



Facilitation: Best Practices for Challenging Situations and People

Corporate Facilitator Program
Susan Davis, June 19, 2023

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SHARE

Challenging Behaviors and Strategies to Try

The Know It All



Try This....

- Work with them by asking them to use a “lens” that’s different than their typical one for an activity (for example, if they’re an engineer, you might ask them to take a social/emotional view for a short period of time).
- Direct your questions more pointedly to others at the table and explicitly create space for others to participate.

Challenging Behaviors and Strategies to Try

The Slacker



Try This....

- This behavior may be because of genuine disinterest, in which case you can pull them aside and give them the opportunity to leave or switch tables to another focus area (if possible).
- They may also be shy or anxious about the process or subject matter, in which case you can endeavor to make them more comfortable (e.g. by giving them more silent thinking time; by inviting them to contribute more directly, etc.).
- Consider giving them a job, like scribing, to help them stay engaged and feel like they're contributing.

Challenging Behaviors and Strategies to Try

The Center of
Attention



Try This....

- The most obvious way of countering this behavior is by asking them during a break to tone it down!
- Next, you might try directing your prompts to other participants.
- Finally, you might try giving them a job: ask them to be the scribe for an activity to keep them involved while giving others a chance to talk — you'll likely still hear from them, but they'll be kept busy by writing!

Challenging Behaviors and Strategies to Try

The Judge



Try This....

- One way of managing a judge is to ask them to deliberately put on a different thinking hat: they're usually black hat thinkers, so try asking them to wear the green hat for generative thinking.
- If someone is known to tend to exhibit this mindset, it can be helpful to get them on-side before the session. For example, sit down with them over coffee leading up to a workshop to understand their perspective and concerns. Help them to feel heard.

Challenging Behaviors and Strategies to Try

The Table Talker



Try This....

- The easiest way to address this is with a short conversation during the break or, if you're comfortable doing so, a direct call-out: a quick “hey folks, can we try and have one conversation?” can work wonders.
- Alternatively, you might consider breaking out into smaller groups, so that they can scratch the itch for a more engaged discussion without disrupting the whole table.

Acknowledge the Conflict



Idea #1. Ground Rules and Setting Self Up for Success

- Lay some 'ground rules' for the session. (I also like the framing of 'tips for getting the most out of today' if the language of 'rules' feels too strong.)
- Ground rules often include things like listen to others, 'yes and' rather than 'no but'. Keep it to 3–5 rules, and frame them positively, e.g., 'stay present'
- Make sure you get explicit group consent for these rules, for example sharing them at the outset and asking 'can we all agree to these' — asking for verbal or physical agreement, e.g. saying 'yes' or giving a thumbs up.
- You can also try co-creating these 'ground rules' together if time allows or if this feels more appropriate for the group you are working with.
- Explicitly outline your role, for example letting the group know that you will be acting as a timekeeper, and making sure that everyone has space to participate.
- Getting permission upfront to play the time cop or to manage group dynamics means you won't surprise anyone later on, and you set a clear expectation of the scope of your role as facilitator.

Idea #2. Ask Questions

- Research has shown a strong positive correlation between the use of questions that ask for clarification and the learner's development
- Asking a learner to elaborate on their response will lead them to think deeper
- Clarifying questions asks a learner to go deeper in their response. It may cause them to “talk themselves” out or in their initial thoughts. In a nonjudgmental way it offers them a chance to change their opinion
- Questions engage the learner and promotes critical thinking
- The questioning process causes the rest of the room to think deeper and more critically

Preparation

- You will be most effective if you can regulate your own emotions (this means staying centered or show little emotion)
- Consider your goals and try and preserve the relationship
- If facilitating a group, best way to avoid is to first set ground rules
- Feelings are inevitable. If someone makes a statement that is offensive, the first thought is to feel emotions of disgust or anger

Preparation

- The first urge is to be argumentative. While natural, rarely productive or successful.
- Don't waste time or energy suppressing, instead get it on the table.
- Practice shifting your emotions.

Your Initial Reaction...

- **Do not** express judgement
- **Do not** try to suppress your feelings or negative emotions
- **Do not** take responsibility that you have to change their opinion
- **Do** let your emotions come out and focus on goals of the rest of the group
- **Do** stay positive towards the person, regardless of how much you reject their comments or attitude
 - Try focusing on something you have in common with the participant
 - Develop a like for the person (John tells us we cannot lead people we do not like)

Types of Questions: Clarifying Questions

- Tell me more about _____?
- What do you mean by _____?
- Could you put that another way?
- How does this relate to our discussion? (motive matters, tone matters)
- Can you give me an example?



Types of Questions: Probing Assumptions

- I am curious about how you chose those beliefs (assumptions)?
- That's an important point. How can you verify (or disprove) those beliefs?

! It is important that you do let other participants mistake your questions for your endorsement or validation for their point of view!

- “I am really interested in your perspective. It is different that what I have experienced or heard. Why do you think these are such differing perspectives?”

Types of Questions: Probing Reasons and Evidence

- How do you know?
- Why do you think that is true?
- What do you think causes that to happen?

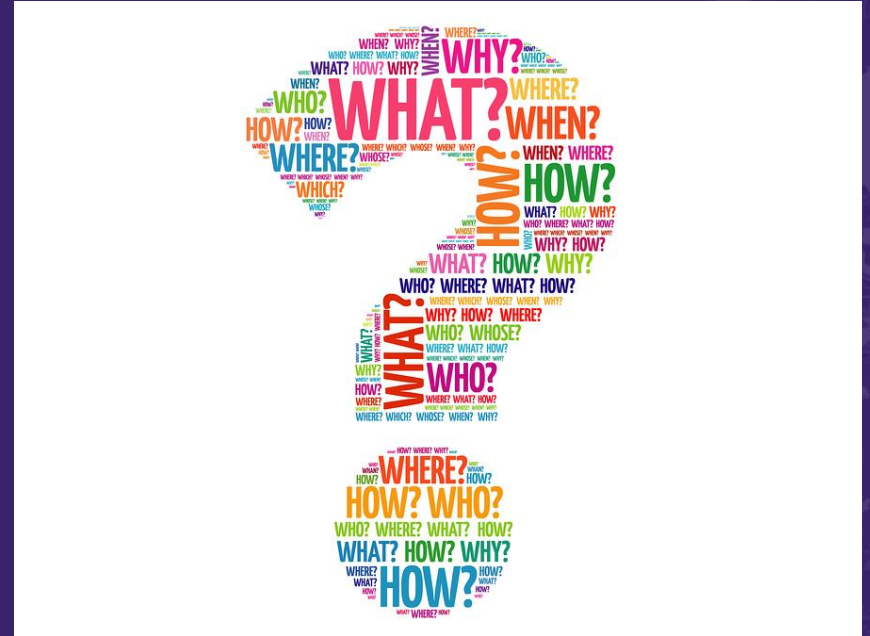


Types of Questions: Probing Viewpoints and Perspectives

- What is another way to look at it?
- What are the strengths and weaknesses of those viewpoints?
- How me understand how....
 - “Thank you for that point. Let’s discuss further. If you were able to make (x) happen, what would happen? Or who would benefit most?”

Develop Your Own Set of “GO TO” Questions

- ✓ You have your own conversation style, use it!
- ✓ After a while, asking questions becomes second nature.
- ✓ Create a cadence or toolkit for yourself of how to start asking questions:
 - ✓ “I am wondering.....”
 - ✓ “Tell me more about.....”
 - ✓ “Help me understand.....”



Handouts

Specific Challenges in Groups

THE PROBLEM	THE SOLUTION
Carrying on a Side Conversation	<ul style="list-style-type: none">• Don't assume the talkers are being disrespectful; depersonalize the behavior by thinking: "Maybe they are unclear about a point in the material, or the material is not relevant to their needs."• Ask the talkers if they don't understand something.• Walk toward the talkers as you continue to make your point; this stops many conversations dead in their tracks.
Monopolizing the Discussion	<ul style="list-style-type: none">• Some participants tend to take over the conversation; while the enthusiasm is great, you don't want to leave other learners out.• Tell the monopolizer that her comments are valuable and interesting and that you would like to open up the discussion to others in the group. Then call on another person by name.• Enlist the monopolizer to help you by being a gatekeeper and ensuring that no one monopolizes the conversation.
Complaining	<ul style="list-style-type: none">• Don't assume someone who complains doesn't have a valid reason to do so.• Ask the rest of the group if they feel the same way. If they do, try to address the issue as appropriate. If they don't, talk to the individual in the hallway during the break.
Challenging Your Knowledge	<ul style="list-style-type: none">• Determine if this person really knows more than you do, or is just trying to act as though he does.• If he does know more, try to enlist his help in the training. If he doesn't, ask him to provide expertise, and he will usually realize he can't and back down.
Daydreaming	<ul style="list-style-type: none">• Use the person's name in an example to get her attention.• Switch to something more active.• If behavior affects more than just one person, try to find out if something work related is causing it and have a brief discussion about it.

from McCain's second edition of Facilitation Basics, 2015

Facilitating difficult participants

"Stay chilled – it's never about you!"

Love them or hate them - they're always there. Fortunately there's a lot of wisdom about managing difficult people in workshops.

3) Set ground rules that assert good behaviour (see next page). For example if you know ranters may be present, set ground rules for respectfulness. For example, invite everyone to be "aware of their own behaviour" and to "respect other speakers".

Top line principles

• Let conflict come out. Unaddressed conflict can be destructive. It's important to hear and respond to conflict, not have it simmering below the surface.

• Allow people to express emotions and get it off their chests. If necessary spend time examining the arguments to find out what the underlying issues are.

• Never takes sides in a conflict. Your job is to be a neutral, fair umpire, always.

• Elephant in the room? Be honest: name it.

• People often just need to be heard. Genuinely listen and let them see their words captured in writing (eg. "parked" on a white board).

• Often people have common values - they care about similar things - and the dispute is really about the ways to achieve them, about misunderstandings, or about a sense of disempowerment.

• Remember: The room will always back you up. In a difficult situation, you can = pause and ask them for advice on the next step.

4) Make people feel important. Give them a job to do (e.g. scribing). Or say "As Bruce reminded us:" or "And I'm sure Bruce would agree with me."

5) If necessary, pause for a break ("time out") or say "Can I talk to you after the workshop?"

6) If an area is controversial, have a respected expert present to answer questions.

Words and methods to use

Ranters and blamers Some people bring their baggage



It might be hard, but always treat them with respect. There's a reason for their emotion.

Give them time to be heard. Listen carefully. Acknowledge their frustration: "I understand – that's terrible!"

Always be curious. Ask them: "What happened?"

If necessary, write down their problem or park it on a whiteboard.

Then switch to solutions: "What would you like to see happen?"; "What's a practical solution?"

And see "unstoppable contributors" on the next page.

Tip: If you know they'll be there, talk them before the start, and let them get these matters off their chest in private.

Tip for angry people: Raise your voice to their volume and pitch, then bring it gradually down to normal.

A story: "For a really bad participant, the facilitator called a halt to the meeting, asked for a 10 minute break and privately asked the trouble maker to leave. Cooperation increased for the rest of the meeting because a clear boundary had been established." (thanks Rob)

A box of tactics



1) Start with **planning:** Avoid large meetings; break into small groups or pairs. Use silent methods to get ideas in writing. Set time limits.

2) Let people speak fully, then check "Is this what you're saying?" Capture their views (e.g. park them on a whiteboard). Thank them warmly: "That's a good point!" Then shift your attention decisively to the next person.



Feedback

