

“The Seven Principles of Masterful Facilitation” by Nina Coil

Facilitating a learning experience of any kind requires a broad and balanced skills set. Among the most challenging of all facilitation situations is leading learning and development programs on leadership and other “soft skills” topics for a senior-level audience.

Managers and leaders have justifiably high expectations given the daily demands they face. They must be able to believe that their time will be well spent in your program, which means that you must establish credibility immediately. Being at your best in the moment, while also giving yourself every potential advantage before setting foot in the room, is critical to your success.

In order to facilitate learning at this level, you must continuously balance structure and process. Managing, and indeed welcoming the unpredictable, in-the-moment experience, is the essence of skilled leadership-level facilitation. In fact, if you have not created an environment in which the unexpected is encouraged to emerge, you have done your audience a real disservice.

Seven foundational principles are at the core of this work. Remaining mindful of these principles will enhance your success and the impact of the learning experiences you create with your participants.

1. Be courageous

Acknowledge and accept that facilitation is about taking risks. By inviting challenges that enrich the learning experience, and handling the unpredictable dynamics of human interaction, you build your own comfort, confidence, and competence.

An experienced facilitator of senior level groups knows to let go of the need to be in complete control. Allowing yourself to go out of your own comfort zone and embracing an appropriate level of risk is critical to real learning for the group and for yourself as facilitator.

In order to be engaged in the material and to accept the necessity of real change, participants need to feel a level of urgency and even anxiety about the topic. But if you, as the facilitator of this experience, are unwilling to take any risks and cannot model courage yourself, why on earth should your participants allow their own guard to drop and challenge their deeply-held beliefs?

Encourage yourself and participants to acknowledge and accept feelings of discomfort while trying out new behaviors. The following is a list of some of the challenges you should embrace as you facilitate:

- Try new activities and explore new topics.
- Invite challenge and disagreement from your audience, in both the content and facilitation.
- Embrace the complexity of your subject and know your own limits; acknowledge that you do not have all of the answers.
- Acknowledge and welcome the challenge of an audience with diverse opinions, backgrounds, and attitudes.
- Challenge your audience in order to enhance their learning. Push them beyond their comfort zone through your facilitation of the content.

Think back to the last time that you found yourself becoming anxious while facilitating a group process. What felt risky to you in this situation? What benefits could the group have derived from your willingness to “hang in there?”

Above all, how can you remind yourself in the moment that the learning experience you are facilitating is about *them*, not *you*, in order to refocus your energy outward to their learning needs?

2. Be a role model

As a facilitator of leadership training, you have a dual responsibility to model both learning *and* leading. As a learner, you must model active participation and openness to your own growth. If you are eager to enhance your own learning experience, through a respect for the participants’ knowledge and contributions, the audience will respond in kind. Your own energy, curiosity, interest in, and enjoyment of the subject and in your participants should provide a strong example to the group.

The second facet you must model is that of the effective leader—the facilitator who “walks the talk,” so to speak. If you are facilitating a module on masterful communication skills, make sure that you use open-ended questions and genuinely listen to the responses that emerge. If you are facilitating a module on coaching, use your coaching framework as you work with the participants during the session.

Being a role model of the leader-learner will earn you respect and credibility from your participants, while demonstrating the value of the subject matter being explored.

Consider the last time you felt bored leading a session. Think about why that might have been the case—were you taking up too much airtime yourself, without involving the participants? If you felt defensive at any point, consider how you might have shared your reaction with participants in furtherance of their own learning. Discomfort is a natural part of the learning process, and this holds true for the facilitator as well as for the audience.

3. Balance flexibility and responsibility

A critical component of exceptional facilitation is the ability to read and interpret (accurately) the needs of the participants, and to make adjustments accordingly. Being spontaneous and flexible to concerns and issues that emerge will benefit both you and the group. Rigidly adhering to your timetable despite clear indications that there is an issue to be dealt with will prevent the participants from concentrating on the learning activities you had planned. You must meet the group where they are, even if that means adjusting your thoughtful plan for the day.

At the same time, you must deliver on your promise to meet the stated learning objectives and overall timeframes of the program. It is critical that you remain mindful of the passage of time, and manage your own reactions to challenging participant behaviors. Nothing can drain the life out of a group more surely than an overemphasis on the needs of one participant. The group relies on you to see to it that their time is well spent. If you digress from the timeframes you had planned, it must be for a significant learning purpose, and with the explicit approval of the group.

Think about the last time that you facilitated a group learning experience during which you felt conflicted as to whether to digress or to adhere to the agenda. What did you end up doing and why? How could you have involved the group in your decision? How might that have modeled one of the behaviors in your leadership program?

4. Make it theirs

Value what participants bring to the workshop. Adult learners, particularly successful senior executives, need and deserve to be respected for their life experience and knowledge. As a facilitator, encouraging participation and asking appropriately probing questions can open a wealth of resources for everyone in the room.

Build in ways to maximize participants’ input, through discussion of workplace issues, paired and small group coaching and feedback, sharing of best practices, advice-swapping sessions, and networking opportunities.

Making full use of participants’ experience is a key component to a successful learning process. The best facilitators are adept at drawing this out, then storing it and resurfacing it at later points in the training. Synthesizing the comments shared in the room within the learning framework you have created will enable

the participants to feel valued while increasing the genuine transfer of their learning back to their workplaces.

Think back to a learning experience in which the participants felt they were being asked to learn a “foreign language.” Consider whether there might have been ways to build in more participant involvement in the naming of constructs, the descriptions of elements, and the sharing of experiences that illustrate concepts and principles in action. After all, if the participants have not made the learning their own, in their own words, it will not leave the room, and everyone’s time and effort has been wasted.

5. Make it yours

In order to be a dynamic facilitator, you must be authentic. Your effectiveness is heightened when you connect with the material and personalize it so that you are fully comfortable and truly engaged in front of your group.

When you are passionate about the material, you foster learning and passion in others. The energy that you put into making the material yours, by accessing your own work and life experience as you prepare to facilitate, will emanate to your audience and improve your facilitation skills immensely. Be wary of including your own “war stories”—participants can be encouraged to share their own when needed. But if you cannot “riff” on the material you are sharing with the group, you have not done your homework, and the learning outcomes will suffer.

When was the last time you facilitated a learning experience and felt either out of your depth or left cold by the content? What might you have done to increase your connection to the material? What value would the participants have gained from your own genuine enthusiasm for or deep understanding of the concepts and practices you were sharing with them?

6. Focus on application

Participants need to apply what they have learned in order to understand how to use it in their daily work. As a facilitator you must ensure that the participants fully grasp the content and can articulate its relevance, in their own words, so that they can translate the learning into new skills and improved performance.

Well-designed workshops incorporate a substantial amount of skill-building practice and application. This is particularly critical in the development of soft skills, which, to be effective, must be practiced live, to desensitize and prepare the learner to try out the new behaviors in real life.

Practice sessions should never be shortchanged. If you must make adjustments due to time constraints, cut your own “airtime” first. Carve out as much time as possible in the agenda for participants to work with and confirm the applicability of all new content and learning.

Not all participants will be equally engaged with all of the methodologies you build into your programming. Some will need discussion time, others will require an opportunity to read, reflect, and plan, still others will be reluctant to engage in role plays or simulations. But unless you incorporate elements of all of these approaches into your learning experience, the learning will evanesce. “Use it or lose it” pertains as much to learning experiences as to the development of Olympic-level athletic ability.

Think back to the last time that you led a learning session. Did the participants have an opportunity to try out the behaviors you were advocating? Did they have time to reflect on their insights and to make a realistic plan to act on their insights? How might you have built in more application activities?

7. Link it to the business

Training events do not occur in a vacuum. You must have a solid understanding of how the training that you are providing connects with the business goals, performance objectives, issues, and challenges of your

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audience. Using this context as a foundation and assisting participants to make this connection establishes credibility and fosters buy-in.

We strongly recommend that you contact each participant prior to the workshop to better understand their specific issues and motivation for taking the course, as well as their role and level of experience.

For internal trainers, the more you know about how your organization’s strategy, operations, and culture, the more effective and credible you will be. Additionally, you should know how any single course aligns with the overall framework of the organization’s management or leadership training initiatives.

After all, if you can’t convincingly articulate the bottom-line value of the work you are doing and of the time these high-level executives are spending with you, who will do it for you?

No one said this work would be easy. In fact, there are days when each of us, if we are honest, wonder why on earth we have chosen to take on the challenge of facilitating learning experiences in which we must model what we would ask of our own leaders. But if we truly believe in the value and the possibility of developing inspiring leaders with wisdom, compassion, and clarity of purpose, we must hold this belief of ourselves, as well.

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Nina Coil specializes in designing, developing, and delivering creative train-the-trainer programs focused on leadership development. As part of Linkage's Product Development Team, she transforms Linkage's intellectual capital into training and certification programs and job aids/tools to help client organizations translate strategic goals into effective individual behavior. Nina has led the design and development of a variety of management and leadership programs, including the Leadership-Level Facilitation Program (which is based on The Dynamic Facilitator Model, and which brings alive the Seven Principles of Facilitation described in this article), Linkage's Management Skills Certificate Program, and the Management Skills Train-The-Trainer Program through which participants become certified to deliver five of Linkage's proven Management Skills modules.

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