

FACILITATION GUIDE FOR USING DR. ANDY ROARK ACTIVE STAFF TRAINING IN YOUR PRACTICE

INTRODUCTION

Facilitation is a process in which an individual conducts a structured and effective meeting that produces a clear result that is commonly understood and supported by all participants. Sounds boring, right? With Dr. Andy Roark's facilitation technique you'll get a handle on proven techniques to facilitate effective and engaging meetings that will drive change in your practice.



GROUND RULES

Ground rules allow us to have productive meetings that result in honest feedback, collaborative conversations, and drive our teams from good to great.

- **This is about the future and not the past.** We are talking about what we are doing to improve client communication and patient care going forward - not about what happened last week.
- **Good to even better.** We are a good team. We are going to talk about what to get even better!
- **This is about the team, not the individual.** “We can improve client experience by being more consistent with estimates.”
- **Everyone gets to talk.** Establish this at the beginning so that individuals know that their input matters.
- **Everyone gets heard.** This allows us to keep the conversation from bogging down and there is no domination of the conversation.
- **Everyone is safe.** There are no negative repercussions coming out of this meeting. Honest feedback is vital.
- **Optional:** Are there other ground rules that the team agrees that they would like to add?

Attendance is important. Make it easy for people who are out of the hospital to attend. Digital attendance is a viable solution with technology like Zoom and Skype.

Seating arrangements. We want to make sure that your team is shuffled up enough to allow everyone the opportunity to talk and to make sure that the dynamic is collaborative.

TYPES OF ENGAGEMENT

Active Team Training with Engagement is the key to quality training. Engaged employees own the process and produce results. Your job is to get your employees to have a conversation that they need to have.

- **Writing/Processing for introverts.** Introverts need to have the time to process before we ask them to engage in the conversation. Normalize processing time before team discussion.
- **Collecting as a team.** Index cards are your friend. Ask the team to answer a question. Team writes it down, turns in their answers. Facilitator reads answers.
- **Sharing as pairs.** Team discusses in pairs about the questions. Rotating who they talk to for each question.
- **Sharing as groups.** Team discusses in small groups about the questions. If they discuss in small groups, it builds their confidence to share as a team.
- **Optional:** Give questions as part of the meeting announcement so people can think on examples.

GETTING TEAMS TO DISCUSS/ROLE PLAY

The research is really clear, the best training method is role-playing. The research is in, team members hate role-play. We are going to talk about what we are going to say to the client and we are going to practice what we say.

1. **Set the mood.** Turn the music up.
2. **Seating arrangement.** Shuffle people around.
3. **Start small.** Simple questions with obvious answers and low-stakes answers.
4. **Give introverts time to write.** Everyone participates.
5. **Collect written responses from groups.**
6. **Prime the meeting.** Ask for help getting people talking ahead of time from your people who know the topic or who are forces of positivity.
7. **Call on people.** After people have time to write their thoughts down.
8. **Stall them out.** You have to be willing to sit in the silence and wait for them to respond.
9. **Celebrate those who respond.**
 - Thanks
 - Praise for the idea/input
 - MAKE IT SAFE!!!
 - Never turn it back on them or penalize them for sticking their neck out.
10. **Collect everything and promise nothing.**

WORKING WITH EXAMPLES

Specific cased based examples are the best team training tool. It allows the entire team to see the same picture.

- **I recommend NOT taking a case that went badly.** These are not teachable moments for groups – they are fraught with danger.
- **Building on a Win.**
 - **When you get a great outcome from an angry client**
- **Using Stand-Alone Examples**
 1. No one thrown under bus
 2. No emotional attachments
 3. No criticisms
 4. Fast to add to meetings
 5. Check the leader notes for background info to share, secret info that you can reveal as the discussion goes on, and the discussion points I recommend you bring out if they don't appear.
 6. Prep your open-ended questions
 - a. What do we really want to make sure we don't do to make this situation worse?
 - b. What could we have done to avoid this situation?
 - c. What do we want to AVOID here?
 - d. What are our goals?
 - e. What EXACTLY do we say to this person?
 - f. How would we, as a team, handle this situation?
 - g. BONUS: Re-arrange suggestions from the team to create your own step-by-step team plan.
 - i. Take notes on a flip chart or whiteboard so everyone can see
 - ii. Focus on the WHY for each suggestion. The goal is to drive understanding of concepts so people can handle a variety of different problems in the future.
 - iii. Give lots of praise for good ideas

BREAKING UP THE COURSE

This course is your own and we want you to use it in a way that works for you!

- **Deep Dive Team Training.** Go through the entire course in one sitting (2-4 hours with discussion)
- **Deep Dive Examples.** Just use the discussion examples (1-4 hours with discussion – no lecture component).
- **Target Teaching Skills** with one Module at a time. (30 minutes - 1 hour with discussion).
- **Target Examples one example at a time as stand-alone.** (10 - 30 minutes with discussion no lecture component).

