

# Training corporate managers to facilitate: The next generation of facilitating experiential methodologies?

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**S**uccessfully managing change in the corporate workplace is probably one of the most important factors in determining an organization's success. Information explosion, rapid evolutions in technologies, workforce changes and needs, global economic influences, environmental factors, adaptations in consumer preferences, and other considerations all create the need for corporate leaders to learn how to manage constantly changing marketplaces.

At the very heart of managing change in corporations is the concept of facilitation. In corporate settings, facilitation skills are often viewed as those process-oriented skills used by managers to enhance an organization's capability and efficiency in reaching designated objectives. Often linked to concepts of synergy and systems thinking, facilitation processes seek to take advantage of what several individuals can do together when their capabilities are integrated.

Based on the thoughts of Bacon (1987) and Doughty (1991), Priest and Gass (1993) postulated the evolution of five (and later six) generations of facilitation techniques associated with experiential learning practices. One way of viewing these six generations can be in the following manner based on when such experiential methodologies evolved and their increasing levels of sophistication (Priest & Gass, 1993, 1997):

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Since the development of this model (See figure 1), several others have suggested other possible evolutions, variations, or generations of facilitation styles associated with experiential methodologies (e.g., Greenaway, 1993; Itin, 1995). Greenaway believed that a future generation of facilitation style would involve learners as facilitators of their own experiences. In a landmark study on the longitudinal impact of follow-up techniques that paralleled Greenway's beliefs, Priest and Lesperance (1994) found that the corporate groups that experienced the greatest gain and retention from experiential methodologies were those groups that were able to implement self-facilitating practices back in their workplace.

Priest and Lesperance speculated that the corporate group was able to use several debriefing techniques (e.g., funnelling as found in Priest & Naismith, 1993; Priest & Gass, 1997) learned during their training program to examine task ("product") and relationship ("process") issues associated with their work projects. The team leader would hold a debriefing session instead of traditional corporate meetings, and corporate managers would literally hold meetings using debriefing strategies similar to those used during their experiential learning exercises. In this way, the group members continued to learn from their workplace experiences and were able to build further on their newly developed teamwork.

The purpose of this study was to expand on these findings, investigating the advantages as well as disadvantages of using experiential programming and associated facilitation skills to train corporate managers to facilitate their own group and individual processes in business settings.

## Methodology

The research paradigm selected for this qualitative investigation was interpretive inquiry using a multiple

method approach (Denzin & Lincoln, 1994; Schwandt, 1994; Wolcott, 1994). As a research process, interpretive inquiry seeks to understand the reality of subjects through their eyes by providing: (1) a description of what is occurring based on data from observations made by the researcher and reported to the researcher by others, (2) an analysis of essential features and their interrelationships (e.g., how things work or aren't working, how things might work "better"), and (3) an interpretation of the process, meanings, and context of what has occurred and presently is occurring and what conclusions might be drawn from this understanding (Wolcott, 1994).

All of the managers, directors, and executive officers of a Canadian financial organization (N = 120) participated in an eight-hour Facilitation Training Program (FTP). This group was divided into five smaller groups of 23-25 individuals, and five consecutive days of FTP training were conducted.

Prior to their training day, subjects were sent materials outlining facilitation theory based on the work of Priest & Gass (1997). The FTP day consisted of one hour of reviewing facilitation techniques addressed in the readings and 6-7 hours of applying these concepts in experiential learning situations. These experiential learning situations consisted of taking turns observing and debriefing (or being participants and being debriefed in) a series of group initiative activities designed to simulate workplace projects (e.g., Keypunch and Mergers/Star Wars, as found in Rohnke & Butler, 1995). Feedback from peers and coaching from two experiential trainers well versed in experiential methodologies and facilitation theory enhanced the quality of the subjects' learning. By the end of the FTP day, it appeared to these two trainers that all subjects were capable of conducting a group discussion using basic debriefing techniques.

One month following the FTP, these skills were further practiced by debriefing a group of ten company employees at an organization-wide learning day. During this time, each subject was assigned the task of

leading a one-hour discussion with a group of employees (whom they had never met before) about the quality of work and life in the corporation with an emphasis on values, learning, and future change. A trained facilitator was present with every subject to assist as a resource. These facilitators were rarely used and most simply acted as discussion recorders. After this homework assignment was completed, all subjects were encouraged to continue applying their debriefing skills on the job with their own employees and teams.

Five months after this organization-wide learning day, 97 of the 120 subjects completed in-depth, open-ended surveys asking whether they were using their newfound facilitation skills in the workplace. They were specifically asked for examples of success and to describe barriers that had prevented the application of their learning. From these 97 respondents, 24 subjects (20% of the original group and 25% of the subjects surveyed) were selected for a tape-recorded interview in the privacy of each subject's office. This selection process had two purposes: (1) to acquire a proportionately representative sample from each strata within the company (i.e., two executives, five directors, and 17 managers), and (2) to obtain a purposeful selection that portrayed a diversity of opinion regarding the FTP. Data were transcribed, analyzed for patterns in behaviors and common content of language, and organized for interpretations following procedures outlined in Miles and Huberman (1994).

## Results

Overall, 21 of the subjects interviewed reported that their facilitation training resulted in a positive difference since the FTP training. At no time did any of these individuals express a sense of futility regarding the training or its implementation. The three remaining subjects reported never finding the opportunity to implement their facilitation training due to "I don't have a group that reports to me" and "We don't have regular staff meetings." These three seemed to dismiss

Figure 1. Six Generations of Facilitation Techniques

DECADE	FACILITATION GENERATION	RESULTING OUTCOME PROGRAM
1940s	Let the Experience Speak for Itself / Recreational	Learning and Doing
1950s	Speak on Behalf of the Experience / Rec.-Educational	Learning by Telling
1960s	Debrief the Experience (Funnelling) / Educational	Learning through Reflection
1970s	(Directly) Frontload the Experience / Developmental	Direction plus Reflection
1980s	Isomorphically Frame the Experience / Develop.-Therapeutic	Reinforcement with Reflection
1990s	(Indirectly) Frontload the Experience / Therapeutic	Redirection before Reflection

facilitation as useful only in group meetings and did not consider its use for one-on-one discussions. However, they expected to apply it soon: "Nevertheless, I think the training was useful and will put it to use when I am eventually given a group to work with."

Even though they had not utilized their training, these three and 12 other subjects could still "recall all the major principles or strategies covered in the training session" six months later. The key concepts possessed a "staying power" with most subjects and were practiced well in situations such as: regular departmental meetings, team brainstorming sessions, corporation-wide special events, divisional future search, responses to employee opinion surveys, and company labor negotiations. These settings provided subjects with "ideal opportunities to practice" their facilitation training. They felt "better prepared" by their facilitation training and "experienced greater feelings of success" when they used a facilitative approach over a directive one. They felt more comfortable speaking in front of groups and more confident in doing their jobs.

Of the remaining nine subjects who applied the facilitation training, six stated that "if a technique was mentioned that did not fit my personality or my job, then I quickly disregarded it." Rather than try an approach and dismiss it upon failure, these six individuals simply chose not to put that approach into practice. They preferred to "stick to those methods that suited them initially."

The subjects applying facilitation concepts consistently identified four successes, one setback, two barriers, and three recommendations regarding their facilitation training. As far as successes, these 21 subjects identified the following four facilitation techniques as the most critical elements of the training: (1) remaining neutral, (2) asking probing questions, (3) pausing for silence, and (4) focusing on listening. Instead of expressing their own opinions or imposing these on their staff, they learned to let go of their agenda and managed to stay impartial allowing their groups to discover or decide for themselves. They asked "thought provoking open-ended questions" to prompt answers and guide thinking. They remained silent waiting for answers and giving staff time to think about a response. They spoke once to ask the question and did not fill the silence with their own voice. When the answers came back, they listened "intently and passionately." They noted how comfortable they had been in their old and usual behaviors of directing their staff and when they made the shift to facilitation, these four techniques provided them with immediate positive and reinforcing feedback that they were indeed "doing the right thing by not being directive."

A single setback was noted by all of these 21 sub-

jects, and that setback was how to deal with resistance. Although they had been trained in confusion/clarifying techniques and solution-focused methods (e.g., Priest & Gass, 1997), they still "had difficulty working with difficult people." They acknowledged that they understood the theory and that the methods made sense. Their problem lay in trying to divorce their emotions and past history with the difficult person so as to be free enough to employ these approaches. They remarked on their personal needs for more opportunity, self-discipline, and rehearsal.

In this same vein, only two barriers were mentioned by these 21 subjects, and these were a lack of time and the need for further practice. They noted the cost of time: "It takes much more time to probe for answers and wait for responses from staff than to impose opinions and dominate discussion!" They also noted that "facilitating properly requires trust from the group and that takes a long time to build up." As time passes, "learning is lost and we need the chance to exercise our new abilities" more. If the "concepts aren't 'flagged' on a regular basis, it's too easy to slip back into our old ways of managing." As a result, a few seemed to lose momentum and then stalled as they ran up against resistant people.

For the future, these subjects made three recommendations: (1) recently promoted managers should get facilitation training immediately, (2) facilitation training should be longer than a single day, and (3) those managers choosing to adopt a facilitative style should have access to support resources and follow-up training days. Facilitation training was commonly viewed as "an invaluable experience in terms of preparation for dealing with large groups of people." It was seen as "mandatory training for any manager and especially relevant for newly advanced managers." Several subjects commented on the need for more than a one-day training session. They would have appreciated more training to build on their newly found competence and to provide additional chances to apply their new learning and counter the barrier of insufficient practice. Follow-up days and other resources should be optional for all and of "particular benefit to those who make regular use of a facilitative style."

## Conclusions

In summary, the notion of self-facilitating corporate clients seems supported by this research, and using facilitation training for managers seemed positive. However, this company was very functional at the time of interview and hence, facilitation training may not be appropriate for all managers in all corporations. Some managers in this study chose not to become more facilitative and less directive for various personal reasons.

The six to seven hours of experiential content of the training session seemed to contribute to a high recall of key concepts by subjects and to their application of those methods in a number of settings with great success. Of particular value were remaining neutral, asking probing questions, pausing for silence, and focusing on listening. Subjects noted the interference that their past baggage contributed when trying to fac-

itate with certain resistant workers. They also called for more time to learn and apply facilitation techniques, as well as more time to practice through further facilitation opportunities. Generally they saw facilitation training as valuable (especially for new managers) and asked for more training sessions, follow-up training, and access to supportive resources in facilitation.

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