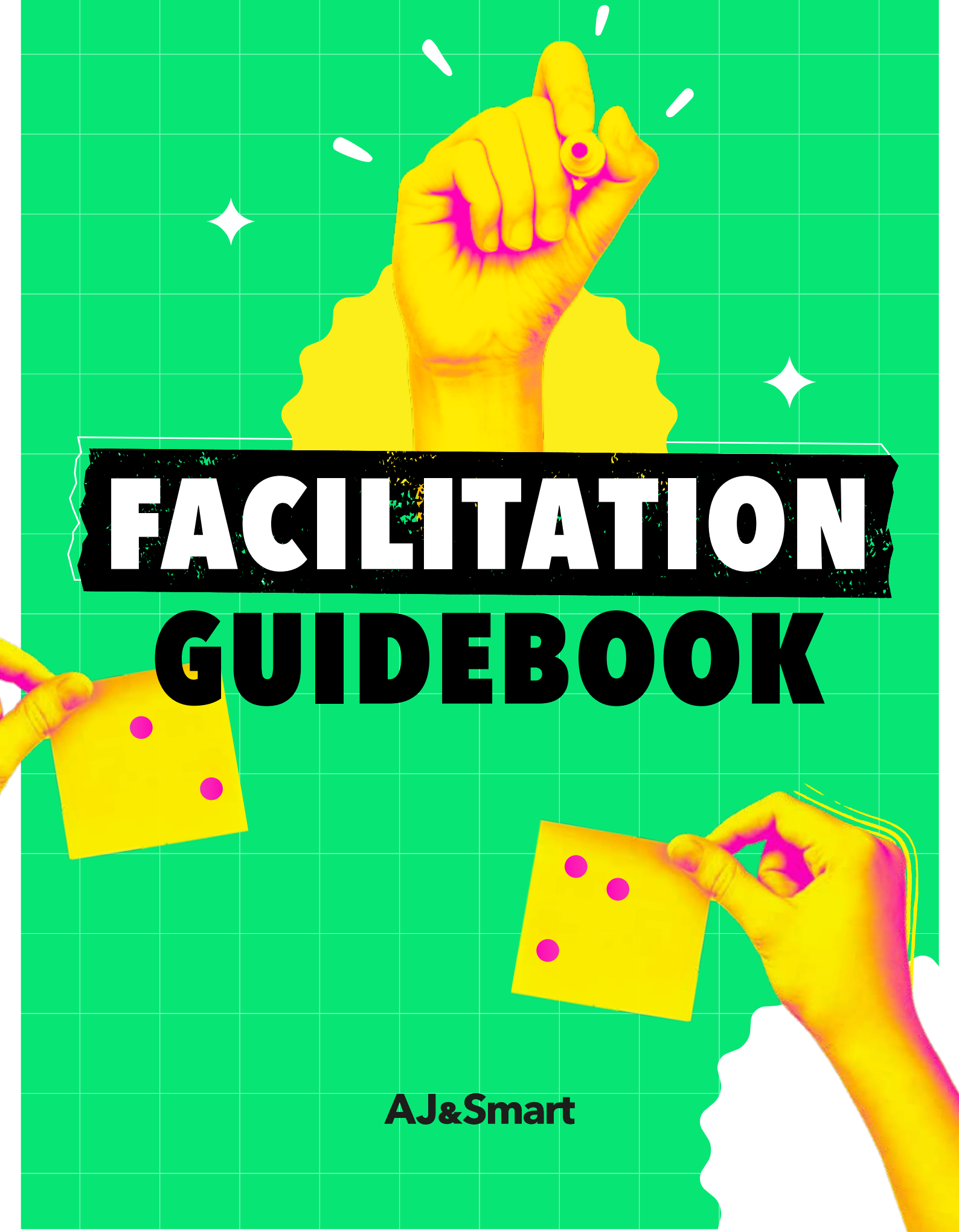


FACILITATION GUIDEBOOK

AJ&Smart

INDEX

Introduction 1

What Makes a Good Facilitator 3

Three Facilitation Myths You Need to Ditch Right Now 6

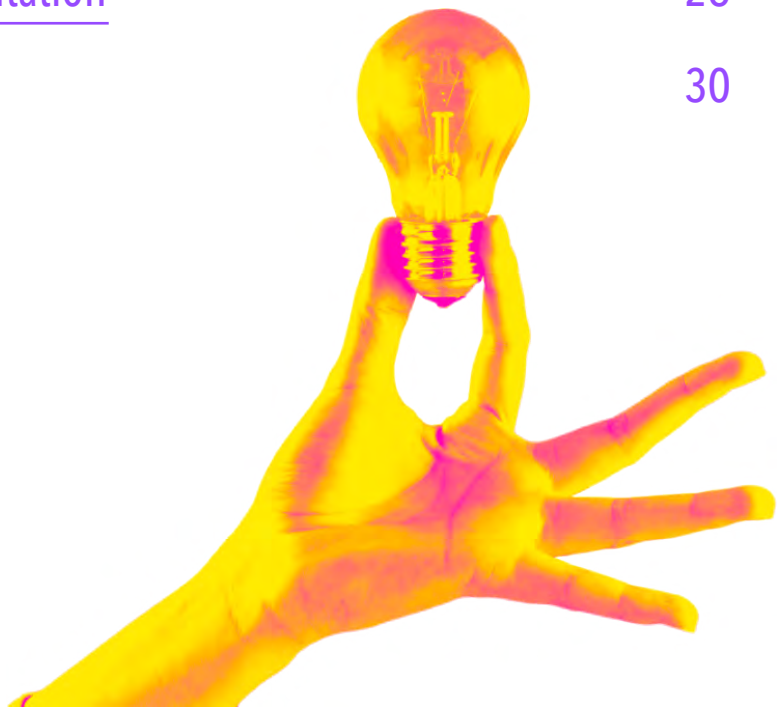
Workshop Preparation: How to Set Yourself Up for Success 10

How to Give Clear Instructions 16

How to Deal with Troublemakers 20

Principles of Remote Facilitation 26

Conclusion 30



INTRODUCTION

Hey there, **Workshopper!** So glad to have you here! Chances are if you're reading this Guidebook, you want to improve the way collaborative work happens in your team or organization. Or maybe you have a business and want to deliver even more value to your clients by learning how to (better) facilitate decision-making, strategy, or innovation meetings and workshops.

Either way, you're in the right place. **Becoming a facilitator is a GREAT career move**, and learning the basics of facilitation is easier than you might think!

This handy Guidebook is just what you need to start facilitating *confidently* in no time! We'll dive deep into….

- What makes a good facilitator
- Three facilitation myths that you need to ditch right now if you want to facilitate effectively
- Concrete tips on how you can set up EVERY workshop for success
- How to give clear instructions and eliminate misunderstandings
- How to deal with troublemakers and skeptics in a group setting
- Remote facilitation principles that will help you make your remote workshops as engaging and energetic as the in-person ones!

ARE YOU READY TO BECOME A CONFIDENT FACILITATOR? LET'S DIVE RIGHT IN!

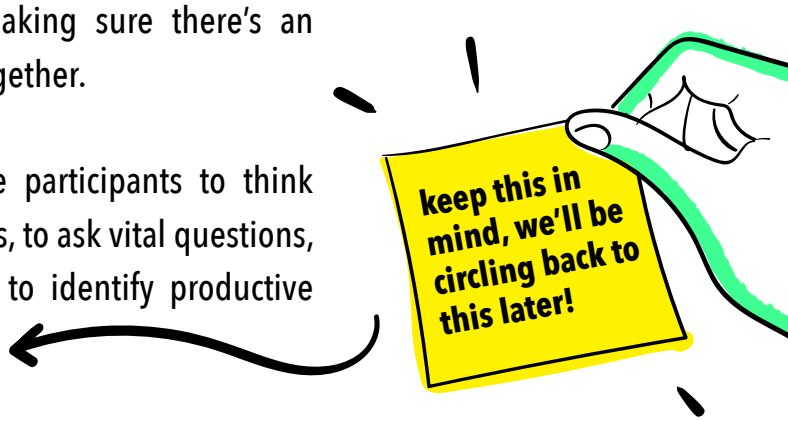
WHAT MAKES A GOOD FACILITATOR

But before we start, let's make sure we're on the same page…
Who is a facilitator, actually, what is their main task, and what makes a good facilitator?

A facilitator (or a Workshopper, as we like to call them!) is the person who guides a team through a process, helping them unleash their potential, do their best work, and avoid the usual pitfalls of collaboration: groupthink, a lack of outcomes, and team politics (to name just a few!).

Facilitation is all about helping the group do efficient, meaningful work. It's about making sure everyone in the room gets heard, without falling prey to 'design by committee', and making sure there's an actionable outcome every time a group comes together.

The goal of a good facilitator is to encourage participants to think productively and ultimately to articulate key ideas, to ask vital questions, to uncover variables, to find solutions, and/or to identify productive actions, NOT to solve the challenge for the team.



A skilled facilitator can supercharge a team's performance by eliminating the friction of group collaboration and providing a process for the team to follow, that the facilitator leads them through step-by-step.

SO WHAT ULTIMATELY MAKES A GOOD FACILITATOR?

Unbiased perspective

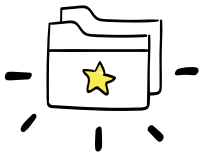
There is nothing worse than a biased facilitator who drives the discussion to a preplanned (and obvious to all) conclusion.

Commitment to collaboration

Collaboration can be frustrating. And all too often there's the temptation for people to take on the role of the teacher and to take charge, rather than the role of facilitator and to guide. However, a good facilitator knows that they're the guide, not the hero. They're in the room to help the team do their best work, not to show off how smart or cool they are.

A sense of timing

A good facilitator knows when a discussion has gone off-topic and needs to be brought to a close, or when team members are done with the exercise and ready to move on.

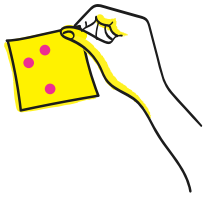


A robust toolkit

of effective exercises for every occasion, be it decision-making, problem-solving, or ideation. The more exercises you learn, the more flexible you are, and the better your workshops will become!

Strong facilitation skills

A good facilitator has tools and tricks up their sleeve that can stop a circular discussion in its tracks, help them deal with troublemakers, and make sure their group is engaged and switched on!



Workshop recipes

meaning a set of exercises that go well together and produce strong outcomes when combined. An example of a workshop recipe is something like a ***Design Sprint*** or a ***Lightning Decision Jam!***

THREE FACILITATION MYTHS YOU NEED TO DITCH RIGHT NOW

When it comes to facilitation, there are a lot of misconceptions out there that might stop you in your tracks before you've even had a go at it. Or worse yet, negatively impact your facilitation abilities by making you focus on all the wrong things!

But not to worry, we're here to **debunk** these myths once and for all so you can pay attention to the things that matter.

MYTH #1: YOU NEED TO COME UP WITH THE BEST SOLUTION IF YOU'RE THE FACILITATOR

Remember we told you in the first chapter that a good facilitator's goal is to encourage participants to think productively, not solve the team's challenge?

Well, this is the thing most novice facilitators get wrong.

Instead of focussing on ***guiding*** the team, uncovering ***their*** expertise, and letting ***them*** solve the challenge, they put pressure on themselves because they think they need to be the person in the room with the best, brightest, most innovative ideas.

That's because they haven't yet adopted the **facilitator's mindset**, which is:

YOU NEED TO BE THE GUIDE, NOT THE HERO

This simple change of perspective shifts the facilitator's focus from being the center of attention and the hero to being the guide, ***the person helping others do their best work.***

To put it bluntly, you don't need to show off how good or smart you are!

It also takes the pressure off of you because you don't need to worry about solving the challenge yourself and can instead focus on observing the group, tuning into their needs, and making sure the workshop moves along swiftly.

Making this mindset shift is KEY to becoming an excellent facilitator. It also ties into the next myth about facilitation, which is...

MYTH #2:
THE FACILITATOR HAS TO BE A SUBJECT MATTER EXPERT

This is a big one! Time and time again, we hear people say things like:

I can't facilitate a workshop for company X because I don't know anything about their industry!

But the thing is, you don't need to be an expert in every industry to facilitate a good workshop. Just like we mentioned above, once you make the mindset shift from being the hero to being the guide, you'll realize your role as a facilitator is **not** to solve the team's challenges but to guide them through the decision-making process and unlock their abilities.

While you definitely need subject matter experts in the room, it doesn't mean you as a facilitator should take on this role. The expertise should come from the group, not from the facilitator.

As a facilitator, you just need to know how group dynamics work, the best decision-making tools, and how to steer the group to their best possible outcome. The point is to bring out the best in the team, give them some tools and guide them to discover their own strength.

MYTH #3:
YOU NEED TO BE AN EXTROVERT TO BE A GOOD FACILITATOR

This myth is engraved deep in the minds of many because it's the one that ***seems*** to make a lot of logical sense. You will be speaking in front of groups of people, so shouldn't you be extroverted?

Well, not necessarily!

In fact, if you rely purely on your outgoing personality to wing it through the workshop, you likely won't deliver strong outcomes.

Some of the best facilitators here at AJ&Smart are introverts and this hasn't stopped them from facilitating successful workshops for some of the world's biggest companies (like Google & Twitter!).

The key to confidently guiding a group is to have a big toolbox of exercises to pull from, to know the core facilitation rules, and to implement them!

How do you do that?? That's precisely what we cover in the next section.

WORKSHOP PREPARATION: HOW TO SET YOURSELF UP FOR SUCCESS

If you want to set up your meeting or workshop for success, you need to do some groundwork before the meeting even starts. We recommend you go through this checklist at the start of every workshop to make sure you don't forget any steps:

- ☐ Warm Up the Participants
- ☐ Set Workshop Ground Rules
- ☐ Set Expectations
- ☐ Get Expectations
- ☐ Set the Agenda

WARM UP THE PARTICIPANTS

A start of the workshop is super important because there are a lot of things you can tick off right at the beginning that will make the rest of the workshop much easier (and more enjoyable!) for you and the participants.

One of the biggest mistakes you can make is jumping straight into the first exercise or discussion. You need to get the team into the right headspace first: a vital part of your workshop's success is getting people to feel engaged and switched on.

If you don't make sure your participants get an energetic start from the get-go, you'll risk people getting bored before you've even started! **Always start with an easy ice-breaker exercise to activate the group and set the tone for participants.**

So which icebreaker should you choose?

We've tried every single icebreaker you can imagine, and one of our favorite ones is "Who's Sitting Next to You?"

HERE'S HOW YOU DO IT:

Ask the participants to break into groups of 3-5 and for each person to share their name, their (very) first job (e.g. babysitting), and something they learned from that job. We love this exercise because it works well whether the participants know each other or not. The room always fills with laughs and smiles, and participants start the day in a great mood!

PRO TIP: Start with your own story first to break the ice and show the team how to do the exercise correctly!

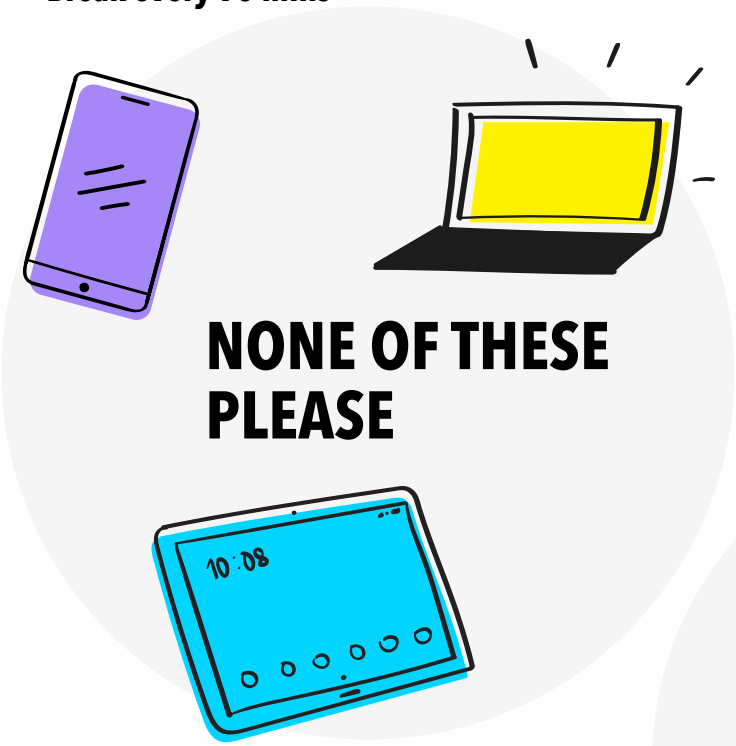
SET GROUND RULES

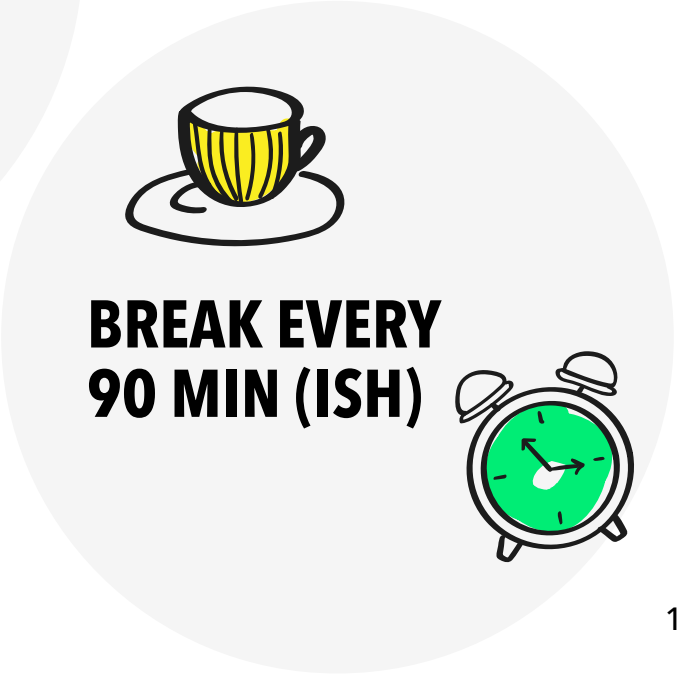
Setting up the ground rules **at the beginning** of the workshop will save you a lot of time and will prevent flow-interrupting discussions down the road, so never skip this step! Do this at a later stage, and you run the risk of your participants being annoyed and disengaged because a rule popped up that they weren't aware of.

All you need to do for this step is to display the workshop rules to the participants and get their buy-in by saying something like ***"Is everyone on board with that?"***

It's totally up to you which rules you want to include (this also depends on the needs of the group and specifics of the workshop), but here's our go-to list:

- **No device rule**
- **No judgment**
- **Break every 90 mins**





SET EXPECTATIONS

This step alone will make your workshops a lot smoother to run! Make it a RULE to set expectations for your participants at the start of the workshop to minimize the risk of them feeling disengaged, overwhelmed, or drained.

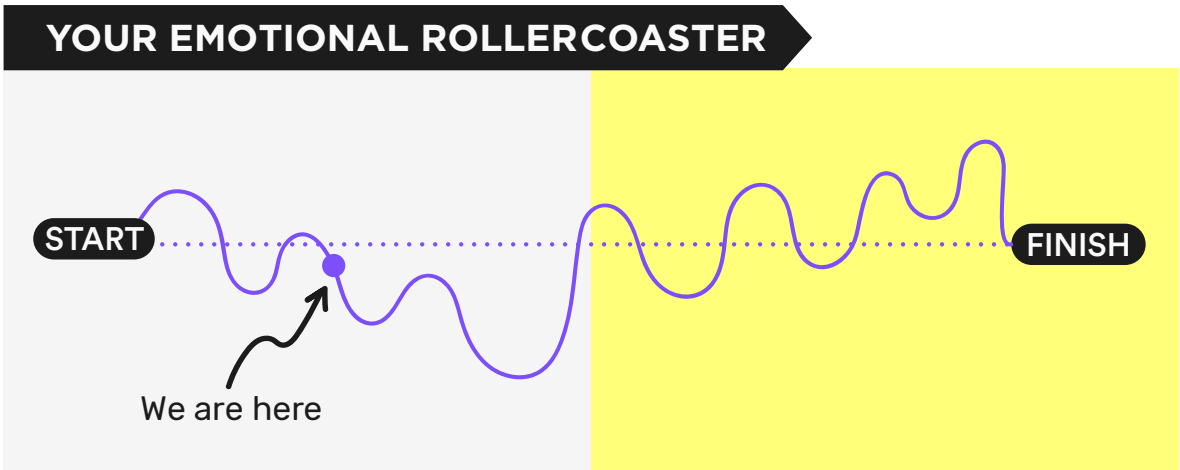
The reason you need to do this is because workshops are INTENSE. And not only for you as a facilitator, but for your participants as well! The workshop attendees will have to work hard to keep their concentration for long periods of time, take in a lot of information, and then put it into practice, so it's 99% likely they'll feel overwhelmed at a certain point during the workshop.

The thing is, people tend to assume that they are the only one feeling overwhelmed or finding something difficult. **Those thoughts can distract them from the workshop and dial up the pressure, resulting in a less efficient session.**

The good news is, you can massively reduce this overwhelm by simply **telling people what to expect and how they might feel during the process.**

So next time try saying these before kicking off a session:

- ***It's common that this might feel too rushed.***
- ***Often it will feel like we're losing ideas because we'll be moving fast.***
- ***The exercises might feel weird or awkward, and that's totally normal!***
- ***It's normal to not have any ideas yet.***
- ***It's normal to feel like it's not going to work.***



GET EXPECTATIONS

Equally important to setting expectations is getting them from your participants! **Asking your participants what they hope to get out of this workshop will make them feel heard and will help you know which topics to focus more attention on.**

Here are a few prompts that you can ask your participants before the start of the workshop:

What are you hoping to get out of this?
What will make this worthwhile for you?
What do you hope to achieve today?

PRO TIP: As participants share their expectations, make sure to note them down! This will signal to the group that this is not a formality, and you really care about making the experience enjoyable and worthwhile for them. As a result, your group will be much more receptive to the workshop and exercises!

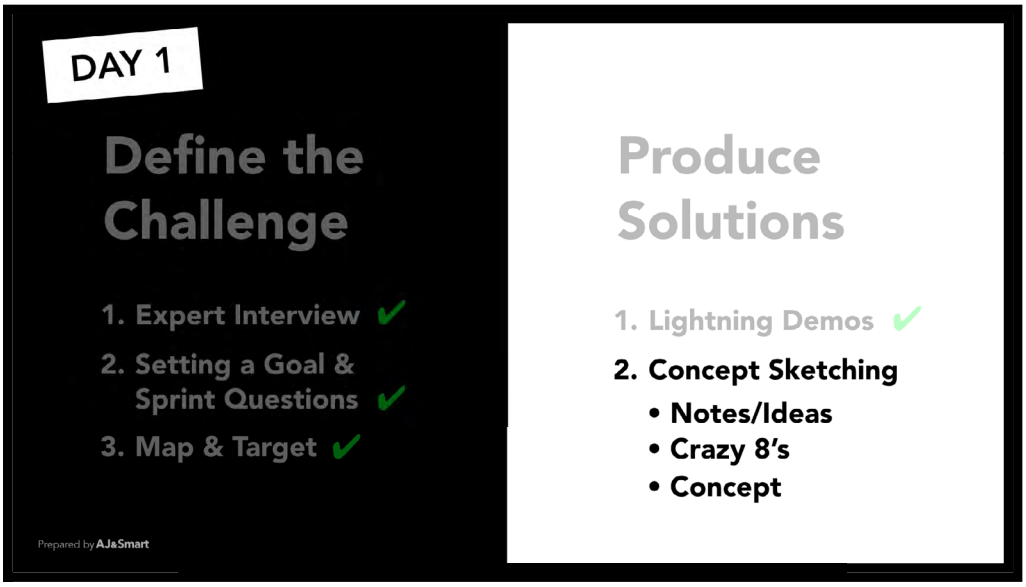
AGENDA & STRUCTURE

Nothing can ruin an otherwise good workshop quite like the participants not being fully present, constantly wondering what's coming up, whether the workshop is moving according to plan, or when the lunch break is.

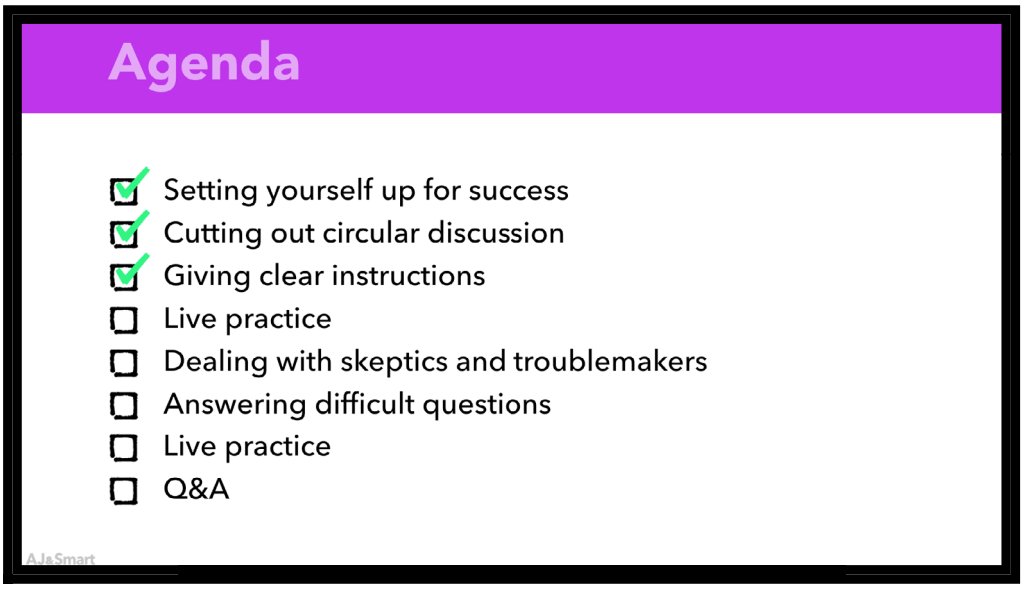
To avoid the group feeling disoriented, be sure to go through the agenda for the day. You don't need to make it fancy or too elaborate, a simple list will do.

This will give people a sense of direction so they never have to wonder about where they are in the workshop or how much more there is to go before a break. It also helps avoid people asking what's coming next, which can break your flow and confidence as a facilitator.

Pro tip: Don't include fixed timeframes in your agenda in case you need to adjust the timing for some exercises, but jot down the flow of the day so people know what to expect.



Example slides from Design Sprint Bootcamp



Example slides from Advanced Facilitation training

And there you have it, once you go through this checklist, you can dive right into the first workshop exercise!

HOW TO GIVE CLEAR INSTRUCTIONS

One of the main things you're going to be doing as a facilitator is asking people to do certain exercises and explaining how they work. Funnily enough, **this is the part of facilitation that causes the most difficulty for a lot of facilitators.**

And nothing can take the wind out of your sails quite like having to explain the same simple exercise 3 times in a row.

To avoid this happening, follow the tips below that will help you deliver crystal clear instructions and avoid misunderstandings.

USE THE FORMULA FOR CLEAR INSTRUCTIONS

The best way to give instructions that people will actually understand is to use the following formula when explaining any exercise in your workshop:

WHAT **WHY** **HOW**

Sounds simple, doesn't it? Yet often we forget at least one of these three things!

This usually happens because of a thing called the 'Curse of Knowledge': because **we** are familiar with the way a certain exercise is done, we omit important details that are obvious to us but aren't to someone who's new to the concept.

We say what we're about to do, then how, but leave out the why. Or we say what & why, but forget to specify how. As you're preparing for a workshop, make sure to run your material for every exercise against that formula and make sure you have all 3 elements covered.

So for example, if you're explaining to the group how to do a ***How Might We*** exercise, it should sound something like this:

WHAT

Hey everybody, we're going to do an exercise called How Might We.

How Might We is a very simple exercise that is going to allow us to reframe challenges into actionable statements that we're going to be able to use to generate solutions.

WHY

We're doing this because a properly framed How Might We allows us to find non-obvious solutions to the problem and gives the perfect frame for innovative thinking.

HOW

Here's how we'll do it: Write 'HMW' which stands for 'How Might We' in the top left corner of your sticky note, and when you hear a negative challenge, rephrase it into a How Might We Statement. For example, if our Expert mentions that "we're not getting enough customers..", you can write down HMW get more customers into our checkout.

If you hit these three tips, the chances of the entire group understanding you skyrockets!

REMEMBER THE 3XRULE

No matter how hard we try to pay attention, the truth is we often can't sustain focused attention for long periods of time, and certainly not for the length of a whole workshop. So don't expect all people to listen all the time. Instead, build that expectation into the way you communicate information in your workshop session.

To minimize the chances of anyone in the room missing a vital piece of information, make sure to say important things three times.

You don't need to repeat the exact same sentence three times in a row, but make sure to reiterate your point, or provide several examples.

REMOVE UNNECESSARY OPTIONS

You might think that giving people multiple options to do an exercise would give them more creative freedom, but in most cases, **more options only add confusion.**

Especially if the team you're working with haven't been in a lot of workshops, or aren't familiar with the exercises you're doing, adding more options will just drain their mental capacity with doubts like….

Should I use 4 or 5 dots? / ***Can I mix red and green dots?*** / ***Should I vote on my own ideas or not?***

So only show one way of doing an exercise. If, and only if, people ask you for other options, provide an alternative.

SHOW, DON'T TELL

Examples help us understand concepts better since they take ideas from an abstract description and make them concrete by giving them context.

Some presenters fear that showing examples will limit and influence people's thinking and decide to leave them out in the name of creative freedom.

In practice, the tradeoff is worth it. Creative freedom can come later. But when you're teaching people an exercise for the first time, it helps to have a template to follow.

USE INSIGHT STATEMENTS

During a workshop, you're going to be talking a lot, which means your participants will have to take in a lot, but **there's only so much the mind can absorb before losing focus.**

So while it's good to give a detailed explanation of a concept or exercise, **make sure to summarize it with an insight statement. An insight statement** tells people the "why" and gives context for the task. Examples of insight statements you can use:

The big idea with this exercise is…
The most important thing about this is…
The way to do this exercise well is…

Try implementing these 5 tips into how you give instructions in your sessions and watch your alignment levels skyrocket!

HOW TO DEAL WITH TROUBLE-MAKERS

Frankly speaking, it's not a question of ***if*** you'll have to deal with a skeptic or a troublemaker, but a question of ***when***. And when that moment comes, it's crucial you know how to deal with them in the most effective way possible.

Otherwise, you run the risk of derailing the entire workshop over one person!

The good news is, there are a few simple yet effective ways of dealing with troublemakers!

1. SET EXPECTATIONS & GROUND RULES

If you've followed our Workshop Prep Checklist, you already have this one down, kudos to you! If not, try to incorporate it into your routine ASAP.

By setting expectations, ground rules, and getting buy-in from your participants, you can hold them accountable for the rules you agreed upon in case they don't follow them.

For this trick to work you HAVE TO set the expectations ahead of time and ask for participants' buy-in.

2. RECORD IDEAS (AND MOVE ON)

Occasionally participants will contribute input that won't seem to fit. This might be because they aren't used to your workshop methods, they don't know what might be coming next, or perhaps they have a hidden agenda you don't know about.

A less efficient way to deal with non-relevant input is ignoring it or explaining that it's outside of the scope, irrelevant, or not important at the moment. We highly suggest you steer clear of this option, as it's only going to make the participant more defensive about their idea, and less receptive to the workshop.

Instead, try this:
Thank the participant for their input and tell them that you're taking a note of it. Let them know that you don't think this will fit with where you're at in the workshop, but it might be helpful at a later stage, and you've captured it just in case. This way they'll feel heard, and they'll be able to take the piece of information out of their head and move on. Then, as the facilitator, you can bring that point back up during a relevant exercise, if you feel like it makes sense.

3. USE A PARKING LOT

Sometimes a circular discussion is heated and complex but isn't relevant to moving forward with the exercise. But the thing is, **it's hard for people to stop talking and move on when they feel that the topic is important and shouldn't be forgotten.**

Luckily, there's an easy way to help your participants feel comfortable while also keeping the workshop moving: create a Parking Lot space.

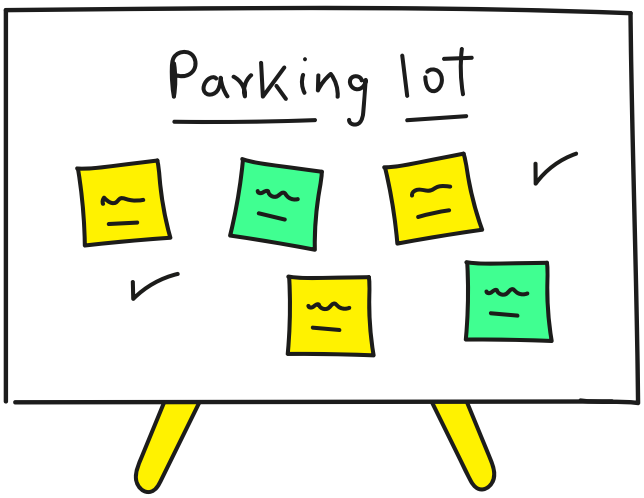
A Parking Lot is a physical or digital space (a specific whiteboard or area on your virtual whiteboard) where questions, ideas, and topics can be "parked" for discussion later. So whenever you spot a circular discussion that isn't going anywhere, simply interject with something like:

That's a big topic/question! Let's park it for later to make sure we give it proper consideration.

Let's finish this step and come back to talk about it later.

That's a great question! It's outside the scope for this exercise, so could you write it on a sticky note to make sure we come back to it later?

There's only one caveat to this: you HAVE TO include a block of time in your agenda to come back and answer those questions! The Parking Lot won't work to cut off discussion if your participants don't trust that you will actually make time to address the parked topics.



4. USE NOTE & VOTE

This method comes straight from the Design Sprint and it's a big reason why Sprints feel lightning fast and productive!

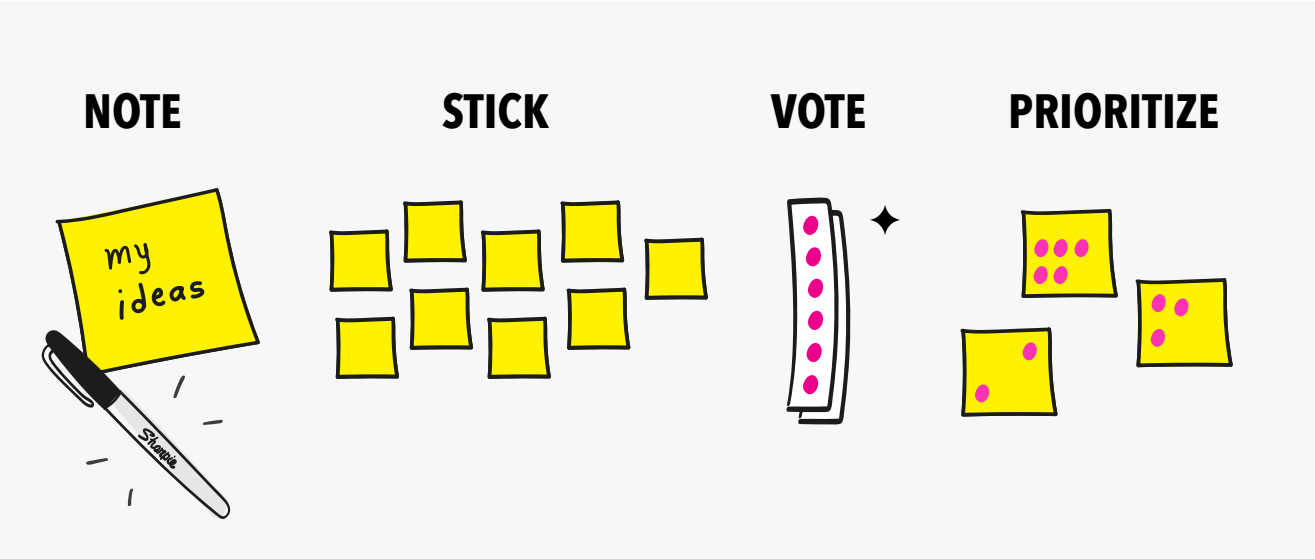
Whenever you see a circular discussion rearing its ugly head, and the topic is important to help you move to the next step, gently stop the discussion and tell people that now is a perfect time to do a Note & Vote!

With a Note & Vote, everyone gets to express their opinions, and you will reach a decision and an actionable outcome much faster than you would with an open ramble.

Here's how to run a Note & Vote session:

1. Set a timer for a few minutes
2. Ask everyone to silently write their thoughts on sticky notes (1 idea per sticky note!)
3. Once the time is up, put all sticky notes up on the wall or a whiteboard
4. Distribute voting dots to everyone (3 dots is often enough, but you can change this)
5. Set the timer again and ask everyone to look at the ideas on the wall and vote.
6. Once the votes have been cast, reorganize the sticky notes by the number of votes they got to see a visual representation of which ideas have the most backing.

And just like that, you have a decision made by the majority and you can move on happily!



5. GIVE TASKS

If someone is consistently disrupting the flow of the workshop, resist the urge to simply ignore them. Instead, give them easy tasks that will keep them occupied and will make them feel involved: sticking the sticky notes on the wall, drawing the map, dialing in a remote colleague, etc.

This might seem patronizing, but what it really does is **allows people to feel involved in a workshop and turns them into allies instead of opponents.**

6. ASK PROBING QUESTIONS

It's a guarantee that there will be times when you are faced with difficult questions to which you don't know the answer. They can throw you off your game and break up the flow of the meeting/workshop if you don't know how to handle them.

THE SOLUTION?

Ask Probing Questions. They're a magic trick that allows you to **engage in the question without revealing that you might not know how to answer it.** So if you're confronted with a question that you don't know the answer to, or one that is clearly aimed at sabotaging the meeting, try using one of these cues:

- ***That's a really interesting question!***
Can you tell me what's behind you asking that?
- ***Are you thinking of a specific situation?***
- ***What do you mean exactly? Can you tell me more?***

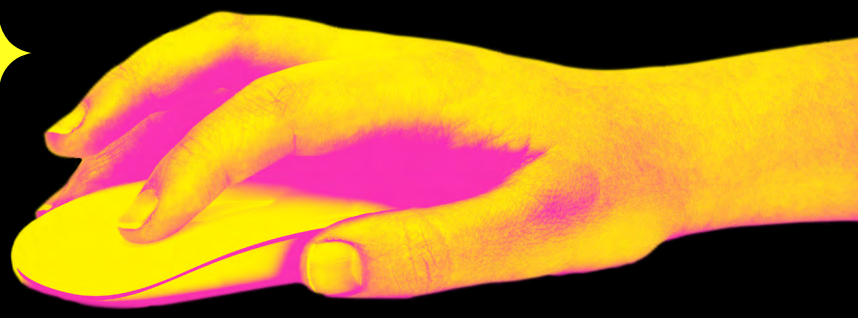
Probing Questions help you validate the asker, provide that extra information you might need, and buy you thinking time. Plus, the troublemaker might just answer their own question in the process! Win-win!

7. THE NUCLEAR OPTION

Although the above techniques work well in most cases, you should still expect and prepare for troublemakers who simply won't cooperate.

If you've already tried all of the above methods, and nothing has worked, approach the person privately, ask them how they're doing, and how you can make the workshop better for them. Take notes while they're speaking to show that they're really being heard and you take their comments seriously! Don't get snarky or passive-aggressive, try to really understand the reasons for their behavior. **Rarely is someone trying to sabotage a meeting just because they feel like it**; most of the time, there are underlying reasons that you might not be aware of.

If that doesn't help, approach the troublemaker again, and tell them that they are being disruptive and are negatively impacting the workshop for the others. If that doesn't help either, revert to the final option and ask them to leave the meeting.



PRINCIPLES OF REMOTE FACILITATION

By now, remote work is not just a hypothetical 'future' of work, but an inevitable reality for many. While some companies and teams have long adopted remote work as their modus operandi, it's a whole new situation for others. But whether you're used to it, or not, remote work is here to say, which also means you need to prepare yourself for remote facilitation!

Remote facilitation requires a new way of thinking: not only do you need the right tools (a virtual version of a whiteboard, sticky notes, online timers, etc), but it also requires a different approach to how you run the session.

There are about a million details a facilitator needs to keep in mind: Is everyone engaged? Is there equal participation? Are all comments being heard? But don't panic, remote facilitation isn't that bad: You just need to make sure you're taking the special principles of remote facilitation into account.

PRINCIPLE #1: ENERGY

Energy is a KEY component in facilitation generally, but is actually even more important in remote facilitation, because you won't have the 'buzz' that's generated from people working in the same space.

If you're not mindful of this fact, you might automatically slip into a remote conference call mode and leave your participants disengaged and bored!

To make sure the group's energy levels stay consistently high, try implementing these tips:

1. **Bring WAY more energy** than you would in an in-person workshop, and don't be afraid to really exaggerate it. It will feel extremely weird at first, seeing that you probably will be the only person in the room talking to a screen of muted participants. But while it might feel weird on your side, it will feel super energizing for your participants.

2. Just like with an in-person workshop, don't plunge straight into 'exercise mode', and **leave time for a warm-up and icebreaker activity.** It's especially important in a remote workshop to leave time for participants to get into the right headspace. The "What Was Your First Job" icebreaker works equally as well in a remote setting as it does in an in-person one!

3. **Put on some workshoppy music to create a nicer atmosphere.** Because remote workshops often mean the participants are not in the same room physically, having some background music can help make the workshop experience feel less lonely and awkward. If you use remote conferencing software you can often share the music that you have playing. If you're not sure which music would fit best, give our Spotify playlist a try!

4. **Have more breaks than you would in a normal workshop.** Because in a remote setting people spend most of their time sitting in front of a screen, it's easier for them to lose energy and momentum, or get distracted. To counteract that, incorporate way more breaks than you would in an in-person workshop. If you can, shorten your workshop sessions as well so that your workshop attendees don't spend 8 hours on end staring at a screen.

PRINCIPLE #2: COMMUNICATION

In an in-person workshop, the participants are usually more engaged and involved because they can physically disconnect from whatever other work they're doing. A remote workshop, on the other hand, is a whole different story. You need to take the extra time and effort to make participants feel involved and make sure everyone is following along.

SLOW DOWN

In an in-person session, you can usually move people along the exercises a bit faster. For the remote setting, it's better if you give the group more time to catch up with you and ask the group for permission to move to the next section.

Hey everyone, is it ok if we move on to the next exercise?
Follow me on the board

BUFFER IN A BIT MORE TIME FOR DISCUSSIONS

Remote discussions take more time, so factor that in. You can still cut in if circular discussions spark up, but do allow a bit more time for people to get their point across.

PRINCIPLE #3: GUIDANCE

Chances are, you'll have to use a remote collaboration tool for your remote workshop. To avoid the team getting overwhelmed, make use of progressive disclosure: only share information the participants need to know when they need to know it and minimize the need to switch between a video call and the remote collaboration board.

PRINCIPLE #4:
SORT OUT THE TECH

Have a plan B for EVERY single tool you're using, because it's not a question of *if* something will break, but a question of *when*. To avoid disruptions and the momentum fading, prepare for the worst-case scenario and have several backups ready.

PRO TIP: have a technical facilitator support you during a workshop! This is the person who can take care of the tech setup (the timers, the music, the online whiteboard) and they're the person to turn to if any tech difficulties come up. While you as the facilitator can take on this role, the quality of your workshop will really skyrocket if you're able to have someone help you out.

PRINCIPLE #6:
SIMPLICITY

It is super easy to get carried away with digital collaboration tools because they're really robust and offer a lot of cool features. But remember: your participants are not professional facilitators and too many shiny objects and functions will probably just overwhelm them!

Keep it **simple** and don't overcomplicate the board with too many elements.

CONCLUSION

Wooo, congrats on reaching the end of our Facilitation Guidebook! You're now ready and equipped for confidently facilitating any kind of workshop, whether an in-person or a remote one.

Here's a quick recap of what we've covered. You can print this checklist out and use it as a lil' handy reminder before and during your workshop!

THE KEY MINDSET WORK

- ☐ **Be the guide, not the hero.** You don't need to come up with the best solutions in the room! Focus on guiding the group & unleashing their potential.
- ☐ **You don't need to be the subject matter expert.** As a facilitator, you just need to know how group dynamics work, the best decision-making tools, and how to steer the group to their best possible outcome.
- ☐ **You can be an excellent facilitator regardless of your personality.** Some of the best facilitators here at AJ&Smart are introverts and this hasn't stopped them from facilitating successful workshops for some of the world's biggest companies (like Google & Twitter!).

WORKSHOP PREPARATION: SET YOURSELF UP FOR SUCCESS

- ☐ **Warm Up the Participants**. Always start with an easy ice-breaker exercise to activate the group, set the tone for participants, and allow the group to get into the right headspace.
- ☐ **Set Workshop Ground Rules**. Setting up the ground rules at the beginning of the workshop will save you a lot of time and will prevent flow-interrupting discussions down the road, so never skip this step!

- ☐ **Set Expectations.** Workshops can feel intense and unusual, so to avoid your team members feeling like they're the only ones finding it "difficult" (and thus being distracted!) address these possible feelings at the start of the workshop.

- ☐ **Get Expectations**. Asking your participants what they hope to get out of this workshop will make them feel heard and will help you know which topics to focus more attention on.

- ☐ **Set the Agenda.** To avoid the group feeling disoriented, be sure to go through the agenda for the day. You don't need to make it fancy or too elaborate, a simple list will do.

GIVE CLEAR INSTRUCTIONS TO AVOID MISALIGNMENT

- ☐ **Use the formula for clear instructions:** What, Why, How.

- ☐ **Leverage the 3x Rule.** To minimize the chances of anyone in the room missing a vital piece of information, make sure to say important things three times.

- ☐ **Remove unnecessary options.** Only show one way of doing an exercise. If, and only if, people ask you for other options, provide an alternative.

- ☐ **Show, don't tell.** Examples help us understand concepts better since they take ideas from an abstract description and make them concrete by giving them context. Make it rule to point to something that exists rather than explaining abstract concepts.

- ☐ **Use Insight Statements.** While it's good to give a detailed explanation of a concept or exercise, make sure to summarize it with an insight statement. An insight statement tells people the "why" and gives context for the task.

TURN TROUBLEMAKERS' ENERGY AROUND

- ☐ **Set expectations & groundrules.** By setting expectations, ground rules, and getting buy-in from your participants, you can hold them accountable for the rules you agreed upon in case they don't follow them.

- ☐ **Record (and move on!)** If someone's contributing input that doesn't seem to fit, thank the participant for their input and tell them that you're taking a note of it. This way they'll feel heard, and they'll be able to take the piece of information out of their head and move on.

- ☐ **Use a Parking Lot.** It's hard for people to stop talking and move on when they feel that the topic is important and shouldn't be forgotten, so make sure to include a Parking Lot into all of your workshops (and don't forget to come back to the parked ideas or questions after!)

- ☐ **Use Note & Vote.** With a Note & Vote, everyone gets to express their opinions, and you will reach a decision and an actionable outcome much faster than you would with an open ramble.

- ☐ **Give troublemakers tasks.** This will keep them occupied and will make them feel involved, but more importantly, turn them into allies instead of opponents.

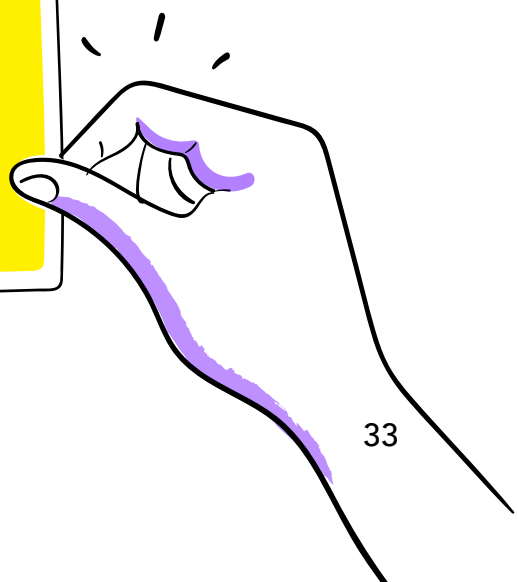
- ☐ **Ask Probing Questions.** They' will allow you to engage in the question without revealing that you might not know how to answer it.

- ☐ **The Nuclear Option.** Do this only after you've tried everything else on the list! Approach the person privately, ask them how you can make the workshop better for them. If that doesn't help, approach the troublemaker again, and tell them that they are being disruptive and are negatively impacting the workshop for the others. If that doesn't help either, revert to the final option and ask them to leave the meeting.

PRINCIPLES OF REMOTE FACILITATION

- **Keep the energy up!** Make your sessions shorter, bring WAY more energy into your presentation, and don't forget the warm-ups and icebreakers.
- **Adapt your communication.** Slow down a bit and allow more time for discussions to unravel than you would in an in-person workshop.
- **Guide the team** through the remote set up by making use of progressive disclosure: only share information the participants need to know when they need to know it and minimize the need to switch between a video call and the remote collaboration board.
- **Have a Plan B for tech difficulties.** To avoid disruptions and the momentum fading, prepare for the worst-case scenario and have several backups ready.
- **Simplicity.** Keep it simple and don't overcomplicate the board with too many elements.

If you'd like to find out **even more helpful tips on how to run and design workshops**, make sure to check out our blog, Workshopper.com, as well as our YouTube channel and Instagram!



THE FACILITATION GUIDEBOOK

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