

How Australian organisations can increase the value added by external facilitators



A study conducted by Strategic Facilitators has found that large Australian organisations are failing to get full value from facilitated meetings and workshops.

Our research shows that while these organisations understand the value provided by external facilitators, they lose out on much of the potential benefit by using relatively unsophisticated selection and evaluation techniques.

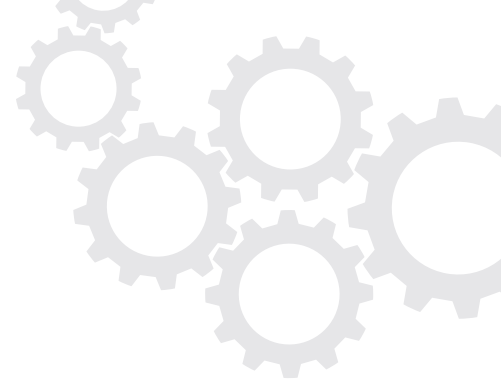
Executive summary

In April, May and June 2015, Strategic Facilitators conducted research among some of Australia's largest organisations to uncover whether they were using facilitators effectively. The results showed significant opportunity for Australian organisations to improve the impact of meetings and workshops by improving the way they source and review their facilitators.

Our research revealed that:

- Large Australian organisations spend substantial sums on facilitators, which they source both internally and externally;
- Organisations understand the value that facilitators add by identifying and achieving the outcomes desired from meetings and workshops, and by following up post-event to ensure that meeting actions are being progressed;
- While internal facilitators are frequently used, there was an acknowledgement that expert, externally sourced facilitators can deliver considerable value through skilful management of meeting dynamics, providing an external perspective and managing conflict dispassionately.

While our research demonstrates that large Australian organisations clearly understand the value added by external facilitators, it also identified that they rarely apply standard purchasing disciplines when selecting and evaluating external facilitators, and are unlikely to be capturing full value when using skilled professional facilitators.



Summary of research findings

Large Australian organisations spend substantial sums on facilitators

We conducted in-depth interviews with executives from large Australian corporates across a range of industries, as well as large government departments. The executives we interviewed expected a one-day facilitated workshop to cost between \$10,000 and \$15,000. This cost includes detailed preparation, facilitation on the day, the documenting of outcomes, and follow-up regarding action items identified during the meeting or workshop.

Organisations understand the value that facilitators add

The executives we interviewed appreciate the value added by expert facilitators. They told us that facilitators improve the quality and outcomes of meetings and workshops in numerous ways, including by:

- Identifying the organisation's needs, expectations and desired outcomes, and being accountable for ensuring these are addressed
- Significantly reducing the preparation time required by co-developing the agenda and materials with the relevant executive/staff
- Bringing structure and energy to the workshop or meeting, to engage and motivate participants
- Operating with a focus on people, process and outcomes rather than bringing a personal or organisational bias
- Balancing adherence to the workshop objectives and agenda with the flexibility necessary to allow important conversations to take place
- Producing a clear and succinct account of workshop outcomes that can assist implementation and the structuring of messages back to the team and the broader organisation if required
- Following up post-event to ensure that meeting actions are being progressed.

While internal facilitators are frequently used, there was an acknowledgement that externally sourced facilitators can deliver considerable value

The value of engaging quality external facilitators was widely recognised in this research. The leaders we interviewed generally appreciated the way that an independent facilitator is able to structure discussions, manage interaction dynamics, and keep everyone focused on achieving the desired outcome.

In addition, executives we interviewed commented that having an external facilitator allows senior leaders to act as participants alongside their team, to observe and reflect on team contributions. Ensuring active engagement and the involvement of all participants is critical to the perception of procedural fairness that an expert facilitator can produce.

Many of the leaders we interviewed also expect that an external facilitator will provide an independent perspective and challenge ideas, giving them authority to make links between disparate points and hold the group to account.

External facilitators are also likely to have specific expertise relevant to the issue at hand (e.g. strategy and planning, team building or change management), and this was highlighted as a key element of successfully facilitated workshops.

We asked interviewees about what facilitators should and should not do when delivering high impact workshops and meetings, and these results are shown in Figure 1.

Figure 1:

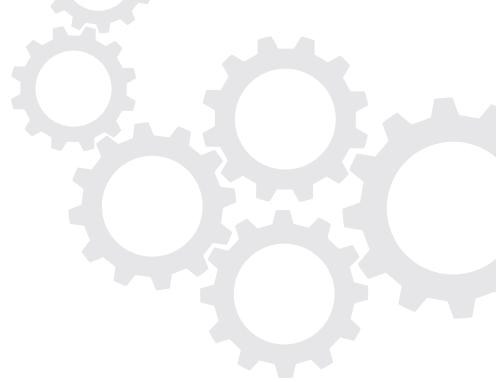
'Thinking about some of the facilitators you have worked with, what would you say a facilitator should do/should not do when delivering a high impact workshop or meeting?'

Should do / nice to have

- Develop a working knowledge of what the organisation does (direction, challenges, opportunities, context) and understand group dynamics
- Be process oriented and achieve agreed workshop goals and objectives
- Clarify roles, including the role of the leader (and agree with the leader how they will engage during the workshop)
- Be independent and bring an external perspective
- Manage the room and disparate views; guide discussions and don't interrupt where possible, allowing participants to resolve issues
- Hold the room to account, including follow up
- Bring structured frameworks and thinking to the discussion
- Fit with the team's culture and engage the whole group, ensuring everyone has the opportunity to participate
- Develop an understanding of the industry
- Bring expertise depending on the topic e.g. strategy, change leadership, organisation development
- Manage distractions; don't be side tracked by strong views
- Ask open questions and draw out unspoken issues
- Produce an outcomes document that captures the key points discussed

Should NOT do

- Allow a talkfest with no outcomes
- Change the agenda without the agreement of the key client contact
- Cut off important and relevant discussions
- Be ego driven; must be able to listen in the moment



Organisations frequently use internal facilitators, despite acknowledging the value provided by external facilitators

Despite recognition of the value an expert external facilitator can bring, and suggesting that internal facilitators can be ‘too close to the problem’, many interviewees do not engage external facilitators and instead use internal resources to facilitate meetings. Internal facilitators are frequently preferred because of their understanding of the organisation and its context, perceptions about relative cost, and the lower risk some decision makers attribute to their engagement.

Some of the organisations we interviewed only engage external facilitators as part of a broader consulting engagement or for large internal events like ‘town halls’ and leadership conferences.

Organisations rarely apply standard purchasing disciplines when selecting and evaluating external facilitators, and are unlikely to be capturing the full value of using skilled professional facilitators

Most of the executives we spoke to adopt an ad hoc approach to engaging facilitators, selecting candidates based on an existing relationship or word of mouth, and rarely using standard purchasing disciplines like competitive tendering or panels.

Many of those we interviewed expressed a strong preference for working with the same facilitators over time, as they had developed an understanding of the organisation’s history and culture, enabling them to challenge the group on specific issues and draw out valuable insights from participants.

Informal team feedback is the primary form of evaluating a facilitator’s performance. Determinants of whether the facilitator is considered for future engagements are their abilities to engage the team, fit with the team’s culture and display good judgement in allowing important discussions to continue.

At Strategic Facilitators we believe that the quality of facilitation should be primarily assessed based on whether the facilitator achieved the specific, intended outcomes that were established at the start of the engagement.

Some interviewees rigorously assessed facilitators in this way; but based on our research this simple discipline could be more widespread.



about the research

During April, May and June 2015, Strategic Facilitators conducted eleven in-depth interviews with senior decision makers in some of Australia’s largest private and public sector organisations, including large publicly listed entities, Australian subsidiaries of large global companies and large government departments.

All of the interviewees were either directly involved in selecting facilitators or had been exposed to that process within their organisations.

about strategic facilitators

Strategic Facilitators is a facilitation firm with nearly 20 years experience designing and delivering engaging, insightful and results-focused workshops.

Our team has more than 100 years of collective experience in workshop facilitation and strategic planning and between us have facilitated more than 500 executive team and board workshops, strategy workshops, conferences, offsites, meetings and retreats. Our workshop facilitators have all worked for top-tier management consulting firms, including McKinsey & Company, Booz & Company and Accenture, or been trained by people who have.

want to know more?

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