

# The Facilitation Mastery Series:

## A McNeil / CoVision capacity-building partnership

### The Offering



The McNeil Facilitation Mastery Series is designed to help our clients develop the capacity to build better Business Strategies, execute these strategies, more fluidly, and achieve outstanding results. We propose to do this by increasing our clients ability to facilitate their critical meetings better than their competition. In short, we help our clients to develop a competitive advantage by taking the strategic meeting away from their competition.

Our offering consists of a structured sequence of facilitation skill sessions followed by skill review clinics where the participants can demonstrate their skill development in a safe and supportive learning environment. Skill development progresses from face-to-face and visual dialogue skills, through facilitating with GroupWare and culminating with designing and facilitating meaningful business conversations via the Intranet or the Internet. The series is designed for both internal

consultants, or external consultants. We will deliver our first public series this fall.

The Facilitation Mastery Series is targeted at experienced high potential employees and external consultants for whom facilitation skills will become an integral part of their skill set. These are employees/ consultants who will lead cross functional projects, help business leaders develop and implement their Business Strategy, and make significant contributions to the organizational well being.

### Rationale

Effective business communication becomes more complex each day. As we move toward broad-band and wireless, our technology is outstripping our ability to use it effectively. This Mastery Series is directed at maximizing the participants' ability to harness the power of technology through the use of facilitation skills and apply it better realize the Business Purpose: attracting, retaining, and growing, customers at a profit.

### The Meeting

The meeting, especially the small group meeting is the basic unit of getting work done in organizations. Conducting better small group meetings means better alignment, commitment, and ultimately, better execution. As meetings become larger and the distance becomes greater, and time zones become a factor, communication becomes more difficult. For example, it is far more difficult to lead and facilitate a teleconference than a face-to-face meeting and even more difficult to run an effective video conference. And yet, we choose to use these tools without effective training in meeting design

or facilitation. As we move to the Internet, we will experience an order of magnitude of increased difficulty in both facilitating and designing effective ways for employees to communicate with each other.

### The Skill Set

Developing the facilitation skill-set for both large and small meetings, and for distance meetings for distributed teams will become an essential part of leading effectively in the future. The ability to design meetings, delegate to technical support people, and facilitate effectively will become more, and more important as the newer technologies take hold and gain acceptance. In effect the manager becomes the director / producer of his or her communication process. Done effectively, it will lead to greater alignment and commitment. Done poorly, it will lead to waste, miscommunication, redoing of work, and less than acceptable return.

### The BET!

In essence the company bets that developing a cadre of highly skilled facilitators builds competitive advantage. The rationale is direct. Facilitation helps groups to think better. It creates buy-in through the process itself and generates enthusiastic commitment. Facilitation generates structural tension - between where the company is, (Current Reality) and where it wants to go, (Desired End Result). Finally, a cadre of highly skilled facilitators raises the bar on the quality of all corporate conversations, making them more meaningful, collaborative, and focused on achieving results.

Putting it all together means that any company having a cadre of highly skilled facilitators can outthink the

competition, out communicate the competition, and ultimately out execute the competition.

## Benefits

### The Benefits

- More effective use of groups, teams, and distributed functions
- Better execution of Business Strategy
- Increased ability to launch and execute large, cross-functional projects
- More buy-in across the larger organization
- Greater ability to surface and work difficult issues – more throughput from meetings
- Lower cost to implement, less confusion, less waste, more alignment
- Faster implementation – meeting designs are repeatable and easily transmitted
- Better usage of collaborative tools, the company has already purchased: video conferencing, white boards, groupware etc.
- Higher quality group work, better decisions, and less resistance
- Greater use of evolving enabling technology
- Additional skill set for High Potentials – more flexibility positioning across all business units
- Improved “Business Offer” for independent consultants

# The Facilitation Mastery Series

## Fundamentals of Action Research Facilitation

This is the beginning workshop. This workshop provides a solid foundation into the realm of face-to-face facilitation. The participant learns how to design simple action research exercises that can be used immediately upon returning to his or her job. Our exercises along with the readings from our workbook provide a time-tested framework for diagnosing and meeting the client's needs. A variety of facilitation techniques and methods are covered. The course prepares the participant to begin facilitating small meetings, team building sessions and projects. Each module includes skill practice and a feedback session.

All participants are required to contract with a client to facilitate a meeting, workshop, or team building session. Six weeks following the course, the participants return to a clinic where designs are discussed and experiences shared.

### Workshop Content

- Action Research Facilitation Defined
- Assessment of Current Skill Level
- The Action Research Model

- Introduction to Assessment Techniques
- Collecting and Analyzing Data
- Giving Feedback
- Making Effective Interventions
- Facilitating Open Discussions
- Facilitating Great Designs - An Experience in Leading Group Experiences
- Design Clinic – How to Design Great Meetings
- Helping Groups to Reach Decisions
- Facilitating Complex Project Launches
- Healthy Conflict Resolution
- Naming and Working with Resistance
- Individual Feedback and Action Planning

This is a three and a half day workshop. There is pre-work. The books we use are Sam Kaner's Facilitators Guide to Participatory Decision Making and David Sibbet's Effective Facilitation.

**Action Research  
Follow up Clinic:**

A one-day session following the basic session where participants return and discuss the work they did with their clients. Successes are celebrated; applied learning is discussed.

# Visual Dialogue and Graphic Facilitation

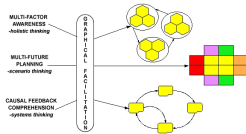
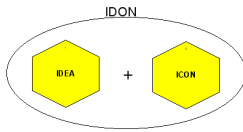
Visual Dialogue is a new facilitation art form that simultaneously combines visual and verbal forms of communication for the clarification and development of shared thought.

Creating the means for Visual Dialogue is another powerful facilitation skill-set for face-to-face interaction that increases involvement, alignment and commitment. People collaborate best when they “draw” their ideas, play with them, and deepen their discussion. Done correctly and well, visual dialogue leads to the “I see what you mean” phenomenon. This workshop teaches how to work with specialized tools that aid visual thinking and visual dialogue. The participants will work with IDONS (moveable magnetic forms) and large-scale graphics. They will learn how to use special IDON Software to record and electronically share the group’s thoughts. These are powerful tools for the serious facilitator. Visual dialogue and visual thinking lead to greater use of imagination, greater flexibility, and breakthrough thinking.

## **Smart Rooms / Better Thinking**

The Participants will learn how to turn any meeting room into a “smart room” – a specially designed place for helping people to work effectively in groups and in teams. These spaces are designed to be flexible and graphically sophisticated places where multiple table arrangements provide for easy room changes. We emphasize the following:

## Idons



- 1 Idons are magnetic shapes that are erasable, and reusable. Their use increases visual dialogue and makes it easy and fun for groups to explore convergent and divergent thoughts. Participants will practice using software, which records these diagrams and projects them with a LCD projector.
- 2 We will introduce ways of working with large groups using the meeting space and large graphic formats. These formats make it easy for groups to develop and explain their thinking to the larger audiences. Participants will practice using the large graphic formats and create an original design with them.
- 3 We will demonstrate solid, time-tested designs such as Scenario Planning and Matrix Building, helping groups to gain new insights for driving results. We will demonstrate how to use these technologies to track progress and to build new group pictures together. These designs will be run, critiqued and customized by the participants to fit their organizations' needs.

## Clinic

This is a two and a half day course and is followed by a one-day clinic. The first half of the clinic is to review progress to date and the second half of the clinic focuses on creating new designs.

## Facilitating - The Structural Approach

This is a critical part of the facilitation skill set. It comes after the other courses and imparts a solid business foundation to the facilitation repertoire. This is an intensive workshop for facilitators who want to become real business partners. This workshop teaches facilitators how to collaborate with their business leaders to analyze structure and create a business strategy that guarantees organization advancement. We have extracted years of work with top executives and developed a means to analyze the dynamics and core elements of any business quickly. The result is a Business Strategy that is understandable, and easy to implement.

Through a series of designs and activities, the facilitators learn how to design an Initial Business Strategy Session, a Quarterly Business Strategy Review Session and a Strategy Renewal Session.

### Topics

#### Topics Include:

- Understanding Business from a Structural Perspective – a mini MBA
- Business Purpose – Creating, Acquiring, Retaining and Growing Customers at a Profit
- The Business Strategy as the function of the Business Purpose
- Defining the Core Elements of Your Client's Business that support the Business Purpose
- Defining the Value Proposition and Achieving Alignment around it

- Arranging the Core Elements into a Hierarchy and creating the Business Strategy
- Publishing the Business Strategy and Gaining Alignment and Commitment
- Developing the Management Strategy from the Business Strategy
- Understanding and Defining Structural Conflicts that lead to Oscillation
- Learning the Skills for Strategic Action Charting
- Business Strategy, Management Strategy, Competitive Advantage
- The Process: Selecting, Structure, Charting, Acting and Adjusting, Completion
- Designing and Facilitating Business Strategy Sessions
- Designing and Facilitating Quarterly Review Sessions
- Handling Resistance from Managers
- Coaching the Executive – A Look at Personal Structure

### Clinic

This is a three-day workshop followed by a Structural Design and Analysis Clinic. Our Course is based on the work of Robert Fritz and we use two of his books: “The Path of Least Resistance,” and “Corporate Tides.”

# Facilitating with Council in Face-to-Face Meetings

## GroupWare

This workshop trains experienced facilitators how to design electronically facilitated meetings, and use Council Groupware. Mastering Council adds a powerful new competency to the experienced facilitator's repertoire - working real data in real time. We teach you how to partner effectively with a Council Guide, who will actively manage the technology for you at your meeting. Imagine, electronic flip charting, instant votes, immediate yet anonymous commentary, instant hard copy for break out sessions and, 24- hour turn around of all the meeting notes. Every response is formatted in an easy to read Microsoft Word document, which can be e-mailed to anyone you choose! We teach you how to combine excellent Action Research methodology with Council technology. The results raise the bar significantly for meeting outcomes.

## Design and Facilitate

Participants in this 3-day course will learn all aspects of designing and facilitating meetings with Council, an advanced groupware decision support system.

## Highly Productive Meetings

The Council technique paves the way to highly productive meetings by asking normally passive "audiences" to become active participants. At key moments in Council supported meetings, the group is asked to take a quick time-out to capture ideas and reactions into Council. This network of laptop computers, distributed

throughout a meeting room, allows each participant to record their own thoughts as well as learn quickly about the whole group's leanings. This technique has been used successfully throughout the organization in numerous strategic planning sessions.

With this ability to tap into the creative and critical thinking of all participants, groups are able to get into essential discussions in much shorter timeframes. It enhances the ability to make informed decisions and reach consensus in a timely and efficient manner.

### **Tools, Tools, Tools**

The tools available within the Council program include: Brainstorming, Categorization, Lichert Scale Ranking, Forced Rank Prioritizing, Check Voting, and Multiple Choice. The training will cover how to appropriately integrate the use of these tools into an agenda in service of meeting the overall objectives. Participants learn the basic Council agenda patterns as well as techniques for theming the Council input (understanding the "groupmind"). Emphasis will be played on the role of the facilitator and their relationship to the Council support person. This is not a technical training in how to run the software and hardware, rather it is a course on how to facilitate with the tools and work in partnership with your support person.

### **When you're out on the skinny branches, work with a net!**

CoVision will support participants in the Master Class program through their first Council supported meeting. CoVision will provide design consultation, support personnel (the Guide), as well as the entire Council wireless, high-speed network with up to 20 stations

(additional stations available at additional cost) Subsequent Council supported meetings will be billed at contracted rates.

### Clinic

A one day clinic follows this session.

## Digital Action Research for Distributed Teams

This is the capstone course. Participants in this 3-day course will learn how to design and facilitate process oriented collaborative websites. This is not a technical course in web design, rather a course in how to choose the right tools and processes to support collaboration, decision making, and knowledge sharing over the web. Participants will learn to design collaborative environments using WebCouncil, a flexible set of collaboration tools, available in a secure customized on-line environment. Participants will also learn how to facilitate effective collaboration over time and distance within this environment. Both same-time-different-place (synchronous) and different-time-different-place (asynchronous) models will be covered. Again emphasis will be placed on the role of the facilitator as driver of the process with support from a technical guide. Participants will learn techniques for driving engaging collaboration in virtual space.

### WebCouncil

WebCouncil currently consists of the following tools: ChartPad, IdeaSet, Checkvote, TopRank, Scalar, Sur-

vey, Threaded Discussion, Slide Show, Vault, Hand (UP), and Sortable Matrix. These tools can be used in various combinations to drive essential discussions and critical knowledge sharing. These tools and processes are currently being used by Several Top Leadership Teams to help them drive results around their top four strategic initiatives. Participants learn how to design monitoring systems for Business Strategy Implementation

### **Support for Master Classmates first Web-based Intervention**

CoVision will support participants in the Master Class program in the design, production, and on-going support of their first web-based intervention. This support includes a collaborative WebCouncil site for up to 20 participants for 1 month - one day of design consultation, one day of site production, technical support as needed, and first month of hosting. Additional months and participants can be accommodated for additional rates. Additional site production provided throughout the month will be contracted separately.

### **Master Classmate Web-based Collaboration site**

CoVision will design, produce and support a Web-Council based collaborative site for Master Class participants to have discussions about program related issues, share program related documents, and prepare and plan for program related activities. They will also be able to use the site as a practice area for WebCouncil designs.