



OFF SQUARE ONE

The Facilitator's Playbook

12 Pro-Tips for Workshop Facilitators





OFF SQUARE ONE

Introduction

If this year is set up to be your organization's most disruptive and explosive yet, you need to seriously consider how you can set your team up for that type of success. After weathering the external threats many businesses have faced in recent years, strong leaders are thinking about what's next and how to get there.

Workshops or offsites enable leaders to think outside of their day-to-day responsibilities and focus on what next month, next year, and the next 10 years will bring for themselves and their organization. If your department recently decided to plan an offsite meeting to dedicate time and energy for a specific outcome, you've taken the first step in your organization's future.

We know that the hard work is ahead, and planning that workshop takes significant effort. Off Square One, a boutique management and performance consultancy, has led a number of organizations through inspired, outcomes-oriented retreats that foster focus and enthusiasm.

We are sharing the 12 pro-tips to make your next workshop as impactful as possible. These 12 steps are the foundation to all workshops that Off Square One designs. Without these, the workshop is incomplete. In no particular order, they set the stage for inspiration and growth that isn't possible in any other setting.

12 PRO-TIPS

01

Make it memorable.

What is the definition of success in the workshop? At the beginning of the session, discuss and define the number one priority to accomplish together.

Question for discussion: What tangible changes do you hope to notice in the team by investing in this workshop experience?

02

You own the room.

The physical space of your workshop has the power to inspire people to think differently. Our team recommends using a room setup that is very different from a normal office space. We use large post-it papers, colorful markers, charts or drawings (*see toolkit for a full list at the end of this guide*), and disguise or cover-up pieces so there are reveal moments and components of intrigue. Ensure that chairs and spaces are spaced evenly and place candy on desks.



03

It takes a village.

You will notice dominant speakers emerge, so ensure that you call on individuals that aren't naturally participating to contribute. As a facilitator, you have an important role to balance individual contributions so that you end up with as much group participation as possible. Avoid both of those dynamics by incorporating solo activities, which provides alternative ways for individuals to contribute.

Action: At the beginning, identify dominant speakers and individuals not participating. Find ways to balance the two different levels of involvement.

04

Establish a growth mindset.

We like to challenge people to think about the space and sensory component of it to feel totally present during the workshop. Beginning the workshop with this exercise helps people let go of outside distractions and become more engaged.

Action: Ask participants: What are you hearing/feeling/seeing? Challenge people to think about that perspective or experience. It's a great way to kick off an exercise and help people relax and focus.

05

Set clear goals and expected outcomes.

Come up with 3 goals and write those on the large Post-it for everyone to focus on throughout the workshop. Keep them simple and measurable.

1.

2.

3.

06

Prioritize movement.

When you create the agenda, build in plenty of time for people to move around their seats and take a break. The more people move, the more engagement you'll see. We recommend that you pause or take breaks at least every 2 ½ hours, and probably more often than that. Some examples to get people moving include:

- ◆ Ask participants to scribe on a flip chart for the group.
- ◆ During a SWOT analysis, encourage the team members to rotate around the room.



07

Park the car.

It's bound to happen — at some point, participants could get off track during the workshop. Facilitators should give space for topics to be discussed, but if an idea is too off course or begins inviting uncomfortable debate, facilitators can and should interject to keep the group on course. **Here's an example:** VP of sales continues to talk about the sales pipeline even though the workshop is focused on team building. *Acknowledge the VP of Sales has been heard and place that topic in the parking lot.*



Action: What are signs of off-topic or unproductive conversation?

08

Set the tone.

Facilitators from Off Square One often make fun of themselves, bring up crazy ideas and generally demonstrate comfort in being funny in the spirit of growth and partnership. We invite people to “take the cool cap off” and bring their guard down. Even so, some people may feel like they have too much going on, and act not interested in the workshop. As a facilitator, acknowledging it from the beginning helps.

09

What gets measured gets done.

Big visionary statements generally won't map to outcomes. Participants have to believe that their goal or desired outcome matters and that they will accomplish it. They have to get others to believe in that desired outcome or goal as well. It is one thing to say it out loud, but to put pen to paper, usually is when it feels real to people.

10

Create urgency and deadlines.

Leaders should assign timelines to the goals that come out of the workshop. A goal and a timeline **MUST** co-exist —that's a non-negotiable when you leave the workshop.

Action: Create one goal as a facilitator that you have for your upcoming workshop.



11

Establish ownership.

We ask people to create personal and organizational commitments. Sometimes we ask if they need accountability partners, choose someone else on their team as a partner. Getting people to create a commitment is front and center as well. We are committed to a follow-up from us that is a recap/overview with key insights learned from our time together.

Action: Who could serve as accountability partners for your employees?

12

Consider bringing in outside voices.

While internal teams are fully capable of facilitating effective workshops, there are pitfalls to consider. You may intentionally or unintentionally drive to specific results or not give as much consideration to opinions or voices based on pre-existing biases. When you embrace an unbiased third-party facilitator, they come into the engagement without that same level of bias, motivators or hidden agendas. If someone's manager is facilitating a workshop, it can be intimidating to provide fluid, unfiltered ideas.



Workshop Toolkit

A successful workshop includes some classic components to drive engagement and excitement. Here are some of our tried-and-true tools.

- Mr. Sketch markers
- Colorful normal sized Post-it notes larger one and smaller one
- 3X5 cards
- Masking tape
- Large Post-it boards
- Easel
- Participant guide
- Facilitator's guide
- Pens
- Sharpies
- Nourishment (snacks, water, sugar)
- Fidget toys
- Flexible or moveable furniture

Yes, we're sharing our secret sauce (shhh Don't tell!)

This section is meant to provide a facilitator with tools/ideas/concepts that will elevate their workshop when paired with the 12 pro-tips. These all require in-depth planning and preparation to execute effectively. They can elevate your traditional corporate workshop to a dynamic, growth-oriented platform for your organization.

- ◆ **Challenge participants.** Even if you get a response that is really on-point, take it a level deeper than what they provided. Do not accept responses at face value, challenge someone to challenge themselves.
- ◆ **Visually capture important contributions.** Participants will feel more inclined to share when they see their contribution is meaningful.
- ◆ **Ask for participants to facilitate too.** Sometimes we pick someone else to facilitate and I'll ask them to facilitate the next part and give them free reign to try it. Empower people to own that time. We make sure they know they are the star of the show.
- ◆ **Prepare memorable stories and strong analogies** to enhance the content you are delivering with real-life experiences that are relevant. Don't rely on yourself to come up with these impromptu—they should be prepared and rehearsed to be the most effective.
- ◆ **Use repetition to your advantage** to hammer home really important topics (either repeating key words or phrases throughout —almost to the point of it being a joke).
- ◆ **Avoid powerpoint style slides or active use of technology (phones, computers, tablets)** unless they are for the workshop. Everyone will claim they are busy or have to engage with an email or text. Unless truly emergency-driven, encourage that devices are out of line of sight and that they can be checked during scheduled breaks.

Want to partner with an expert facilitator?

If you'd like to engage with Off Square One for your upcoming workshop, send a message to hello@offsquareone.com. We'd love to meet you and bring our pro-tips to life during your next retreat.