the process to the participants will ultimately impact the quality of the outcomes that can be achieved.



What will my facilitator need from me in advance of the session? How can I prepare?

Frequently, more time is spent preparing for a workshop than in the actual workshop itself. Success depends on the effort put into the workshop's development.

Background material developed in the lead up to a strategy workshop informs the discussions on the day and contributes to how the session will be structured.

Background material typically includes, but is not limited to, how your business is currently performing, the environmental forces impacting on your industry or sector and the implications of these for your organisation. Researching how your competitors are performing and what specifically they are doing in response to changes in the environment may also be important.

The preparation of insightful background material will take time and effort. You should expect that this effort will extend to at least 5-10 days of dedicated activity from one or more analysts.

Depending on the circumstances we also work with clients to develop detailed workshop session plans, and data visualisation and visual meeting capture materials. We meet with all participants to gain their input to the structure and content of the workshops, and we sometimes employ staff surveys, such as our strategy execution diagnostic.

Should I conduct our strategic planning workshop onsite or offsite?

The majority of CEOs we work with prefer to conduct strategy and planning workshops offsite, creating space for executives to consider current and future opportunities and challenges without the distraction of a busy office. There are numerous locations purpose-built for workshops of varying sizes, offering affordable deals that can incorporate IT and catering. Some organisations prefer to conduct strategic discussions in company premises to minimise cost and the impact of these activities on day-to-day operations.

What should I look for in an offsite venue?

Facilities should at least be comfortable and preferably inspiring, full of natural light, with external facing windows in the main meeting room. We recommend you carefully consider how the room set-up is likely to influence the dynamics of workshop or meeting. Boardroom and classroom style arrangements often discourage broad participation in workshop discussions and do not foster empowerment and individual responsibility within teams. Smaller table groups or u-shape rooms help open discussions and give participants opportunities to speak up.

Break out spaces help facilitators to vary the format of discussions allowing both high-level discussions and deeper evaluations of particular topics. They also cater for different individual interactions styles – reflecting the fact that some people are more inclined to contribute to a small-group discussion than a large open plenary session.

Pay attention to things such as technology requirements (data projector, Wi-Fi connections and internet availability) and quality catering. Productivity is at its peak when participants are comfortable and can focus their full attention on the task at hand.



want to know more?

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