

Facilitation Skills for Consultants

Program Overview

Description

Your client meetings are a great opportunity to accelerate project results, get buy-in, and establish "eminence" with many clients at once. There's no doubt that consulting skills apply when facilitating groups. But there's much more to successfully convening 5 - 150 clients than meets the eye. The best leaders make it look easy when in reality...it's not.

BossaNova Consulting Group's *Facilitation Skills for Consultants* was specifically developed to teach consultants in client-facing roles how to both design and deliver meetings that make a mark.

This program is customizable. The standard format includes two staggered classroom days with a practicum in between using a current or potential client opportunity.

Purpose

Accelerate project results by adding meeting design and facilitation skills to your consulting toolkit

Outcomes

A core group of consulting staff who are skillfully able to:

- Design and deliver strategic client events that engage many diverse stakeholders
- Apply facilitation skills to a variety of group settings
- Engage clients in a thought-provoking way.



Consulting made extraordinary

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Facilitation Skills for Consultants

"A Story about Partnerships"

The mood could not have been any more serious: a very big and well-known international consulting firm (VBF for Very Big Firm), was hosting a first-ever stakeholder summit. Attendees included client VIPs — high-ranking Department of Defense officials and members of the military brass. The goal? To get alignment on a strategic initiative, the likes of which had never been undertaken before. A tall order and VBF was taking no chances. It had brought in the expertise of BossaNova to help design and facilitate this big stakes and highly interactive conference.

As the creative tension of the two-day meeting mounted, BossaNova shifted into the role of conductor, allowing both VBF and their clients to participate fully for the best results possible. The event was so successful that one senior client immediately hired VBF for a repeat performance; once skeptical, they had been blown away by the event's value.

Immediate recognition of value — that is the kind of result BossaNova's clients receive. Much like the 1960s marriage of Brazilian rhythms to American jazz that produced the original music for which the firm is named, the right partnership can push boundaries, redefine convention, and inspire action. And, because BossaNova knows their clients so well, the partnership is seamless. Just hours into the summit, several participants asked how long the BossaNova team had been VBF employees.

Ask JB, the VBF executive who oversaw planning for the event and hired BossaNova. "This is the first time I have worked with a consultant who truly has our best interests in mind," JB says.

"The folks at BossaNova are not scared to push back. Andrea Howe, the company's president, is gutsy. And she is a genuine person who cares about her clients and more importantly, her client's clients."

The partnership was music to everyone's ears. Soon after the summit, VBF hired BossaNova to train their own people to design and facilitate strategic client events. VBF recognized an ongoing opportunity to not only deepen their relationship with clientele, but to increase bottom line results.

From the very beginning of the training, the VBF-BossaNova team was having fun. "BossaNova has ignited a new passion toward my work." says SW. "I have found the right niche at VBF; I'm really engaged with our clientele. With the tools and techniques that I have learned from BossaNova, I know I provide more value to our clients."

SW also has been able to communicate with her clients on a new level. She is redefining consulting by providing her clients with ways of working together that emphasize openness and collaboration: "After the facilitation training, I was able to help one particular client through a very difficult issue that ultimately changed the direction we were heading with a major initiative."

BossaNova is not only about delivering high-quality facilitation and training; it's also about changing the lives of the consultants they serve. Now that's true partnership; that's doing the bossa nova.

Facilitation Skills for Consultants

Workbook Contents

Program Orientation

- Why Are We Here?
- Learning Stages
- Program Roadmap
- Guiding Principles
- Workbook Symbols
- Context: Facilitation Defined
- More Context: Roles Facilitators Play
- Experience and Expectations

New Perspectives and Mindsets

- The Hat Trick
- Managing Your Comfort Zone
- Working Within Cultural Norms

Planning

- Client Partnership Conversations
- Event Purpose and Outcomes
- Event Types
- The Event Team
- Design Principles
- Getting the Right Participants in the Room
- Data Gathering

Design

- Event Phases
- Opening and Closing an Event
- Scripts and Data Capture Templates
- Other Materials

Logistics

- Logistics Fundamentals
- Space Matters
- Pattern Interruption

Delivery

- Delivery Fundamentals – Essential Delivery Skills
- Brainstorming
- Verbal and Non-Verbal Techniques
- Group Memory Tools
- Distilling
- Deciding
- Keeping the Group on Track

Group Dynamics

- Group Dynamics Fundamentals
- Diagnosis-Intervention Cycle
- Group Behaviors
- Ground Rules
- Managing Conflict
- Dealing with Resistance
- Knowing Thyself

Follow-Up

- Evaluate the Event
- Prepare Event Report
- Conduct Close-Out Meeting

Appendices:

- A: Checklists
- B: Resources
- C: Learning Journal



Facilitation Skills for Consultants

Program Roadmap

Session I: 8:30a – 5:30p

Program Orientation

Facilitation Skills Inventory – Self-Evaluation

Context: Definitions, Roles

New Perspectives and Mindsets:

- Lecturette
- Activity: Norms in Action

Planning and Design:

- Lecturette
- Activity: Mock Client Interviews

Delivery:

- Lecturette
- Activity: Small Group Brainstorming

Session I Closing

Session II: 8:30a – 5:30p

Welcome Back

Practicum Review – Your Facilitation Experience

Group Dynamics:

- Lecturette
- Simulation – Try It!

Event Logistics

Practicum Review – Detailed Event Design Feedback and Discussion

Event Closing and Follow-Up

Facilitation Skills Inventory – Re-Rate Yourself

Creating a Demand for your Skills

Program Closing



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Facilitation Skills for Consultants

Tools & Techniques Companion Guide

BossaNova's *Facilitation Skills for Consultants* program includes a content-rich program workbook as well as a Tools & Techniques Companion Guide. The Tools & Techniques Companion Guide is a “best of” compilation for facilitation; it includes over 20 recommended best practices on the following topics:

- Opening/Closing
- Building Group Rapport
- Managing the Group
- Interviewing
- Brainstorming
- Reporting Out
- Group Analysis
- Group Decision-Making
- Closing/Evaluation

Each best practice includes a detailed write-up, divided into three sections: What Is It, How Do I Do It, and Why Is It Useful.



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Tools & Techniques Companion Guide - Sample



Closing/Evaluation: 1-7 Evaluation

What is it?

An approach for quickly evaluating an event using numeric measures.

How do I do it?

- Pose a reflective question to the group, such as, “*If you had to rate the overall value of this event, using a scale of 1 to 7, what number would you give it?*”
- Ask participants to write their number on a corner of a piece of paper (so they are less likely to change their response when they hear other numbers called out).
- Go around the room and ask participants to call out their numbers. (An alternate approach for large groups: ask all 1’s to raise their hands, 2’s, 3’s, etc.). Create a bar chart showing participants responses by stacking “x’s” on top of each other for each number represented.
- Ask those who gave an answer of 4 or lower to share why; do the same for those responding with 5’s or higher.

Why is it useful?

- Provides tangible (i.e. numeric) data along with an opportunity to offer specific feedback.
- Creates a visual display.

Note: The 1 to 7 scale is used (rather than 1 to 5 or 1 to 10) so there is a clear neutral point (4) and to force participants to indicate whether they are closer to neutral or the end points (there are two possible answers between 4 and 7 and likewise between 4 and 1).

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Participant Feedback

“I think this was great preparation for doing facilitation. It was one of the most valuable trainings I’ve done. I hope there are more classes to come!”

“This training is the most useful and best administered training I have ever taken at this organization. I think this training would be valuable for all consultants.”

“This was one of the most informative, fun, and memorable trainings I have had since being here. I strongly encourage more trainings like this. They are highly effective.”

“I thought it was a very engaging training. I learned a lot that I can apply directly to my client work.”

“Our instructors were willing to tailor the class to our evolving expertise, client situations, personal questions, etc. This made it incredibly relevant to each attendee.”

“The instructors were excellent!”

