

Engagement Strategies

**Selected Engagement Strategies
from *The Advanced Facilitators
Workshop***



56 Perimeter Center East #103

Atlanta, Georgia 30346

770.454.1440

www.leadstrat.com

Copyright (c) *Leadership Strategies, Inc.* 2007

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise without the prior written permission of *Leadership Strategies, Inc.*

SESSION OBJECTIVES

Build a tool box of engagement strategies by:

- Showing where engagement fits in a facilitation methodology
- Categorizing types of engagement strategies
- Using what we all know to build a list of engagement strategies by type
- Demonstrating engagement strategies in action

TECHNIQUES WE KNOW

In your teams, record on post-its answers to the following question:

- Think about the **best techniques you use for facilitating groups.**
- Some techniques might be for gathering information, others for generating ideas, prioritizing, and so on. Think about the techniques you use that are most creative and most stimulating for participants.
- What are some of those techniques?

OUR AGENDA

- A. Getting Started
- B. Types of Engagement Processes
- C. Sample Processes
- D. Your Best Processes
- E. Review and Close

OUR SOURCE

Principle 1. PREPARING FOR SUCCESS

Cover All the Bases

Principle 2. GETTING THE SESSION STARTED

Inform, Excite, Empower, Involve

Principle 3. FOCUSING THE GROUP

Establish the Course, Avoid Detours

Principle 4. RESPECTING THE POWER OF THE PEN

Use It, Don't Abuse It, Make It Theirs

Principle 5. INFORMATION GATHERING

Know Your Tools and How to Use Them

Principle 6. MANAGING DYSFUNCTION

Conscious Prevention, Early Detection, Clean Resolution

Principle 7. CONSENSUS BUILDING

Generate a Consensus-Focused Process

Principle 8. KEEPING THE ENERGY HIGH

Set the Pace, Anticipate Lulls, React Accordingly

Principle 9. CLOSING THE SESSION

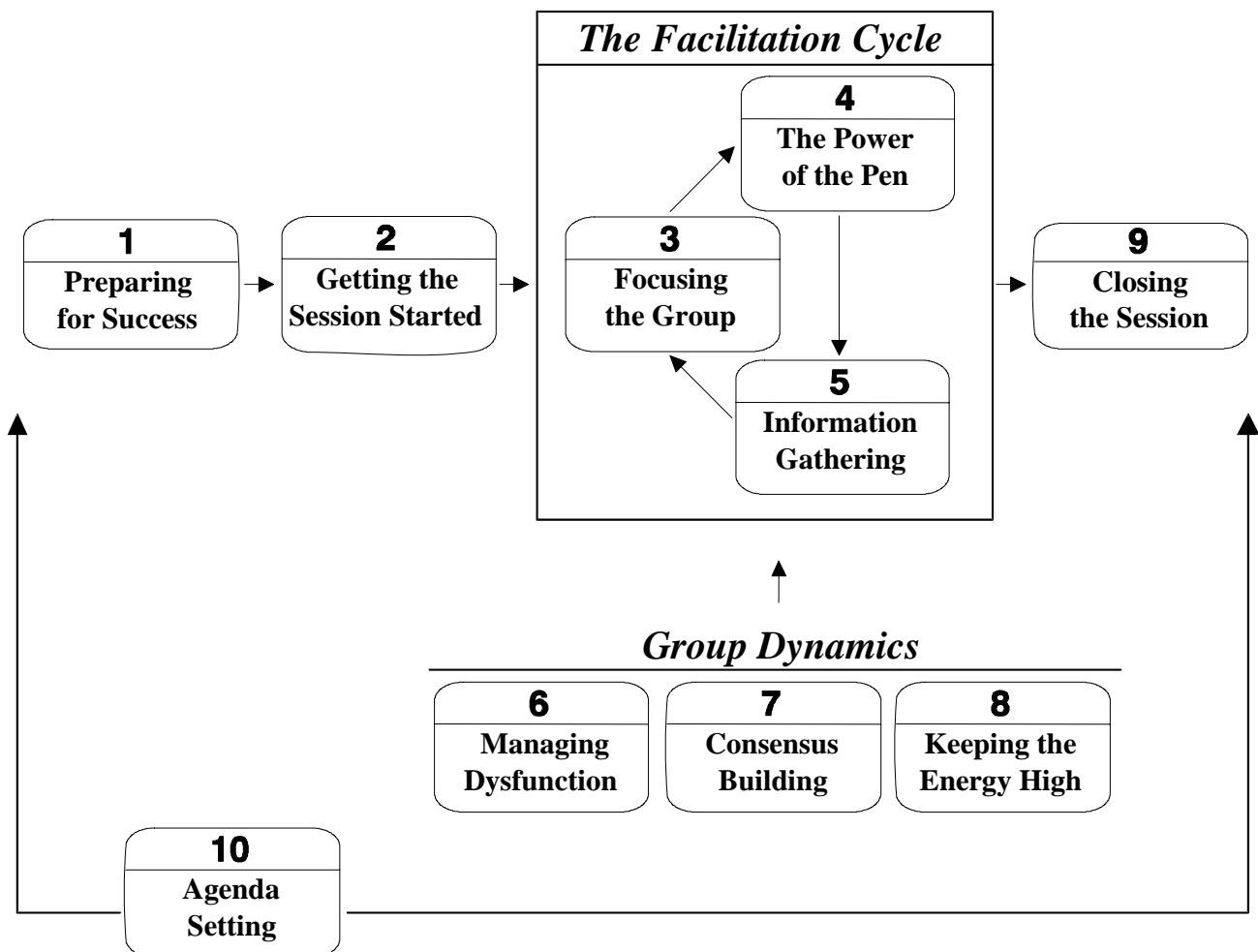
Review, Evaluate, Close, Debrief

Principle 10. AGENDA SETTING

Adapt Your Agenda to Address the Need

*The Facilitator's Methodology*TM

The Leadership Strategies Approach For Structuring Successful Group Sessions



Processes

Modes of Processing

- Full Group
- Small Group
- One-on-One
- Individual

Process Order

- Random
- Round-robin
- Assigned

Types of Processes

- Gathering Facts
- Generating Ideas
- Categorizing
- Deciding/Prioritizing
- Inquiring
- Evaluating
- Personalizing
- Reporting

Engagement Strategies Summary

From the Advanced Facilitator's Workshop

Name	Purpose
Basic Brainstorming	To generate a large number of ideas
Brainstorming with Post-Its	To generate a large number of ideas
Brief Encounters*	For participants to get feedback from others on their ideas
Dot Voting	To narrow a list or select items from a list
Dump and Clump*	Gather information and then categorize that information.
Dyads/Triads	To generate ideas or answers in groups
Elevator Speech	Participant summary of content
Forced Analogies	To use once a group has brainstormed ideas, and the group is running out of ideas
Future Letter	To assure transfer of training
Group Questioning*	Surfaces all the questions participants have after a presentation
Introductions	To open the class
Journaling	To encourage individual involvement and participation.
Last Person Standing*	Identify the most unique information or ideas in a short and energy-filled period of time.
More Of or Less Of	Helps the participants evaluate an approach or a change
Rotating Flipcharts*	Gather information with the ability to get input and/or review of content by other teams/individuals.
Start/Stop/Continue	Provide an opportunity for reflection and commitment to action by group and/or individual.
Talking Stick	Promote discussion and listening
Think-Pair-Share	Gather information in groups of two to three and share in a crisp, concise manner.
Whip*	To determine whether individual participants are in favor of an idea or to allow participants to express their feelings about something.

*Included in this sample

Name	Brief Encounters
Type	Generating Ideas
Purpose	For participants to get feedback from others on their ideas
General Description	Brief Encounters is a fast-paced activity that pairs participants for brief periods of time. In the time allotted (usually 10 minutes), participants pose a prepared question to others in the class and record their answers.
Benefit	<ul style="list-style-type: none">• Gets participants up and moving• Allows participants to get considerable input into an idea• Gives participants an opportunity to hear about and make recommendations on the issues of others
Sample Words (Purpose, example if necessary, general directions, specific instructions, questions, starting question)	<ul style="list-style-type: none">• The facilitator instructs the participants to develop a personal question (e.g., “How do I give constructive feedback without sounding judgmental.”)• In 10 minutes, the participants engage in as many one-on-one conversations as possible in which each asks and receives answers. Responding to the answers is specifically discouraged.

Name	Dump and Clump
Type	Generating Ideas
Purpose	Gather information and then categorize that information.
General Description	Each individual or team prepares their items for a list (e.g., what are all of the steps in the hiring process; what are my objectives for this session) or a brainstorming activity (e.g., where we might plan our company outing). These items are collected (dumped) and then organized in categories (clumped).
Benefit	An approach to get many people involved, develop and organize a large amount of input in a timely and organized manner.
Sample Words (purpose, example if necessary, general directions, specific instructions, questions, starting question)	<p>You just heard about what our objectives of this session are; what is even more important are those key issues that you would like to cover so that we ensure this session will be a productive use of your time.</p> <p>So, while we are completing this Strategic Plan, I would like to get your input about those key issues that you would like to ensure we cover as a part of this Strategic Plan so that you will know it has addressed the areas you see as important to you.</p> <p>Any questions?</p> <p>OK, imagine it is Wednesday afternoon and we have just completed our session. You are on your way to your car to start on your way back home. One of your colleagues approaches you and says, “Well, what did you think about the Strategic Planning session?” You reflect and tell them, “Well I really enjoyed this new approach, It was engaging and the time really went by fast; but, you know there were a few items I really had hoped we would address that we really never got to.....”</p> <p>What are those items that you had hoped we would address?</p>

Name	Group Questioning
Type	Breakout Groups
Purpose	Surfaces all the questions participants have after a presentation
General Description	<ul style="list-style-type: none">• Following a presentation, the facilitator asks tables to identify the questions they would like answered.• The facilitator then gives each team 1-5 minutes to ask as many of the questions they would like.• Alternatively, the facilitator can have each team ask one question.• If time permits, another rotation is done.
Benefit	<ul style="list-style-type: none">• Prevents one person's questions from dominating the discussion• Empowers the group to ensure that the most important questions are being asked
Other Tips	<ul style="list-style-type: none">• Take one question at a time from each group so that no group dominates the discussion.

Name	Last Person Standing
Type	Gather information; generating unique items for a list or ideas.
Purpose	Identify the most unique information or ideas in a short and energy-filled period of time.
General Description	Teams (or individuals) are asked to gather as much input as they can. Then the Team Leader has a competition with other Team Leaders to determine which team has the most number of unique ideas. (All other participants act as the judges to help identify the duplicates.)
Benefit	Competitive and energetic approach to infuse energy into the session. Especially good during those lull times of the day.
Sample Words (purpose, example if necessary, general directions, specific instructions, questions, starting question)	<p>The purpose of this exercise is for us to identify as many different characteristics of (an energetic speaker) as we can.</p> <p>For example, if we were looking for a list of all of the automobile models that we could think of, we would be looking for a list that would include items like Taurus, Impala, Escort, Escalade, Jetta, 626, etc. But we are not.....</p> <p>What we are doing is identifying the characteristics of an energetic speaker. So, think about the last time you were at a meeting or presentation and a speaker began his presentation. Right away he simply “got you!” I mean he captured you attention, you were almost on the edge of your chair because of his approach.</p> <p>Let’s write each of those characteristics, one per post-it note that just made the speaker make you just listen to what he/she was saying....</p>
Other Tips	<p>Each team leader is asked to come to the front of the room and one-by-one, team-by-team they post their answers to a flip chart. For example, Team Leader #1 posts one answer and moves to the back of the line, then Team Leader #2 posts one answer and moves to the back of the line, etc. While the Team Leaders are posting their answers, ask the audience to identify duplicates by raising crossed arms and saying “oonk.” This helps to keep the entire group engaged.</p> <p>When a duplicate is identified, the facilitator collects that post-it and the Team Leader goes to the back of the line. The second duplicate eliminates that team. By using color post-its by team, it is clear when the 2nd duplicate is identified.</p>

Name	Rotating Flip Charts
Type	Breakout Groups
Purpose	Gather information with the ability to get input and/or review of content by other teams/individuals.
General Description	Groups prepare a flip chart. After initial information is completed teams rotate amongst flip charts to provide their feedback and recommendations on other team's information.
Benefit	Sharing information in a crisp and concise manner. Allows many participants/teams to provide and review/revise information.
Sample Words (purpose, example if necessary, general directions, specific instructions, questions, starting question)	<p>Next, we are going to determine our recommended yardsticks for each goal area that we just agreed upon. In other words, we will determine how we want to measure our progress against these goals (e.g., dollars of revenue, % increase of revenue, market share, etc.)</p> <p>Example...</p> <p>If we were going to decide what yardstick we would use to measure our progress on a car trip from Boston to Miami, we might suggest to measure that progress by miles traveled or hours in the car; either would be yardsticks on which to measure or track our progress.</p> <p>But we are not planning a trip. We have just identified the ("x") goal areas that we have agreed to consider our broad areas on which to focus for our planning horizon. What we are going to do is ask Team #1 to identify their recommended yardsticks for (goal area #1; e.g., Products); Team #2 will be identifying yardsticks for goal area #2; e.g., employees); Team # 3.....</p> <p>Any questions?</p> <p>OK, if each team will move to their flip chart with their marker and post-its, I would like you to think about the goal area you have been assigned. Think about the different approaches you might be able to use to track progress against this goal....the things you would look at and say, "Yes, we are on the right track..."or that you would be able to comment on as follows, "Hey, you know this is telling us that we need to make adjustments to achieve this goal...." What are the tools you would use to clearly measure where you are against this goal?</p>
Other Tips	Allow between five to ten minutes for each team to build their initial lists (based on complexity, team size, etc.). At the end of the building of this initial list, ask each team to rotate to the next flip chart with their marker and post-its. Then have that team indicate that they agree with the prior teams list by placing a check by that item or, if they do not agree, place a post-it by that item and enhance/revise it so that

Name	Rotating Flip Charts
	<p>they would agree.. (By using the team markers and post-its it is clear which team provide their feedback on each item.)</p> <p>Rotate as many times as necessary. By providing one complete rotation, all teams/individuals will have had the opportunity to provide their input on all items.</p> <p>This is another fast-paced, comprehensive way to get all participants involved in a meaningful way.</p>

Name	Whip
Type	Individual Activity
Purpose	To determine whether individual participants are in favor of an idea or to allow participants to express their feelings about something.
General Description	The facilitator rotates around the room to get short responses from each participant regarding some element of the training.
Benefit	<ul style="list-style-type: none">• Quick way to take the temperature of the group• Fast way to determine how a group feels about an idea or approach
Sample Words (purpose, example if necessary, general directions, specific instructions, questions, starting question)	<p>“We have just discussed the new performance appraisal system. Let’s go around the room, and one-at-a-time, you can react to what you have just seen. Here are the rules:</p> <ul style="list-style-type: none">• You can only use one word or a short phrase to describe your reaction to the new system. <p>Let’s start with Fred. Go.”</p>

What's Next?

If you would like to learn more:

- **Public Class:** The Effective Facilitator

Atlanta, Chicago, Dallas, DC, Denver, Los Angeles,
Sydney, Toronto (2007)

No Facilitation Class Offers You More!

- Give us 4 days and learn 90+ techniques, with six practices, feedback and videotaping!
- Give us 5 days and we will prepare you for INIFAC certification!

- **Private Class:** On Your Site

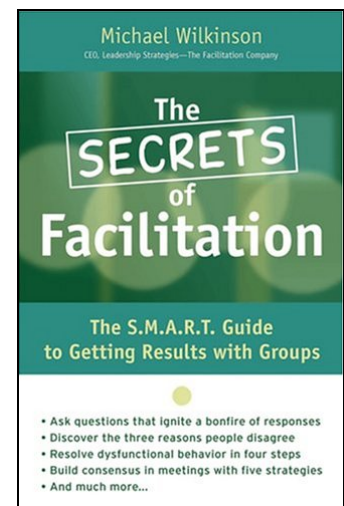
Most cost-effective for 8 or more

- **Purchase a Product**

The Effective Facilitator Workbook

The Book – The Secrets of Facilitation

The Facilitation Guides



Open House and 15th Anniversary Celebration!

Saturday, April 12, 2008 7:00-9:30 pm

55 Perimeter Center East, Suite 103, 770.454.1440



Leadership Strategies - The Facilitation Company has rapidly become one of the national leaders in facilitation services. We provide companies with professional facilitators who facilitate executive teams and task forces in topics such as strategic planning, issue resolution, requirements analysis, process improvement and conference forums.

Professional Facilitation

Meeting Facilitation

Strategic Planning

Systems Analysis

Issue Resolution

Team Building

Conference Facilitation

Process Improvement

Leadership Training

Facilitation Series

The Effective Facilitator
Facilitating IT Sessions
Making Meetings Work!
Effective Teams Work!

Management Series

Management to Leadership
The Effective Consultant
The Effective Communicator
Effective Presentation Skills

Planning Series

Strategic Planning
Project Planning

IT Series

Project Leadership
Managing User Relationships

Along with being expert facilitators, we also train people in facilitation skills, leadership, team building, presentations and consulting skills. We offer public classes in Atlanta, Chicago, Dallas, Denver, Los Angeles and Washington, DC, and on-site private classes for clients around the nation and the world. We make it our business to research the best practices used by successful organizations, compile these best practices into practical workshops and guide organizations in implementing these practices in their environments.



56 Perimeter Center East, #103
Atlanta, Georgia 30346
770.454.1440
www.leadstrat.com

Engagement Strategy

Name of Engagement Strategy	
Submitted By	
Company	
Phone	
Email	

Description:

--