

Pre-event checklist for facilitators

Highly effective facilitation for every leader



PART 01

Preparation leaders need, to achieve success

Pre-event checklist for facilitators

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“Our new Leaders need to be facilitators, not order givers”

..... *John Naisbitt*

Pre-step # 1: Know your audience

- ❑ Is it an external event?
 - registration records offer a great starting point which you could research.
- ❑ Is it an internal event?
 - info. should be readily available. Maybe you know many of the participants personally.
- ❑ Can you utilize online tools
 - which empower you to create simple but helpful surveys.

Great preparation - yourself, approach, language, questions, analogies and the better your connection.

Pre-step # 1: Know your audience

Additional Notes:



What insightful challenge/s can you pose to your audience to heighten their senses and trigger deeper thinking?

Pre-step # 2: Know your event and agenda

- What is it, that the organisers are wanting the audience to take-away – i.e. objectives?
- What is the relevance of each presenters' topic to the overall subject matter?
- What are the topics, is there an appropriate mixture between lectures?
- Will the participants have an opportunity to embed their learnings?
- How long is each presentation scheduled to run?

Do your research to understand the broader issues surrounding the subject.

Pre-step # 2: Know your event and agenda

Additional Notes:



Ensure you are fully conversant with the subject,
the topics and the presenters.

Pre-step # 3: Create the venue environment

- Is their clear & attractive signage?
- Is there a foyer where you need to advertise?
- Is it possible to create excitement or intrigue?
- Is it possible for some background music?
- What do they see, feel, experience?
- What's the ambience & first impression you want?
- What's the seating arrangement?
- Are participants sitting with people they know?
- Can people see the backing screens and props?
- Can they hear and engage with the presenters?
- Do proceedings to reflect the audience diversity?
- Can people escape the room without disruption?
- How will participant microphone be handled?
- Are there any surprises waiting for the participants?

Think of it as a journey the participants have embarked on;
– ensure we make as memorable as possible.

Pre-step # 3: Create the venue environment

Additional Notes:



Challenge your audience by surrounding them in a higher level of intelligence.

Pre-step # 4: Prepare your tools and questions

- Is the venue planning to use special technology?
- Are you familiar with the facilitator / presenter tools?
- Is there a separate technical crew supporting?
- If yes, have you met them and rehearsed separately?
- First research and study the workshop subject?
- Are there any forums or chat groups to utilize?
- Search books & articles written on the subject.
- Speak with the organizers for reference material.
- Prepare a series of related questions on subject?

Murphy's Law has a tendency to play it's hand at the most inopportune time.

Pre-step # 4: Prepare your tools and questions

Additional Notes:



Enable participants to achieve breakthrough moments from
our challenges and questions

Pre-step # 5: Prepare your mind & your agility

- ☐ Play your internal success video.
- ☐ Visualize the workshop progression.
- ☐ Practice inner-sparring with different situations.
- ☐ Think through and prepare your responses.

Preparing your mind and your agility by calming your inner-self.

Pre-step # 5: Prepare your mind & your agility

Additional Notes:



To succeed in the future, as you have in the past,
you must be ready, agile and set to react calmly.

Facilitators game plan

Highly effective facilitation for every leader



PART 02

Leaders need to learn how to facilitate

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