



# Self Facilitation Guide

TIPS FOR SMALL GROUPS  
(5-13 people)



My name is Matt. I am the founder of Turning Leaf, a strategy facilitation firm based in Sydney, Australia.

Here are the main tips I have gathered from over 900 facilitated strategy sessions. Some of these tips are simply doing the opposite of what people hate. Others are tricks to get more out of groups based on group psychology.

If you're about to self-facilitate, I personally guarantee you will get a better outcome if you adopt at least one of the facilitation strategies below.

## Remember: The Day Is Not The Goal

As an away day or workshop is a big deal for most groups, it is natural to focus on the day itself. The venue. The invitees. The agenda. Truth is, none of these matter.

**The only thing that matters is what happens after the workshop.**

The most common complaint from workshop participants is that the workshop had no actions or impact when they got back to the office. I'm sure you have often felt the same way about workshops you've participated in. We all have.

The solution is to start with the purpose in mind. And that should always be about encouraging the group to do something differently. The operative word there is "do". If no one does anything differently, nothing changes.

Therefore it is essential for the group to discuss changes in their own behaviour, and actions they will take. A workshop without an action plan is usually a failure.

**Even if the group develops a brilliant solution to an intractable commercial problem - they must still agree how to implement the solution.**

And that brings me to my first tip...



# 1. The GAME

To make a strategy happen in the real world, you need to convert it to a series of actions. The best way I've found (so far) is to get GAME.

GAME stands for **GOALS, ACTIVITIES, MEASUREMENT, EVALUATION.**

For each element of strategy, what is the GOAL for the business, what ACTIVITIES need to happen (in the real world, not in the office), how will you MEASURE the activities, and how can you EVALUATE the impact on the business against the goal?

In 17 years of facilitation I have never seen a group disappointed when they leave with a GAME plan for success.

## 2. Map the Conversation

Butcher's paper is a facilitator's best friend. A client once said to me, "you really destroy a room, Matt." At the end of a successful day of facilitation she was looking at all the butchers paper, notes and diagrams stuck to every conceivable surface.

Writing the conversation as it progresses, even as bullet points, is a tremendous group productivity booster. Writing down the points people make, even in rough notes, makes people feel heard. It also helps the group keep track of alternatives and dead ends, and work to a far more sophisticated and nuanced discussion.

Two words of warning, though. First, if you are the scribe, you must NOT be selective in what you write up and don't write up. And second, having someone sit there typing up the discussion on a computer **does NOT work.**

You need to map the conversation organically.



## 3. No Phone Rule

This is serious. I promise you, if you heed nothing else but this one tip, you'll thank me after your session. If you let your group keep their phones on (or even visible), you will waste the day. Full stop.

It is physiologically impossible for people to have their phones with them without looking at them.

I now recommend a clear rule at the outset – all calls and texts must be taken outside the room and the group will stop and wait. It is very uncomfortable for a facilitator to have to pause a group conversation while a CEO texts his EA. But it must be done. There cannot be two classes of people in the group.

No phones. No exceptions.

## 4. Don't Start with WHY

There are too many TED Talk videos about the *power of purpose* and how if you don't "start with why" you can't possibly have a great team and business. Bullshit.

I won't say that purpose isn't important at some level, but the main thing is to start with something useful to talk about – and that could just as well be a *What, How, or Who*.

Usually a How or a What is easier as a starting point. As in "how are we going to sell out our new launch stock?" or "what are our main goals for the year?" You could also start with Why, as in "why are our sales falling?" And that would be fine too.

What I am advising against is an esoteric discussion about brand or business purpose – it usually ends up getting slippery and often disingenuous. Your group is there to sell more stuff and make more profit.

My advice is, keep it real, start with WHAT and allow the deeper conversations to come out later.



## 5. The Leader is the Leader

In any business setting, there is usually a leader in the room. If that's you, you have to remember that the way you approach the session will determine its success.

It's not just what you say, but how you approach the whole day. Your mindset is critical. If you are going through the motions people will tell and the day will be wasted. If you have no intention of altering anything or being open to new ideas, people will know and the day will be wasted.

**Leaders:** your actions and behaviours in the session will determine the tone and flow of the day. You are being watched! Therefore, make sure you are relaxed and allow everyone time to speak and be heard.

## 6. A List of Topics is Not an Agenda

It is important to have an agenda for a meeting. Some people won't even attend a meeting without an agenda – and I don't blame them. However, most agendas tend to be far too busy and often just a list of hot topics.

What this does is drive a meeting into a series of tick-the-box discussions. There is no chance of developing more sophisticated teamwork and alignment. It may feel productive but it isn't. Less is more.

Ideally your agenda should have a clear overall objective (to agree your strategy) and no more than 5 elements in the day. It is also perfectly acceptable to discuss the agenda during the workshop itself – do not be afraid to alter it.

**The agenda is there to help you decide what to focus on – it is your servant not your master.**

One of the common traps we see is a facilitator moving the group to a new topic just moments before the resolution on the previous matter. If they had only given the matter another 5 minutes, rather than rush through the agenda.

While it is important not to let people go down the rabbit hole and drone on in circles, it is also not helpful to stunt real conversation by moving on too soon. Usually it is pretty obvious to the group itself when an issue or topic needs more time.

## 7. Listening is Hard

Groups find it hard to listen, especially if they think they will have to say something themselves. So don't just go around in a circle asking for peoples' comments on each topic.

A quick tip here is to ask someone to speak first but ask them to nominate who goes next. What this does is keep people on their toes a bit. They can't switch off while the circle of conversation closes in - it could be them next.

## 8. You Don't Need Games

Some people like team games, and some people hate them. There is a role for an ice-breaking conversation. But don't feel that you need to do team building games. The best teams develop by working together to solve real business problems. Work on problems as a team.

## 9. Set Up is Important

People notice when you have taken the time to arrive early and set up for the day. Always arrive first and have things looking ready. When you do this, it changes peoples' attitudes and they participate in a deeper way. They also suspend some of their day-to-day stress when they can see the signs of productivity in front of them.

## 10. Avoid the Group Table

The best group work happens in a circle of chairs. Tables - especially if computers are open in front of everyone - stunt conversation and give people a place to hide their phones. Better just to sit everyone in chairs in a circle.



# 11. Avoid PowerPoint

Full stop. It is detrimental to group work and will cause your session to fail. There isn't enough space here to list the reasons why (if you are interested, Google "Edward Tufte" and the paper on how PowerPoint caused the Space Shuttle explosion - which it seriously did).

If you need to give information out, please print it or even write it on butcher's paper. I know it is not good for the environment but you can recycle it later.

# 12. Rotate the Roles

Every self-facilitated group will need a facilitator, scribe and timekeeper.

- The facilitator is running the conversation (and for the time, NOT a participant)
- The scribe is keeping notes on the butcher's paper
- The timekeeper is keeping track of time for the agenda

Rotate the roles between participants.

# 13. Conflict is Essential

Some disagreement along the way is a sign of success. Obviously naked conflict and aggression is not what you want. But if people feel comfortable disagreeing and discussing their positions (and even emotions) then this is a big positive sign.

The worst workshops are the ones where everyone is in violent agreement all the way through. Usually there is a leader in the group with no intention of listening and everyone has checked out for a relaxing day out of the office.

Don't shy away from difficult discussions (the issues that are usually swept under the carpet can often be the root of your problem), but if individuals are getting aggressive you need to take control of the situation.



# 14. Disclosure is a Sign of Success

Another way you know you are on the right track is if people feel able to openly discuss either how they feel about something or problems they are having.

If no-one has any problems and no-one cares much about anything one way or the other, this is plainly a veneer since that is never the real case.

So if you are having a meeting where there are no problems and no-one talks about how they feel, you can bet there are some sleeping elephants in the room.

# 15. Frameworks and Models

There are hundreds of frameworks and models you can use to help bring out useful discussion. Frameworks help us get started on a conversation and build out a group perspective more easily. Models help the group see how individual pieces work together. Both are always flawed and incomplete.

But they help. If you are the facilitator, have a couple up your sleeve before you start but always ask the group if they have any models or frameworks that could help.

Surprisingly the group selection of the model or frameworks to use is often a very good activity in itself since it often stimulates thought about the nature of the problem you're addressing. A bit meta, I know. But trust me.

Lastly a couple of tips on strategy. There are hundreds of books on strategy but they all say the same thing in different ways.



# 16. Good Strategy Solves a Big Business Problem

If you can't define an overall issue or problem facing your business, the group will have a hard time aligning on a good strategy. I am not talking here about the vision or mission or any of that. I mean, what is the problem? Is it competitors? The market? Access to capital?

If you can get the group talking about the big problem, this is arguably the most important step of all. However, it takes work.

There are always multiple problems. So which is the root cause? Which is the one that must take priority? How will the group decide? If you can have the group define the problem, the rest of strategy is about organisation. Much easier.

# 17. The Power of the Pyramid

There is a great book called The Pyramid Principle by Barbara Minto. You should read it because the heart of all great facilitated strategy is a pyramid-shaped bundling of themes and actions to achieve common objective. It also lends itself to simplification of thinking and - the holy grail - a plan on a page.



# Get Moving

A lot of prep work goes into facilitating groups. If you're new to leading workshops, don't try to do everything. Pick a few of your favourite tips from this guide and make sure you have an agenda that you and the participants are happy with.

Group psychology is fascinating and if you want to do more research, there are whole books on how to get better results from groups - Call me if you want to borrow some.

But for now, I hope these tips are a useful starter for you.

Good luck, and let me know how it goes.

## Have Any Questions?

*If you have any questions at all or would like to know more about facilitation or how to choose a good Facilitator for your group work, please feel free to call or email us anytime.*

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