Facilitation Training
Conducting Effective Meetings & Workshops

Description

The Facilitation course is designed to help business analysts take their facilitation skills to the next level. In this 3-day training course, participants receive detailed quality feedback and facilitate two practice meetings/workshops. The course provides practice in interviewing and facilitation techniques needed for conducting effective business analysis and requirements gathering for agile and traditional projects. The course focus is:

- Tips and techniques for conducting successful business analysis and business requirements meetings
- What constitutes a successful meeting and workshop?
- Planning your workshop and meeting with detailed agendas and scripts
- Practical experience combined with hands on exercises for planning and conducting workshops and meetings
- Constructive feedback provided to the participants
- Practice techniques for handling difficult group dynamics and common people problems

The objectives of the course are to:

- Provide practical exercises for: active listening skills; planning a workshop; building agendas for decision making business analysis and business requirements workshops; questioning techniques; consensus building and facilitation techniques for controlling difficult group dynamics
- Give each course participant the opportunity to facilitate specific agendas for different types of business analysis and requirements analysis workshops
- Build upon the principles and techniques learned in course

Course Content

Day 1 am
Introduction
- Agenda, ground rules, materials and student introductions

Overview
- What is an effective workshop lead?
- What are the skills, qualities and traits needed to conduct an effective workshop and meeting?
- Creating an effective workshop environment

Facilitation skills
- Active Listening
- Questioning
- Neutrality
- Observation skills
  - Reading and interpreting body language
  - Responding to observed body language
- Appropriate response styles
• **Exercise-** Active Listening Skills
  • How to handle problem people
    o Motivation of problem people
    o Types of difficult behaviors- characteristics and what to do
  • Presentation skills

Group Dynamics
• Phases of group dynamics
• Leadership styles
• Managing conflict
  o Reasons for conflict
  o Types of interventions
• Workshop problems (tips of what to do when things go wrong)
• Workshop set up and ground rules

**Day 1 pm**
Facilitator’s Tool Kit
• Facilitation techniques
  o Brainstorming
  o Storyboarding
  o Interviewing
  o Kit reviews
  o Teleconferencing tips and techniques
  o Consensus building
  o Decision making techniques
• Ice Breakers
• Team building exercises

Building an agenda
• Steps for planning an agenda
• **Exercise-** Planning a meeting approach

**Day 2 am**
**Exercise-** Short Facilitation experience using a specific technique demonstrated in course

**Day 2 pm**
Meeting and Workshop Management
• Methodology
  o Preparation (checklists)
  o Workshop (set up, basic communication techniques, ground rules)
  o Follow-up (checklists)
• Workshop Roles and Responsibilities
  o Business Sponsor
  o Project Manager
  o Facilitator
  o Business SMEs
  o Business & Technical Experts
• Key components of a successful meeting and workshop
Discovery Techniques for Business Needs

- Process Analysis Techniques
  - Exercise: Facilitating process flows using storyboarding

- Requirements Analysis Techniques
  - High Level Use Case Techniques for lean requirements
  - Exercise: Facilitating using the high-level use case technique
  - User Story Technique for agile requirements
  - Exercise: Facilitating a user story session
  - Product Backlogs Technique for agile projects
  - Exercise: Facilitating a Product Backlog Session

Day 3

Exercise: Facilitation Experience

- Using the case study provided in course, the participants will facilitate a workshop using different techniques taught in course.
- Each student creates an agenda and facilitates a workshop using the techniques learned in course. Workshop participants are given roles and real life behaviors to make the role playing more challenging.
- The participants are given individual feedback

Wrap up

Who Should Attend?
Individuals who need practice in conducting facilitated meetings and workshops. Those who will find this of value are: Business Analysts, Scrum Masters, Project Managers, Product Owners, Technical Leads, Quality Assurance Analysts, SMEs, Systems Analysts, Architects, Designers and Developers.

Material:
Each participant receives agendas, scripts, technique descriptions, checklists and questionnaires.