

# Essential Facilitation™ for Online Meetings

Core Skills for  
Guiding Groups



**Prewrite**



**ESSENTIAL FACILITATION™ AND OTHER PROGRAMS TAUGHT AT...**



**ABOUT INTERACTION ASSOCIATES**

Since 1969, IA has developed and taught simple and effective methods for helping people achieve great results by working together across functions, viewpoints, and geographies. IA introduced the concept and practice of group facilitation to the business world over 50 years ago. Since then, over one million people have learned The Interaction Method™, a facilitated approach for building understanding and agreement so people can take informed, concerted action.

**Essential Facilitation™**

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# Workshop Overview

## The Purpose of Essential Facilitation™

To develop the skills, knowledge, and mindset for:

- ✓ Guiding groups toward their objectives.
- ✓ Assisting people in building understanding and agreement.
- ✓ Bringing out the best in all group members.
- ✓ Demonstrating the power of facilitation at work, at home, and in your community.

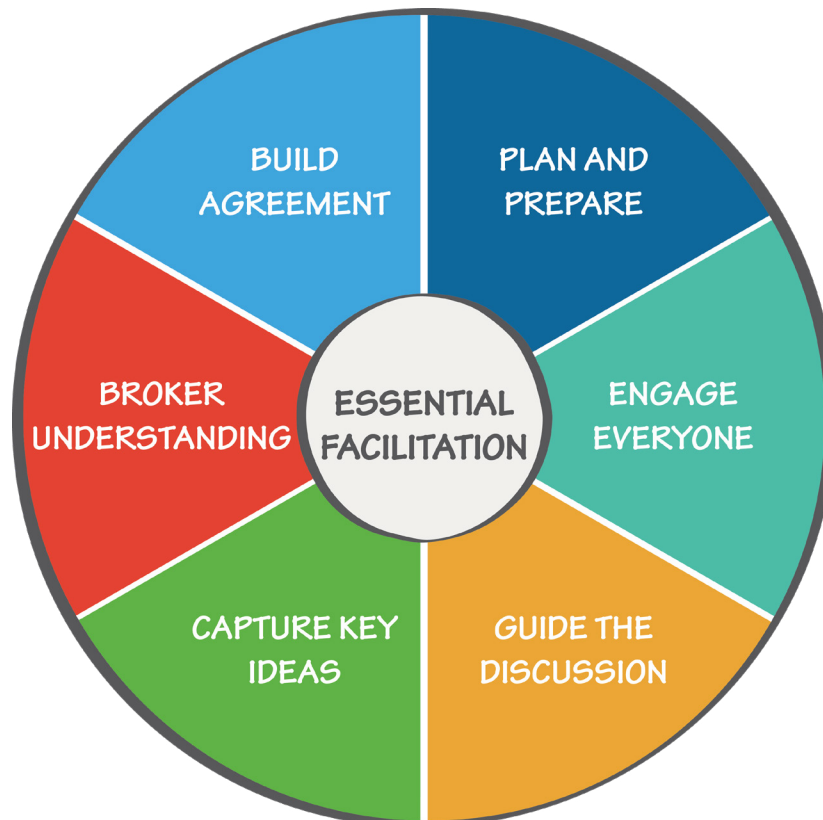
\* **Fa•cil•i•ta•tion, n.** the act of making easy or easier.



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# Learning Objectives

A facilitator is a person who makes it easier for people to understand each other, build agreement, and take concerted action. They do that by mastering the Essential Facilitation competencies.

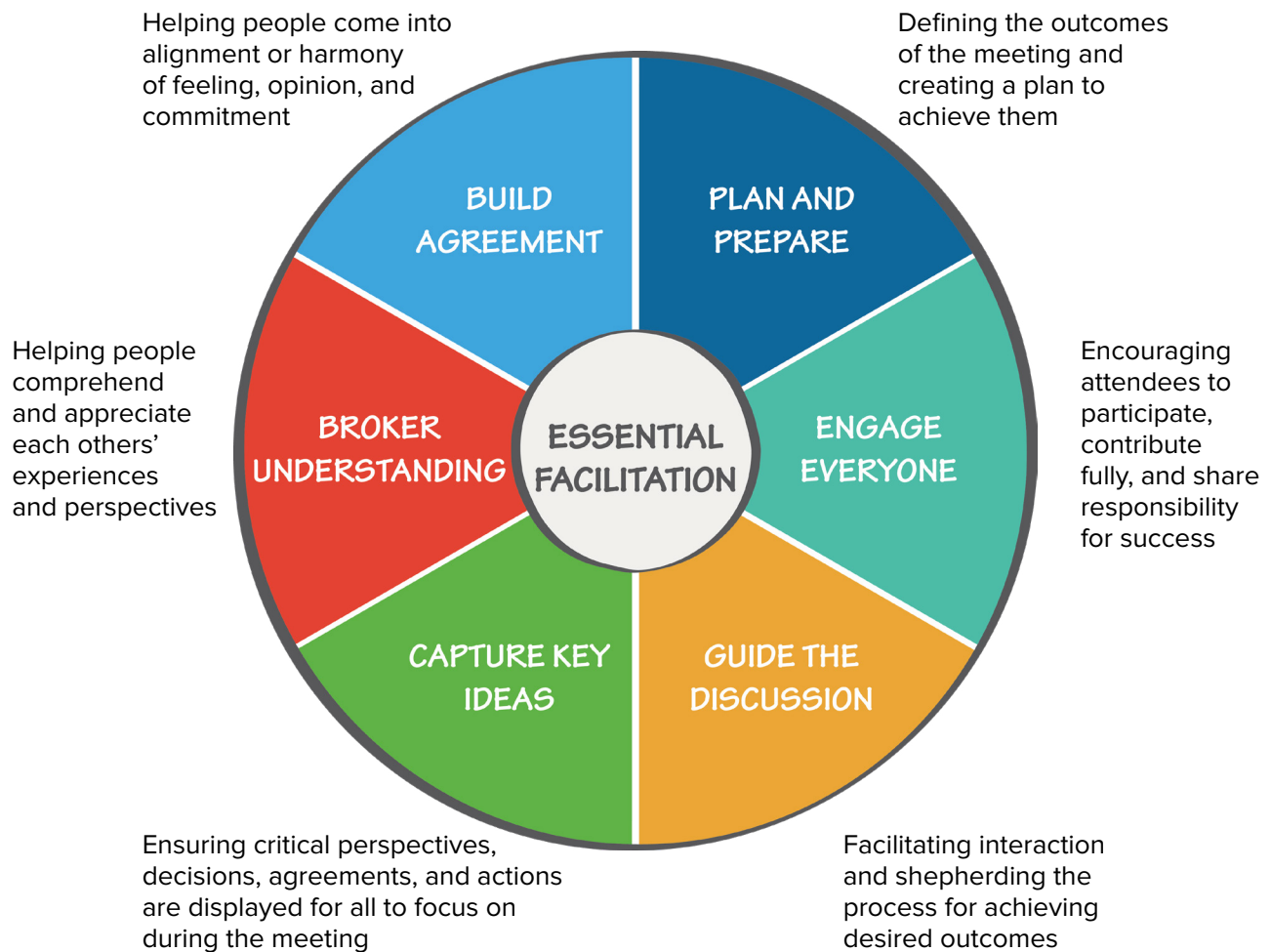


By the end of this workshop, you will be able to:

- Define the desired outcomes of a meeting and design a process for achieving those outcomes.
- Encourage attendees to participate fully and share responsibility for success.
- Facilitate interaction and shepherd the group toward their desired outcomes.
- Make sure that key ideas, agreements, and action items are noted for use during and after the meeting.
- Help people comprehend and appreciate each other's perspectives and experience.
- Fashion agreements, build alignment, and encourage harmony of feeling and commitment.

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# Essential Facilitation Competency Clusters

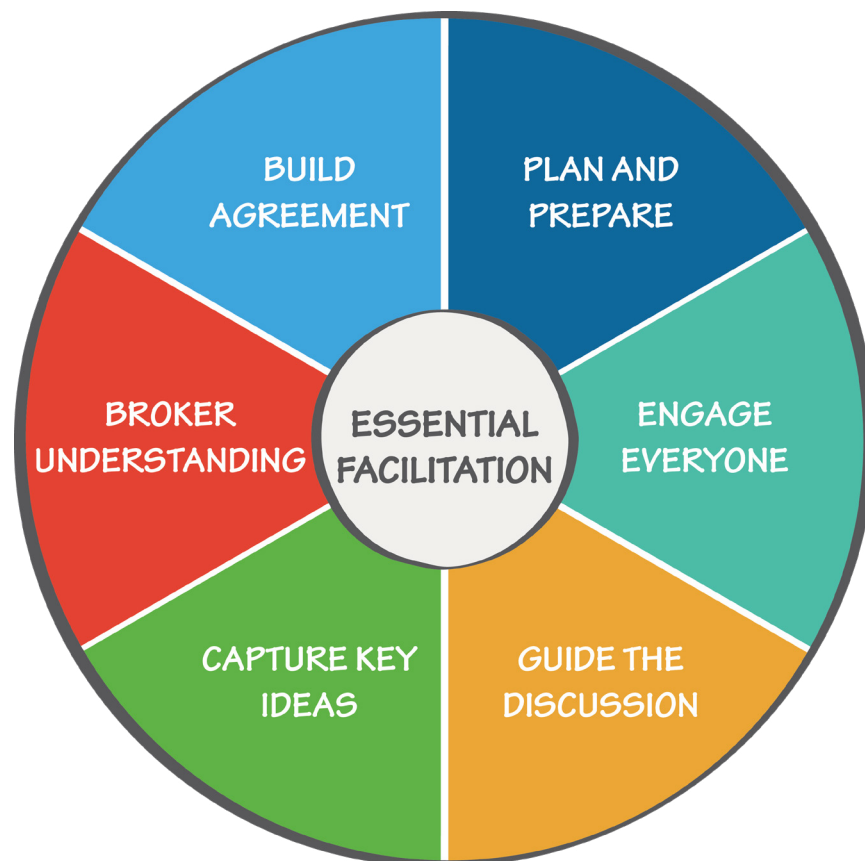
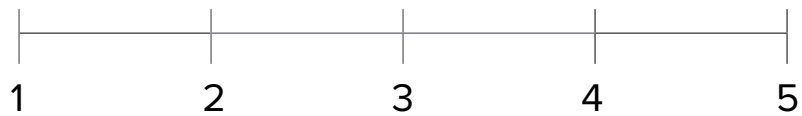


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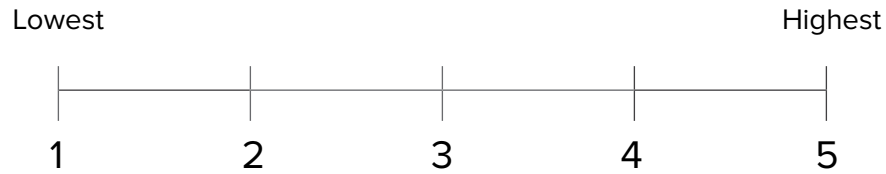
# Essential Facilitation Competencies

## Instructions

- The following pages describe the major skills required by a facilitator. Please rate yourself on your ability to perform each skill using the scale below. (5 = highest rating)
- At the end of the workshop, you will be asked to rate yourself again and to build a plan for continuous improvement.

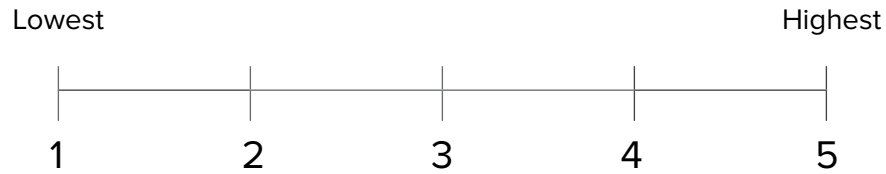


# Essential Facilitation Competencies (continued)



	First Day	Last Day
<b>Plan and Prepare</b>		
<i>Defining the outcomes of the meeting and creating a plan to achieve them</i>		
1. Define a meeting's Purpose so everyone knows why they are gathering.		
2. Write Desired Outcome statements that define what the leader and group want to achieve in the meeting.		
3. Design Agendas that enable more effective and successful facilitation of online meetings.		
4. Survey the meeting Context to identify and avoid potential pitfalls.		
5. Identify meeting attendees and key stakeholders and assess their needs.		
6. Prepare attendees for active involvement and shared responsibility for success.		
<b>Subtotal</b>		
<b>Average</b>		
<b>Engage Everyone</b>		
<i>Encouraging attendees to participate, contribute fully, and share responsibility for success</i>		
7. Launch a meeting in a way that sets everyone up for success.		
8. Create a safe and inclusive container for an honest and productive conversation.		
9. Share responsibility for success by allocating various critical functions to meeting attendees.		
10. Generate active and energetic discussions.		
11. Involve quiet and distracted attendees.		
12. Win back attention when the energy wanes.		
<b>Subtotal</b>		
<b>Average</b>		

# Essential Facilitation Competencies (continued)



	First Day	Last Day
<b>Guide the Discussion</b>		
<i>Facilitating interaction and shepherding the process for achieving desired outcomes</i>		
13. Facilitate discussions in a way that generates a variety of ideas.		
14. Keep the group focused and on track.		
15. Scan and highlight relevant content so all attendees focus on the same things simultaneously.		
16. Balance your participation in the process and content of the meeting in accordance with your neutral or invested position as facilitator.		
17. Limit distractions and help the group get to the heart of the matter.		
18. Navigate the group through challenging situations.		
<b>Subtotal</b>		
<b>Average</b>		
<b>Capture Key Ideas</b>		
<i>Ensuring critical perspectives, decisions, agreements, and actions are displayed for all to focus on during the meeting</i>		
19. Create a note-taking template for documenting ideas, decisions, and next steps.		
20. Write ideas on the group memory as the group moves from topic to topic.		
21. Check that a speaker's meaning and intention are accurately reflected on the group memory.		
22. Use highlighters to focus attention on key ideas, proposals, and agreements.		
23. Confirm that decisions and action items are accurately reflected on the group memory.		
24. Store the group memory in an accessible online location.		
<b>Subtotal</b>		
<b>Average</b>		

# Essential Facilitation Competencies (continued)



	First Day	Last Day
<b>Broker Understanding</b>		
<i>Helping people comprehend and appreciate each others' experiences and perspectives</i>		
25. Ensure clarity in the group by helping meeting attendees to express themselves fully and clearly.		
26. Notice your own biases as you listen, and manage their impact on how you facilitate.		
27. Use a variety of Listening Techniques to encourage and affirm participation.		
28. Clarify a speaker's meaning by uncovering the reasoning or feelings beneath their assertions, proposals, or concerns.		
29. Use eye contact and body language to encourage speakers.		
30. Help group members take initiative for understanding each other's meaning, reasoning, and feelings.		
<b>Subtotal</b>		
<b>Average</b>		
<b>Build Agreement</b>		
<i>Helping people come into alignment or harmony of feeling, opinion, and commitment</i>		
31. Encourage diversity and creativity by helping people appreciate other points of view.		
32. Clarify differences of opinion and suggest a practical sequence of steps for reaching agreement.		
33. Discover underlying concerns, interests, and needs.		
34. Find ways to build small agreements in order to catalyze momentum and keep the meeting moving.		
35. Combine the best parts of different proposals to yield an informed decision that everyone can support.		
36. Steer a group away from magical thinking and toward practical solutions.		
<b>Subtotal</b>		
<b>Average</b>		

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# What Will Success Look Like For You?

What do you want to make sure you walk away with?

## My Goals and Expectations

