

**Healthcare Financial Management Association**

**Certification Program Coaching Course  
Facilitator Guide**





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## 1. Guidelines for Effective HFMA Educational Programs

### What kinds of learning strategies are best suited for participants of the HFMA Certification Program Coaching Course?

- Include real-life, hands-on examples in your presentation that are relevant to the audience.
- Offer interactive opportunities for participants to relate their own experiences.
- Define clearly the learning objectives for the course – be clear about the benefits of the program to the audience and what skills and information the participants will acquire.
- Provide information and tips so participants have something they can take back with them to use on the job and to prepare for the corresponding certification exam.

### HFMA – Guidelines for Exceptional Speakers

HFMA members have provided us with excellent program evaluation feedback to let us know what it takes to be a successful presenter at HFMA educational programs. Incorporating these approaches may contribute to your success as a coaching course instructor. Take these into consideration as you prepare to instruct the coaching course.

According to HFMA program attendee, top-rated speakers did the following:

- Presented information and material at the appropriate educational level for their targeted audience.
- Realized that they were presenting an educational program and did not use the presentation to “sell” products and services.
- Used real-life, practical, hands-on examples throughout their presentation. Emphasis was not on theory alone.
- Provided useful tools, tips, checklists, etc. for participants to bring back to their facility.
- Engaged their audience by creating a dynamic, friendly, lively, interactive atmosphere.
- Allowed time for questions and answers during or at the end of the presentation.
- Presented current, accurate information.
- Knew how to simplify complicated ideas and processes.
- Used case studies to emphasize points and maintain interest level.
- Made sure that their handouts matched the information presented during the live program.

## 2. The Learning Process

Training is the science of helping people gain new awareness, knowledge, skills, attitudes, or achieve a defined standard of performance through instruction and practice. The transfer of knowledge or skills from a trainer to a trainee is called teaching. Learning is the result of teaching. Learning may be thought of as the process of absorbing ideas or practices new to the learner who then places them in memory for either immediate or future use.

### Levels of Learning

The ultimate objective of training is to change behavior. The adult learner generally goes through four levels of learning to achieve behavioral change.

- Awareness: The learner is introduced to the learning situation and the objectives.
- Understanding or knowledge: The learner places the learning event in context, connecting causes and consequences associated with the event.
- Skill: The learner applies the understanding or knowledge learned and can perform the new behavior.
- Attitude or values: The learner undergoes a change in behavior and values as the result of the training event. The learner wants to perform the new behavior.

### How We Learn

We learn through a combination of our senses – sight, hearing, touch, smell, and taste. None of these senses allows for complete information “pick-up” alone. The more senses we use, the easier it is to learn. Of the five senses, information received via sight is the most effective. Research findings indicate that learning is based on the following percentages in relation to the five senses:

- 87%            Sight
- 7%             Hear
- 3.5%          Smell
- 1.5%          Touch
- 1%             Taste

Retention of learning is based on the following percentages. We retain:

- 20% of what we hear
- 30% of what we see
- 50% of what we see and hear
- 70% of what we say
- 90% of what we say as we do things

Because retention is highest when the learner has opportunities to “say” and “do” indicates that encouraging the learners to talk, explain, and discuss what they are learning will support better retention. Retention is not encouraged as much by the instructor says, but by what you allow each learner to say.

## **Some Laws that Govern the Learning Process**

- Law of Readiness – One must want to learn and be interested in learning. As the facilitator, you must motivate, create interest, stress the value of learning, and provide knowledge of results. Sharing successful and unsuccessful experiences stimulates the attention span.
- Law of Exercise – One learns by doing. Each time the skill is practiced, the learner gains the confidence to perform the new task. Repetition strengthens learning and helps the learner to retain the knowledge or skill.
- Law of Effect – If accomplishment gives satisfaction, one tends to learn quickly to accomplish and repeat. The likelihood of meeting the desired objective is much greater if the experience is fun, pleasant, and enjoyable. Feelings such as defeat, frustration, and anger can cause interference with learning.
- Law of Intensity – Learning experiences that are exciting, dramatic, vivid, and fun, will create a better opportunity to change behavior than boring experiences.
- Law of Recovery – Even with good instruction, a high percentage of knowledge is forgotten quickly. Research indicates that material learned just enough to allow 100% recall a few minutes after being presented, may be forgotten in several days. The same material may be relearned more rapidly a second time and the percentage forgotten will be less. The Law of Recovery states that the ease with which knowledge once learned is recovered is in proportion to the following:
  - Intensity with which it is initially impressed
  - Frequency with which it is used
  - Demonstrated value of the knowledge

## ***How to Support Adult Learning***

Since adults have a vast amount of experience from which they have learned, and are responsible for making their own decisions and living with the consequences, they:

- Need to see the relevance of learning to their life experience.
- Have a vast store of knowledge and experience from which to draw and apply to the current learning situation.
- Learn best when they have some control over their own learning experience.
- Need to take an active part in the learning process.
- Regard growth in self-understanding equally as important as growth in learning.
- Generally, learn best in task- or experience-orientated learning situations.
- Learn best in a cooperative climate that encourages risk-taking and experimentation.

## ***Attention Span Impacts Learning***

Many things can cause a learner's loss of attention, e. g., a voice that is monotonous, boredom, an air conditioner hum, a dull presentation, fatigue, or pre-occupation with other responsibilities that need completion. To gain the learner's attention, help the learner maintain a mindset where learning can take place. Variety in presentation, style and pace, change in activity, enthusiasm, and creativity are all

means of maintaining attention. Long classroom sessions are less productive than shorter ones. Give short breaks to stimulate and recapture the attention span.

There comes a time after which no further instruction on a topic will be useful because of the learner's inability to absorb more information without the opportunity to mentally organize what has already been received. At this point, the rate of learning may decrease because the learner is so overloaded with information. This is called the *saturation point*. Saturation can be reached in as little as two to three hours, so plan and present your material carefully.

### **Role of the Instructor/Facilitator in the Learning Process**

Your role is to motivate people to learn. There are specific behaviors that will help you accomplish your objectives while also building the learner's confidence. An instructor/facilitator's behavior should be based on the following five principles of motivation:

- Maintain and increase confidence of the learners.
- Focus on the learner's behavior, not on their personality or attitude.
- Listen to show understanding.
- Set goals and maintain communication.
- Use reinforcement to shape learning.

Attributes of a successful instructor/facilitator include the following:

- Enthusiastic
- Friendly
- Fair
- Patient
- Understanding
- Confident attitude
- Genuine concern
- Positive attitude

As a facilitator of learning, you can support the adult learner by doing the following:

- Ask questions; provide prompts to focus attention.
- Make sure you share with learners the relevance of what they are learning.
- Provide opportunities for the learners to be actively involved – discussions, sharing, etc.
- Provide reviews of materials to help learners consolidate new information.
- Ask learners to share their experiences and knowledge. Learners benefit from each other's experiences.
- Create a learning environment that encourages the above.

To better facilitate learning, take the following factors into consideration.

- Immediate Need – If a trainee realizes the short-term importance of learning, he or she is likely to be highly motivated to learn. Emphasize the advantages of learning the content now.



- Friendly Competition – Too competitive of an atmosphere can interfere with the learning process. Competing with oneself is usually more effective than competition with others in the group. Participants must feel at ease to learn.
- Environment – The better the light, ventilation, etc., the easier it is for learners to concentrate. A facilitator's positive attitude also contributes to a positive learning environment.
- Facilitator's Qualifications – A facilitator should be very knowledgeable about the topic he or she is presenting, convey enthusiasm and understanding, and speak in a manner that the learners will understand.
- Accountability – The learner must understand that they are responsible for everything that is presented. If they do not feel accountable, then they are less likely to concentrate on the materials. Conducting review activities validates learning and can increase the learner's accountability.

### 3. Instructional Modes

#### Lecture

Lecture is a method of instruction that relies on the instructor to provide directly all of the necessary information. Instructors use this mode when information is simple, factual, not readily accessible elsewhere, organized in a special way for a particular group, and must be disseminated in the most rapid manner.

Lecture has the following three disadvantages: The learner remains passive, there is little opportunity to verify the participant's understanding of the material, and it relies heavily on the instructor's delivery style.

To prepare for a lecture, do the following:

- Review the materials so you clearly understand the overall sequence of the materials.
- Familiarize yourself with all the major points and prepare examples to illustrate their meaning.
- Prepare relevant questions to involve the audience at appropriate times.

To conduct a lecture, do the following:

- Do not just read notes or content on slides. (Participants can read on their own time.) Maintain as much eye contact as possible.
- Utilize your best presentation skills
- Periodically take time for participants to ask questions or ask your prepared questions.
- When asking for questions, say, "What question do you have?" instead of "Do you have any questions?" This will create a sense that questions are welcomed, and it can encourage the participant to seek clarification on things they do not fully understand.
- Summarize or have participants summarize the major points. Having the participants say what they learned enhances retention.
- Encourage participants to add to the summary and ask questions.

#### Discussion

Discussion is a method of instruction that encourages participants to share their thoughts and experiences. Instructors use this mode when they want participants to explore a topic, relate the topic to their own experiences, and learn from other participants. The disadvantages are that it takes time and much of its success depends on the willingness of participants to share.

To prepare for a discussion, do the following:

- Plan points you wish to cover.
- Set time limits for discussion.
- Plan a way to record ideas by recording them on a flipchart or having participants take notes and summarize the key points.
- Develop questions that will elicit the points you wish to cover.

To conduct a discussion, do the following:

- Inform participants of what is expected of them during the discussion, e.g., level of participation, keeping on the subject, being open to feedback, etc.
- Introduce the discussion with a brief statement of the objectives, i.e., what you want the participants to accomplish.
- To introduce and maintain a discussion, use questions appropriately.
- Move through the materials at a pace in alignment with the participants' responsiveness, i.e., pick up the pace when needed and be ready to slow it down if you see puzzled looks.
- Reinforce participants' comments.
- Vary your involvement by moving in and out of the discussion.
- Frequently link discussion issues to main content points.
- Summarize or have participants summarize major points.
- Incorporate the objectives into review of the content.

### **Facilitation**

Facilitation is a presentation method that should be attempted by effective, somewhat experienced presenters. It requires being able to assist or lead a group to their own conclusion on a topic, with the conclusion being consistent with the "expert" opinion. Facilitation is not just a matter of questions or answers. It is a highly skilled presenter leading a group in a discussion that reaches the "right" conclusion. The facilitator must be able to tap into the knowledge and experience of each participant and constructively channel it toward meeting the objectives for the session.

Group characteristics needed for effective facilitation include the following:

- Willing to participate
- Flexible, open-minded, not defensive
- Honest
- Able to share leadership
- Collective knowledge equal to or greater than the content expert for that subject

Advantages of facilitation include the following:

- Participants want to participate.
- Increased interaction equals more effective learning. (Learner Principle of Effect)
- The group collectively often has much or more knowledge on the subject than the facilitator.
- When allowed to participate, the participants will work harder toward the objectives.
- The variety of presentation methods provides a more interesting participant experience. (Learner Principle of Intensity)

Disadvantages of facilitation include the following:

- Not all topics can or should be facilitated.

- Facilitation is a difficult skill to master.
- Facilitation requires more intensive preparation than standard presentations or lectures.
- When not properly controlled, facilitation can get off track and the session objectives may not be met.

### **Skills of an Effective Facilitator**

Training involves telling and teaching the participants. Facilitation involves helping the participants discover for themselves. Facilitators guide the learning process and actively involve learners along the way.

Group facilitation is a skill and an art. A good facilitator guides groups through a process and employs processes to help the group meet its goals/objectives and accomplish what they set out to do. Facilitation may need to adjust for remote/online or in-person training as needed.

Skills include:

- Keep time and keep the session on the planned track.
- Complete process checks. Are we still on track? Is everyone still “on board?”
- Fully understand and remind the group of the objectives for the session.
- Monitor the group and know when to intervene.
- Use two-way communication. Seek and provide feedback.
- Ask open-ended questions to encourage more information sharing.
- Remind group of time remaining.
- Make participants feel safe and comfortable to participate.
- Paraphrase participant comments to check for understanding and to ensure others heard the comment.
- Before moving on to the next topic, summarize after major sections of the course have been completed.
- Vary the pace of the session to keep participants engaged.
- Recognize when you are “losing” participants. Take appropriate actions.
- Be open to suggestions.
- Offer opportunities for the more reserved participants to contribute during the class.

## 4. Using Instructional Media

### Guidelines for Developing Slides

Simple, easy-to-read, and concise handouts and slides make the greatest impact. The following suggestions are designed to help you create effective presentation materials.

- Everyone in the room should be able to read the slides. If you are unsure of any slides, run the presentation in a large room. Stand at the back of the room and see if *you* can read the slides.
- Slides should contain an average of 5 to 7 lines per slide and a total of about 30 to 40 words.
- Limit the number of bullet points on a slide to 5. For more than 5 bullets, use a second slide.
- Avoid small text. If *you* are unable to read the text from the back of the room, the text is too small. 24-point type is, generally, the smallest you should use to create readable slides.
- Keep the message on each slide simple and concise. Use discussion to expand upon the content. Avoid excessive verbiage and lengthy text on slides. Be brief.
- Use outline format to present information. Complete sentences are harder to read on the slide. Be grammatically consistent to create a better flow and presentation of information.

Examples:

**Not**

Education will be improved  
Expanding goals  
It will reduce the amount of class time  
Knowledge increased

**Rather**

Improved education  
Expanded goals  
Reduced class time  
Increased knowledge

- Use contrasting colors for legibility. Don't choose colors that are difficult to see or read. Avoid using light or pastel colors for text. Remember that your handouts are usually reproduced in **black & white**.
- Keep backgrounds simple. Limit distracting clipart unless it is essential. Don't put text over pictures or graphic backgrounds making the text difficult to read.
- Only use **two** levels of bullets on slides. Using too many sub points makes it difficult for attendees to follow the logic of your statements. *If you need more sub points, you need more slides.*
- Keep graphics and diagrams simple. The most effective graphs are simple pie charts with 3 to 4 slices or simple column charts with 3 to 4 columns. Diagrams lose their impact when they contain more than 4 to 5 elements.
- Avoid dense tables. Attendees will be unable to read or follow them. If you have too much information on a table, break it up into two or more slides.

### Guidelines for Using Instructional Media

- Before the session begins, test equipment and confirm all electronic files that will be used during the presentation are available on the system.
- If you are using equipment other than your own, make sure you know how to operate it.
- Tape electrical cord to the floor to avoid tripping.
- Slides are most effectively used when you do not read verbatim from them. Put information into your own words.

- Discuss content in the sequence presented on the slide.
- Speak to the participants not the computer or the screen.
- Make sure all text is visible from the back of the room.

**Guidelines for Using Flipcharts** (*applies only to in-person training*)

- Leave the first two pages blank to prevent ink/images on prepared pages from showing through.
- Skip a page between visuals to prevent “bleeding” through from the next flipchart page.
- Staple each prepared page to a blank page for easy turning.
- Mark prepared pages with paper clip or tape tabs for ease in locating the page.
- Write reminder notes lightly in pencil in the upper corners of the flipchart. You can see it but the participants.
- Write letters at least two inches tall.
- Use color for emphasis. Yellow must be outlined to be visible. Dark blue, green and black are easiest to read.
- Visualize the verbal with symbols and pictures.
- “Drain and explain” all lists and visuals. Read the main point and explain the subpoints one at a time.
- Turn to a blank page when done using the flipchart. This removes a potential distraction.
- When recording participants’ comments, ask for permission to paraphrase. Use key words rather complete sentences. It’s faster to capture and easier for participants to read.
- Write no more than six words to a line, no more than six lines per flip chart. This helps maintain readability.
- Uppercase letters are easier to read.
- Spell correctly. Misspelled words can decrease your credibility.
- If posting flipcharts in the room, be sure whatever process you use will not damage the surface, e.g., paint pulled off of the wall from the tape.

## 5. Tips for Conducting an Effective Learning Session

### Prior to the Session

*Adjust directions as needed depending on the delivery method (virtual vs. in-person).*

- Communicate to all participants the high-level agenda so they know when the day will start and stop. Be sure to include all the information needed to locate the building and the classroom in the building. If participants will be on their own for lunch, be prepared to offer suggestions for where they may go to lunch.
- Check out the classroom. Be sure that the room arrangement is appropriate for the size of the class, supplies are available, and all equipment is functioning properly.
  - ☑ Arranging chairs in a circle or around a table encourages discussion.
  - ☑ Podiums imply a formal presentation and intimidate the participants. Avoid using these if possible. Sit close to the participants, join them at their table, or walk around as you talk. Make yourself part of the group.
  - ☑ Plan on using a microphone if the group is large and/or you are very soft-spoken. Ensure you can be heard well by all participants in the room.
  - ☑ If making refreshments available, ensure they will not be disruptive to the class such as crunchy potato chips, greasy popcorn, rattling candy wrappers, etc
  - ☑ Place name tents at each participant's seat. This will help you and others get to know each other better.
  - ☑ Place an evaluation form at each participant's seat. This will enable participants to record comments throughout the class. When provided at the end of the class, participants are less likely to provide detailed feedback, as they are often anxious to leave the classroom.
- Based on how much time has been allocated to the class, assign times to each section of the agenda. Use this as a guideline for how much time will be spent during class on a section. Do not share this detailed time agenda with the participants. Many participants will expect strict adherence to it and may become frustrated when more or less than the allocated time is spent on a topic.
- Review the participant list prior to class. Become familiar with the demographics of your audience including level of professional experience, type of organization etc. Use this information to identify who can share relevant experiences during the class.
- Based on the number of registrants, prepare enough copies of handout materials. Make a few extra copies to accommodate late or on-site registrants.
- Prepare adequately and be familiar with all of your materials. This will better enable you to better conduct the class in a more facilitative way versus presenting information.

### Starting the Session

- Greet everyone as they arrive. Make them feel welcome. This is also an opportunity to get to know something about that person.
- Begin by briefly sharing your relevant professional and/or academic experience. Establish your credibility, without selling products or services that your organization may offer to clients. Do

this in such a way that participants feel that you understand their needs because you are familiar with their job responsibilities.

- Briefly explain the goals and objectives of the class. Confirm the group's expectations.
- Have participants quickly introduce themselves so you become familiar with the experience level in the room and so participants also learn a little something about each other.
- Establish ground rules for the session such as the following. Ask the class if they would like to add any. These can be written on a flipchart and posted in the room to serve as a reminder or printed on the back of the name tents.
  - ☑ No cell phones allowed. Request participants to turn off their phone. Incoming calls should not be answered, or the call returned until break time.
  - ☑ Be on time. Start and stop times honored by all. When the end time for break has been reached, the class will resume whether or not everyone has returned. Those who have returned to the room on time will not be penalized because those who have not.
  - ☑ One person speaks at a time.
  - ☑ Listen to what others are saying.
  - ☑ When appropriate, please share your experiences and ideas.
  - ☑ During large group discussion, raise your hand if you have something to say.
- Remind participants to complete the evaluation form throughout the session and inform them on how you plan to use that information to improve future offerings of this class.

### **Conducting Activities**

- When introducing the activity, clearly state the directions and be sure to provide all information needed. State the timeframes for completion and monitor closely to ensure the activity takes the approximate stated time to complete. All the extra few minutes can add up and require you to re-adjust the agenda significantly for a later portion of the day.
- Walk around the room as participants complete the activity to monitor progress and to answer questions as needed.
- Provide feedback as groups present their portion of the activity; respond to review questions, etc. Explanations serve as reinforcement of the concept and build in additional review. It also validates that a participant is on track.
- Close the activity by quickly summarizing the key points or requesting the participants to do so.

### **During the Session**

- Be aware of your timing and pace. Stay within the established timeframes to avoid running short on time and needing to skip sections. If you should end early, the extra time can be spent answering participants' questions.
- Be sure the content covered during class matches the published class objectives. That is what participants will expect!
- Use handouts and slides to guide you through the presentation. Do not rely on them fully or read from them. Participants are capable of doing that on their own and expect you to share your expertise. That is why you are facilitating this class.



- Don't memorize the script. Know the content well to appear conversational. As needed, glance at the slides or your notes to discuss the topic at hand. Don't rely on the slides or your notes to the extent that you are reading directly from them.
- When discussing content on a slide, cover one point at a time.
- Don't speak to the slides or your notes - they can't answer back. Speak to the class. Make the participants feel you value their attendance and they have made a wise choice to be there.
- As you present, focus your attention on the participants. Read their non-verbal messages. If they look puzzled, ask questions to validate they understand the concept presented. If they look bored, it may be time for a quick stretching break.
- Provide short breaks to allow participants to re-energize, but not so many as to be disruptive of the flow of the class or to take away too much time from the planned agenda.
  - ☑ Encourage participants to network during breaks. You can do likewise or spend the time to get ready for the next section.
  - ☑ Start at the scheduled beginning and end time.
  - ☑ Resume the class immediately after the stated end time for the break has been reached. Respect the time of all participants and do not wait for the "stragglers."
- Be flexible. If more time is needed for a topic than planned, be willing to accommodate that need and readjust the remaining schedule. If it's anticipated the class may take longer than needed, request the participants' permission and obtain it from all attendees to go past the designated end time. If not everyone is able or willing to stay longer, readjust the agenda to end as planned.
- Be politically correct and culturally sensitive. Humor can be used to break tension and to lighten the mood of the room. Use it only in a way that would be considered offensive by anyone in the room. If you choose to present cartoons/comic strips, be sure you are not violating any copyright law.

### **Closing the Session**

The instructor can close the course, or he/she can ask the participants to provide the necessary review information. A successful closing to a course should involve the following:

- Review of course objectives
- Suggestions on how the new skills or behavior can be applied to the job
- Link the participants' personal objectives to the course materials

If an instructor closes the course, all points are covered, the instructor is in control, and it is time efficient. On the other hand, there is limited participant involvement and participants' clarity of points is unknown.

If participants are asked to close the course, the advantages include participant involvement, opportunity for the instructor to provide feedback on what has been learned, and opportunity for the instructor to respond to questions. On the other hand, when participants present the course closing, critical points may not be covered, and it is less time efficient.

**After the Session**

- Review the evaluation forms and use the feedback to make the session even better for the next group of participants. Change processes, content covered, amount of time spent on topics, types of activities, etc.

## 6. Checklist for an Effective Learning Session

- Appear prepared. This does not necessarily mean that you are unprepared. It simply means that you may appear not to be.
- Establish yourself as the expert, but do not overly flaunt your expertise to the point that is viewed as being offensive or condescending to those in the room.
- Start and end on time. Whether everyone is there or not, start on time. Respect time of those who did arrive at the right time. Ending late is even worse than starting late.
- Handle questions properly. Don't come across as being abrupt or giving people the impression that their question is awkward, dumb, or didn't need to be asked.
- Don't apologize if you don't need to. If there is a problem, it is likely that 80% of the participants won't be aware of it.
- Be very familiar with all relevant materials. Know the course content/material and be able to explain the requirements and process to become HFMA certified.
- Use audiovisuals professionally and know how to operate the equipment.
- Always appear to be organized and on schedule. In order not to appear off schedule, tell participants where you are going and about how long it will take to get there.
- Involve the participants in the session. The more you involve the participants in the learning process the more effective the learning will be.
- Establish personal rapport. Make eye contact while conducting the class and be available to the participants prior to class, during breaks and after class.
- Cover the stated learning objectives. Deliver what you promised. Use the objectives to help stay focused.
- Schedule adequate breaks. Give the participants short breaks to re-energize and to network with others.
- Avoid distracting habits such as jingling coins in your pocket, twirling a pen, leaning on a lectern, using a lot of "uhms" and "uhs"
- Use materials that are current, relevant and that match the learning objectives. Using outdated information can reduce your credibility or that of the study materials.

### **Checklist for an Effective Learning Session (cont'd)**

- Admit when you don't have the answer. It's okay to admit you don't know the answer. Offer to look it up and get back to the person. Follow up as promised.
- Avoid any humor or language that offends any participant. It is inappropriate.
- Don't read the materials to the class. They can do this on their own. Share something beyond what is available to them in the written materials.
- Have fun! The participants will feel and reciprocate that positive energy.

## 7. Using Questions Appropriately for Effective Discussion

Maximize participation in discussions by using questions effectively. Consider the following tips.

- Begin discussions with a specific, well-prepared question.
- Encourage questions from the participants, but do not expect them to start a discussion by asking questions.
- Wait for answers to your question. Pauses give participants time to formulate their responses.
- Do not ask questions with an obvious answer as it may be viewed by participants as condescending. On the other hand, avoid playing guessing games.
- Redirect selected participant questions. Rephrase the question, if necessary, to clarify it.
- Use open-ended questions that begin with “What”, “When”, “Where”, “How”, “Who”, etc. Do not ask close-ended questions that will yield a yes or no response.
- Avoid agreeing/disagreeing outright. Use noncommittal reinforcements to keep the discussion flow moving.
- Use positive reinforcements to stimulate further discussions.
- Use the question “What questions do you have?” genuinely. It may signal that you have run out of things to say rather than that you are really interested in wanting feedback.
- The phrase, “Any questions?” does not replace a summary or closing.

### Asking Questions

Discussions usually begin when a question is asked after presentation of materials or completion of an activity. The following are different types of questions that may be asked to facilitate a learning session.

- The overhead question is asked of no one in particular and everyone in general. It is a kickoff question for discussion. When using an overhead question, make certain your wording is clear and allow the participants time to generate their responses.
- The direct question is asked of a particular person. State the person’s name at the beginning so he/she will hear the question and feel as though they have been caught off guard. Use this type of question to elicit specific responses from specific people.
- The redirect question is asked of one person, particularly the facilitator/instructor, but redirected to another person. It is a good way for the instructor to avoid becoming the “answer person” and to encourage more participation from the group. It can also be used when someone has given a wrong answer, and you want someone else to provide the correct answer.
- The reflective question reflects the content/and/or feelings contained in what the listener heard the speaker say, e.g. “I hear you saying you are frustrated by this situation.” This type of question lets participants know they have been heard and understood, and to clarify a point. Use the reflective question carefully so you do not come across as an “amateur therapist”.

### Eliciting Responses from Every Participant

Some techniques for eliciting a relative response after presenting a topic, idea, etc. and eliciting it from every participant includes the following:

- When posing a question, pause for 10 seconds before selecting a respondent. Look around the group. Give everyone time to formulate a response, and then select a respondent.
- Some questions can be answered by everyone, especially short-answer ones or ones in which you are tallying responses, e.g., when you are asking participants to select from a pre-defined list of responses.
- When asking thought-provoking questions, ask participants to write their response. Circulate around the room, review some of the recorded responses, and decide upon whom to call.
- Occasionally, ask participants to question some information that you are about to present, e.g. "What percentage of time does the average manager spend in communicating on the job?"
- Use pre-printed response sheets that the participants will complete throughout the course, such as a participant guide with space to record answers, list steps to a process, etc.
- Distribute a self-assessment, i.e., a self-scoring, quickly administered exercise that allows you and the learner to know to what degree the concepts are understood. Such a tool is included at the end of every chapter in the certification self-study guides.
- Ask for a show of hands what you want to tally a response, e.g., how many of you think the average employee is mainly interested in level of monetary compensation? How many disagree?
- When working in small groups, have participants respond to their "neighbor", e.g., "Turn to you neighbor and tell him/her what percentage of your time is not under your control."
- Allow time for silent decision or reflection in questions for which response are confidential or that do not require an overt response because you know that participants will answer it themselves, e.g., "When did you last write a note commending your employees on a job well done?"

### Answering Questions

The way in which you answer questions often determines if a discussion will begin and the depth at which it may continue. Consider the following factors when answering the questions.

- *Use appropriate honesty.* If you do not know the answer, don't be afraid to say so. Offer to find out the answer or see if someone else knows it.
- *Provide support.* Let participants know that you appreciate their responses by using comments such as "That's an interesting point." Or "I'm glad you raised that question."
- *Be clear.* Present your responses as clearly as possible.
- *Be open to challenge.* Answer questions in a way that encourages people to let you know if they do not understand or agree.

### Giving Feedback

Feedback must be given so the person receiving it can do the following:

- Hear it in the most objective, least defensive way possible.
- Understand it.
- Choose to use it or not use it.

Feedback should include the following characteristics:

- Descriptive rather than evaluative
- Specific rather than general
- Goal- or task-oriented
- Directed toward modifiable behavior
- Well-timed
- Both verbal and non-verbal

## 8. Dealing with Challenging Situations

Even if you respect all of the characteristics of adult learners, you may encounter participants who either remain uninvolved, refuse to cooperate, or try to dominate the class. Some techniques for dealing with these situations are as follows:

### **The Uninvolved Participant**

- Ignore the participant.
- Move physically closer to him/her as you are instructing.
- Give the participant more eye contact.
- Ask a direct question of that person.
- Use his or her name in an example.
- Separate uninvolved participants for small-group situations.
- Establish ahead of time that he/she will be the one to debrief the group's response for the rest of the class.
- Engage in conversation with that participant during breaks.

### **The Uncooperative or Dominating Participant**

- Break eye contact with that person.
- Avoid looking at that person when waiting for a response from the group to a question you have asked.
- Anticipate that other participants will use peer pressure to stifle the obnoxious behavior.
- Diffuse testy questions with a comment that indicates that you are not threatened, e.g., "That is an interesting point."
- Handle monopolies by saying, "Those were good questions." "Who else has a question or comment?"



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