

People on Projects

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guest columnist

Selecting a Team-Building Facilitator

Projects need professional facilitators

by Dick Grimes

The dictionary has one definition of what a “facilitator” is or does; unfortunately, project management often has another. Here’s an excerpt from a PM training manual:

“There are stages to team development and you should be able to determine the current stage and how to get to the highest stage. If you are unable to make the determination, you should call in a facilitator. A facilitator is for assessment of team dynamics or stage of team development. A facilitator should also be able to give suggestions on how to get to the next level(s). The stages of team development are *forming* (very little if any work is being accomplished); *storming* (very little if any work is being accomplished); *norming* (first time significant work is accomplished); and *performing* (highest stage and work happens efficiently).”

By this definition, it seems that the project management profession’s perception of a facilitator is someone akin to a fireman, called in to put out a blaze that has gotten out of control. Unfortunately, there is no professional qualification of “Project Facilitation Professional (PFP)” (yet) to help us narrow the field in finding the best facilitator for our project.

However, one thing project managers can do in their search for an effective facilitator is to use a fundamental of behavioral study to approach the problem differently: “You cannot do things the way you always have and

expect different results.” If we want to find a facilitator that can be more than just a “fireman” when team development struggles, we will have to revise, review, or reconsider many things, such as:

- How we view the facilitation process as a whole
- How we look for a facilitator
- What we expect from a facilitator
- How we structure the facilitator’s relationship to the project.

How We View Facilitation

The sooner the *PMBOK® Guide* admits that a project is an organizational microcosm focused on people doing work instead of work that people do, the sooner it will become evident that a specialist in organizational development (the future PFP) should be a member of the team from the beginning, not just on-call in case a fire breaks out. If we take enough time during project initiation to look at the people first and set the foundation for effective interaction between them, the work will almost take care of itself because these are technical professionals. (If they aren’t, why were they hired?)

But if all of our focus is on the work while the people who perform it are an afterthought, it is no wonder that we have a development stage called “storming”! The very name is an admission that work, not the people who perform it, is uppermost in our minds.



Dick Grimes

Wouldn’t it be easier to do things from the beginning that prevent fires instead of having the fireman stand by because we assume that, sooner –or later, we will need him?

The Way We Look for a Facilitator

We can quickly narrow the field of applicants if we approach the dilemma of facilitator selection from another perspective. Let’s look at the big picture of the project before we look at the facilitator part of it.

fa-cil-i-ta-tor
(pl. **fa-cil-i-ta-tors**) **noun:**

1. *Somebody enabling something to happen: somebody who aids or assists in a process, especially by encouraging people to find their own solutions to problems or tasks.*
2. *Meeting organizer: somebody who organizes and provides the services for a meeting, seminar, or other event.*

--Encarta® World English Dictionary, North American Edition, Microsoft Corp., 2003.)

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Take a moment and write your definition of a successful project. Not for a specific kind of project but more of a general model. Many PMs will write something like, "Project success means all deliverables and results as promised. All expectations were met and the client pays us." (You can add the boilerplate comments about "world-class," "state-of-the-art," and "industry-environment" later as you desire.)

Now suppose you added this phrase to the end of it: "All involved agree that we would want to work together as a team again as soon as possible." Would that make any difference in your criteria for selecting a facilitator, what you would expect from the facilitator, and whether he or she would be a semi-permanent part of your project or just a drop-in when the fires got out of control?

I add this line because I have seen projects in the past, which, according to the definition of all deliverables, promises, and expectations being met and the client paid us, were successful but the participants could not wait to get away from the site, and vowed never to work with each other again.

If that were a 24-month project, the team members would have lost two years from their lives and want to forget the experience as quickly as possible. How could an experience like that be considered "successful" by anything other than meeting contractual specifications and getting paid?

If we extend our definition of success beyond the contractual aspect of the project and look forward to working with that team again, the past two years could become fond memories that we want to re-experience.

How could "warm and fuzzy" feelings like that from a former client, vendor, or other project principal enhance your career as a project manager? (If you aren't sure, just consider the contrary position: What career impact would it have for you if former project principals thought working on the project was an absolute disaster from a relationship perspective and never wanted to see you again?)

If you agree that revising your definition of a successful project should include that extra phrase, you now have a focused and perceptive question to ask facilitator-candidates: "How, specifically, would you design a teambuilding process for the duration of

our project that would make team members want to work together on another project as soon as possible?"

Some of the topics they should be able to discuss (and provide details for implementation if you want to know more) are:

1. How would you help us prevent (or reduce the impact of) these disadvantages associated with a typical project matrix organization?
 - Team members with little or no project focus
 - Team members with decreased motivation and innovation
 - Dual reporting
 - Performance monitoring and controlling
 - Lacking goal alignment with management.
2. How would you help us develop a value system within the project team that guides how we work with each other?
3. How would you help us shorten (if not eliminate) the typical development cycle of a team through the stages of forming, storming, norming, and quickly get to the performing stage?
4. How would you help us avoid or overcome these typical communication barriers on a project?
 - Education levels
 - Perceived social status
 - Attitudes
 - Different values
 - Work pressure
 - Conflicting priorities
 - Interdepartmental friction and strife.
5. What products would you deliver from a project "kick-off" meeting? What would the agenda contain? Who would you suggest attend? How long should it run?

Question for a facilitator:
"How would you design a team building process that would make our team members want to work together?"

What We Expect from A Facilitator

Just as a project probably has technical experts available as needed, the facilitator is

the project's "organizational development" expert and his or her input should be valued just as much as the input of other technical experts.

The facilitator can be designing the team development, interaction, monitoring, and measurement components during the project's initiation stage while other technical experts are working on scheduling, estimating, and procurement components.

Recently, I was looking at a RFP for a facilitator on a construction project, which said, in part, "Tell us what you would do in a kick-off meeting of not more than a day-and-a-half and we anticipate one, or two at the most, additional meetings during the project."

Oh, boy.

Instead of defining the scope of the project's requirements for facilitation services and asking, "How would you meet our needs?" and allowing the facilitator candidates to reply, the project manager was telling the facilitator how long he or she could take to do the job!

Let's be blunt: PMs do not tell engineers, architects, accountants, or any other project professionals how to do their jobs, and they shouldn't tell the facilitator how to do his or hers, either. "Define the scope and I'll give an estimate" is the way a company bids a project. It is also how the PM should negotiate with a facilitator.

How We Structure the Facilitator's Relationship to the Project

It should be evident by this time that a facilitator should be a member of the project team from the beginning instead of being on call in case of problems. This does not mean the facilitator should be there full-time; let the facilitator set a schedule (time and price) that you can live with that will give you the results you want. All you have to do is tell the facilitator what you want and let him or her do it. The success of each of you is tied to the other—make it a partnership! ♦

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