Designing the Conversation

Techniques for Successful Facilitation

Russ Unger   Brad Nunnally   Dan Willis

Praise for *Designing the Conversation*

A book on facilitation? I wouldn't have thought this was needed, but after reading Designing the Conversation, *I'm reminded of all the valuable skills we learn—with some difficulty, mind you—on our own. Fortunately, all that stuff is covered here, from preparing for a session to handling the difficult personalities. And it's all delivered in a way that's short, to the point, and packed with plenty of pop culture references, making this a fun, lively read! You'll grin at uncomfortably familiar situations and nod in agreement as bits of invaluable advice are served in style through every chapter.*

Stephen P. Anderson,
***Independent Consultant and Author of* Seductive Interaction Design**

As a user experience professional, you know how to get inside your users' heads to understand their mindset, needs, and goals. Those same skills can help you communicate more effectively with your colleagues, clients, bosses—even strangers. This book taps into the collective wisdom of dozens of experts, showing you how to engage and facilitate more meaningful discussions.

Karen McGrane, Managing Partner, Bond Art + Science,
and author,* Content Strategy for Mobile *(A Book Apart, 2012)

If you spend any time speaking with users, stakeholders, and any other people, you need to read Designing the Conversation: Techniques for Successful Facilitation. *Within a few short chapters I was completely rethinking my process in how to best reach, and utilize, quality user and stakeholder feedback.*

Shay Howe, Designer and Front-End Developer, The Starter League

This comprehensive, handy, easy-to-read guide is full of tips, tricks, and techniques that will soon have you facilitating like a pro.

Dave Gray, consultant, facilitator,
***and coauthor of* Gamestorming: A Playbook for Innovators,**
Rulebreakers, and Changemakers

In the design field, we work with a wide variety of team members while building products. It is not uncommon for communication hurdles to arise during the product design process. Communication, collaboration, and facilitation skills are key to improving the conversations around design. Designing the Conversation: Techniques for Successful Facilitation *provides valuable, practical insights that are useful for sharpening facilitation skills and improving the conversations had with stakeholders, team members, and, of course, users.*

Aaron Irizarry, Experience Designer, Hewlett-Packard

Praise for *Designing the Conversation*

This is a special book. With Designing the Conversation, *Unger, Nunnally, and Willis have written the definitive guide to practical, accessible facilitation. There's no jargon or mind-numbing filler here, just an excellent balance of theory, technique, and practical, real-world examples. It's an excellent addition to any designer's daily toolbox.*

Matthew Milan, Partner, Normative

Chock-full of useful and thought-provoking quotes by everyone from Voltaire and the Indigo Girls to Seinfeld, Chinese proverbs, and contemporary facilitation experts, Designing the Conversation *is a great resource for anyone who aspires to bring their wit, wisdom, and knowledge to the podium. Russ Unger, Brad Nunnally, and Dan Willis cover in great detail all the potential opportunities and pitfalls that can arise when facilitating workshops and presentations, offering sound advice for overcoming hurdles and best practices for making your audience's experience the best it can possibly be.*

Tim Frick, speaker, author of* Return on Engagement: Content, Strategy, and Design Techniques for Digital Marketing, *and owner of Mightybytes, a Chicago-based web design and digital marketing firm

If you can't talk to your clients and customers, you can't make great products. Every young designer and product manager should read this book; the good stuff they forgot to teach you in school is laid out in these pages in clear, readable, and playful prose.

Christina Wodtke, Publisher, Boxes and Arrows

The discipline of design may be about users and interfaces, but the practice *of design is about facilitation. Dan, Brad, and Russ have written a clear, concise handbook packed with tips, insights, and years of experience. Designers—and an entire consulting industry—can use this book to make sure every meeting, workshop, presentation, or working session you ever schedule goes off like a charm.*

Austin Govella, Experience Design Manager, Avanade

Buy this book. Then read it. Then read it again. Projects that fail don't fail because of poor technology choices, bad design, or evil clients. They fail because the people working on them are pulling in different directions. Designing the Conversation *will teach you how to start a conversation with everyone involved with your project. Facilitating a conversation with your stakeholders won't guarantee success. But failing to do so will guarantee failure.*

Rich Quick, Head Web Developer, Arnold Clark Automobiles, Scotland, UK

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New Riders | VOICES THAT MATTER™

Designing the Conversation: Techniques for Successful Facilitation
Russ Unger, Dan Willis, and Brad Nunnally

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Acknowledgments

Russ Unger

There's something about writing a book. I've not birthed a child, so I can't pretend to fathom that experience, but my understanding is that eventually you forget certain things and agree to the idea of having another. What I'm trying to get to is, well, it's something like that. Except this time I roped two other people into doing it with me, and they were exceptional people to do anything with, and extremely so in this undertaking.

My wife, Nicolle, and our daughters, Sydney and Avery, were extremely supportive, and I am proud and grateful for love, laughter, and space that they gave me when it was needed; you make it all worthwhile. My mother is an incredible woman who has always been supportive of me, and while we were writing this book, it became my turn to return the favor. A lot of my world turned upside down as hers did, which didn't always make me the most fun person to be around. Yet, we're all here today, and that's a pretty good outcome.

Brad and Dan made me a better writer, and they made me constantly excited by what they were writing, and that's such a blessing. If you haven't already flipped through the pages of this book to look at the illustrations that Dan has created, you should do so. They're nothing short of phenomenal, and they tie in so nicely with our content. Every time a new illustration appeared in our folders, I was consistently amazed and impressed by his talent and creativity. I hope you are, too.

A lot of people helped out along the way, from the various experts who provided timely, intelligent content to the friends who chimed in with support. As always, Brad Simpson (www.i-rradiate.com) was the first round of support in helping me make sure that my design elements were sharp, crisp, and, of course, following publisher guidelines. Gabby Hon, the late Dr. Arthur P. Doederlein and his *so what?*, Mark Brooks, Stephen Anderson, Jared Spool, Lou Rosenfeld, Laura Creekmore, Eduardo Ortiz, Tim Frick, Dan R. Brown, Fred Beecher, Adam Connor, Matthew Grocki, Steve "Doc" Baty, Christina Wodtke, Nishant Kothary, Shay Howe, Rich Quick, Austin Govella, Matthew Milan, Todd Zaki Warfel, Eduardo Ortiz, Aaron Irizarry, the #SubChiUX gang, and the UXsters all helped out in a bunch of different ways, but mostly by being good friends along the way, and keeping my head straight and my laughter present. The Cranky Talk Workshops for New Speakers faculty and alumni have been a great inspiration in this effort, as well.

The contributors are some of the smartest people I know, and you should type all of these names into your favorite search engine, learn more about them, and follow their work. They made me much smarter through this process, and I'm extremely grateful for their assistance. In no certain order, these brilliant people are Scott Berkun, Christina Wodtke, Samantha Starmer, Dana Chisnell, Luke Wroblewski, Christine Cronin, Richard Dalton, Dan Roam, Nathan Shedroff, Eric L. Reiss, Cennydd Bowles, Andy Budd, Shay Howe, Aaron Irizarry, Brad Smith, Jennifer Jones, David Farkas, Steve "Doc" Baty, Nishant Kothary, Margot Bloomstein, Tim Frick, Fred Beecher, Laura Creekmore, Bill DeRouchey, Nick Disabato, Dale Sande, Ross Belmont, Jared Spool, Chris Risdon, Josie Scott, James Macanufo, Rob Moore, Sunni Brown, Christopher Fahey, Marc Rettig, Jesse James Garrett, Alex Dittmer, C. E. Lane, Eytan Mirsky, Erik Soens, Adam Polansky, Dave Malouf, Kate Niederhoffer, Peter Kim, Donna Spencer, and Jason Kunesh.

And, of course, Jonathan "Yoni" Knoll, if for no other reason than being himself.

All the great folks at New Riders really help make a sometimes bumpy road less so, and I'm thankful that we got to work with Michael Nolan, Glenn Bisignani, Valerie Witte, Gretchen Dykstra, Mimi Heft, Katerina Malone, Patricia Pane, Danielle Foster, James Minkin, and Margaret Anderson.

Finally, it's important to note that without organizations like the Information Architecture Institute, the Interaction Design Association, and others, it would have been impossible for me to make the connections with many of the people mentioned. If you're at all curious about the field of UX design, go explore these organizations, join them, and get involved!

Dan Willis

I want to thank my daughter, who has no idea how much support she gave me, and my wife, who knows exactly how much support she has given me in this and dozens of other crazy-ass projects over the years. Nothing I do would mean anything without Lanie and Eva.

For my work on this book, I depended heavily on the big brains of others. The idea that I can send out a call and get so much great content from so many people humbles me. I'm tempted to list them all here, but then you'd just skim the rest of my acknowledgements and I hate the idea of losing an audience. So instead, I encourage you to hunt down the insights generously supplied by those folks for the chapters I wrote: Brainstorming, Sales Calls, Mentoring, Virtual Seminars, Lectures, and Measuring Success.

I also want to thank everyone involved in any way with the Cranky Talk Workshops for New Speakers, which I've had the pleasure to run the last few years. The energy, knowledge, and continuing support of the faculty and students of those events have changed me in wonderful and unexpected ways. It is an honor to be part of that tiny, yet robust community. Now that this damn book is out of the way, I hope to start scheduling more sessions and we'll see how much we can expand the Cranky Family.

Finally, I want to thank Russ and Brad for the freedom they gave me in illustrating this book. The last time I got that much elbow room on a group project, I was in high school and I botched the execution. Hopefully this time around I've been a bit more successful. There are some weird ideas and plenty of ugly, fat people in my drawings and yet I got nothing but encouragement from my coauthors. They didn't have to do that and I very much appreciate that they did.

Brad Nunnally

It has always been a dream of mine to write a book. When Russ approached me with the idea for this book and told me he wanted Dan to be involved, I saw this dream becoming a reality. I also knew I'd be working with two of the smartest people I know. I've become a better writer and a better person after collaborating with these two gentlemen. The lessons I've learned while writing this book will serve me for years to come. There are no words that can communicate how grateful I am to Russ and Dan for this opportunity.

A special note is necessary about Dan and his illustrations. Dan's illustrations are, in my opinion, the one thing that brings this whole book together. They convey the tone and the spirit of the information you will find and it was truly a gift to see him create such wonderful art.

There are two other people I owe the world to, and they are my loving wife, Kim, and my son, Tristan. I am blessed to have both their presence and their support in my life. The patience my wife has shown me while I worked into the night is a debt I will never be able to fully repay, no matter how many St. Louis Cardinals games I send her to. Even though he is only three years old, Tristan reminded me that sometimes it's necessary to step back and just play and enjoy life. This lesson, more than anything, helped me get past the barriers that pop up during any project one undertakes.

I owe much to my family, especially my mother and father for instilling a love for reading in me at an early age. I'm grateful for my in-laws, especially Ray "Opa" Schneider, who every Sunday at the family dinner asked if the book was done yet.

This simple question kept me focused and it was a good day when I could tell him, "Yes, it's finally done."

My good friend and #UXFrathaus mate David Farkas deserves special thanks for being a voice of reason over IMs, a thorough draft reviewer, and a willing contributor.

My coworkers at Perficient XD deserve special thanks for their patience with me over these last few months and for allowing me to bounce ideas off them. The team I work with is filled with some of the most talented people I know, and it's a pleasure to work with them every day.

I am grateful to my many friends and professional peers within the UX community: Diego Pulido, Eduardo Ortiz, Chris Avore, Gabby Hon, Jared Spool, Lou Rosenfeld, Jeff Parks, Chris Risdon, Adam Polansky, Fred Beecher, Nathan Verrill, Christina Wodtke, David Gray, Chris Baum, Eric L. Reiss, Andrew Hinton, Dan Shipton, and many more who have graciously shared a beer with me, listened to my ideas, and welcomed my thoughts over the years. You all have made me smarter simply by knowing you.

I will forever be in the debt of both Whitney Hess and Jonathan "Yoni" Knoll. I am so lucky to have befriended you all those years ago and your guidance put me on a path that I would never have dreamed possible.

My gratitude for the experts who agreed to contribute to this book—Carol Righi, Kevin Hoffman, Adam Connor, Aaron Irizarry, and Dana Chisnell—is immeasurable.

I learned very quickly that a successful book isn't created solely by the writing team. It takes everyone behind the scenes as well. To the team at New Riders, I'm thankful for all the work you've done in putting this book together, reviewing our drafts, and pushing us to meet our deadlines. Thank you Michael Nolan, Glenn Bisignani, Valerie Witte, Gretchen Dykstra, Mimi Heft, Katerina Malone, Patricia Pane, Danielle Foster, James Minkin, and Margaret Anderson.

I owe much to wonderful organizations like the Information Architecture Institute, the Interaction Design Association, and others. The body of knowledge represented by the members and the connections these organizations have provided to me made my career possible. You won't find more open, friendly, and nurturing people than the ones in the field of UX. I encourage you to join, participate, and contribute so we can all continue to grow.

Finally, I'd like to thank my late father-in-law, Kevin Schneider. He was a second father to me and I wish he could be here to see this book get published and play one last round of gin rummy with the family.

Contents

Introduction

Why we wrote this book

It's difficult to think of a professional role that doesn't have some degree of facilitation attached to it. You may not consider "presenting" or "pitching" or "brainstorming" or "interviewing" to be a part of your job description when you explain what you do. However, this core soft skill—which centers around dealing with and directing people—is at the heart of what many of us do.

We are designers, and as designers, we think about how people interact with the world around them. We love to do research and we love to watch users doing their thing because these are the activities that help us perform the actual design activities that shape our work, which we like to think we're already pretty good at. It takes skill and practice to be able to facilitate people, and facilitation is truly the foundation of an effective design practice. Facilitation skills help us collaborate with and lead others to ensure that their ideas have been heard and have contributed to the design process.

Our goal with *Designing the Conversation* is to give you the basic tools and context to help you facilitate in some of the most common scenarios. As you'll see in many of the chapters, we're not trying to be everything to all people, but we're trying to provide you with the core information and knowledge you'll need to perform many of the facilitation activities you may encounter, not just the ones mentioned in this book. Beyond our own examples, we provide you with the insight and experience of some of the brightest minds in the field.

But, this book isn't just for designers, just because we are. This book is very practical for those in a variety of fields: marketing, product management, business analysts, managers, human resources professionals, and so on.

We hope we've done a decent job of articulating that this is a pretty good starting point for a variety of facilitation types and activities, and more importantly, we hope you think so, too.

Who should read this book

Designing the Conversation provides a broad, introductory overview to facilitation within the context of three main types of facilitation: group facilitation, one-on-one, and one-on-many. Anyone who has an interest in becoming a better facilitator—whether you're a designer, product manager, marketer, or someone who's interested in sharing your knowledge with others—should find something useful between the covers of this book.

We didn't take a "deep dive" approach to the topics highlighted in this book; our goal was to provide you with the knowledge you need to be prepared and to get started facilitating as quickly as possible. In most cases, we've highlighted leading experts and resources that can help you go deep on the subjects you have the most interest in. Mostly, however, we want to help you put this information to good work as quickly as possible.

How to use this book

There are many excellent resources out there about the innumerable types of facilitation. The chapters in this book could each be covered in much deeper detail in books of their own—and in several cases they already have by other talented authors, many of whom we learned from ourselves.

The best way to use this book is to take the following approach:

- **Everyone, well almost everyone,** should read Section 1, "Facilitation Preparation," and Section 5, "Post-Facilitation." In these sections, you'll find invaluable information about how to plan and prepare, be aware of the different factors that can impact your ability to facilitate, and handle everything that can take place when your facilitation activity is complete.
- **The book makes for a great end-to-end read (in our humblest of opinions);** however, once you've read sections one and five, you may find it best to pogo stick around the book to the subjects that interest you most.
- **If group facilitation is your need,** Section 2, "Group Facilitation," is where you want to start. There are chapters on Workshops (7), Brainstorming (8), Focus Groups (9), and Participatory Design (10).
- **If you're facilitating in one-on-one scenarios,** you'll find Section 3, "One-on-One Facilitation," most beneficial. There are chapters that focus on Interviews (11), Usability Testing (12), Sales Calls (13), and Mentoring (14).

- **If you're going to stand in front of a group of people and share information with them,** Section 4, "One-on-Many Facilitation," provides you with chapters on Conference Presentations (15), Virtual Seminars (16), and Lectures (17).
- **Finally, if you're interested in stories from other experts,** Practicing (6) is loaded with information detailing how leaders in their fields practice for facilitation. Horror Stories (20) shares some experts' personal experiences of things gone wrong. Their situations might have felt catastrophic at the time, but now we can all use them to reflect on and laugh about, at least a little, with them. Be sure to visit www.designingtheconversation.com for bonus stories in extended versions of both of these chapters.

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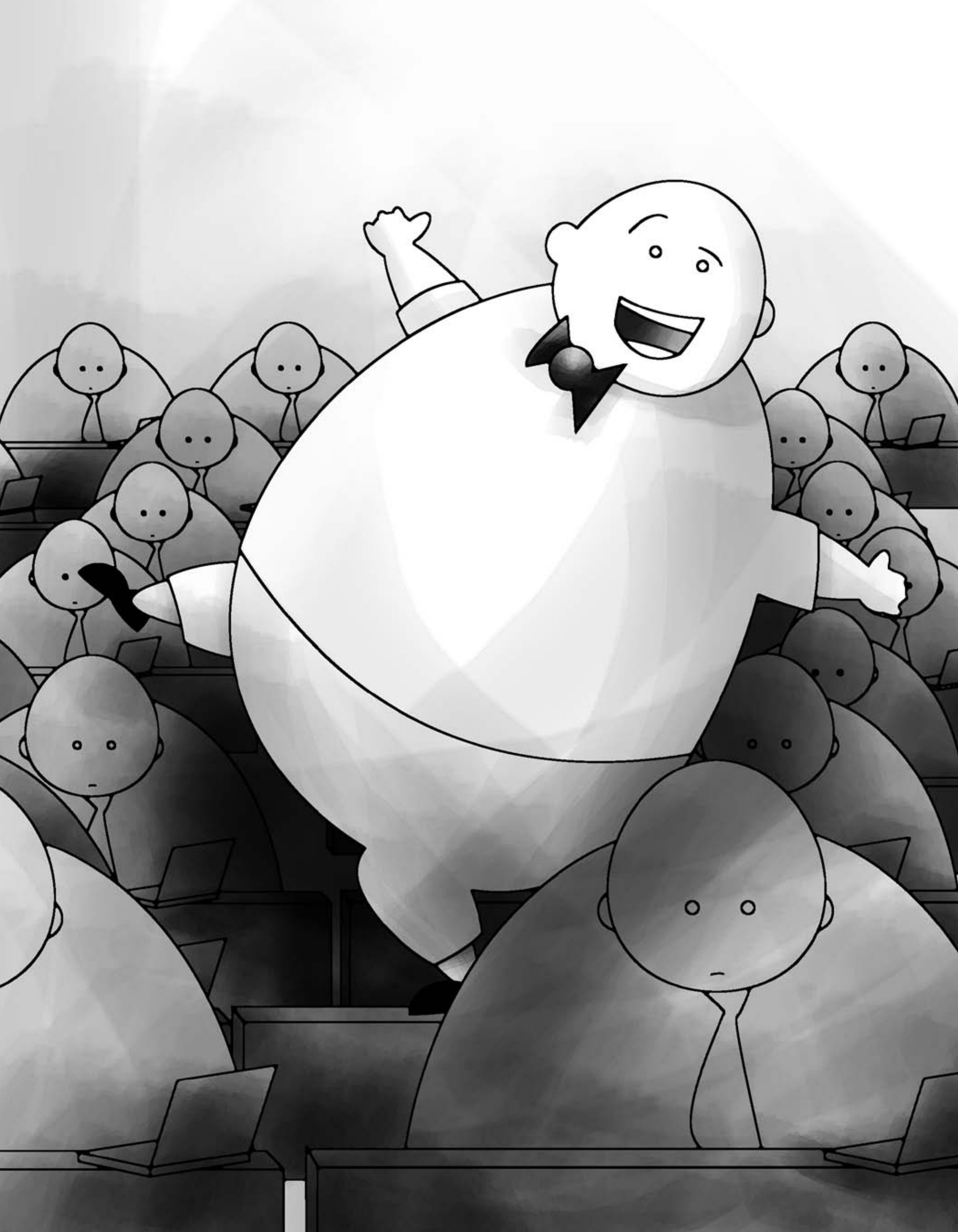


Chapter 4

Preparing for Personalities

I'm kind of a big deal around here...

— Ron Burgundy

One of the great wonders of the human race is that every person is unique. This wonder can wreak havoc for you as a facilitator, no matter your skill level. Past dealings with a variety of people help you prepare for certain types of personalities and behavior traits. However, it's still a crapshoot when you sit down and start the conversation about how participants will actually react during a session.

When gathering a diverse group of participants, keep this old saying in mind: "It takes all kinds to make the world go around." Likewise, it takes all kinds of people and personalities to understand complex problems and create game-changing solutions.

Creating a happy place

Regardless of the kinds of personalities in a group of participants, the best tactic is to create an environment where people feel safe to share, collaborate, and, most importantly, fail. By paying attention to participants' behavior, their reactions to one another, and their body language, you can create an atmosphere of encouragement. If participants are willing to take risks and share ideas or information that is unexpected, participants of any personality type can become productive and engaged.

Unpredictably human

Participants' unpredictability is one reason why facilitation is needed in the first place. If everyone behaved the same way, getting to the right solution for any given problem would be so easy there would be no need to facilitate anything. Getting to the proper solution takes time, collaborative conversations, and your guidance through the muddy waters of participants' mix of personalities.

Expecting the unexpected

While it's common to be surprised by what a participant says or does, it's important to never *act* surprised. This is something you should not only expect, but also encourage, depending on the nature of the behavior. If a participant unexpectedly jumps up and starts showcasing a previously unknown tool, it's an opportunity for you to discover something new and potentially groundbreaking about the subject.

It's good to have a plan for dealing with surprises because it reduces the chances of being shocked or taken off guard. If either of these occurs, the overall flow of the conversation is disturbed and it can be difficult to get the participant to begin contributing to the session again. The best tactic to take if something offensive, distracting, or otherwise attention grabbing happens is to avoid giving energy to it. Like a child screaming for attention, the more energy and attention bad behavior gets, the worse effect it has on the overall session.

Unpredictability is a good thing

Divergent behavior patterns and personalities are part of what makes facilitating rewarding in the end. When you encounter these areas of chaos, you have an opportunity to bring order to the session. Participants who are overly loud, conversational, or energetic can be used to draw out those who are quiet or timid.

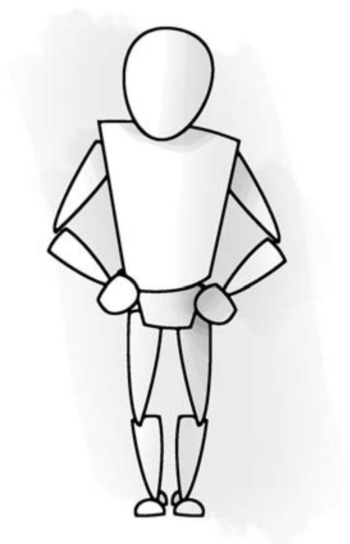
Unique personalities can also help turn a session that would normally be boring or discouraging into one where all participants are engaged and provide their own content. Participants who bring energy and passion to the session not only help to inspire others, but also quickly become your best friends. These participants benefit the other members of the group and help you remain focused, passionate, and energetic. Think of naturally charismatic participants as star players in a session.

Reading body language

Gauging a participant's level of interest, excitement, temperament, and attitude can be determined by watching how someone holds himself or herself. Our bodies reveal many pieces of information about what's going on internally. If you take in the signals and react with the proper nonverbal and verbal cues, you can help bring in a participant who has checked out from the session or regulate one who is overeager. Any signal that you pick up should not be taken on its own, but rather in the full context of other body language cues to properly understand what the participant is saying.

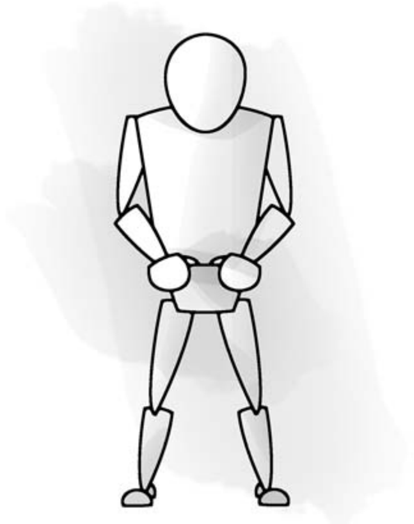
Common stances

People naturally take certain positions when they get excited, agitated, or anxious. These stances are instinctual and go unnoticed when we reposition ourselves unconsciously to react to our surroundings. It's important to know a few of the key stances that people might take during a session. This listing isn't all-encompassing, and in some cases a particular stance may not mean what you think it does. For example, a participant might be seated with arms crossed and the chin tucked into the chest. Overall, this is a very closed stance; however, if the temperature in the room is hovering around 65 degrees it could be that the participant just happens to be cold. However, the following stances are useful guidelines if you keep alert for cues that identify the exceptions.



Hands on hips

Participants with their hands on their hips are ready for action, and that action can be positive or negative. This position is one we learn in childhood as a means to assert ourselves. It's a way to begin to show our independence. By the time we reach adulthood, placing our hands on our hips shows that we're ready to do something and we increase our personal space to ensure that no one tries to get in our way. When it's time to throw the control of the session back to the participants, look for those who are in this position. Their energy and passion can be infectious for the other members of the group.

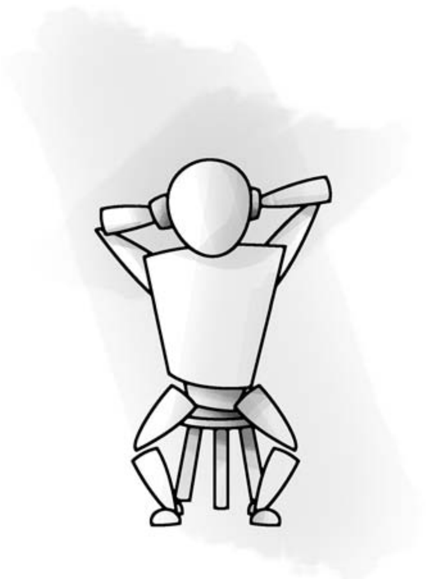


Thumbs tucked into pants

Sometimes known as the "cowboy stance," this position comes into play when one participant is sizing up another, or even you. By nature, it puts a participant into an aggressive position. This could be good or bad, depending on the other signals the participant is giving off. A participant whose thumbs are tucked in could mean that they're about to pounce on another participant, and you need to be prepared to protect the other participant or defuse the situation.

Hands on head

In some sessions, participants are required to sit at a conference table or around a room and they're able to stand up only when they "have the floor." A participant who leans back and with both hands on the back of the head is one who's ready to get up and take the floor. The participant is showing you a level of confidence and readiness that you need to be ready to react to and either support or suppress depending on the participant. This participant is ready to take a turn, and simply waiting for the current speaker to wrap up so they can easily stand up and take over.



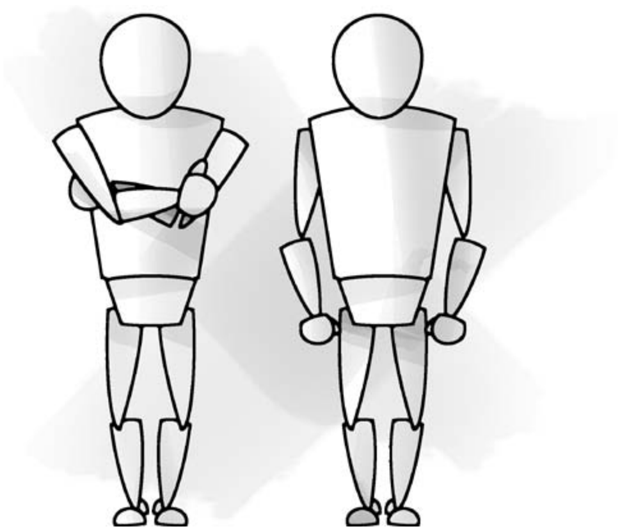
Leaning forward while sitting

Participants can easily get excited and passionate during a session. Someone who is seated when this happens will quickly get on the edge of the seat. This tells you that the participant is done sitting and being a bystander. That person is ready to jump in and add some excitement to the conversation and contribute to the session. This level of energy can be used as a catalyst to get other participants engaged and excited.

The number of body stances a participant can take are numerous, and some tell more of a story than others. Having a mental catalog of stances and their meanings can help you direct the flow and energy of a session to a greater degree.

Positive and negative arms

The motion and position of a person's arms provides a lot of insight into their mental and emotional state. The arms communicate if a person is feeling threatened, agreeable, or open to suggestion. One of the most important positions of arms is if they are positioned in a closed or open fashion. For instance, whether his arms are crossed across the chest versus relaxed and down at his sides.



A closed position is the body's attempt to protect itself from danger. This danger could be physical or emotional, and the participant is trying to defend either himself or his ideas. Changing to open arms suggest that a participant is becoming more agreeable to the idea being presented. If a participant does enter into a closed position, there are several tricks that get them to open up again and engage in the conversation rather than remaining removed from it.

The power of a nod

The meaning of a head nod is as impactful as it is diverse. Head nods can range from the slow and steady to fast and erratic. Participants who are mulling over an idea will often slowly nod their heads as they think through the details. When the level of excitement in a session gets high and participants are in agreement with what another participant is saying, their heads quickly bounce up and down.

You can use a head nod yourself to draw out additional detail from a participant. By nodding your head at a participant as the participant shares an experience or thought, you encourage the participant to keep going. This really becomes helpful when someone does not easily share information. In situations like this, you need every trick in the book to draw information out of reluctant participant. To learn more about body language, check out Allan and Barbara Pease's book *The Definitive Book of Body Language* (Bantam, 2006) or Janine Driver's *You Say More Than You Think* (Three Rivers Press, 2011).

One technique is to get participants to do something with their hands. This could be sketching out an idea on a piece of paper, writing down notes on a diagram on the whiteboard, or looking something up on a computer. The earlier you can break the closed position, the quicker the participants become active contributors again.

Occasionally, participants will use an object to protect themselves rather than their arms. Grabbing a clipboard, coffee cup, notepad, or even a laptop is an effort to place a barrier between the participant and the topic, idea, or suggestion that is felt to be attacking them. It's important that you notice when these barriers get put up. Removing the barrier can be easy, if caught early and if participants are given something to do that allows them to voice their disagreement or discomfort in a productive way. One technique would be to suggest that they get up and contribute to a shared working space like a whiteboard.

Putting baby in the corner!

Participants are not always positive, cooperative, or engaging. Occasionally, a participant has his own agenda or reacts negatively to other participants, and turns a good session into a bad one. Part of your job is to manage a participant who has gone over to the dark side in a way that brings him back into the fold but doesn't detract from the session. There are three useful methods for dealing with a participant who begins to behave negatively. It's key to address a disruptive participant as promptly as possible, because that person's actions will quickly spoil the rest of the session.

Encourage self-regulation

The best way to deal with a disruptive participant is to let the group respond. It's best if the participants provide encouragement or suggestions to address the issue. You can foster this by encouraging participants to address issues as they arise. Here is an example:

> **John:** Well, that suggestion will never work! There is no point in us even discussing this anymore!
>
> **Facilitator:** Joan, why do you think John thinks this wouldn't work? What's he seeing that would make your idea not possible?

Directing the issue back to a different group member forces the confrontation out into the open and allows all the participants to reach a resolution. It also avoids making you the bad guy who has to reprimand one of the participants.

Taking a break

Conversations can get heated when sensitive topics come up. Participants will have strong feelings and ideas about how they would address the topic and come to a solution. These strong feelings and ideas can easily turn a healthy debate into a bickering session. Before the session reaches a tipping point and turns into a fight, it's a good idea to call a break and allow people to walk away from the conversation for a bit.

While the group is split up, you can have a private chat with participants who are proving to be overly negative or disruptive. Again, an example:

> **Facilitator:** Joe, what's going on? I can see you care a lot about this issue. What can I do to bring this conversation to some type of resolution between you and Janice?
>
> **Joe:** She just doesn't understand the direction I've been given by my directors. What she's asking for would make it appear as if we're taking a step back rather than a step forward.
>
> **Facilitator:** That makes sense. When we get back together, let's talk about that specifically and see if Janice can rethink her idea to address that concern.

Getting Joe away from the conversation was key to understanding what he is feeling and where his negative behavior was coming from. Knowing that it was making him look bad in front of his bosses helps you bring Joe back in, and progresses the conversation.

Ejection!

Eventually, a participant who continues to behave negatively and is disruptive to the other participants will cause the session to be a wash. If this happens, that makes the whole thing a waste of time, money, and manpower. You have to ensure that this doesn't happen, and sometimes that means you have to ask a participant to leave. This is not fun, comfortable, or enjoyable. This can kill a certain amount of energy and flow in the session and it's really hard to get it back.

However, there comes a point where getting the disruptive participant out of the room is more important than losing a bit of energy. The best time to ask a participant to leave is during a break. This gives that person a safe out (avoiding the embarrassment of being asked to leave) and it avoids you having to be the bad guy in front of the rest of the participants.

> **Facilitator:** Hey, Andy, it's obvious you don't want to be here and you don't see what we're doing as valuable. Why don't you let us wrap this up and I'll send you the final notes and decisions that we reach. We can talk about it tomorrow maybe?
>
> **Andy:** That works. I've got a deadline I need to be working on anyway.

The fact that Andy had a deadline might have been something that caused his disruptive behavior. He wasn't seeing value in the session, and viewed it as a distraction from something he felt he needed to be doing. Having this side conversation gave Andy "permission" to return to work and removed his negative effects from the other participants.

Preparing for patterns

Handling a diverse group of participants can be planned for, and you can make it part of your process no matter the type of session you have to manage. Even though each person's personality is unique, they generally fall into one or more personality patterns. There are many patterns out there, but it's important to have a handle on a few common ones that have a negative influence on a session when they show up.

Mr. Personality

This person has so much charisma it just oozes out of him. People naturally gravitate toward people like this and tend to follow their lead.

Imagine having Bill Clinton, known for his extreme charisma and attention-grabbing personality, in a session. Keeping and maintaining the focus of all the participants is going to be impossible. Not only that, but any participant who would like to get a little attention is going up against a juggernaut and the valuable information she wants to share will never be heard. The best approach to take with Mr. Personality is to turn him into an asset rather than a distraction. Funnel the facilitation cues and motions through him, such as getting him to kick-start a group activity rather than doing it yourself. This removes his participation from the overall session, but capitalizes on his charisma and charm so the rest of the participants remain focused and engaged.

Teacher's pet

All she wants to do is help. Yet sometimes, her help is the last thing you need.

Every facilitator needs a helper, and it's a blessing when that helper is one of the participants. Sometimes though, having a helper can be the most unhelpful thing imaginable. A participant who eagerly attempts to help you rather than engage in the session might be feeling out of place. She may not be comfortable with what is being asked of her, and avoids the activity by trying to assist with it.

Occasionally, the helping participant can have an ulterior motive. In her head, she may think she could be a better facilitator than you are, and she may want to take control of the session. In essence, she is being a usurper. No matter what her intentions may be, you need to direct the helper back to the task at hand and retain control of your session. If reinforcing her in her role as a participant by pulling her aside during a break does not work, then as a last resort you may need to remove her from a session.

Chatterbox

He keeps going on and on and on and on. You hope he will eventually get to his point, but it becomes pretty obvious that it's not going to happen.

In most sessions, having participants talk is a good thing. It's a sign of a successful facilitator when the ideas being shared lead other participants to contribute their thoughts. Unfortunately, this environment is the perfect camouflage for the Chatterbox. A Chatterbox is a participant who gives the appearance of contributing to the conversation without actually ever saying anything of value. This behavior stems from wanting to feel knowledgeable about a subject or not wanting to be left out by the group.

You can easily turn a Chatterbox into a normal—value-creating—participant by challenging the participant to explain what he means. If ignorance is the source of the ramblings, the group will likely pick up on it and bring him up to speed. The group doesn't want to leave anyone behind, so they will self-regulate and make sure that doesn't happen.

The quiet one

This participant sits in the back and tries her best not to be noticed. She has something to say, but just assumes someone else will say it for her.

Some participants have a hard time speaking up in a crowd. This is normal, especially for people who could be classified as introverts. An introvert ends up telling an observant facilitator a lot, though nonverbally. These nonverbal cues are opportunities to engage her and to allow her to share her comments, suggestions, and ideas with the group. It's vital for you not to forget, or unintentionally ignore, a quiet participant. You'll find that introverts typically have some of the most insightful things to say. If they are ignored, they may not speak well of you when feedback is collected after the session. Try directing questions to a quiet participant, or asking her to answer or respond to another participant's last comment. If done in a very friendly and approachable manner, these are great tactics to get her to break out of her shell a bit and become more engaged in the session.

Bone picker

This is someone who shows up to push an agenda or tear down other people's ideas. He'll disagree with every suggestion or comment that gets shared, but never provide any alternatives or suggestions of his own.

Not every person who shows up to a session is there to be a positive contributor. From time to time, a participant will show up with an agenda to simply pick a bone about the topic being discussed. There are two courses of action you can take with an intentionally disruptive participant. The most productive method is to encourage the group to self-regulate the negative participant. This can be accomplished by directing the negative comments and ideas back to the other participants to challenge or discredit. At times, getting the other participants to do this can be a challenge, especially if the negative participant is of high rank or influential in the company culture.

The only option left to you, if self-regulation doesn't work, is to kindly ask the negative participant to leave the session.

The boss

Everyone has a boss, and this person is the *boss, or holds a higher rank than the other participants. She can make people nervous, and less willing to share.*

The Boss, especially one who's high ranking and carries a lot of influence or simply thinks they do, is one of the hardest personality types to deal with in a facilitated session. One of the major risks with The Boss being present in the room is that any progress or boundary-pushing ideas can get killed by a single comment. Participants who are used to having authority over the other people in the room can have a hard time letting go and letting ideas flow and gestate. The Boss also may be privy to information that makes a new concept or suggestion impossible to implement. If she shares that with the group, the flow and energy of the group is disturbed.

Handling The Boss is best done before a session starts. Ask your sponsor or host if any of the participants are authorities in the organization. Take the time to meet beforehand and explain the ground rules and the purpose of the session. During this conversation, it may become clear that The Boss's presence in the room would be counterproductive, and she will excuse herself from the activity. It's important to schedule an immediate follow-up to go over the initial results of the session and collect her feedback privately.

The danger zone

Sessions can become chaotic and negative pretty quickly, and normally it's due to one of the above personality patterns. Once a session has been thoroughly disturbed and participants stop contributing to the overall goal, it's very difficult to get it back on track and to get all the participants engaged again. Luckily, there is a period of time—the danger zone—when troublemakers have just begun to cause problems and there's still an opportunity to intervene. When a session appears to be entering the danger zone, call a break if it makes sense. While participants are grabbing a fresh cup of coffee, hitting the bathrooms, or just chitchatting with one another, pull the participant causing the issues aside and have a frank conversation with her. You must think of the group over the individual, so turning problematic participants back into productive ones takes high priority.

Finding your star players

Star players don't always naturally arise during a facilitated session. Occasionally, you have to draw them out, or help draw them out of their shells. Finding a star player is easy once you understand where participants' passions are. This can be discovered prior to the session or during it. If you don't know the participants, project sponsors, or hosts, your host should be able to provide you with a general understanding of which participants care about what topics prior to a session. During a session, pay attention to how participants react to certain topics and areas of conversation to see how you can capitalize on their personal areas of interest.

Knowing where the pressure points are allows you to quickly find these star players by lobbing questions or directing responses to a participant who is showing passion about the current topic. This takes a lot of the pressure off you and allows the participants to generate and maintain their own flow and energy.

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