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With 25 years under our belt at Quality Process Consultants, Inc., of course it's time to celebrate! At our core, we facilitate teams and train others to facilitate high-stakes meetings, teams, panels etc. So it's appropriate that this month's articles help to describe what exactly a facilitator does, when you might need to use one, and a few ways you can use some facilitation skills. Thanks for your support over the years.

Kristin

P.S. As you may be aware, the European Union recently put into effect a new data protection law called the General Data Protection Regulation (GDPR). Since you have subscribed to my newsletter, I want to assure you that your privacy and security of your data is a high priority. Check out our new privacy policy and other legal information [here](#).

#### IN THIS MONTH'S **ISSUE**

- ◆ [What Does a Facilitator Do Throughout 25 Years in Business?](#)
- ◆ [When to Use an External Facilitator](#)
- ◆ [How to Facilitate Audience Q&A During a Panel Discussion](#)
- ◆ [From the Bookshelf: Facilitator's Guide to Participatory Decision-Making](#)
- ◆ [Contact Kristin](#)

#### WHAT DOES A FACILITATOR DO THROUGHOUT 25 YEARS IN BUSINESS?

OHMIGOSH! It's been 25 years since I started Quality Process Consultants, Inc. It was early September of 1993, and Ed Zurich, a colleague from the Hampton Road Quality Management Council, had heard about the facilitation skills workshop I developed for my US Coast Guard buddies. He asked me if I could train some of his folks in facilitation skills and so, QPC Inc. was born!

Facilitation has always been at the core of what we do. It quite literally is in our DNA. *"Facilitating high-stakes meetings – and training others to do what we do"* has been our mantra for these past 25 years. Sure, it has morphed over time, but that still is at the core of what we do. We:

- Facilitate really important meetings you can't afford to screw up.
- Train others in facilitation skills and all things related to facilitating an important meeting.
- Speak about the skills needed to lead/facilitate an extraordinary team e.g. critical thinking, decision-making, and problem-solving.
- Speak about the types of meetings we tend to facilitate: strategy, innovation, culture, leadership.
- Have hyper-niched into a specific type of facilitation on moderating panel discussions. It's all about helping our clients move their teams from "Point A" to "Point B" while

generating great results as smoothly and collaboratively as possible.

It's been a wild ride! While in Hampton, VA, I grew the business, bought an office building, hired consultants and staff. When I moved to Washington D.C. in 2002, I transformed the business model to a more lean, virtual business, hiring resources as I needed them. And when I moved to Scottsdale, AZ in 2008, I became much more focused in the work that I do for my clients.

I wouldn't be where I am today without my early mentors, Jeff Anthony and Elaine Biech, or without my support network at the National Speakers Association and the International Association of Facilitators (too many to name here!). But it really has been my joy and pleasure to work with such fascinating and diverse clients.

And if you are reading this, I gotta believe you are part of that circle of mentors, supporters, and clients. And for that, I continue to be thankful for your support and interest.

Looking forward to the many years ahead!

## WHEN TO USE AN EXTERNAL FACILITATOR

While a team member can effectively perform the role of facilitator in many situations, it is often preferable to use a facilitator who is not a team member nor a member of the related functional area. This might be an "in-house" facilitator who is not associated with the team's work or an independent facilitator (like myself!)

The Sponsor and Team Leader should consider using an "outside" facilitator when there appears to be a meeting with a high degree of<sup>1</sup>:

- **Importance.** Leading an important meeting and participating in that meeting are each sufficiently demanding to warrant having a facilitator focus on the former.
- **Ambiguity.** When the problem is poorly defined or defined differently by multiple parties, an unbiased facilitator can listen to, analyze, and integrate everyone's views, helping to construct an integrated, shared understanding of the problem.
- **Uniqueness.** Most teams that have developed their own patterns for addressing ordinary problems are making repeat decisions. When approaching an unusual situation, a group can benefit from a process expert to provide a fresh approach to the team's efforts.
- **Complexity.** When the issue is intricate, has lots of moving parts and/or is difficult to understand, a neutral, objective facilitator can help bring clarity to each of the parts as well as the whole.
- **Inefficiencies.** Team members may be reluctant to attend meetings because of competing demands on their time, doubts about the amount of progress they will be able to make, or travel costs. By making each team meeting more efficient and productive, a facilitator can reduce the overall cost in terms of time.
- **Distrust or Bias.** Team members may view the team leader or process owner as "biased" – steering the process in some way to promote his or her own agenda.
- **Intimidation.** When team members are of disparate educational, social or economic status, are at different hierarchical levels, or are in other types of control relationships (such as purchaser-supplier or client-provider), some team members may feel intimidated and not participate.
- **Rivalry.** Team members are typically reluctant to reveal personal rivalries or attack one another in the presence of an outsider. And, if rivalries do surface, a facilitator can determine if they are relevant to the task at hand. If they are not, the facilitator will refocus the group on its stated purpose.

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<sup>1</sup> Adapted from Sandor P. Schuman, "The Role of Facilitation in Collaborative Groups," in C. Huxham, ed., *The Search for Collaborative Advantage* (London, UK: Sage Publications, 1996).

## HOW TO FACILITATE AUDIENCE Q&A DURING A PANEL DISCUSSION

At some point during a panel discussion, the panel moderator will turn to the audience and ask for questions. Most folks call this “Audience Q&A” where the moderator takes questions from the audience via text, question card, open microphone, or Oprah-style, depending on the event.

To facilitate a meaningful Q&A session, a powerful panel moderator will:

**Describe the Process.** Share the process you will use to solicit questions. Then follow the process. Don’t deviate for anybody.

**Review the Ground Rules.** For example, “Please stand, state your name and organization, the name of the panelist you are directing the question to, your one sentence question and a few sentences to clarify your question if necessary...and panelists, please speak to the audience when answering all the questions. Now, what questions do you have?”

**Repeat the Question.** Repeat, restate or summarize the question for the entire audience to hear and for it to be picked up on any recordings being made. Reframe tangential questions to be more on topic.

**Prompt a Panelist.** When the question is for anyone on the panel, restate the question and then direct the question to a panelist who:

- Is signaling to you
- You feel would best answer it
- Has not responded as much

**Hot Potato the Question.** If a panelist is not being asked questions by the audience, you can say, “John, that was a great answer. Mary, do you feel the same way?”

**Queue.** If a large number of people raise their hands at the start of the Q&A session, start with the first person who raised a hand and establish a “queue” or lineup that lets the audience know who will go next.

- *Follow the Queue.* Once you establish the order, doggedly follow it. If you have a hard time remembering the order, write it down or enlist someone to help you keep track.
- *Add to the Queue.* While a panelist is answering a question, you may see someone new raising their hand. You can point to the person and nod, signaling that the person will be next in the queue.
- *Call on the Questioner.* Call on them by name if you know them or can read their nametags. Otherwise, use some defining, flattering feature: “The lovely lady in the bright red jacket, please give us your question in one sentence.”

**Work the Room.** Make sure that the questions are spread among different members within the audience. Try to hear from everyone who has a question before you return to someone for a second turn. You can even offer that you are looking for new faces to chime in before you let a repeat questioner back in the queue.

**Prevent Speeches.** You and your microphone runners should NEVER let go of the microphone.

**Last Two Questions.** Warn the audience when the session is drawing to a close and that you have time for one or two more questions. Take the last few questions and then move to the next segment on your agenda, typically, the ending activities.

When a panel moderator lays out the process and follows the ground rules, the Q&A will be the highlight of the panel discussion!

## FROM THE BOOKSHELF: FACILITATOR’S GUIDE TO PARTICIPATORY DECISION-MAKING

If you lead or facilitate meetings, then this book is a MUST-READ. I've had the first edition on my bookshelf and I was delighted to see that it has been updated. One of the founding fathers of facilitation, [Sam Kaner's book](#) is a classic, visually appealing and highly useful. This is the first book that really crystalized my thinking around facilitating groups of people to collaborate on a decision. It brings facilitation concepts, tools, and group dynamics to life in a practical, meaningful and relevant way. And, you can immediately apply the concepts to real-world situations!

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