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Facilitation Skills

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Facilitation

- Facilitation is a skill set for communication, collaboration, and decision-making in a group.
- We apply facilitation skills implicitly.
 - Team Meetings
 - Sprint Planning, Backlog Grooming, Sprint/Project Retrospectives
 - Design & Code Reviews
 - Requirements Analysis
- Facilitation is a critical skill for project teams.
 - Company internal and client
 - Client commitment and decisions
 - Informal or formal approaches

Basics

- Facilitation requires a plan.
 - Who will facilitate
 - Participants
 - Productive environment
 - Goal
- Role of a facilitator is to primarily to ask questions and build a consensus amongst participants.
 - Ask questions, record answers, identify nascent agreement
 - Mediate difficult issues and personalities
 - Do not dictate the results
- Examples used refer to a company name and contact management system for underwriting specialized insurance.

Questions

- Asking the right questions is the primary skill of a facilitator.
 - *Definitional* – “What defines a legal entity? How is it different from other organizations?”
 - *Examples* – “Can you list a few examples?”
 - *Edge cases* – “What would fail your definition of a legal entity? What happens if the entity is in Chapter 11 or 13 bankruptcy?”
 - *Unusual cases* – “What happens in a corporate name change? How are acquisitions handled?”
 - *Counter example* – “Is a person a legal entity?”

Environment

- Use whiteboards, flip charts and other means for capturing output.
- For virtual meetings, use a document share or similar collaboration tool.
- Ideal environment is comfortable, separate from day-to-day workplace.
- Encourage participants to shut laptops and turn off phones.

Soft Skills

- Know the names of all participants and use them appropriately.
- Never under-estimate the power of doughnuts.
- Keep visible, public notes.
- Bring some energy and enthusiasm.
- Engage all participants, if possible.
- Recognize the contribution of participants.
- Understand the decision-making process in the room.
 - Will one participant determine the outcome?
 - Is the outcome pre-determined?
 - Will the group take responsibility?