Facilitation in Action

Finding Your Authentic Training Style

ATD's Facilitator Team

Carrie Addington, Jared Douglas, Nikki O'Keeffe, and Darryl Wyles

Buy This Book

For all the learners we've encountered in our careers,
you have taught us just as much as we've taught you.

For all our fellow trainers who have shaped our own journeys.

Contents

Authors' Note

Writing *Facilitation in Action* was a collaborative labor of love among four master ATD facilitators, who came together to write a book that guides facilitators in continually honing and developing their skills in an ever-evolving capability.

Collectively, we have 55 years of facilitation experience across 22 ATD Education programs and have reached more than 7,000 ATD learners across various segments, including government, healthcare, technology, media, transportation, and retail. We facilitate ATD's train-the-trainer programs, where we hear so often how insular and autonomous the role of a trainer or facilitator can be. What our participants end up valuing most about these programs is the opportunity to come together with colleagues and share ideas and experiences, to build a sense of camaraderie, and to learn from one another's unique experiences through shared stories and examples. While the four of us are aligned in our approach to facilitation, we also make room for the unique style and approach that each of us favors. In short, there's no one way to facilitate, and that's what this book hopes to explore with you.

So, with that value in mind, with that hunger for more stories and examples to help turn concepts into practical application, we immediately thought of how our various perspectives, facilitation styles, and approaches to key topics in our field would provide a rich cache of stories and techniques for consideration in your own work.

Whom Is This Book For?

As new facilitators, we began our careers by watching other trainers and facilitators in action; by gathering all the checklists, tips, and common practices we could find; and by diligently studying. We absorbed intently in the hopes of embodying what other people's definitions of *good* and *impactful* looked like. We checked off all the checklists we could find as we began developing skills. While this continues to be a worthwhile approach, especially at the start of a training career, the moments we learned the most from were the stories and practical examples shared by other trainers—the ideas we gathered from being creative and practical with those who do what we do every day.

This book aims to be a trainer's how-to, a trainer's manifesto, a trainer's call to arms, a trainer's celebration and assessment of where we've come from and where we're going. It's for new and aspiring trainers who are looking to learn from other trainers. It's also a book for those who are established in the field and looking for new and different approaches to trusted methodologies and attitudes. It's for any learning and development professional who wants to hear stories, examples, and practical tips that open your thinking around the impact a facilitator and trainer can have.

You may notice we toggle between *facilitator* and *trainer* at times. There are nuances that differentiate the two roles, but for the purposes of this book we will use them interchangeably. Whether you identify as a trainer or a facilitator, or both, depending on the programs you're delivering, we are speaking to you when we use the word *facilitator*.

Our Approach to Facilitation

When we are facilitating, we are in constant communication with our learners. We are working alongside them in their exploration, hearing what they have to say and implementing their needs into the experience. We are coaching and guiding them to find their own path to walk during and after the experience. Our mindset is crucial to preparation because facilitation is organic, collaborative, and sometimes messy.

If we asked you to name a great facilitator, you would most likely identify someone you had an impactful experience with (our own lists are very long). That is because facilitation is personal. In facilitation, we want to break down tangible and intangible barriers between us and our learners.

This book will guide you through the process of deepening your thinking and developing your skills in training and facilitation. There are a plethora of "best practices" that infiltrate the industry. To be clear, we have nothing against best practices. The term was first introduced as a spin-off from the original "best method or procedure" in the early 1980s. And, the industry has been using this terminology for almost half a century to mean "a procedure that has been shown by research and experience to produce optimal results and that is established or proposed as a standard suitable for widespread adoption" (*Merriam-Webster*). No wonder we continue to find them, use them, and respond to them. There are, in fact, best practices in our field, and in a role that is largely dependent on the people it serves, it's our call to challenge best practices, evolve the field, and create new approaches based on what we learn from those we work with. We aim to explore common or proven practices that can be used to clarify your approach, not define it.

What to Expect in This Book

Writing *Facilitation in Action* was an opportunity to redefine how we think of honing our training delivery and facilitation skills in the dynamic landscape that is learning and development. We'll provide our considerations and stories, which are rooted in practical experience and application, not only from our tenure as facilitators at ATD but from our own backgrounds spanning industries from government and healthcare to marketing and beauty.

We present a lot of questions and offer our varying perspectives for your consideration, and we provide tools and templates that start as lists but invite you to take what we've shared and apply it in your own work.

Each chapter is structured around subtopics, posed as questions. These questions are actual learner questions that we've received over our years as facilitators conducting train-the-trainer programs. Questions that, in the moment of hearing them, raised deeper and broader questions for us as facilitators as well. The participants who attend our programs challenge our thinking regularly with their viewpoints, their insightful questions, and their desire to acquire a deeper level of expertise in their role; this structure was a way to honor the learners we've had the great pleasure of working alongside over the years. You can read the book in the order we've laid it out or skip around based on your preferred topic; the journey is yours.

Chapter 1 kicks off with developing a facilitation mindset, one that embraces a growth mindset and focuses on what your learners can achieve and what they need to be successful.

Chapter 2 is all about setting the stage for learners ahead of time, from environment setup to communications, and preparing yourself to ensure the learning experience is engaging and outcome-oriented.

Chapter 3 delves into the role of the facilitator, from being a department of one and creating positive environments for learning, to scaling your delivery for different group sizes and understanding your role in workplace performance.

Chapter 4 focuses on developing your unique facilitation style and building confidence in your approach.

Chapter 5 explores adapting your facilitation across various modalities (virtual, face-to-face, asynchronous, blended).

Chapter 6 looks at how to have the greatest impact through a learner-centric approach, while remaining flexible enough to pivot and adapt in the moment to learner needs.

Chapter 7 discusses the importance of empathy and inclusion to facilitation, with tips for modifying your verbal and nonverbal communication as well as some activities.

Chapter 8 dives into the art of feedback: how to deliver it and how to receive it.

Chapter 9 ties the discussion of the facilitator's role and impact together with an inspection of how to ensure learners' performance improvement.

Chapter 10 wraps up with a look to the future of facilitation and how we as facilitators can stay future-focused and remain lifelong learners.

Throughout the book there are moments of interaction for you, the reader, to engage with, either as a reflection tool after your next training delivery, at your next train-the-trainer book club, or even at your local ATD chapter event or team meeting. Fold the pages, highlight meaningful passages, write in the margins—do whatever you need to engage with the content. At the end of each chapter, we'll leave you with an invitation to reflect on considerations and questions that will help you define and intentionally live in your role as a trainer and facilitator. Because at the end of the day, nothing prepares a trainer better for the role of training delivery than another trainer.

With continued admiration on your learning journey,
Carrie, Jared, Nikki, and Darryl

Meet Your Facilitators

"How did you get started?" This question is a consistent one that we hear in our training programs. We all want to know the origin story, the path each person took to get to where they are today. How we began directly affects where we go, so it's important to consider how you got started in the profession. It's also worth exploring how there's no one right way to become an impactful facilitator.

We'll start.

How did you get started in training and development?

Carrie Addington: Very carefully.

I was working for Esteé Lauder Companies in a field sales position, where I partnered with small-business owners to provide education and business consulting. I found myself gravitating to the education part of the role more so than the sales or business consulting.

The haircare brand I worked for had a university housed within the corporate offices in the heart of the Meatpacking District in NYC, where business owners, managers, and staff would come from around the globe to learn about business strategy and professional development. Day one on the job, I stated to a co-worker that I would be teaching at the university before it was all said and done. It wasn't premeditated, and I hadn't had that plan when I'd accepted the role; I just naturally felt called to that as I oriented myself within the company. I watched the transformational experience of that learning space, the tangible representation of partnership between a brand and its customers, and I became more

and more drawn to facilitation. I volunteered to teach at the university in addition to my sales position and took that time to be a sponge and soak up everything I could from that experience.

The career sweet spot (that moment when I realized, like a small spark ignited within, this is what I'm meant to do) happened at our annual sales gathering, when I co-facilitated a program in front of 100 peers and the company executives. During those two hours, something came alive in me, and I felt more connected to the people in the room through the learning experience. That's the magic, I suppose. Training and developing others is a whole category of human connection separate from any other method, and I was hooked.

Jared Douglas: Very intentionally.

I was in graduate school studying industrial organizational psychology, and I did an internship with the Metropolitan Transportation Authority (MTA) in NYC in their training and development department. I learned so much and absorbed a variety of training programs, from new hire orientations with 100 people in attendance to manager development programs. During this internship, observing the vast scope of training and how it set people up for success, I realized my love of communication, people, and leader development, and that's when I decided to pursue this field that I'd fallen in love with. One day, my manager missed the Long Island train, and I stepped into the new manager program as the facilitator. I was thrown into the deep end of the pool and had to swim.

I also received some great advice early on. I started in training and development as a designer and had a mentor who said, "Anyone can be a 'good' facilitator or designer. If you want to be great at either, you must become fluent in both."

Nikki O'Keeffe: With sheer determination, really.

I had always wanted to be a teacher, but for some reason delayed stepping into that role initially, telling myself, "I'll do that later," as if

I knew it would be waiting for me. I was living in Australia counseling international students when I found myself building a growing curiosity for how to support the students outside our one-on-one conversations. Everyone needs to learn how to make friends when they don't speak the language, so I started creating opportunities for learning and mentoring based on a gap and a need.

Years later, I moved back to the United States and was working in software project management and building systems for drug trials, and the technical focus of it was not filling me up like the curiosity and connection that I had established in my work in Australia. I wanted to help others. I wanted to mentor people. As good timing would have it, I saw an opening for a trainer and was definitive in my thought: "This is my job; this is what I have to do."

The funny part of the story is that I went into labor with my first child during my first interview for the role. I told myself and my husband, "I'm not going into labor; I'm going into that interview." I spent my first week with my first child creating a slide deck around the importance of a needs assessment to continue the interview process. I knew I wanted the job, and I was determined to get it. (I did, by the way.)

Darryl Wyles: I'm an accidental trainer.

I initially struggled at my job as a banker and my manager said I needed assistance to improve performance. They paired me with someone to get me up to speed quickly, and my performance improved dramatically from this approach. Soon, I was succeeding at the job, and all I could focus on was helping others who were facing similar challenges. Before long, I got the opportunity to participate in a project as a trainer (thanks to a company merger). The training department at the financial institution noticed my efforts and asked me to apply for a role in their department. I fell in love with training and participating in the growth of others. Ever since, I've been focused on learning and helping others grow.

What topic do you love to facilitate?

Carrie: Facilitation and train-the-trainer programs, daring facilitation, overcoming challenging classroom behaviors, and leadership development programs.

Jared: Communication skills and instructional design principles (both the science and the art).

Nikki: Train-the-trainer programs and instructional design.

Darryl: Management development.

How has facilitation changed you?

Carrie: It's made me a better human and is my way of connecting with others. It's crafted and personalized my leadership style.

Jared: Facilitation has given me confidence as a subject matter expert (SME)—building expertise, exuding expertise, and managing to convince learners immediately that you are an expert. To do so, you must convince yourself first.

Nikki: Hearing expert advice from learners I work with. We, as facilitators, don't know it all.

Darryl: Facilitation has broadened my world perspective thanks to the people I meet. I love creating an environment where people come together and forge bonds.

What's your point of difference (POD) as a facilitator?

Carrie: My focus on the uniqueness of each individual in the room and my love of language and the arts contribute to work with individuals on establishing deeper connections with their daily work.

Jared: Establishing safety and comfort for learning to happen. I care about the learners a lot.

Nikki: Thoughtful and caring—at the root, the learners are humans who value connection first.

Darryl: I think training programs are great mini networking opportunities.

How would you define your facilitation style?

Carrie: Structured, service-minded, practical, and impactful.

Jared: Learner-centric, purpose-driven (I hate busy work), and casual.

Nikki: Energetic.

Darryl: A smooth, cool vibe.

What's the perspective you'll be bringing to the topics covered in this book?

Carrie: Challenging our thinking on key facilitation topics. I ask myself often, "What's different that I haven't heard before that's going to help me challenge and elevate our thinking?" I focus on the importance of mindset shifting, coaching, and questioning. Imagine empathy married with practicality.

Jared: I'm going to fight Carrie for some things because we are so similar in so many ways, but how we do facilitation is different. I'm focused on practical approaches—are we providing tips readers can use tomorrow for micro-adjustments and quick wins?

Nikki: I want to motivate readers to incorporate previous skills sets and lean on confidence from prior experience. Encourage readers to try new techniques and have fun. Model respect and your learners will follow.

Darryl: Your skill set can work across multiple industries. It's all about creating a productive learning environment.

These are our stories—well, at least the beginning of them. Throughout the rest of the book, you'll read more practical examples of our experiences on all things facilitation. And as you can tell, while we share similarities, our perspectives are our own and deeply unique.

Now it's your turn! Over the course of this book, we want you to reflect on your facilitation style; how we begin directly affects where we go, so it's important to consider how you got started in the profession. What is your origin story?

Chapter 1
The Facilitation Mindset

Being intentional with our mindset is at the core of our role as trainers and facilitators. It matters not only *what* we think, but *how* we think as we guide learners through a learning experience. So, it's only fitting that we open a book on training and facilitation with a conversation about mindset.

Ryan Gottfredson (2022) delved into research to make the argument that the effectiveness of a talent development professional "hinges upon your mindset," or how we view the world. For facilitators and trainers, our world most often includes the learning experience, the learners, and the content. So, in short, our mindset affects everything we do.

When the four of us facilitate ATD's train-the-trainer programs, and as we reflect on our early careers as trainers, there is a constant focus on "getting it right." This includes following all the checklists and best practices that tell us how to successfully meet the objectives of the program and demonstrate skill in training delivery. We want to deliver the content, adapt to our learners, overcome challenges, and even remove those pesky filler words we've grown accustomed to using when our nerves get the best of us. We want to provide our learners with the information they need and engage them with impactful questions and discussions. We want what they learn to translate into workplace performance improvements that impact the business. These are important skills to manage and master, but these alone can leave us feeling like merely a conduit for information and, over time, our function can start to feel—dare we say—mechanical.

At one point it may have been enough to be a conduit for information, and in certain contexts it may still be, but for most trainers and facilitators our role demands we go a step further. Questions like "What does this mean for you?" or "How does this impact your daily work?" are some of the most powerful in our toolkit. We take the objective content we are exploring and support learners as they contextualize and connect individual meaning to what they are learning. So, what does our mindset have to do with that?

Well, a lot. What is possible if we don't focus so much on "getting it right"? What happens when our foundational facilitation skills become developed, sharpened, and easier to use? This is when we elevate from good to great and when our mindset expands, adding dimension and depth to our facilitation.

A Tale of Two Mindsets

We can't have a conversation about mindset without referencing Carol Dweck (2007). As a psychologist and researcher for 30 years on the topic of developmental psychology, Dweck demystifies the two mindsets we confront as humans: a fixed mindset and a growth mindset (Table 1-1).

Table 1-1. Fixed vs. Growth Mindset

Mindset	What It Is	How It Presents
Fixed Mindset	Belief that your qualities are set in stone.	Creates an urgency to prove yourself over and over.
Growth Mindset	Belief that your qualities are things you can cultivate through your efforts, your strategies, and help from others.	The basic qualities you possess are a starting point for development.

Adapted from Dweck (2007).

You might wonder, how does this apply to facilitation? What does a fixed or growth mindset look like in our facilitator minds?

Well, it looks like this: Early in her training career, after executing a failed jigsaw activity, Carrie convinced herself (á la a fixed mindset) that she couldn't conquer this sometimes challenging activity. Her inner

dialogue anytime a jigsaw was used as an instructional method in a course was "I'm not smart enough to get this right," "I'm not good with numbers," and "I'm going to damage my credibility if I mess this up." She had to work overtime to move from a fixed mindset to a growth mindset. Now, she conducts jigsaw activities, and while they're not easy for her, if something goes awry, she responds with "I should consider using a visual analogy to help explain the activity (for the learners and for me)," or "I have more opportunities to get this right," or even "My challenge with this technique is relatable to the learners and builds trust."

The challenging thing about mindset is that we can very easily backslide into a fixed mindset as facilitators in moments when negative self-talk creeps in, almost without us recognizing. However, we can learn to uphold a growth mindset even while having individual thoughts that are more fixed. When it comes to your role as a trainer or facilitator, what type of mindset do you have? If we place mindset on a continuum, where would you place yourself? To pose the question in a different way, what belief do you have in yourself? Write your initials on the continuum in Figure 1-1 (not where you want to be but where you are).

Figure 1-1. Mindset Continuum

Fixed Mindset ———————▶ Growth Mindset

Now that we know where we are starting, let's explore how we move from good to great. (Hint: Regardless of where you placed yourself on the continuum above, there's always opportunity for growth.)

How Do I Move From Good to Great?

The Ritz Carlton prides itself on customer service in the luxury hotel space (NIST 2015). The brand has been celebrated and revered in the customer service industry for defining the gold standard of service. It empowers its employees to live the company's values by establishing a strong foundation of guiding principles, including a company motto, three essential service steps, a credo statement, and an employee promise. To uphold this level of

service-oriented greatness, the Credo Card is designed to be a part of the employees' uniform as a reinforcement of their foundational standards. This is supplemented with brief, daily touch-base meetings to discuss how to uphold their service. We, as facilitators, are also always thinking of how to elevate from good to great. The Ritz Carlton's service-oriented approach is an inspiration for how to do just that.

This type of work takes more self-management than we may initially realize. Adopting a service-minded perspective can help us to focus on our learners' needs for sure, but we can't completely overlook our own needs along the way. We need a second focus on developing our own skills to ensure we continue to grow and develop.

The concept of growth in our roles is challenging because there's no real endgame for facilitators. There's no peak to reach where you are greeted with magical beaches, refreshing drinks with tiny umbrellas, and the ability to rest in your acquired skills; instead, the industry is always evolving, the people in the room (virtual or in-person) are continually changing, and our considerations and environments are constantly shifting. We must remain curious about what is new, what is next, and even what isn't working anymore if we want to continue to create impactful learning experiences.

After all, the role of a facilitator is to create opportunities for learning, opportunities that our learners want to seize. We prepare content and experiences, but a large part of our success is dependent on our relationship with learners and how we hold them *able*.

For Your Consideration

Moving From Good to Great

Consider these tips for elevating your facilitation.

▶ **Take on or volunteer to train a new topic to stretch your skill set.** Early in Darryl's career in retail banking, he trained bank tellers and built his confidence in this space. To grow his skill set, he volunteered to facilitate training for the company's wealth management

units, stretching him to learn about new systems, new clients, and a segment of the workforce he wasn't familiar with. Volunteering for this opportunity helped sharpen the skills he uses to prepare for new training initiatives.

▶ **Observe other facilitators in action.** This enables you to view a learning session from two points of view: the facilitator and the learner. Whether you watch a colleague or attend a session at a conference, these are opportunities to see common facilitation skills modeled and to identify nuances of a particular facilitation style along the way. Also, it gives you an opportunity to view how learners receive and respond to information shared.

▶ **Read books and articles on facilitation skills and techniques.** The road to where we want to go often has already been traveled by someone else. Reading books and articles from thought leaders exposes you to new perspectives that can inform your planning and decision making in the classroom. Read and study broadly and aim to continually connect with other facilitators.

▶ **Periodically, take a facilitation skills self-assessment.** We constantly evolve. Completing a self-assessment gives you a snapshot of where you are today and highlights the opportunities for growth you have moving forward. Build a schedule where you set time aside to do a self-assessment as part of your preparation process for training delivery.

▶ **Take risks.** Don't be afraid to challenge yourself and get away from your comfort zone. After spending 15 years in retail banking, Darryl transitioned to working for a parks and recreation agency. The change in workforce and workflow was different from what he was accustomed to in retail banking, and allowed him to adjust his facilitation approach to fit within the agency's culture. Instead of delivering classes in hotels or conference rooms, he delivered classes at a maintenance facility or a nature center. While the setting changed, the expectations his learners had for him remained the same.

How Do I Hold Learners Able as Opposed to Accountable?

Part of the facilitation mindset is the language we use to connect individuals to information. The words we use have innate and sometimes unexpected power (which we explore more in chapter 7). Sometimes our mindset influences our language, and sometimes our language influences our mindset. *Accountable* is an example of the latter.

Consider your reaction to the word *accountable*. Do you tense at all? Perhaps you roll your eyes, or even get flushed or feel frustrated. Whatever happens for you, it's an example of how language influences your mindset and the power of words in triggering emotions and reactions. The same happens for learners when we are facilitating. Our goal is to open their minds to possibilities, so our language is crucial to making sure we don't unintentionally shut them down, render them passive, or distract them.

Shifting from *accountable* to *able* with our learners is a subtle yet important example of this concept. *Ableness* has a positive connotation because it is rooted in what our learners can do as opposed to what we think they should do. Table 1-2 gives a few examples of a simple shift from *accountable* to *able*.

Table 1-2. Accountable vs. Able

Accountable	Able
Did you complete the activity?	Did you have everything you needed to complete the activity?
Did you use the feedback model in the role play?	What was challenging about using the feedback model for the first time?
You will need to score 80% to pass this assessment.	A passing score is 80% on this assessment. What additional support do you need to be successful?

It is a subtle but important shift that is rooted in mindset. Holding learners able includes using language oriented toward opportunity and how they are set up for success. We are giving learners the opportunity

to share not just if they did something, but how they did it, and perhaps even what could have improved the experience too. Accountability is a transactional approach (tasks and deadlines), whereas ableness is a collaborative approach (ideas and parameters).

Ableness focuses on what's possible, what our learners can achieve and what they need to be successful. This is a powerful focus for us as facilitators because we can guide our learners down this path with us. We can ask them questions to encourage thinking in this pattern of ableness during the learning experience, which could have a lasting impact when they are back on the job. If we adopt a mindset of ableness, it could influence our learners to approach their own work with a mindset of ableness. We can even apply the concept of ableness over accountability when we encounter one of the biggest challenges in facilitation: pivoting mid-course.

How Do I Get Better at Pivoting in the Moment When Facilitating?

When we talk about pivoting during facilitation, we are referencing those unexpected moments that occur that require you as the facilitator to adapt to keep the learning experience on track. In fact, you'll find that as we explore various topics throughout this book, a common theme is modeling adaptability and perfecting the pivot in your facilitation. This ranks high on our "frequent questions from learners" list, regardless of what program we are facilitating.

Pivoting is equal parts intuition and planning because, at its very core, facilitation is adaptation. Yes, we plan content, and we also plan to be ready to throw it all out if it isn't working for our learners. Sometimes, at the proverbial fork in the road, neither path works, and we need to turn right around and march back up the road we just walked.

When we prepare to adapt, what role does mindset play? What are we thinking about and how are we anticipating and approaching the work that we do? These are abstract questions that we invite you to revisit. They are not easily answered, but they are crucial for facilitators

to consider for every program we deliver, marking the ability to pivot or adapt as an essential skill for facilitators.

When we are facilitating, we are in constant conversation with our learners. We are working alongside them in their exploration, hearing what they have to say and incorporating their needs into the experience. We are coaching and guiding them to find their own path to walk during and after the experience. Facilitation is organic, sometimes messy, sometimes collaborative, so our mindset is particularly important in preparing us to adapt. To prepare ourselves for the pivot, we typically think through the following questions:

- What feelings do I have around pivoting?
- What's at risk if I pivot? If I don't pivot?
- What's the ideal outcome?
- What behaviors or specific facilitation skills can I leverage in this moment?

Facilitation in Action

Feedback as an Enabler for Mindset

Early in her facilitation journey, Carrie was leading a 60-minute course for small-business owners and managers on managing profit and loss statements. Her audience was captive, and her organization was the leading authority on business trainings in the beauty industry for its particular segment. A mentor observed from the back of the room as Carrie facilitated the content, exactly as the facilitator materials dictated. The content was delivered on time and as expected. The learners were gracious as they departed the room for the next session and remarked on how much they enjoyed Carrie's facilitation style.

As the last participant departed the room, Carrie was beaming and feeling confident in her performance. Her mentor asked if she was open to feedback. The mentor pointed out that while the delivery was on time, accurate, and informational, the experience and practicality of the content was lacking. Her mentor pointed out that Carrie had added no

relevant examples or personal stories to illuminate the content and that when a few questions were posed by the learners, she'd answered with a promise to follow up instead of taking those questions in the moment. Carrie nodded and was ready to defend her choice when her mentor asked her a simple question: "You know to include stories and questions for increased engagement and retention, so why did you make the decision you did?" Carrie sat quietly before uttering, "I was scared it would mess up my plan." The pivot didn't happen, not because of a lack of skill or knowledge but a lack of willingness (mindset) and preparedness. It's this moment that shifted Carrie's mindset to constantly invite formative feedback from learners and peers and plan for how to overcome in the moment. Today, nearly 15 years later, Carrie embraces those moments, thriving when a kink is thrown into the plan, challenging her to adjust in the moment. The mantra she uses to keep herself on track is "It's not about me! It's about the learner."

What Is the Difference Between Training and Facilitation, Really?

If context and preparation are crucial to our mindset, we need to understand what different contexts we may be called to prepare for. As we stated in the introduction, it is quite possible to identify as both a trainer and a facilitator depending on the training program, the content, the organization, and the intended outcomes. Recognizing the difference between training and facilitation and when to leverage each is an art. Let's take an opportunity to define each (*Merriam-Webster*).

Facilitate (verb): To make easier, help bring about.

Train (verb): To make prepared (as by exercise) for a test of skill.

For a more learning-specific definition of *facilitation*, we can turn to the Talent Development Body of Knowledge (2019):

Facilitator: takes less of a delivery role, is learner-centered, and acts as a catalyst for learning

Trainer: a TD professional who helps individuals improve performance by facilitating learning in a traditional or virtual classroom, one-on-one, or on-the-job in an organization

The definitions help to illuminate a rather clear distinction between the two. **Facilitation** is about getting learners comfortable in the environment so they can discover their own takeaways. We might have learning objectives and ideas of what learners will walk away with after a facilitation, but we also remain open to being surprised with new or alternative ideas or perspectives. Consider this, and reread this paragraph. Identify the words and phrases that resonate with you.

Training is a very collaborative form of information delivery. When we train, we usually teach specific processes and procedures and ensure that our learners comprehend the information and can replicate the skill or process we are covering. Training tends to work with higher-risk scenarios like software training, safety regulations, and new hire training. These areas have content that is specific in nature, containing fact and fallacy, and right and wrong ways to do things. Not following the proper safety measures when operating heavy machinery in a manufacturing environment has very dangerous and specific consequences: People will be injured and equipment will be damaged or destroyed. Now, consider rereading this paragraph and highlighting all the words that resonate with you. How many words and phrases resonate with your daily work?

It's likely that you identify with one more than the other by the very nature of the type of training programs you deliver. When conducting field training for a premier beauty brand, Carrie was a trainer because her role was to share the right information, to inform, and to drive performance through information delivery. When conducting learning programs focused on developing leadership narratives, Carrie was a facilitator because her role was to listen, question, and coach as well as build consensus.

The content, the learners, and the experience of our learning programs all might require us to toggle between these two roles often.

Consolidating the differences and situational nuances of the trainer's role and the facilitator's role is filled with "what if's." ATD provides an overview of some of the core differences in the snapshot in Table 1-3.

Table 1-3. Training vs. Facilitating Roles

The Trainer's Role	The Facilitator's Role
Shares the right information	Shares content in a learner-centered way
Offers clear point of view	Serves as a catalyst for learning
Champions content	Champions experience
Instructs, directs, and informs	Listens, questions, and coaches to allow learners to derive meaning
Ensures learning takes place	Builds consensus
Drives learning objective achievement	Drives action and relevance to enhance learning

Adapted from ATD (2016).

We, the authors of this book, identify most as facilitators and will use that language throughout the book to encapsulate both facilitators and trainers, regardless of which role you more closely identify with.

For Your Consideration

We Don't Know What We Don't Know

Imagine you are facilitating a leadership workshop where learners took a 360 assessment of their leadership abilities, submitted their self-assessment, and collected feedback from their peers, teams, and leaders. Each learner receives a different report highlighting their unique strengths and weaknesses. That means each learner has something different to focus on, yet they are all attending the same workshop with you.

How will you make this work? How do you run one workshop with a myriad of outcomes for your learners? This is one of the key differences between training and facilitating. When we facilitate, we do not always know how we'll guide the learners to the outcomes. We provide the content and the opportunity for them to devise significant meaning for themselves, while serving as a guide or coach.

> In this example, we would most likely introduce learners to the leadership model we are working with, help them digest their reports to understand their results, then support their exploration to identify key opportunities to strengthen their leadership abilities. We move past the specific takeaway from us or the course and into a contextualized plan that is learner generated.

Having a general understanding of the difference between training and facilitating is important because we all gravitate toward our own preferences. One of the most impactful learning moments in our experience facilitating ATD's Training & Facilitation Certificate Program is a lesson that uses Elaine Biech's Four Dimensions of Training to identify the dimensions we as facilitators focus on when delivering programs (Biech 2005). Those four dimensions are:

- **Content:** The purpose or goal of the learning experience
- **Process:** The overall flow of a training program
- **Task:** The tasks needed to manage the learning environment
- **People:** The participants in the training program

There are a variety of approaches to take in facilitating this content, but regardless of the facilitator's approach, this is one of the highest rated and remarked-on activities. It gets such a high response because it's actionable and a great mechanism for not only evaluating your facilitation approach but planning for ways to continue your own professional development.

Think about your style when you are working with learners. Do you tend to focus on the mechanics of a workshop, putting time and effort into the setup of activities? Perhaps you always have one eye on the clock to make sure you cover everything in your agenda. Maybe you hear yourself saying, "I'm going to pause here to make sure we are all clear on this point before moving on." If any of these scenarios sound familiar, you are probably focused on the tasks and processes involved in a workshop; this may indicate a preference for the dimensions of task and process.

Do you find yourself getting very excited about your subject matter? Maybe losing track of time as you move from topic to topic? Do you hear yourself asking questions that yield responses with more feelings or opinions rather than facts? If you answered yes to any of those questions, you are probably focused on the content and people when facilitating and may have a preference for the dimensions of content and people.

Natural preferences are just that: *natural*. It doesn't matter which category we lean toward if we are aware of where our preferences push us, so we can pull from the other dimensions whenever it benefits our learners. The art is moving between the four dimensions of training to weave an experience for our learners that feels seamless and provides a more balanced approach. For instance, the experience in the next Facilitation in Action section encompasses many of the ideas we have discussed in this chapter.

Facilitation in Action

A Day in the Life

"I have an update for you," Jane, the stakeholder, said to Jared.

"Oh?" Jared replied, his head cocked to the side. It was 8:30 a.m. and he had just arrived in the Chicago office ready to facilitate a team-building workshop for Jane's team of 15.

"We got approval to fly the extended team in for today!" Jane said. She was beaming, excited by this development.

"Well, that's great news! How many people are we expecting now?" Jared asked nervously as they rounded the corner to the main conference room, which was buzzing with people.

"We're close to 40 now," Jane said, her smile shrinking a little as she turned to him. "Is that going to work for what you had planned?" she asked.

"We'll figure it out," he said with a smile.

Jared was in a bit of a dilemma. Jane's team had recently partnered with a new creative team and there was a little friction between them. They didn't know each other, worked in different cities and offices, and didn't

even use the same terms and concepts because their day-to-day work was quite different.

The original training plan was to travel to Chicago to conduct on-site training for Jane's team in communication and relationship-building tactics to make headway with their creative counterparts. The workshop Jared had planned would have equipped learners with tools to develop relationships. Now, with both teams in the same room, the purpose had changed. Jared could go beyond equipping individuals with tools—he could develop actual relationships in the moment of the learning experience.

Jared's mind was already racing, and his mindset needed to shift quickly. He began thinking of what he had prepared and what he could still use. What activities or content could he keep? What could he change to be more effective? How could he manage the logistics of almost triple the number of learners he had been expecting?

Jared used the preparation time he had left to adapt the beginning of his plan. As a facilitator, he was very purpose focused. That meant he needed to be crystal-clear on why everyone was together, and he wanted to ensure that his learners could walk away feeling like they could immediately apply what they had learned or do at least one thing differently or better than before.

Most of the content was relevant because they were still there to learn how to work better with one another. The format changed drastically, though. Many learners were meeting their counterparts face-to-face for the first time. Jared gave more time to introductions, knowing it was an investment in their relationships and would build rapport.

Because there was some existing tension between the teams, he knew the learners needed to spend a good amount of time exploring communication styles and preferences. He leaned heavily into his training skills when exploring the styles, ensuring they understood the model, and switched into facilitation when trying to pull preferences from everyone. He adapted as many activities as possible to partner each learner with someone new they were working with. They shifted from learning about developing relationships to building them together in the moment.

He printed extra materials and took the workshop one section at a time. While learners worked through an activity, he used that time to adapt what would come next. It was challenging, a true test of flexibility and creativity, but it became one of the most powerful and memorable experiences he's had as a facilitator. And he attributed his success to his facilitation mindset.

Jared thought of how to hold the learners able on two measures: Were they practicing adapting their communication styles? And, were they getting to know their colleagues better? He chose these two measures because they were possible to accomplish in the room and they were possible to observe as a facilitator. Throughout the workshop he used debriefs to ask questions and hear from learners what their experiences had been. This helped inform along the way how their relationships were dweveloping and what they needed in the next activity or discussion.

The day was a success both in formal and informal measurements. Many learners shared in their evaluations that they'd learned a new skill and felt a new appreciation for different styles and perspectives when communicating. On the informal side, his stakeholders were happy and felt the day was energizing and productive. Most of the team members went out to happy hour together after the training, which, after spending a full eight hours together, says something about the relationships they were already building. They literally didn't want to stop communicating when the workday was done.

In this example, Jared's mindset focused on the practical. He made choices that yielded immediate results for his learners; they developed relationships with their new colleagues that very day. This story is not unique; every day, facilitators face changes in circumstances or last-minute requests. While we may handle similar situations in different ways, we are all capable of being successful.

What's Next?

Being intentional with our mindset means taking a physical and mental breath, thinking about where we are in the moment and where we want

to be in the next moment, and making decisions that get us closer to the desired outcome. This admittedly can be difficult. It requires fierce control over our emotions, reactions, biases, and impulses, yet also a dash of spontaneity and trust in ourselves.

Our mindset is not stagnant; it is something ever-changing that adapts to our context. We can, however, practice shifting our mindset. We can find a comfortable or productive place for our mind to rest, and we can practice getting it there with different techniques. One technique is to explore more about ourselves and our preferences.

In the Authors' Note to this book, each of us answered a series of questions to demonstrate our preferences and experiences, and how we view our individual styles as facilitators. You can use the same questions to begin exploring your facilitation mindset. Where are you starting from? What are your natural preferences? Being aware of yourself will influence your relationship with your content, your learners, and the learning experience you create.

Invitation

Answer these questions to explore your mindset and preferences. Feel free to review the authors' responses in the Authors' Note to prompt your thinking.

1. What topics do I love to facilitate ?

     _____

     _____

2. How has facilitation changed me?

     _____

     _____

3. What is my point of difference as a facilitator?

     _____

     _____

4. What are three words that define my unique facilitation style?

_____

_____

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