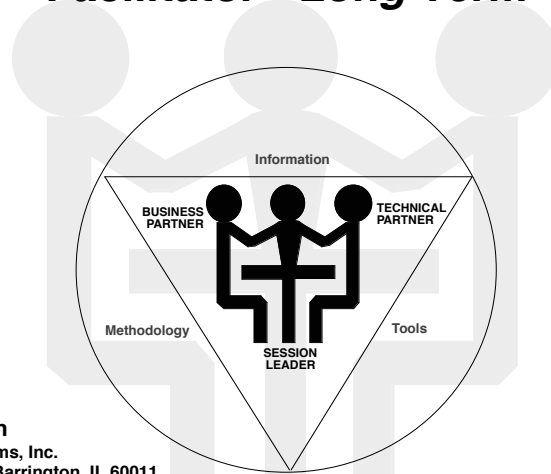


***How to be a Successful Facilitator
Long Term***

How to be a Successful Facilitator - Long Term

How to be a Successful Facilitator - Long Term



Gary R. Rush
MG Rush Systems, Inc.
P.O. Box 3186, Barrington, IL 60011
(847) 304-1464, mgrush@mgrush.com

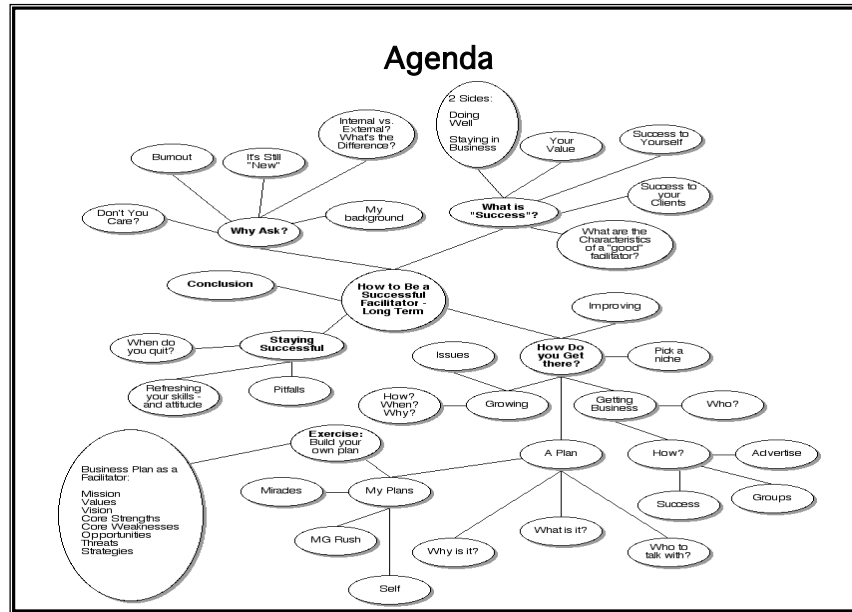
1

Objectives

- To understand Success.
- To know how you define Success and some ideas how to achieve it.
- To better know where you are going.

2

How to be a Successful Facilitator - Long Term



3

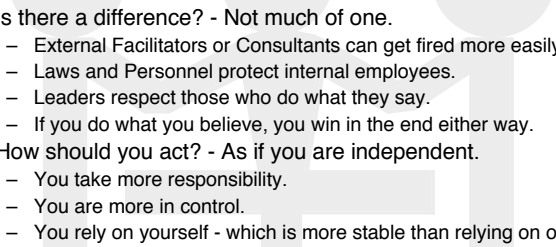
Why Ask?

- It's Your Life
- You may want to avoid "burn-out"
- It's still somewhat new
- I'm telling you because

4

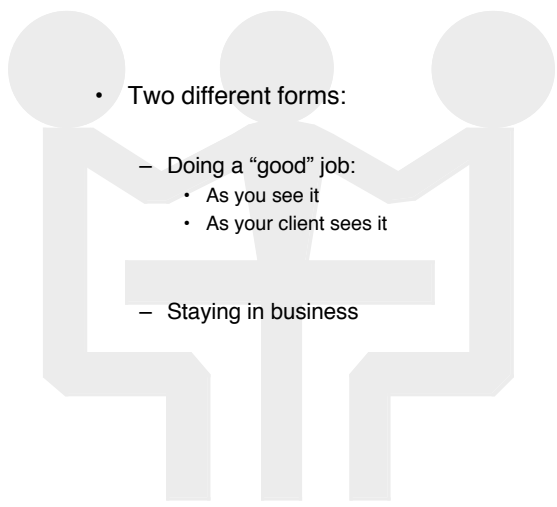
How to be a Successful Facilitator - Long Term

Internal vs External?

- 
- Is there a difference? - Not much of one.
 - External Facilitators or Consultants can get fired more easily.
 - Laws and Personnel protect internal employees.
 - Leaders respect those who do what they say.
 - If you do what you believe, you win in the end either way.
 - How should you act? - As if you are independent.
 - You take more responsibility.
 - You are more in control.
 - You rely on yourself - which is more stable than relying on others.

5

What is Success?

- 
- Two different forms:
 - Doing a "good" job:
 - As you see it
 - As your client sees it
 - Staying in business

6

How to be a Successful Facilitator - Long Term

Doing Well

- Are you satisfied with your work?
- Are your clients satisfied?
- Did the workshop achieve it's objectives?
- What is a "good" facilitator?
 - Helps the group
 - **Listens**
 - Guides them to their objective
 - Brings them together

7


Staying in Business

- Do clients ask you to return?
- How busy are you?
- Is your client base expanding? Are you getting more business?
- Can you support yourself?

8

How to be a Successful Facilitator - Long Term

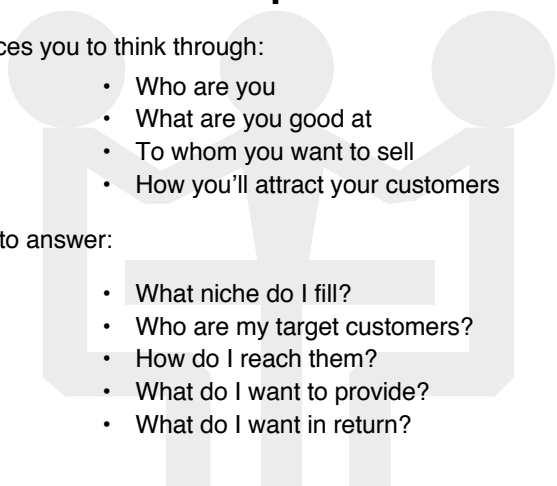
How do you get there?

- 
- Develop a Plan
 - Pick a Niche
 - Get Business
 - Improve
 - Grow? Or Sustain?

9

Develop a Plan

A Plan forces you to think through:

- 
- Who are you
 - What are you good at
 - To whom you want to sell
 - How you'll attract your customers

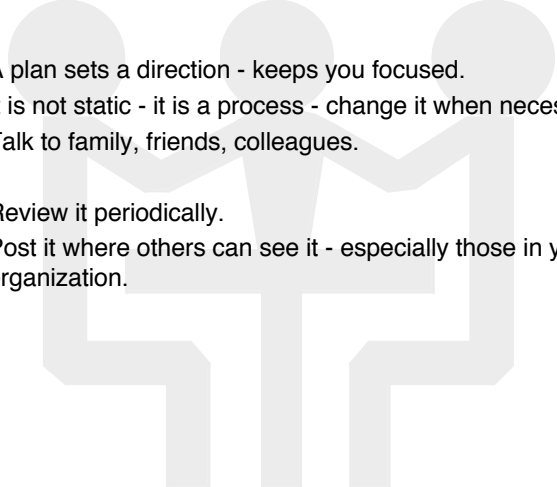
You need to answer:

- What niche do I fill?
- Who are my target customers?
- How do I reach them?
- What do I want to provide?
- What do I want in return?

10

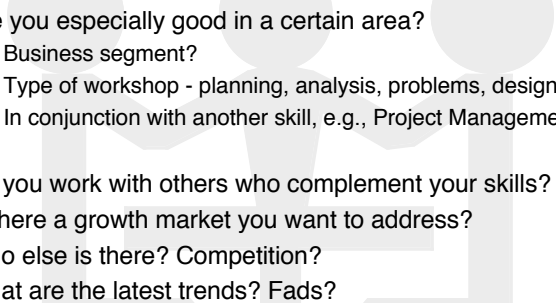
How to be a Successful Facilitator - Long Term

Develop a Plan

- 
- A plan sets a direction - keeps you focused.
 - It is not static - it is a process - change it when necessary.
 - Talk to family, friends, colleagues.
 - Review it periodically.
 - Post it where others can see it - especially those in your organization.

11

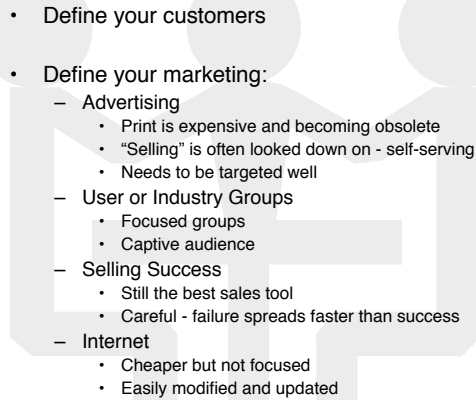
Pick a Niche

- 
- Are you especially good in a certain area?
 - Business segment?
 - Type of workshop - planning, analysis, problems, design, etc.?
 - In conjunction with another skill, e.g., Project Management?
 - Do you work with others who complement your skills?
 - Is there a growth market you want to address?
 - Who else is there? Competition?
 - What are the latest trends? Fads?

12

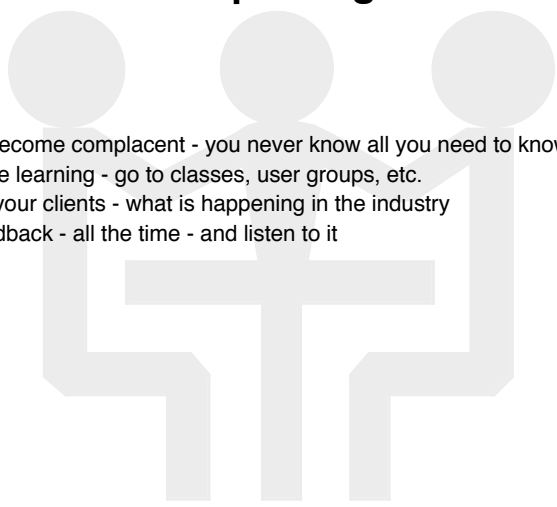
How to be a Successful Facilitator - Long Term

Get some Business

- 
- Define your customers
 - Define your marketing:
 - Advertising
 - Print is expensive and becoming obsolete
 - "Selling" is often looked down on - self-serving
 - Needs to be targeted well
 - User or Industry Groups
 - Focused groups
 - Captive audience
 - Selling Success
 - Still the best sales tool
 - Careful - failure spreads faster than success
 - Internet
 - Cheaper but not focused
 - Easily modified and updated

13

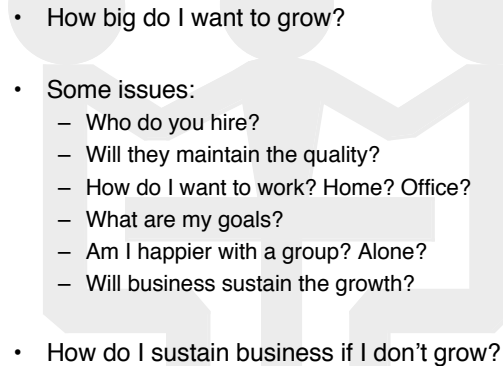
Improving

- 
- Never become complacent - you never know all you need to know
 - Continue learning - go to classes, user groups, etc.
 - Talk to your clients - what is happening in the industry
 - Get feedback - all the time - and listen to it

14

How to be a Successful Facilitator - Long Term

Grow?

- 
- How big do I want to grow?
 - Some issues:
 - Who do you hire?
 - Will they maintain the quality?
 - How do I want to work? Home? Office?
 - What are my goals?
 - Am I happier with a group? Alone?
 - Will business sustain the growth?
 - How do I sustain business if I don't grow?

15

Our Plan

MISSION

MG Rush Systems, Inc. is a consulting firm dedicated to providing the highest quality facilitator training and facilitator services. Our training enhances the lives of those who attend.

VALUES

QUALITY TRAINING - We provide only the best quality in content, materials, training, and the classroom experience.

HONESTY - We always answer customer questions honestly - never inventing answers because we are consultants. If we know, we answer. If we do not know, we say so.

INTEGRITY - We say what we mean and what we believe. We abide by our values, principles, and beliefs. We never accept work that violates our principles. We are not in this just for the money.

FAMILY IS FIRST - We believe that the family is more important than the business. We bring work home and work hard, but never at the expense of the family.

16

How to be a Successful Facilitator - Long Term

Our Plan

VISION

MG Rush Systems, Inc. is known and recognized as the premier provider of facilitator training in the entire world. We are viewed as the "Rolls Royce" of facilitator training.

OBJECTIVES

- o Have an average of at least 8 students per class for each of the public *FAST* classes in Chicago.
- o Conduct a minimum of 10 on-site *FAST* classes per year.
 - o Conduct 3 on-site Data Modeling classes per year.
 - o Conduct 6 on-site FORM classes per year.

17

Our Plan

STRATEGIES

- Maintain a presence on the Internet
- Direct mailing with our newsletters
- Public forums such as user groups
- Tap previous students who have been successful
- Continuously update and improve our products
- Develop new complimentary products
- Provide consulting and facilitator services in strategic planning, data modeling, business reengineering, product development, and others as requested.

18

How to be a Successful Facilitator - Long Term

Miracles Plan

MISSION

Miracles provides elegant, fine dining for discerning adults. Our ambience, price fixe menu, wine bar, and gourmet specialties create a truly memorable evening experience.

VISION

Miracles will be the best restaurant in the Caribbean. We will be a world renown destination for world travelers. Miracles will achieve awards from major organizations such as Wine Spectator, Relais and chateau, DiRona, El Nuevo Dia, and be recognized by the James Beard Foundation for quality in food and service. We will be the standard-bearers in Puerto Rico and will change the face of dining in Puerto Rico forever. We will be mentioned in the same company as Charlie Trotter's, The French Laundry, and Alain Ducasse.

19

Miracles Plan

VALUES

Quality is everything. Quality is the hallmark of our restaurant - for all aspects including food, service, ambience, setting, cleanliness, and experience. We never settle for mediocre - we never compromise. We never settle for best - it can always be better. Quality is not a destination, it is a way of living - a continuous process of improvement.

The Customer is always right. We always treat the customer with respect and begin with the premise that they are right. We are there to provide a unique and unforgettable world-class dining experience. Customers never forget a dinner at Miracles.

Employees are our partners. All employees represent us to the public and need to be professional and knowledgeable. We depend on them and respect them. All employees are treated as family, listened to, and treated with courtesy. We value their ideas, their contributions, and their help. As such, we care about their growth, their dreams, and their careers. Because of their value, we only hire the best and treat them as if they are the best. We reward excellence, innovation, and teamwork.

20

How to be a Successful Facilitator - Long Term

Miracles Plan

VALUES

We are a corporate citizen. We are part of a community and are involved in our community. We participate in community activities and support the community in its goals. San Juan will be better off because of our presence. Our establishment will be a standard by which others may measure their contribution to the community.

Innovation is key to growth. We value risk-taking more than inaction. We learn, try, and do as a way to grow and continue to deliver excellence. Education, experimentation, and research are critical to success.

We support the Earth. We are responsible to the Earth and use organic, sustainable-farmed products. We recycle and avoid waste. The health of the environment is considered in all we do.

21

Miracles Plan

OBJECTIVES

- We will be profitable by 12-21-04.
- We will achieve the Wine Spectator's Award of Excellence by October 2005.
- We will achieve the Tenedor de Oro by 12-31-05.
- We will be debt-free by 12-31-06.

CRITICAL SUCCESS FACTORS

- MG Rush Systems retires no later than 6-01-04.
- We obtain sufficient funds by 06-01-04 to open the restaurant.
- The restaurant opens no later than 08-01-04.

CRITICAL ASSUMPTION

The world economy - especially Puerto Rico - remains stable or improves by 2004.

REALLY IMPORTANT MANAGEMENT ISSUES

Get good staff - caring, reliable, knowledgeable, and well trained.

22

How to be a Successful Facilitator - Long Term

Miracles Plan

STRATEGIES

- Identify and secure the best purveyors.
- Develop employee training and growth programs.
- Define fair profit-sharing programs. Some employees become part-owners after a tenure.
 - Target local clients for repeat business.
 - Target high-end local hotels for referrals.
- Bring in local public through programs such as wine-tasting events, special events, and afternoon cooking classes.
 - Develop a wine program - cellar, sales, tasting, and education.
- Develop market programs aimed at local clients, tourist groups, and international publications.

23

Exercise

Build your plan:

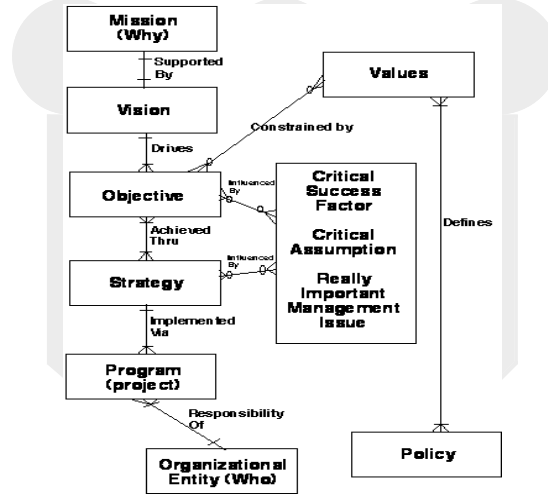
“As a facilitator, my mission is ...”

“As a person, my mission is ...”

24

How to be a Successful Facilitator - Long Term

Strategic Planning Model



25

Now you have to Stay Successful

- Watch out for pitfalls:
 - “I’m the best”
 - “I already know enough”
 - Customers don’t change
 - Needs remain the same
 - “Pride of Authorship”
- Refresh your skills:
 - Learn something new
 - Try new areas
- Know when to quit - and how to quit

26

How to be a Successful Facilitator - Long Term

Conclusion

- Successful people and businesses:
 - Know where they are going
 - Know how to get there
 - Never settle - continue to learn, grow, improve (an “expert” is a has been drop of water)
 - View planning as a process - not an end result
 - Aren't afraid to take risks - “He who will not risk, cannot win”

If you fail to plan, you plan to fail

27

Being Successful

Why

I've been in business for 17 1/2 years and I've been a successful facilitator for over 19 years. I thought that I'd share some of what I have learned and seen over the past 19 years. I also thought that I'd share this now because of the increase in the use of facilitators – many who remain in companies and many who venture out on their own. MG Rush Systems has been very successful over the 17 1/2 years that we've been in business. Much of our success is because of three factors:

- We know where we were going
- We believe in what we do
- We believe in only doing the best job we can

Internal versus External

One question that I get when I teach is, “Is there a difference between being an internal facilitator versus an external facilitator?” (The answer is, “Very little difference.”) Often it is followed up by the statement that, “It's easier for you since you are external.” Well, there is a difference, but not in the way you may think. This has a direct impact on staying successful, too. Being an external facilitator is riskier. It is easier to be fired and you risk your own money and time. Being internal isn't a “cakewalk” either, since you have to work with your “clients” afterwards. In terms of staying successful, I'd treat both cases as if being a facilitator were your job your business. That attitude change helps both internal and external facilitators – you assume more responsibility for yourself.

What is Success?

The first question is, “What is success?” I see two different measures of success:

- Your quality of work - i.e., how good are you as a facilitator
- Your continued tenure in business – i.e., how long do you remain in business or working as a facilitator

Both measures are important and often related. The first measure defines whether you are a good facilitator or not. Do clients ask for you to return? Are the clients satisfied with your work? Did the workshops succeed? These are the questions that define your quality of work. If the answers are “yes”, then you are doing a job that the clients view as quality. Also ask yourself, “Am I satisfied with my work?” This helps define quality from both your client's eyes as well as yours.

The second measure – are you still in business – is a little different. I have seen good facilitators fail in business and poor ones succeed – because facilitation skills and business skills are not the same. Quality work, alone, does not keep you in business. Staying in business requires that clients – internal or external – hire you. That requires a plan.

How to Succeed

To maintain a quality of work, you need to learn, grow, get feedback, and be honest with yourself.

I want to focus on staying successful by continuing in business. To succeed in that way, you need a plan. A plan is not a static document. It is a process whereby you continuously look at who you are, where you are going, and how you'll get there. You need to know and plan out where you are going and how you'll get there – both personally and professionally – or you go wherever someone else dictates. Developing a plan for yourself forces you to think through:

- who you are
- what you're good at
- to whom you want to sell
- how you'll attract your customers.

This plan needs to be done for yourself and for your role as a facilitator – in other words, “As a person, my mission is to....” And, “As a facilitator, my mission is to....” As a facilitator, look at:

- What niche do I fill? Business? IT? Both? Process focus or relationship focus?
- Who are my target customers? Corporate? Government? Non-Profit?
- How do I reach my customers? Advertising? Seminars? Telephone? Internet?
- What do I want to provide? Consulting? Facilitating? Project Management?
- What do I want to get in return? Do I want to grow a business? How much do I want to make? How long do I want to do this?

The critical elements of the plan are:

- Your Mission – who you are
- Your Vision – where you are going
- Your Values – what you believe in and how you'll behave
- Your Objectives – targets to achieve
- Your Strategies – what you'll do to reach your targets/objectives

From these elements, you can plan tactical work – projects, advertising, seminars, education, etc. – to implement the strategies. These tactical efforts define your annual budget. These tactical efforts also feed back to your plan to help you decide if it's working or if you need to change it.

Review the plan with colleagues, friends, and family. Get their input, but make the plan right for you. Publish the plan – it isn't a trade secret. The plan, though, keeps you in focus. Do you want to grow the business? If yes, then you need to include that. If not, then you avoid efforts that distract you from what you want to accomplish. I have seen many businesses who directed efforts towards accomplishing something that wasn't in their plan – and they failed as a result. I've also seen businesses miss doing work that would help them achieve their plan because they were distracted from their overall vision. A plan helps keep you focused.

Staying Successful

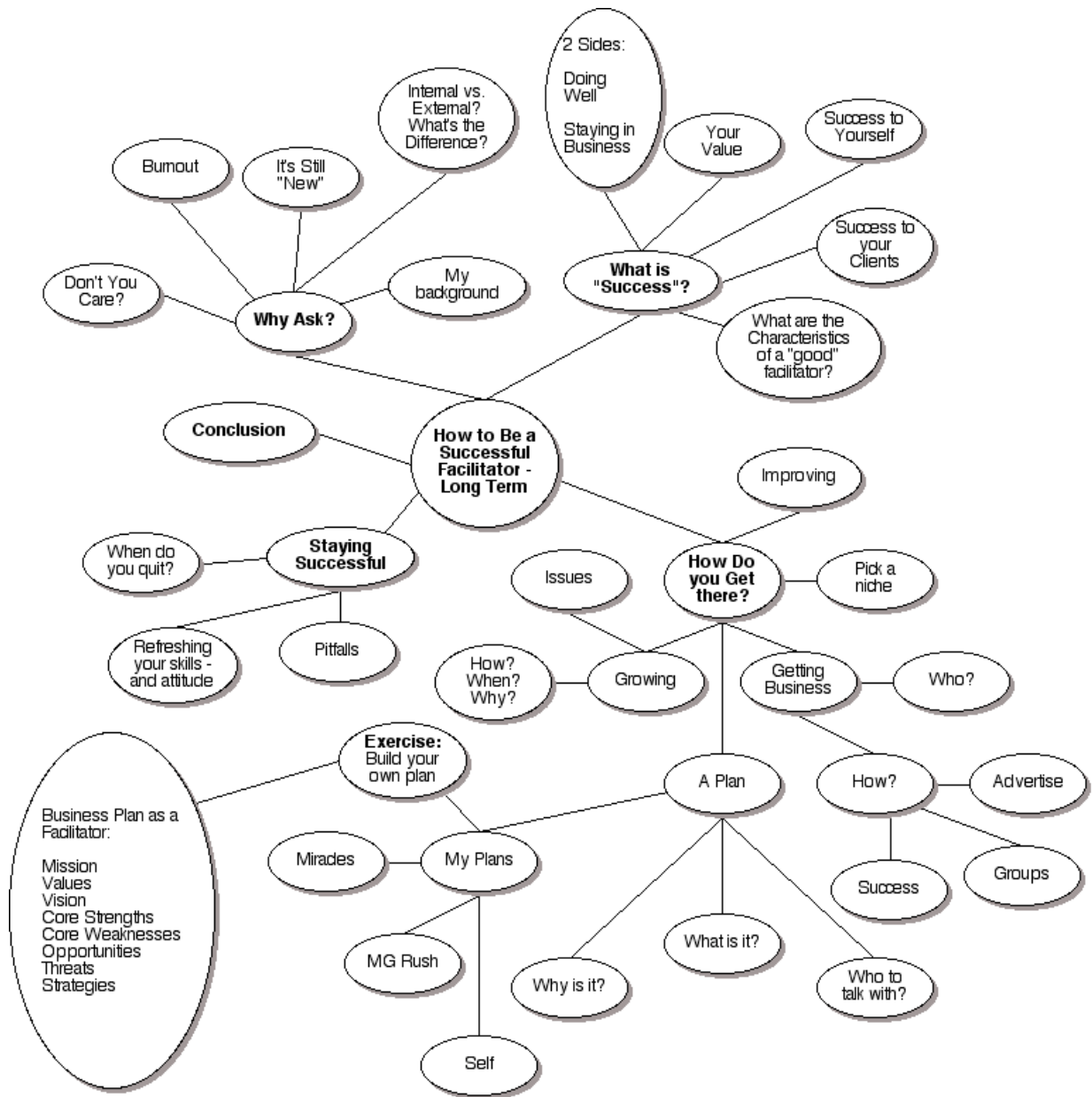
One thing that many people forget is how to stay successful and how to stop. Staying successful requires that you refresh your skills – the “same old story” doesn't sell well. Business and your clients change – and you need to with them. Business issues and trends (or fads) require you to keep up with what's going on. Once you know what you're doing as a facilitator, remember that there is more to learn than you already know. Keep learning and growing your skills. Attend seminars, classes, and talk to people in business – whether they are perceived clients or not. The biggest pitfall I have seen is for the facilitator to become complacent – think that they have the answers. Continuously learning helps maintain an interested attitude. Your clients know when you don't care anymore – it comes through loud and clear.

Also know when it's time to quit. Sometimes, the best course is to do something new and different. Many people are afraid to change jobs – it's scary. In this day and age, change is constant. If you no longer have a passion for what you are doing, find out what you do have a passion for and develop a plan to get there.

Conclusion

I have used my plans for many years. I developed a plan for MG Rush Systems, Inc. and have largely achieved it. In moving forward in my life, I have developed a plan for a planned future restaurant – named Miracles. Both of these plans help guide me. Both plans have changed over time – and will continue to change as life, the economy, and other factors dictate. Change is ever-present. The plan is not static. Review it periodically. Don't be afraid to revise it to keep it alive and current.

Remember, if you fail to plan, you plan to fail.



Exercise

On the following pages, write out your plans – one for you, personally, and one for you as a facilitator. If you have questions, please ask. There is no “right” answer as to what constitutes a “good” mission, values, etc. What matters is, “Do you feel good about it and does it help you know where you’re going and how you’ll get there?” If the answer is “yes”, then it’s a good plan. Use the illustration below to help.



Legend:

- |— One and only one
- <|— One or many
- <⊗— Zero, one, or many

Read the model Top-Down, Left-to-Right

My Mission is.....

My Values are....

My Vision is

My Objectives are....

My Strategies are....

My Facilitator Mission is.....

My Facilitator Values are....

My Facilitator Vision is

My Facilitator Objectives are....

My Facilitator Strategies are....