

TRAINING 101

The Essential Skill

Rule the room
with flipchart
finesse.

By Alan Ramias

Illustration by Claudia Newell

Group facilitators possess subtle and difficult skills to master. They control pacing and participation; bring teams to consensus; draw out issues and ideas; apply tools and techniques that stimulate dialogue and understanding; develop rapport while maintaining an effective distance; and manage conflict, competitiveness, and other group dynamics. Some of those tasks require more artistry than mechanics. It's a pleasure to watch a skilled facilitator guide a

team through the intricacies of group process with just the right pace and style.

There is, however, one skill that every facilitator needs—a basic, bedrock skill that can make the difference between success and failure. That skill is statement capture.

An effective facilitator grasps the essence of a statement quickly, writes it up accurately, and sustains the flow of conversation. An ineffective facilitator intervenes in the group process, disrupts

it by asking for clarification or, worse, a replay, and thus draws attention to his or her lack of skill. It's painful to watch someone go through that ordeal so publicly and so needlessly. Because of all of the many skills required of a good facilitator, statement capture is one of the most mechanical and most readily learned. It applies to any situation in which a team is generating a list—of ideas, opportunities, problems, or alternatives—and someone is charged with writing up the list on a flipchart or chalkboard.

Speed and accuracy

Speed and accuracy are the paramount dimensions of performance—whether you're shooting hoops, lobbing a tennis ball, or capturing statements. But to become good at any of those activities, speed and accuracy aren't achieved at once. The beginner concentrates first on accuracy: hitting it right every time. Performance is sometimes embarrassingly slow, but the learner who tries to speed up too soon will find that accuracy drops off radically.

Once a beginner masters the basics—the right stance, an effective swing—a coach can begin to demand more speed, until performance begins to falter. Then, it's back to basics and refinement of the small things that enhance performance (such as changing the angle of a swing) before gradually speeding the pace of performance to whatever standard is required.

Skill level 1: Accuracy. For the skill of statement capture, here's how you achieve accuracy:

- Break down skills into learnable steps.
- Practice.
- Measure improvement.

Accuracy means writing down spoken statements with 100 percent accuracy. You can train someone for that skill by providing numerous opportunities to practice writing down statements you or others make until the facilitator captures the statements without error.

Here are some practice tips.

- Speak slowly and clearly. Remember that you're not after speed just yet.
- If you're working with a nervous beginner, have that person start by writing down what you say on a pad of paper, not a flipchart. Part of the challenge for some facilitators is performing in front of a group, so don't stick your learner in that situation until he or she is jotting down statements accurately.
- Consider providing a tape recording of statements, and let the learner practice at his or her own pace. That type of drill is effective because the learner can concentrate on *what* is said, rather than *how* it's said. (Interpretation of tone,

level skill. For now, require only accuracy but at 100 percent.

Skill level 2: Accuracy and speed. Once your learner has become accomplished at capturing statements, it's time to add the ingredient of speed. The goal is for the facilitator to become skilled at capturing the verbal exchanges of others without disrupting the flow of conversation.

Once again, audiotape practice can be effective. To make sure the focus is on increased speed of capture, consider these actions:

- Play the tape straight through to the end of a discussion. That will keep your learner from stopping the tape periodically to check for accuracy or repeat a section.

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body language, and hidden meanings is a higher-level skill.) The learner can replay the tape for additional practice.

- If you use an audiotape, give your learner a workbook or transcript for self-evaluation.
- Allow your learner to drop unnecessary words (pronouns, indefinite articles, and so forth) from statements gradually as long as meaning isn't lost. But control that liberty as it can lead to ineffective summarizing.
- Allow use of abbreviations and acronyms, but only those familiar to the group.

Some things to avoid:

- Don't ask people to practice by taking endless notes during meetings. Start by asking them to capture single statements.
- Don't ask learners to summarize statements. Summarization is a higher-

● Taped discussions should be about real subjects, conducted at normal pace with interruptions, non sequiturs, and the other stuff of real conversations. The learner's role is to cut through any clutter and capture the useful statements.

● A more challenging way of training for speed and accuracy is to use videotapes of group discussions. That way, the learner has to contend with gestures and other behaviors that contribute to the tone and meaning of a discussion, while focusing on capturing statements accurately at the pace of conversation.

● If you conduct the training with actual groups, ask your learner to capture statements on a notepad, not to run the session. After the discussion, compare notes with the learner to check for accuracy.

Skill level 3: Refinement. Your learner should now be competent at capturing

statements with reasonable speed and accuracy, but not necessarily skilled at doing it with a group. To increase that skill, do this:

- Have him or her practice statement capture using a flipchart instead of a notepad. For learners unfamiliar with the basics of using a flipchart, show them how to use colors, graphics, and other techniques.
- Ask a volunteer group to hold a meeting with your learner as the facilitator. If group members are skilled at meeting facilitation, they might provide some constructive feedback.
- Videotape your learner running a meeting, and play it back so that you can critique the performance together.

Now it's time to teach some techniques for controlling the pace of conversation and intervening without seeming to slow down the discussion.

Parallel capture. When a group is having a fast-paced conversation and ideas are popping out too fast to get them all, the facilitator should turn his or her back to the group and face the flipchart, listen intently, and write a word or two rather than try to capture complete statements. When the conversation lulls, the facilitator shows the list to the group and says, "Let's go back now and flesh out these ideas." The group then develops complete, thoughtful statements of each idea.

Index cards. When a group has a tendency to get out of sequence—let's say you're asking them to identify problems and they're continually bringing up solutions—give group members index cards and tell them that when they have an idea to write it on a card. Collect the cards when you're ready to move to the idea-generation phase, and use them to create a starter list of ideas.

1-2-3 page reviews. Establish a rule to review flipchart entries with your group periodically—such as every

second or third page—rather than reviewing every item as you write it up.

Skill level 4: Mastery. A facilitator needs to do more than just capture what group members say; the facilitator should be able to improve people's statements. That means getting good enough at facilitation so that you no longer write up what someone says but what that person means. The proof is when you ask, "Is that what you meant?" and the person replies, "Yes, exactly" when what you wrote is far more succinct, eloquent, and accurate than what was actually said.

You can train someone to do that by reading off prepared statements and asking the learner to improve on what was said. Be forewarned: At this stage, we're leaving behind the mechanical skills and entering an area in which some facilitators have capabilities that others won't attain even through practice and training. The person who can sum up the disjointed thoughts of others eloquently and concisely with a single apt phrase doesn't acquire that skill through practice alone. Still, most of us can get good enough to lead a group through the thickets of complicated discussions with grace and precision.

The essential skill of statement capture consists of four levels of difficulty, each of which can be learned with practice. Is all that preparation worthwhile for what is essentially a single skill of a competent facilitator? I'd argue that it is more than a basic skill. It's the summation of what a good facilitator does: enhance the creativity and thinking of groups.

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