

Facilitator Interview Guide

7 Questions to Help You Qualify Potential Facilitators

Knowing what questions to ask in the process of creating a short list of two or three qualified facilitators can be a challenge. We've designed this guide to help you identify facilitators capable of handling your specific project.

In our experience, many people find this difficult simply because it's not something that's done on a regular basis. As a result, many good questions go unasked, while others (for example, about price) are often used to eliminate candidates before their qualifications are explored.

A word of caution

Very often, the person tasked with identifying a couple of potential facilitators has been asked to get a "quick quote." While cost is certainly a factor and must be considered, not all facilitators are created equal. Consequently, it's important to make sure that you're considering someone who has the ability to do the job you want done, and to do it well.



Once you've provided a potential facilitator with an overview of the facilitated project you have in mind, use these 7 questions to determine if he or she is a good fit.

*Not all questions will be applicable in every situation,
so pick the ones you feel are most relevant.*

1. Does this sound like the type of assignment in which you'd be interested?

This can be a quick way of disqualifying facilitators who are either not comfortable with the assignment or will admit that it is not "in their wheelhouse."

2. Are you available for the date(s) we have in mind?

If the individual is unavailable on these dates, and the dates are unmovable, it's on to the next candidate.

3. About your facilitation experience, ...

... have you facilitated similar projects?

Experience with process can be a real advantage. For example, a facilitator who has demonstrated his or her ability to facilitate a strategic planning process will likely be much better able to lead a group successfully through a strategic planning assignment than someone who has little or no experience with the process.

... have you facilitated executive teams or groups of senior people?

Similarly, it takes experience as well as confidence to facilitate a group of senior executives and leaders. These assignments are not for the faint of heart or individuals who are either just starting out in the facilitation business or have not had experience dealing with senior people on an equal footing.

... have you worked in our industry?

In most cases, a facilitator's experience and objectivity should trump specific industry knowledge, particularly when the project demands new approaches and innovative thinking.

On the other hand, there are situations in which specific knowledge can be a real asset, for example, when the project involves a significant level of technical expertise that an "outsider" would have a hard time learning "on the fly."

4. Is facilitating your primary business?

While you certainly want a skilled facilitator, a breadth of business experience is a valuable asset. With this experience comes an ability to analyze situations and contribute in a meaningful way to dialogues involving complex business issues.

A word of caution. Your facilitator is there for one essential reason: to achieve the outcomes that have been established for the session, ...not to promote their own personal agenda. We know of situations in which facilitators have spent time trying to sell the group on other services (for example, sales training or leadership development) therefore losing sight of the reason they were brought in.

5. What is your process for facilitations like this?

Does this facilitator have a tried and proven process? If not, the session you are planning could turn out to be a bit of a free-for-all.

To verify that they do have a process, and that they will be able to provide evidence that it works, there are two questions you can ask:

Can you take me quickly through your process and what it involves?

While it's unlikely that anyone will expect you to assess the quality of a facilitator's process, you will at least be able to verify that they have one.

Will you be able to supply testimonials and a couple of references?

You might not need either at this point, but you should make sure they will be available at the appropriate time.

6. What do you expect or need from us?

If the answer involves words to the effect, "not much – all you have to do is show up" you've got the wrong facilitator.

A good facilitator does not operate in a vacuum.

To be effective, he or she will need to meet with your executive sponsor (in person or by telephone) to understand exactly what you want to achieve, and to identify any likely impediments to achieving it. They will want to understand the history of the project, obtain any relevant documents that should be reviewed, and clarify the role you'd like them to play in respect of communicating with participants, booking a suitable facility, note-taking, report generation and other things. And they should talk to you about speaking with some or all of the participants prior to the session to understand their position on key items and build some rapport.

Why do these things matter?

The person who facilitates an important workshop, meeting or retreat should be a valued partner, ...someone who wants to work in partnership with your executive team to deliver expected outcomes and provide an experience that participants will consider worth their investment of time and energy.

7. What or how do you charge?

The person you're interviewing might not be able to provide an exact price until they have had a chance to consider your requirements, ask a few questions and map out a plan of attack. However, they should be able to provide some ballpark numbers. If your budget and the lowest ballpark is right out of sync, you might have to revisit either the terms of reference or your budget.