



## CHAPTER 1

### FACILITATION, DESIGN, AND THE REST

This book is intended for experienced facilitators – those who know how to design an outstanding workshop and know how, alone or as part of a team, to deliver one. In a sense, this book will only be of value to you if, deep down, you already know everything that is written here.

This book is *not* about event design or building an agenda. There are many outstanding design methodologies, some of which I am familiar with and one of which, MCTaylor’s DesignShop™ methodology, I have been trying to master since I was first introduced to it in 1997. I have experienced and used several others, including Owen Harrison’s Open Space Technology, The World Café, and InnovationLabs’s Solutions Workshops, and I am in no position to improve on them or replace them.

Rather, this book is about the facilitation experience – interacting with clients, participants, and colleagues<sup>1</sup> to create a brief moment of great possibility. I hope it is pertinent regardless of the design methodology you employ, if you employ one at all.

Many methodologies for conducting large meetings and workshops are based on codifying – making explicit and repeatable – the things we do intuitively when we are at our best. Likewise, this book tries to decipher those techniques and ideas I employ and the observations I make while in the act of facilitating, based on my experience and

---

<sup>1</sup> Some terminology: Clients are the people – companies and individuals – who call for our services and, hopefully, pay our bills. Sponsors are the sub-set of participants, usually including the individual we refer to as our client, who co-design the event with us and take responsibility for its success. Participants are invited by sponsors to fill the seats and, with luck, find themselves changed by our work.

intuition, and to make these explicit and repeatable. While most methodologies are built from models and tools, facilitation is created out of behaviors and techniques. The behaviors and techniques that I make use of as a facilitator are the subject of this book.

## **ESSENTIAL ELEMENTS FOR A SUCCESSFUL EVENT**

Apart from facilitation and design, there are at least three other elements needed for a successful workshop or other collaborative event:

### **Convening**

Getting the right people there.

### **Content**

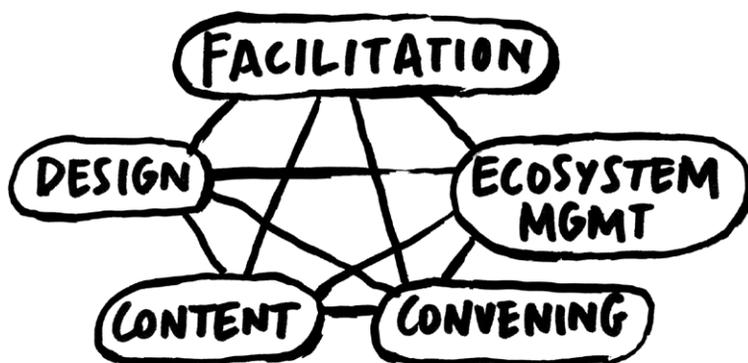
Assembling a single version of the truth – or multiple versions for the participants to sift through – with all the supporting data and analysis to make this truth understandable.

### **Ecosystem Management**

Looking after all the moving parts – logistics, environment, facilitation team, knowledge objects – that add up to a seamless experience for participants. (We also call this Process Facilitation.)

Event sponsors tend to focus on facilitation and design while ignoring or taking for granted convening and ecosystem management. They often focus a great deal on content, but see it as somehow divorced from the bigger picture of the event. Either they focus exclusively on the content and trust the rest to just happen, or else they have vague ambitions (e.g., team building) which they believe can be realized in the absence of focused content.

In fact, all five of these elements are essential and all five depend on each other. For example, convening involves not just identifying decision-makers and people affected by an event's outcomes, but also inviting people who bring content. Content (human, paper-based,



electronic, or other) needs to make it to the right break-out teams at the right time, which is an element of ecosystem management. The design process itself is the object of facilitation, while facilitation can only thrive when the ecosystem is appropriate.

This book attempts to take a holistic approach to building collaborative events – an approach that treats all five of these elements in relation to each other. The overwhelming focus, however, is on facilitation – how a facilitator behaves when shaping the work of a large, heterogeneous team of participants. The other four elements are presented here insofar as they relate to facilitation.

### **THE MISSING CHAPTER: GRAPHIC FACILITATION**

An essential element of facilitation is *graphic facilitation* – the real-time translation of a group conversation into visuals combining words and images, all under the eyes of the participants. When I am in the front of the room helping shape a large-group discussion, I am almost always accompanied by a graphic facilitator – a scribe – who listens, judges, filters, and then draws. While the artifact which the scribe creates can provide a useful and colorful addition to a meeting report or Executive Summary, the real value of the scribe is as a designated listener. There, standing before all of us, a man or a woman with colored markers is listening on our behalf, focused on the conversation, thereby helping us to stay focused. And when participants *see*



A book about facilitation should have a lot to say about graphic facilitation. This one doesn't. The simple reason is that what scribes do is, for me, magic. I know that there is considerable method and discipline to their work, but I am unable to describe their role or how they go about it. Scribes are the yang to my yin. For better or worse, this book is limited to the yin.

