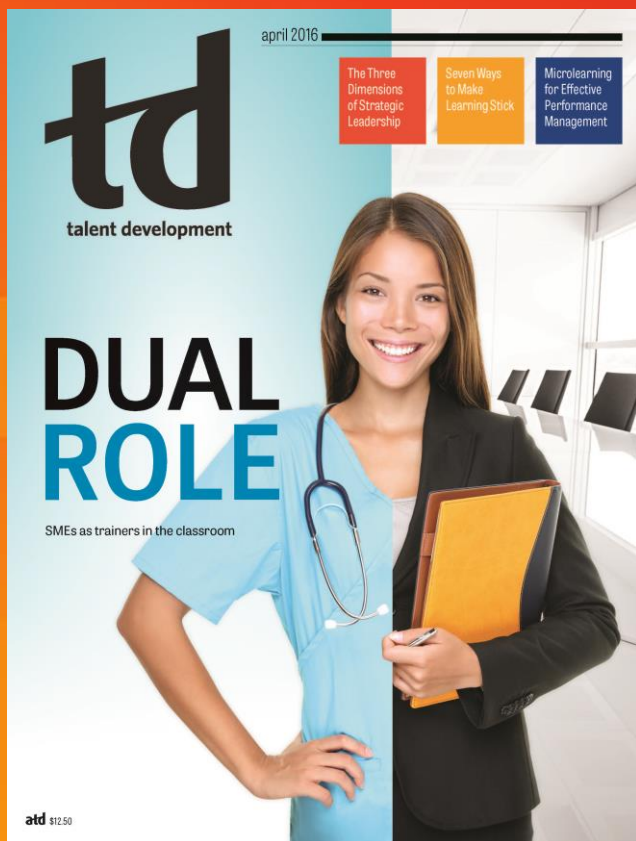


# 5 Ways to Help SMEs Facilitate Learning

*Dale Ludwig & Greg Owen-Boger*  
*April 21, 2016*



**Paula Ketter**  
**Editor**  
***TD***



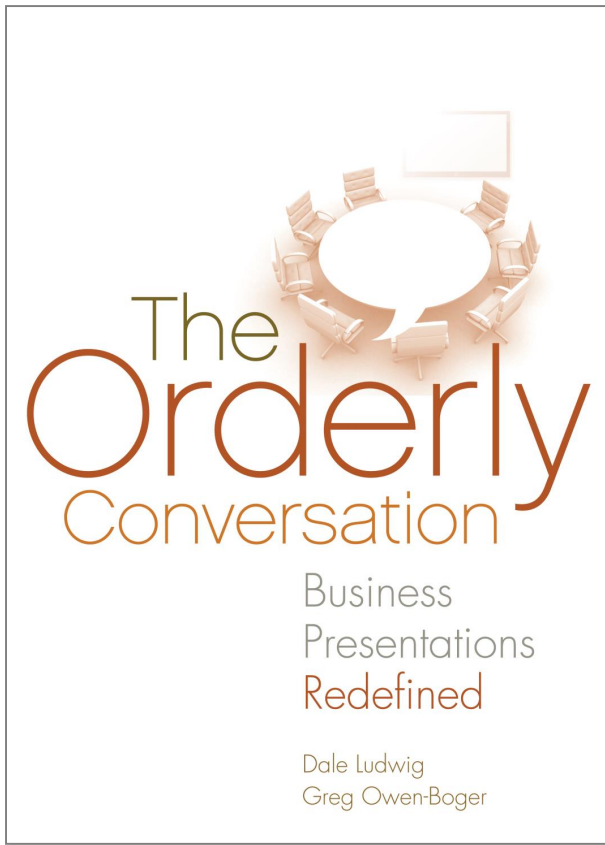
# A Bonus Webcast From the April 2016 *TD*



The Leadership Challenge is a global campaign to liberate the leader in everyone. We believe that teams, businesses—and even the world—get better when ordinary people enable those around them to achieve extra-ordinary things.

# 5 Ways to Help SMEs Facilitate Learning

*Dale Ludwig & Greg Owen-Boger*  
*April 21, 2016*



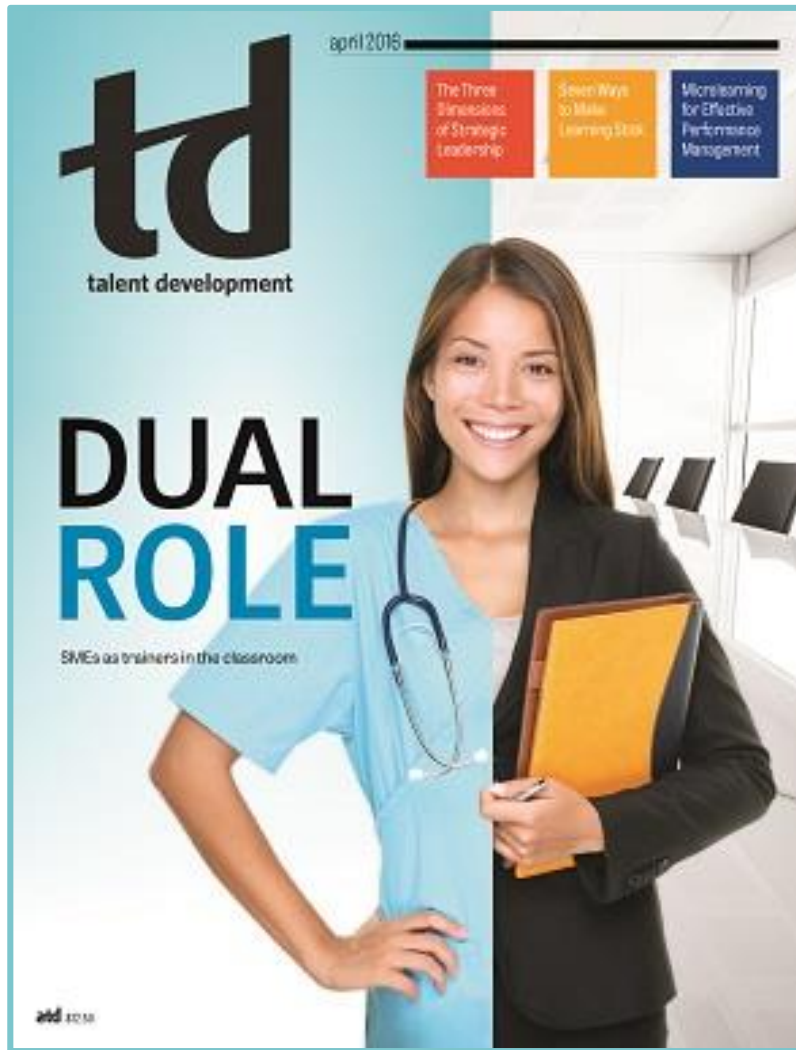
Presentation & Facilitation Training

46 Combined years experience

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**TURPIN**  
COMMUNICATION



- Two Levels of Success
- Dual Role

## 5 Ways to Help SMEs Facilitate Learning

1. Frame Training as a Conversation
2. Design for a Conversation
3. Encourage Personal Stories
4. Beware of Training Activities
5. Coach them to Facilitate

# Takeaways

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Fresh language & ideas for coaching SMEs

Help SMEs make instructor-led learning as fruitful as possible

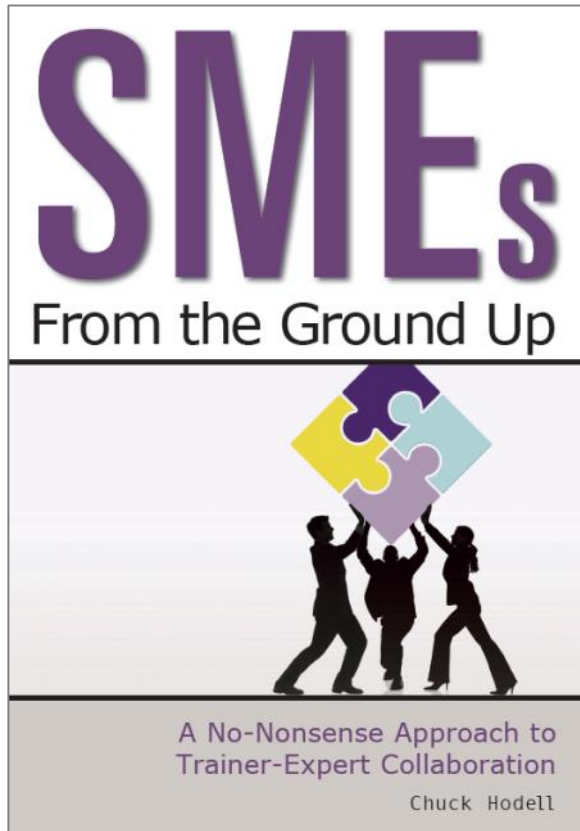




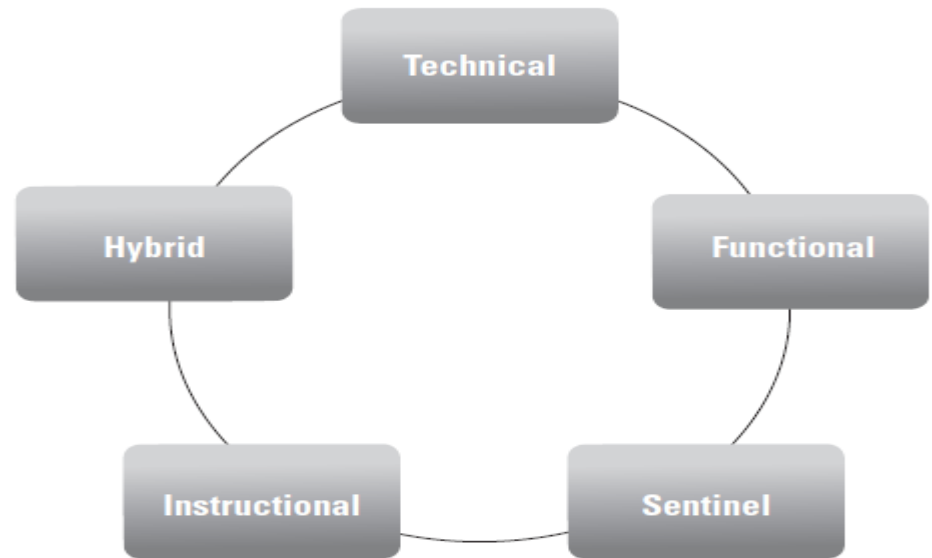
# YOU?

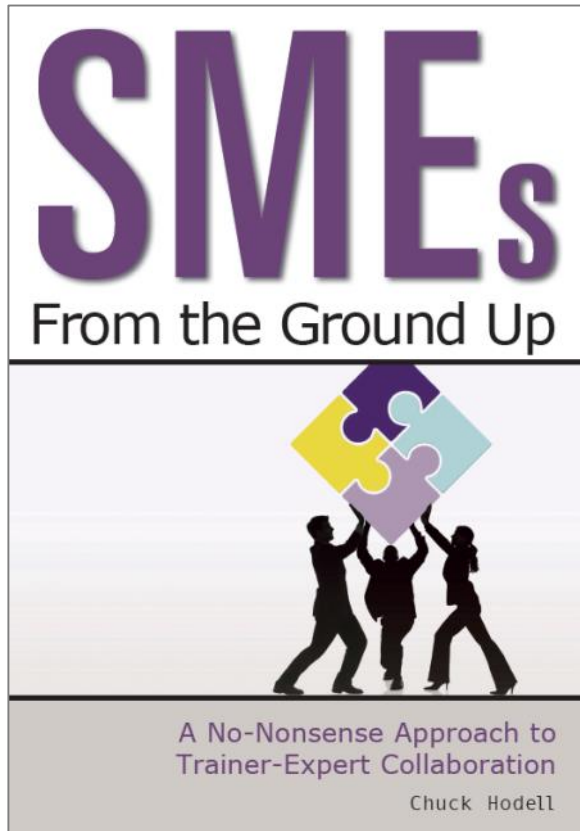
**Do you work with SMEs on**

- **Design**
- **Delivery**
- **Both Design and Delivery**
- **Neither, I'm an SME**

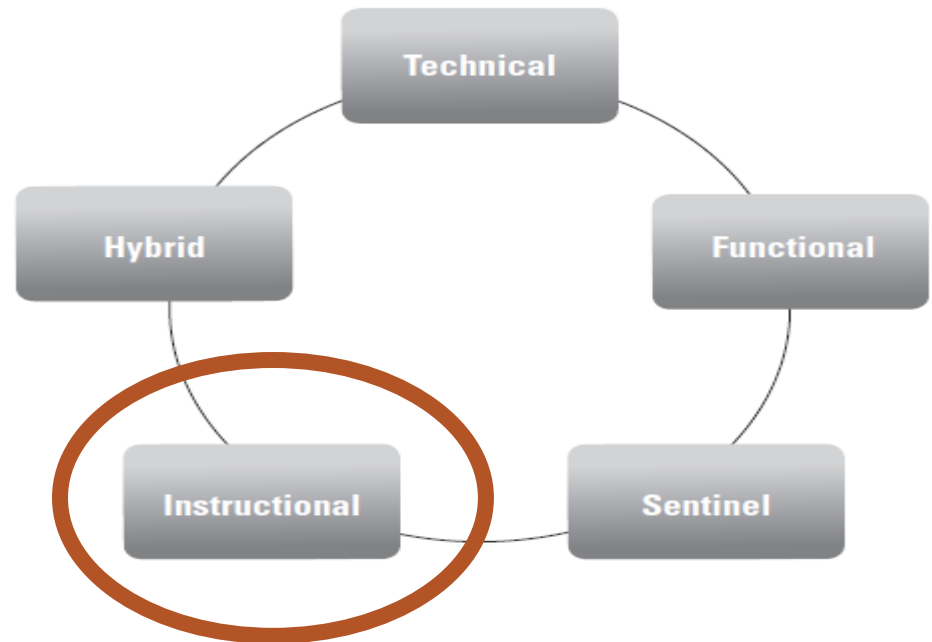


# Types of SMEs

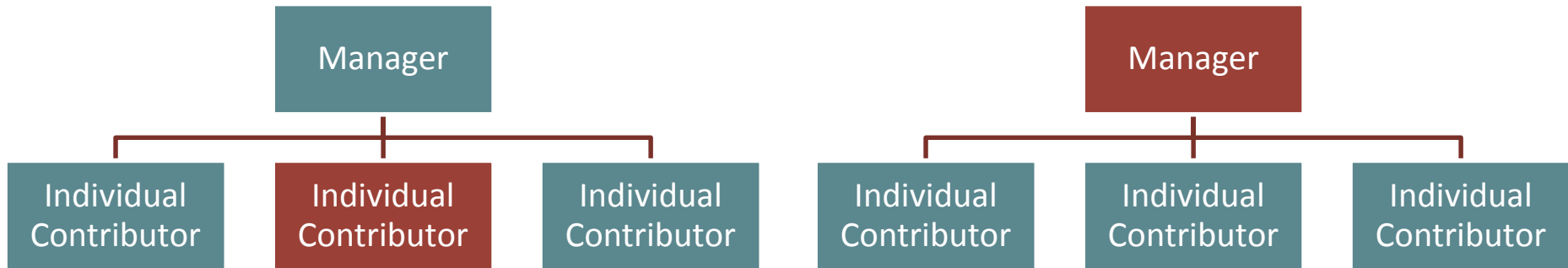




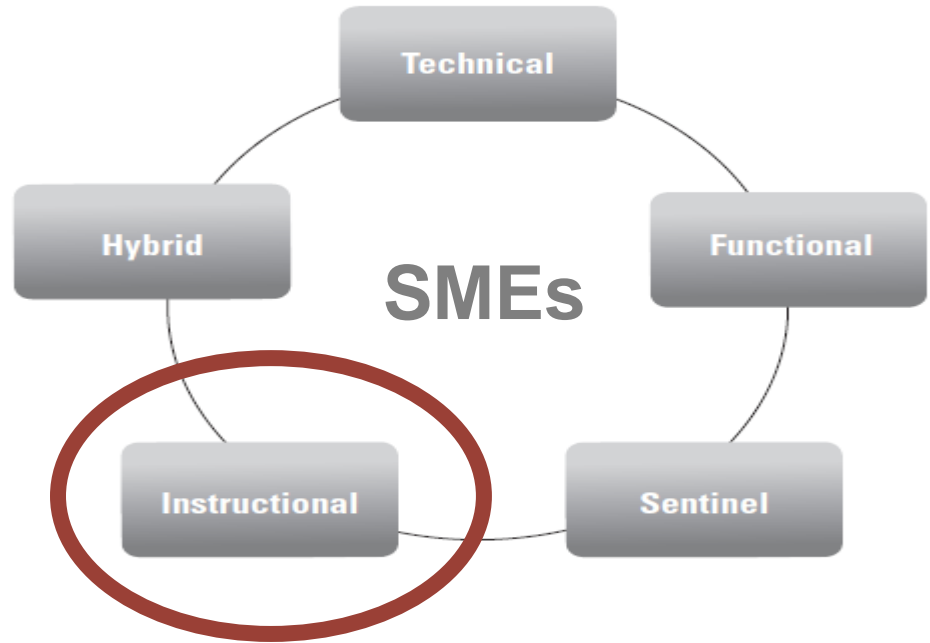
# Types of SMEs



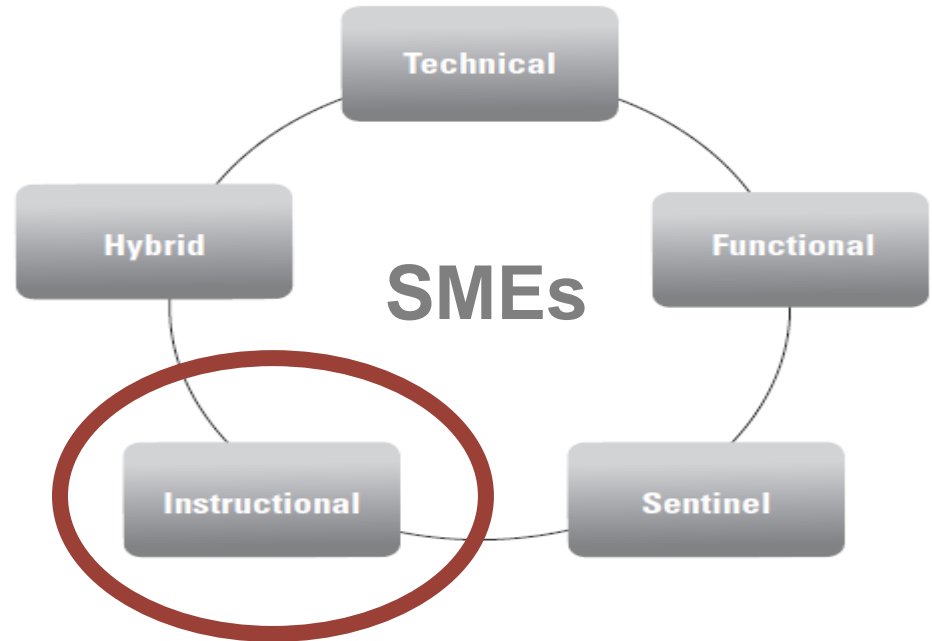
# It Takes Training & Coaching

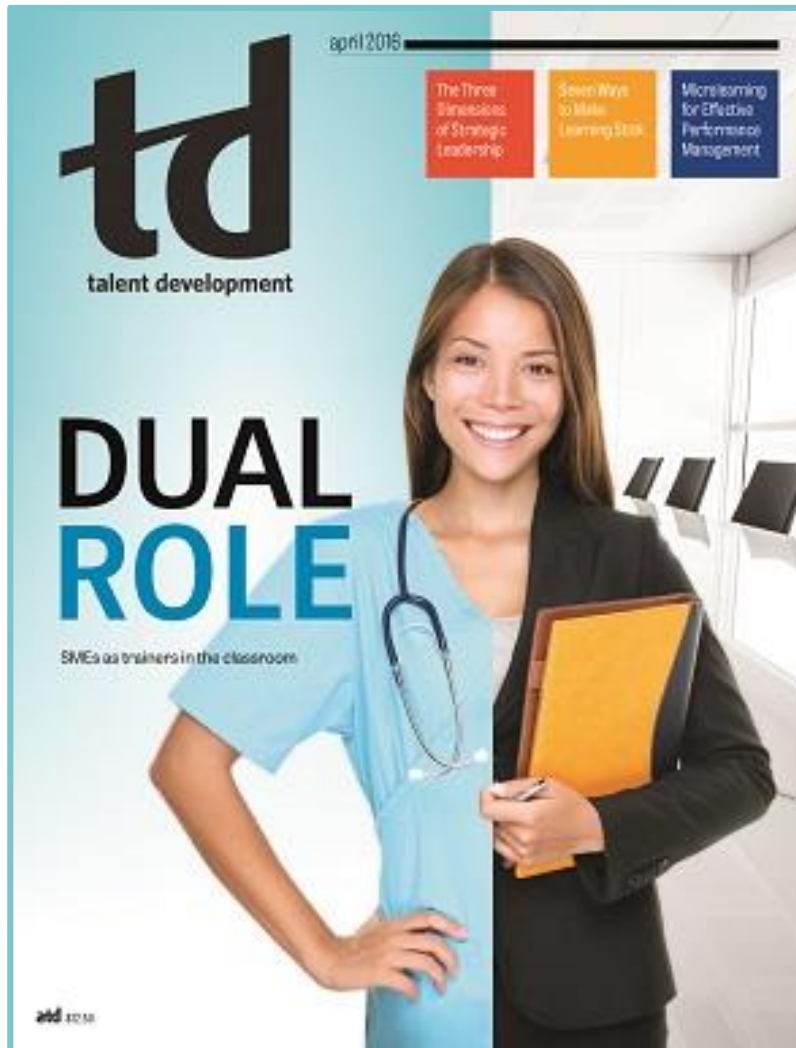


This Takes  
Training &  
Coaching Too



What challenges  
do you face  
working with  
SMEs?





- Two Levels of Success
- Dual Role

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# Guiding Principle

Successful Learning Events Succeed on Two Levels

---

Level 1

Level 2



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Level 1

## Meet Learning Objectives

Create a learner-centric plan

Deliver material so that it is clear

Level 2

# Guiding Principle

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Level 2

## Manage the Process

Create the conditions for fruitful learning

Make participating easy

Create thinking opportunities

Manage the give & take

Reinforce what was previously learned

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In our experience with trainers in general, level 1 is often missed because of unintentional mismanagement of level 2

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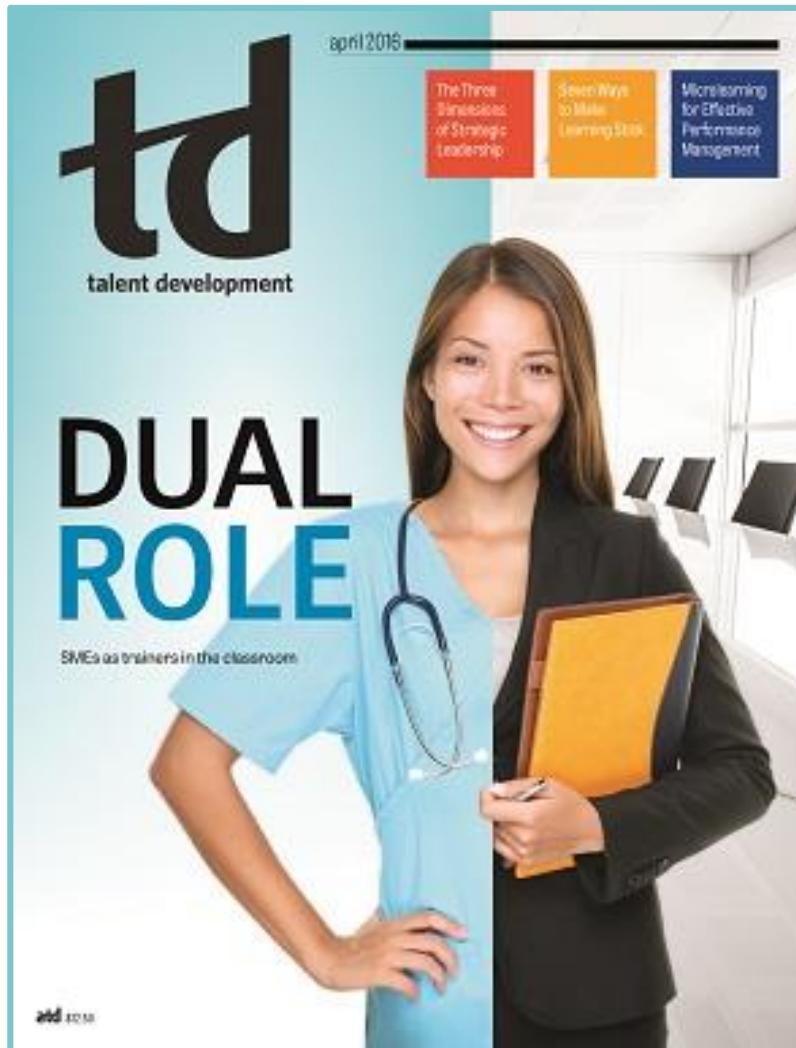
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# As a Facilitator of Learning, the SME Wears Two Hats

---



# As a Facilitator of Learning, the SME Wears Two Hats



Expert



- Data
- Details
- Personal experience & stories
- What it means



# As a Facilitator of Learning, the SME Wears Two Hats



## Expert

- Data
- Details
- Personal experience & stories
- What it means



## Trainer

- Context
- Big picture
- Help them learn
- Connect dots
- Why it matters





# As a Facilitator of Learning, the SME Wears Two Hats



## Expert

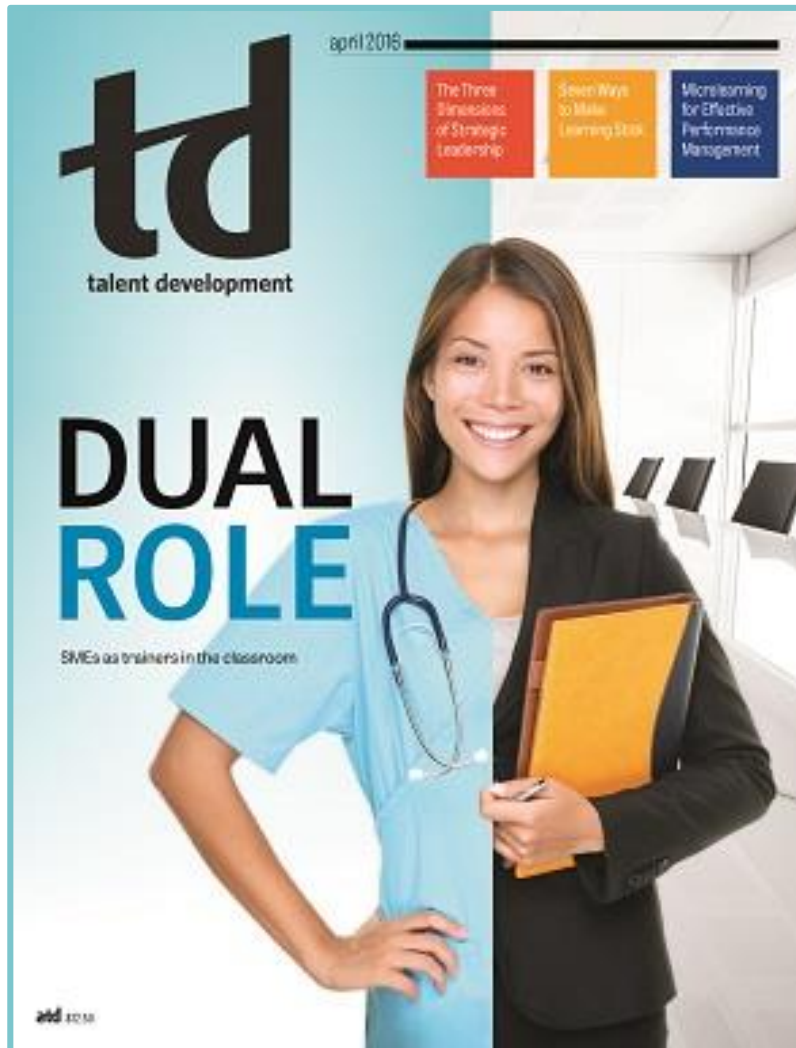
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# Training is an Orderly Conversation

## Orderly

organized  
data  
accurate  
structure



## Conversation

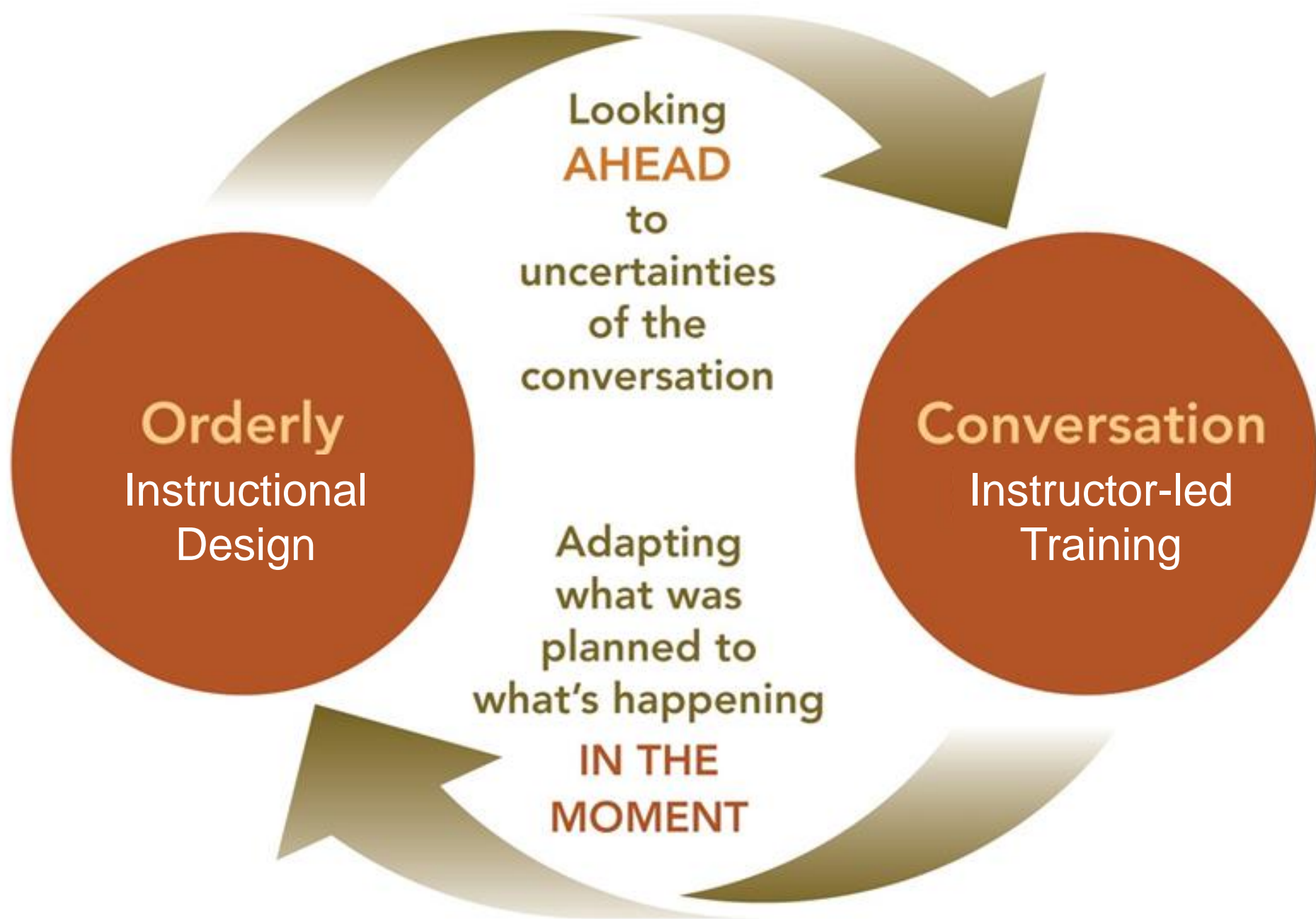
spontaneous  
interactive  
non-linear  
engagement

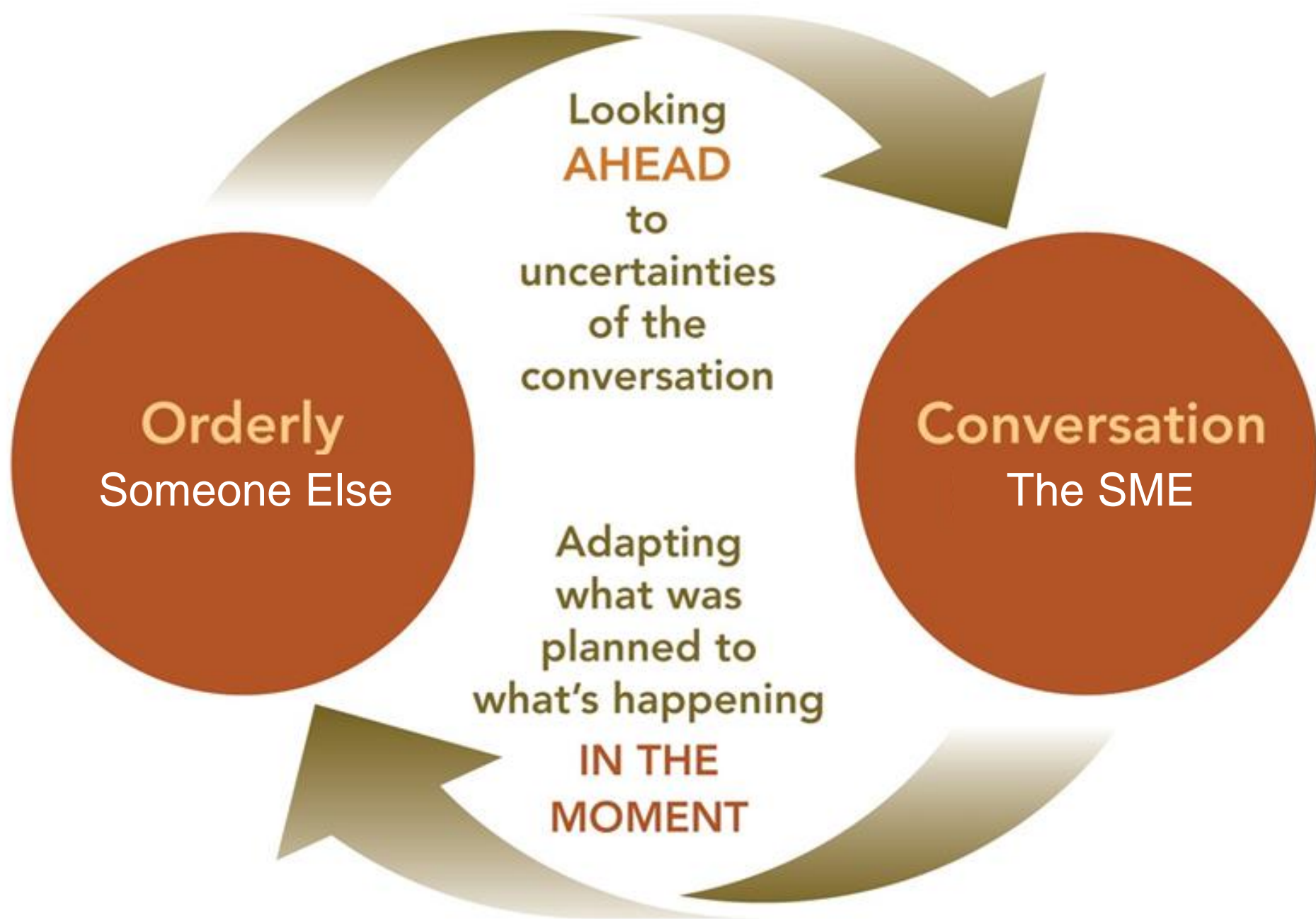
**Orderly**  
(Planning)

Presentations  
**Training Sessions**  
Facilitated Discussions  
Meetings  
Conference Calls  
Performance Reviews  
1-1 Conversations

**Conversation**  
(Presenting)

Any outcome-oriented communication event that is prepared, well-organized AND takes place in a responsive, conversational way.





# This is What SMEs Think Of



Speeches



Sage on the Stage

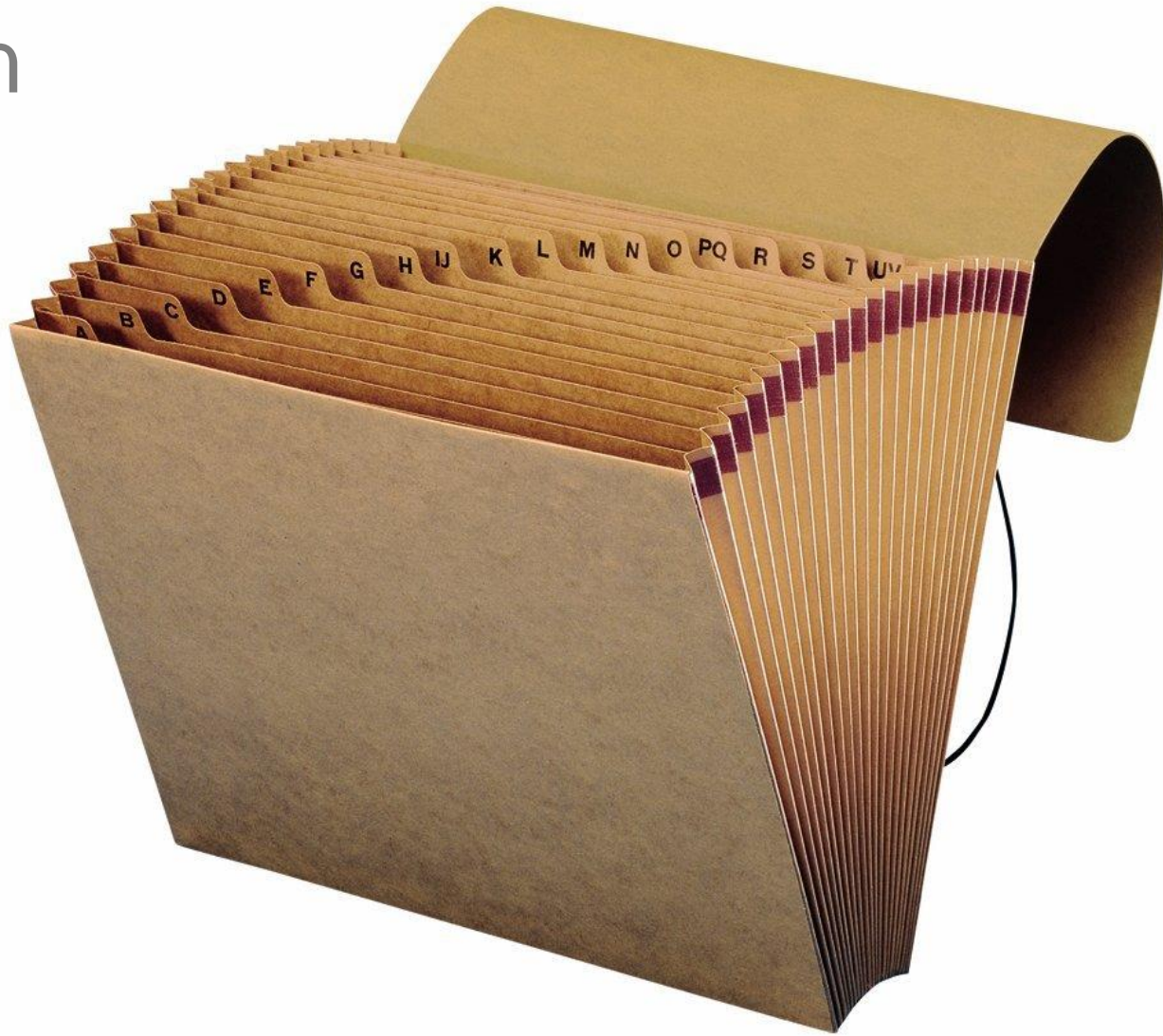
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“I do my best teaching at the bar after my training sessions.”

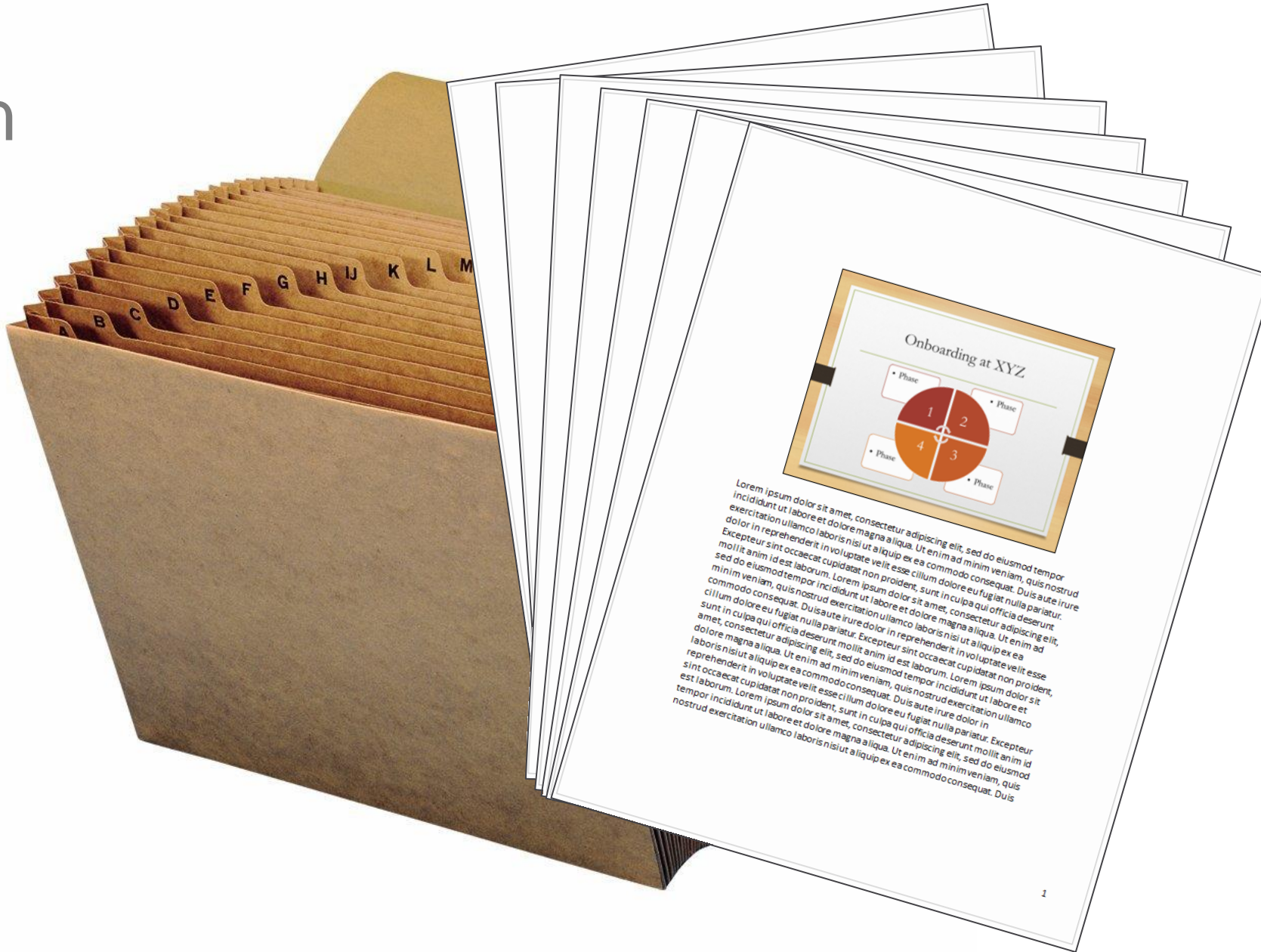


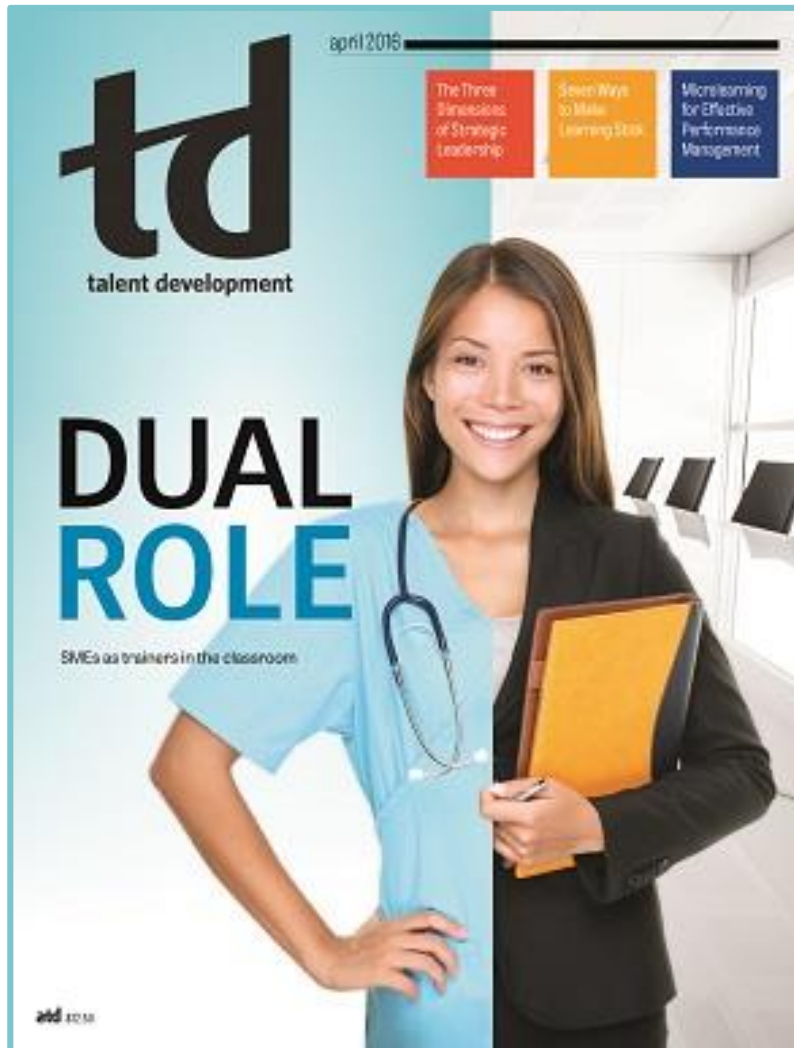


Lynn



# Lynn

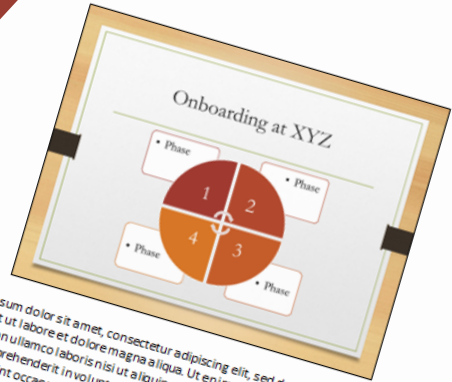




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# Design Materials with the SME in Mind

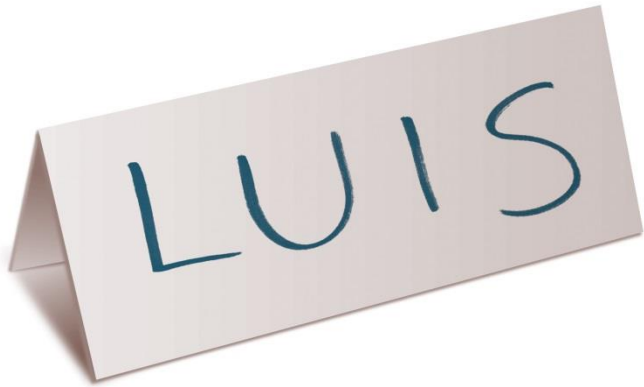
How slides will be used is more important than design

Create meaningful  
slide titles

Build in triggers

Give them the  
“so what”





Entrepreneur

Speaking to Venture  
Capitalists (High-Stakes!)

Disorganized, in his head,  
forgetful



# The Orderly Conversation

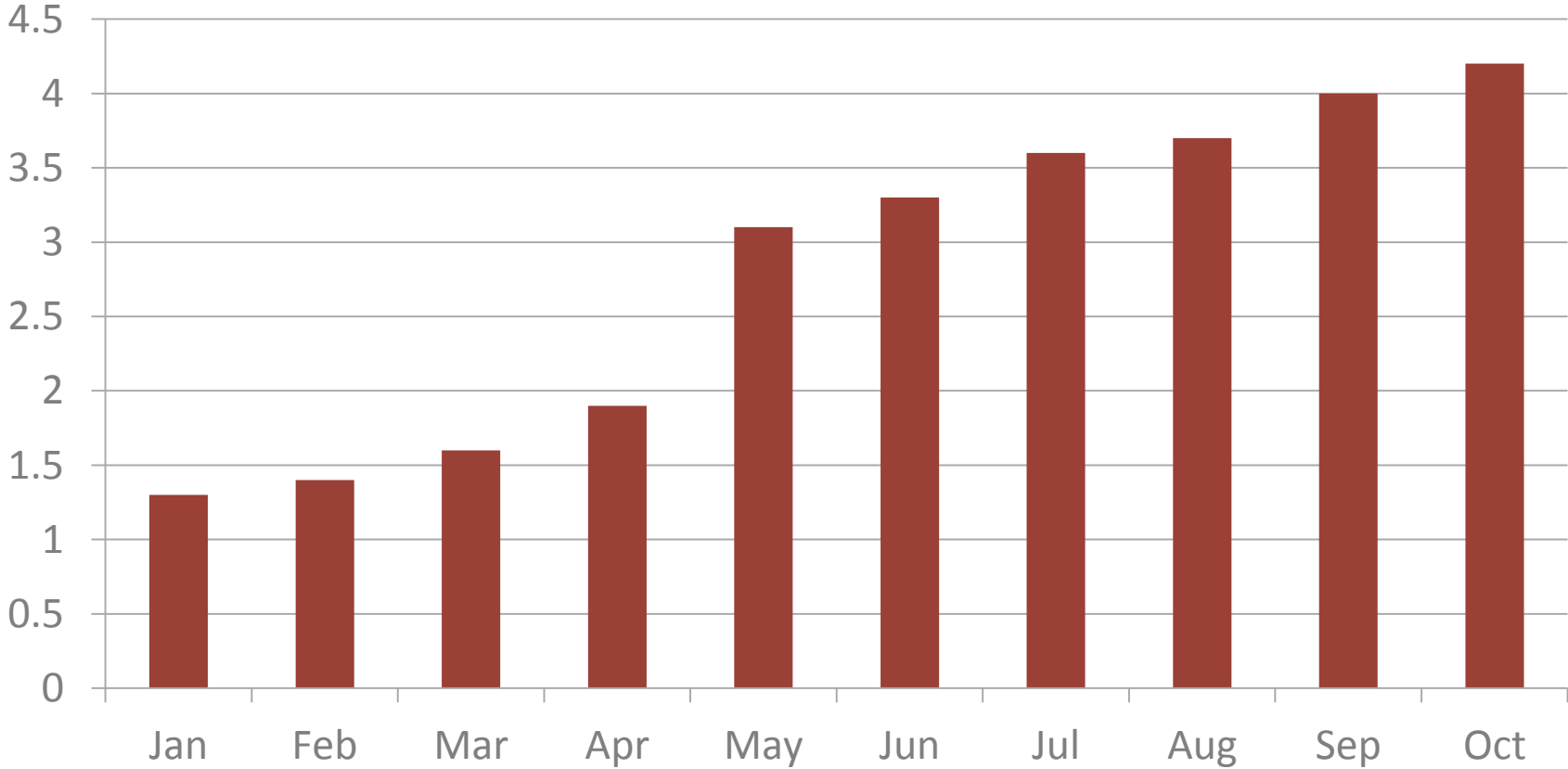
Business  
Presentations  
Redefined

Dale Ludwig  
Greg Owen-Boger

# Gross Sales

LUIS

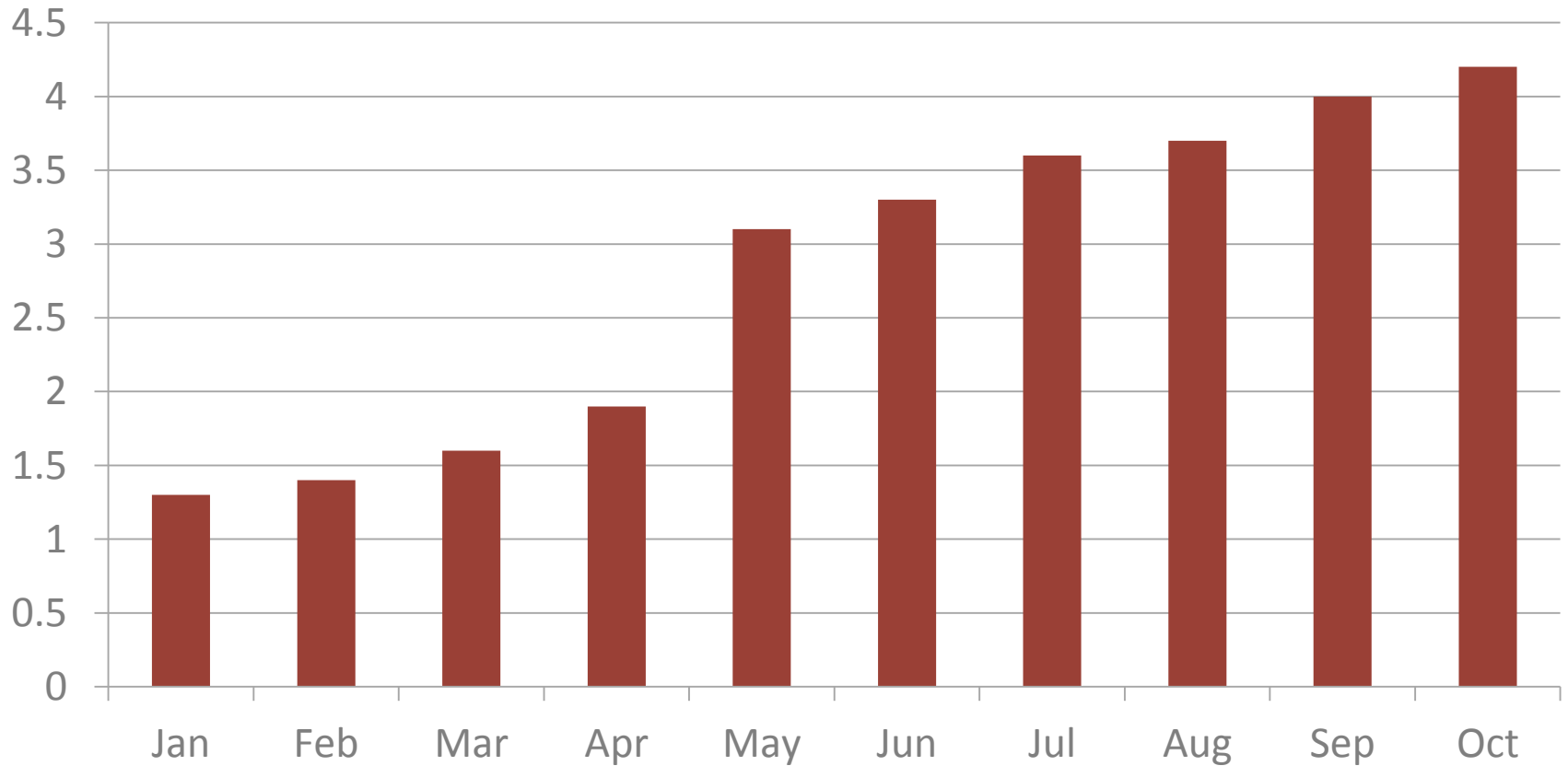
In Millions



# Month-Over-Month Sales Growth

LUIS

In Millions

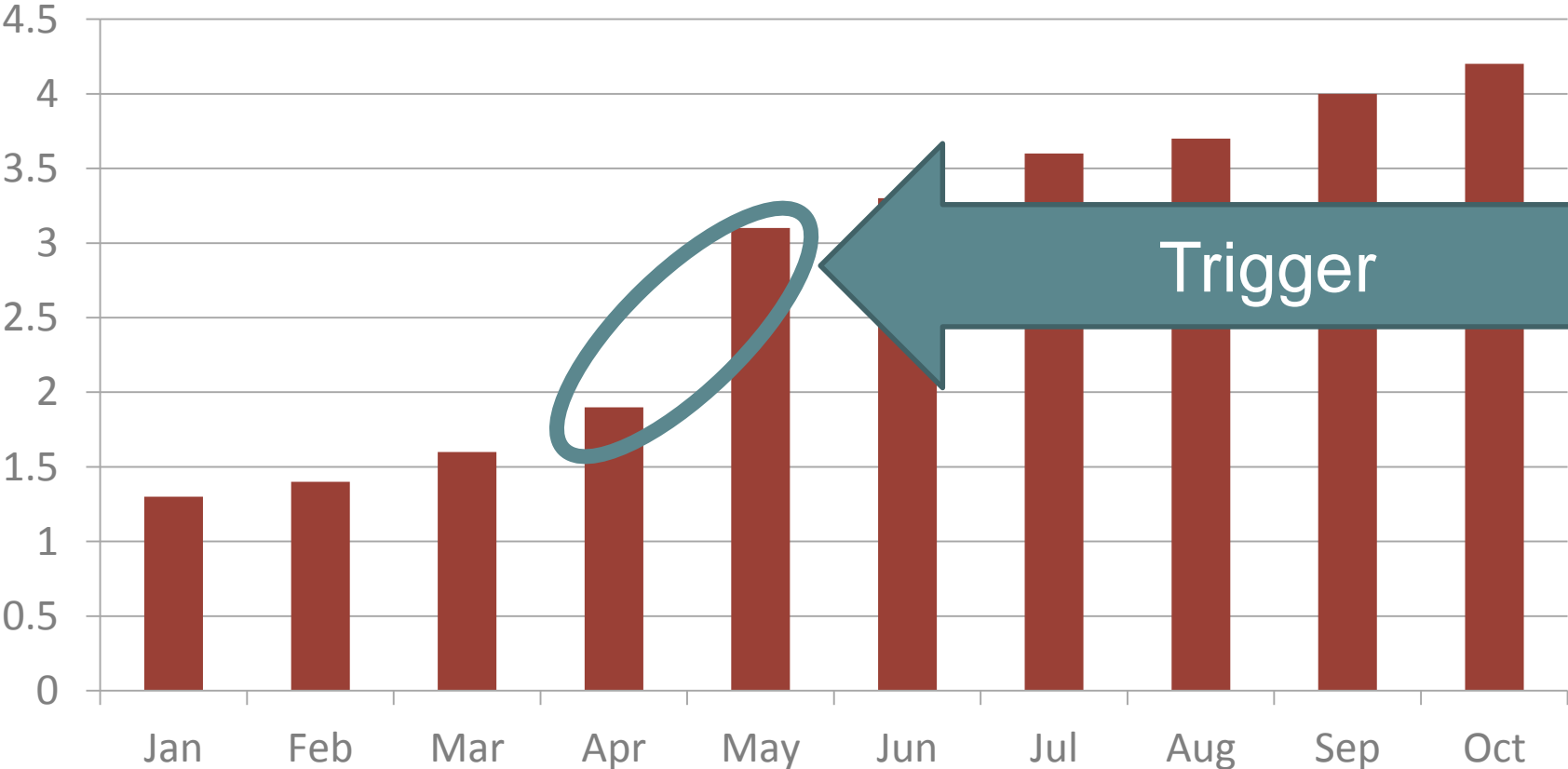




# Month-Over-Month Sales Growth

LUIS

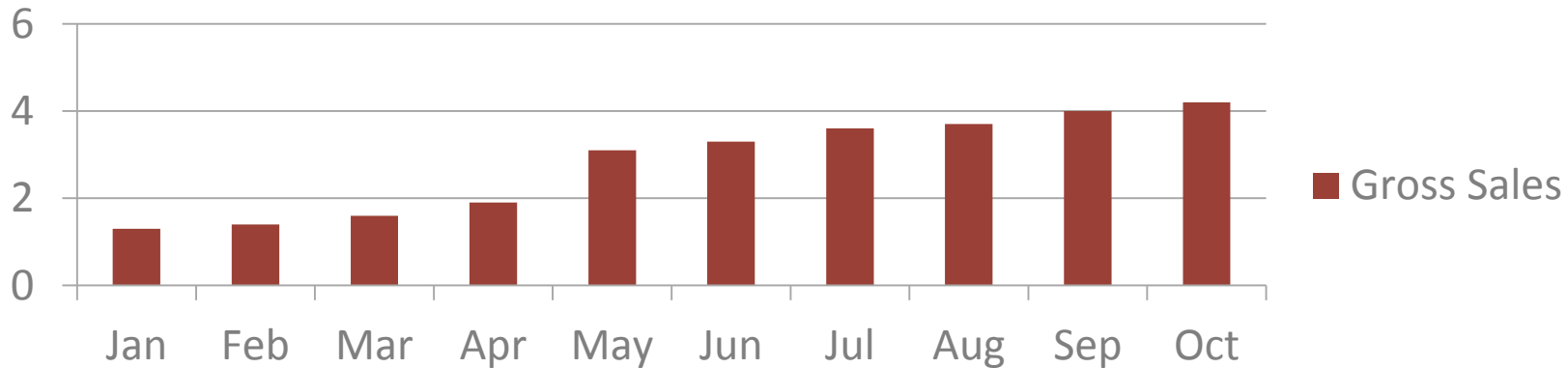
In Millions



# Month-Over-Month Sales Growth

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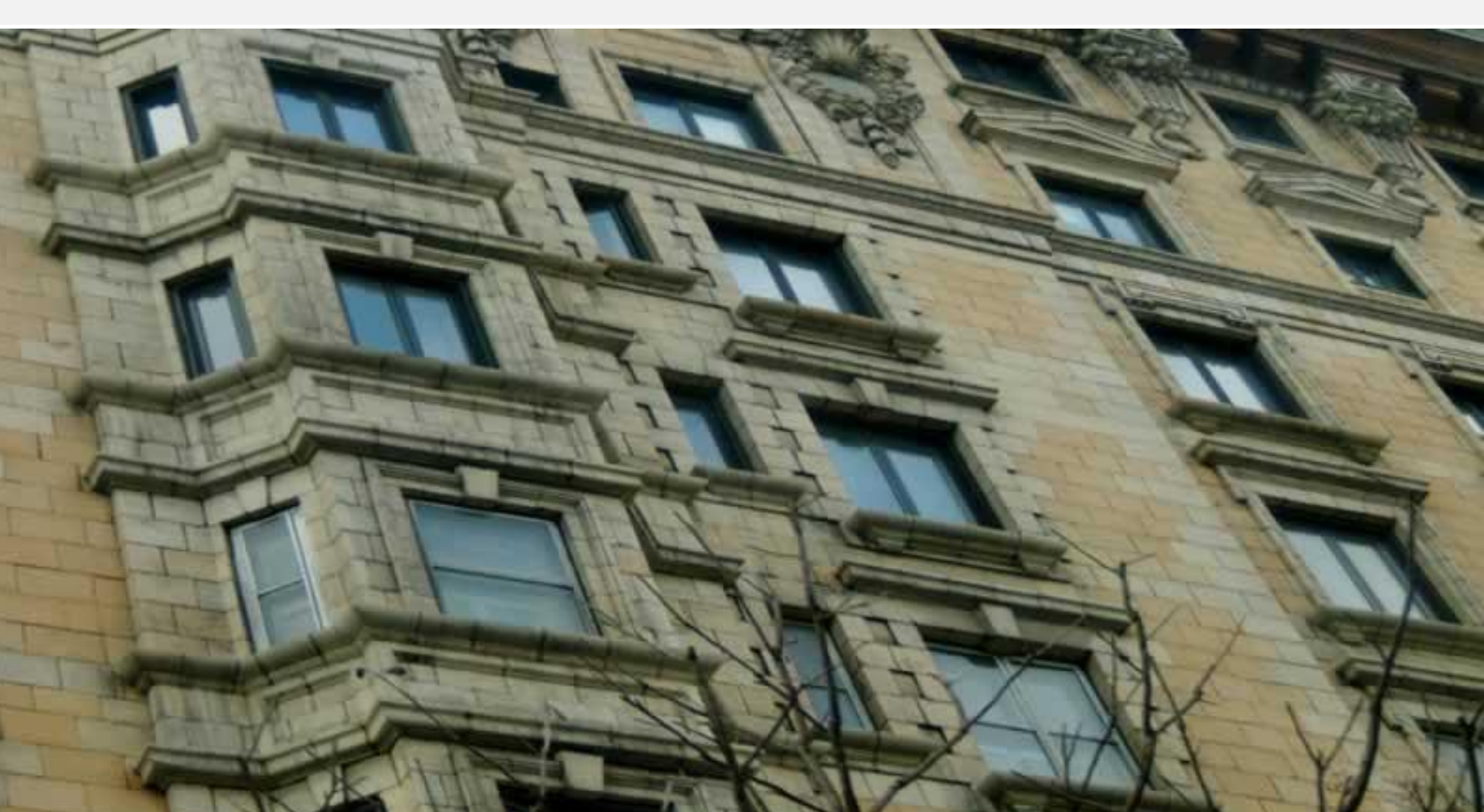
In Millions



Positive Trending = Positive  
Forecasting into Next Year

So What





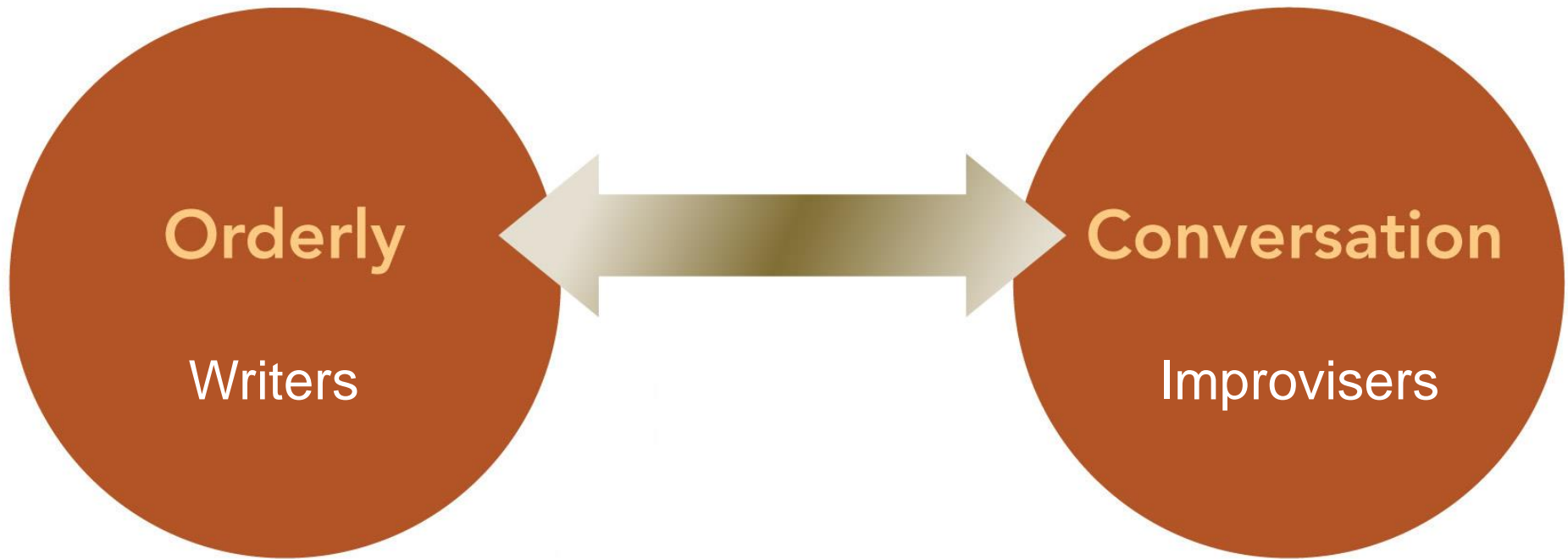
We need to do something to get noticed in the marketplace

---

# Play to Your SMEs' Strengths



# Play to Strengths Adapt to Weaknesses





## Which Are You More Like?



### Writers

Need structure and predictability  
Are naturally thorough, careful, detailed, and accurate  
Thrive with organization and preparation

**But...**

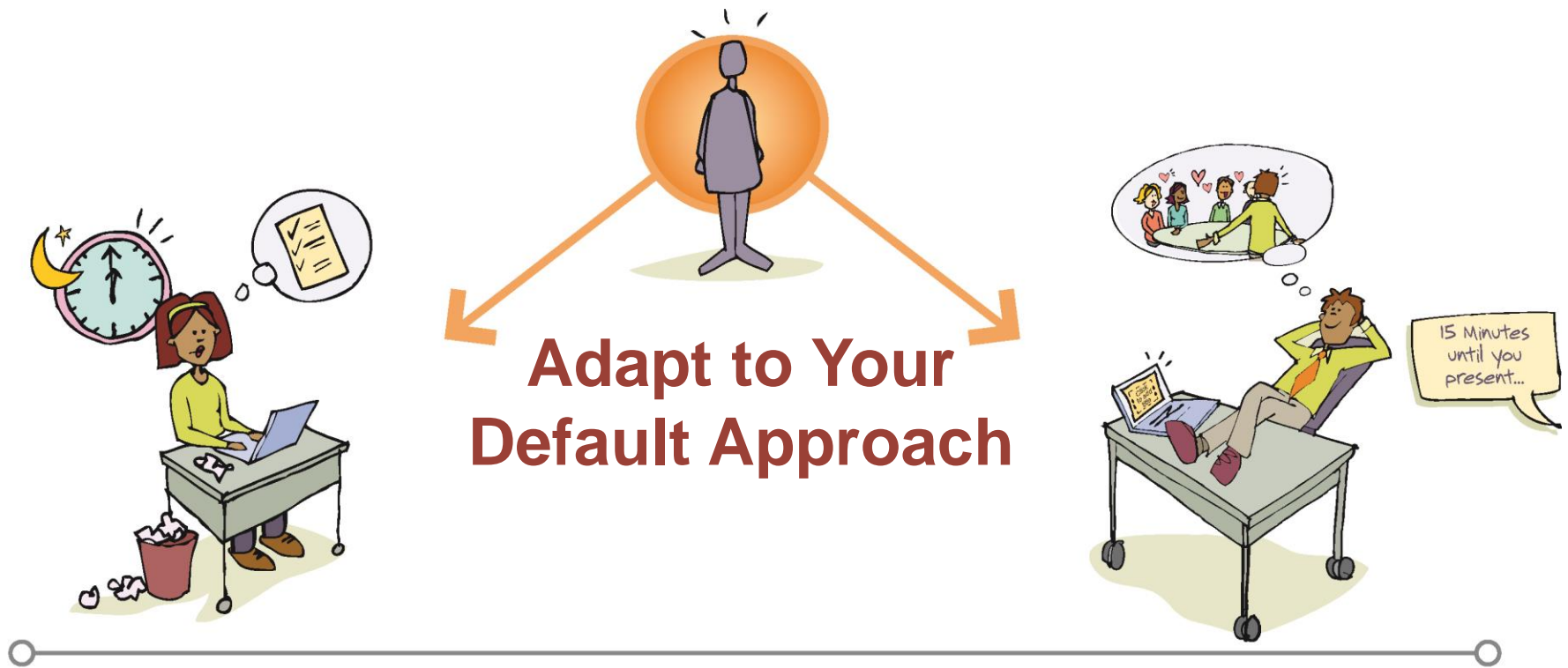
**can be inflexible and too strict**

### Improvisers

Need to be spontaneous and engaged  
Are responsive and unafraid to make last minute changes  
Thrive with connection to listeners

**But...**

**can lose focus and cause confusion**



## Adapt to Your Default Approach

### Writer Recommendations

- Include lots of prompts on slides
- Prepare them to be flexible

### Improviser Recommendations

- Provide structure to improvise around
- Help them manage their time



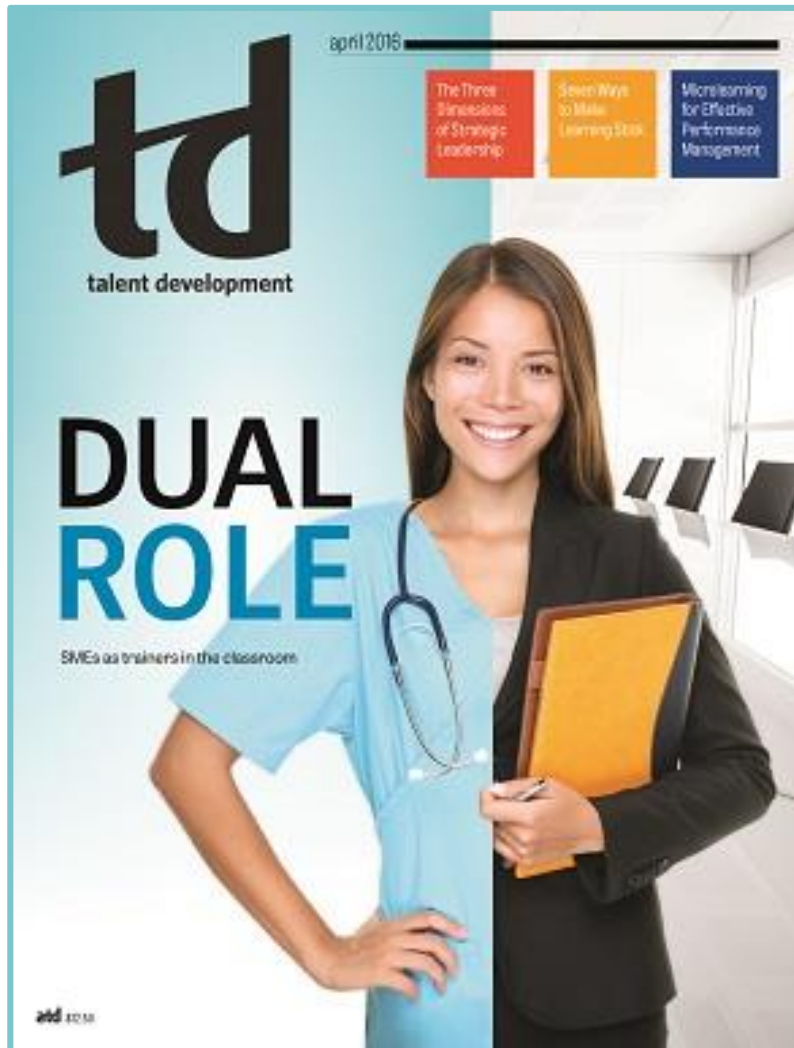
# Do They Have to Go It Alone?

---

Co-facilitation ideas:

- You wear Trainer Hat, they wear Expert Hat
- Moderate an SME panel with Q&A
- Have SME discuss a real-life case-study, you connect dots and provide relevance





- Two Levels of Success
- Dual Role

## 5 Ways to Help SMEs Facilitate Learning

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# Encourage Personal Stories

Successes &  
failures

History with the  
company

What it was like  
back in the day



Remind them  
to reinforce  
relevance to  
the learner



# Encourage Personal Stories

How?

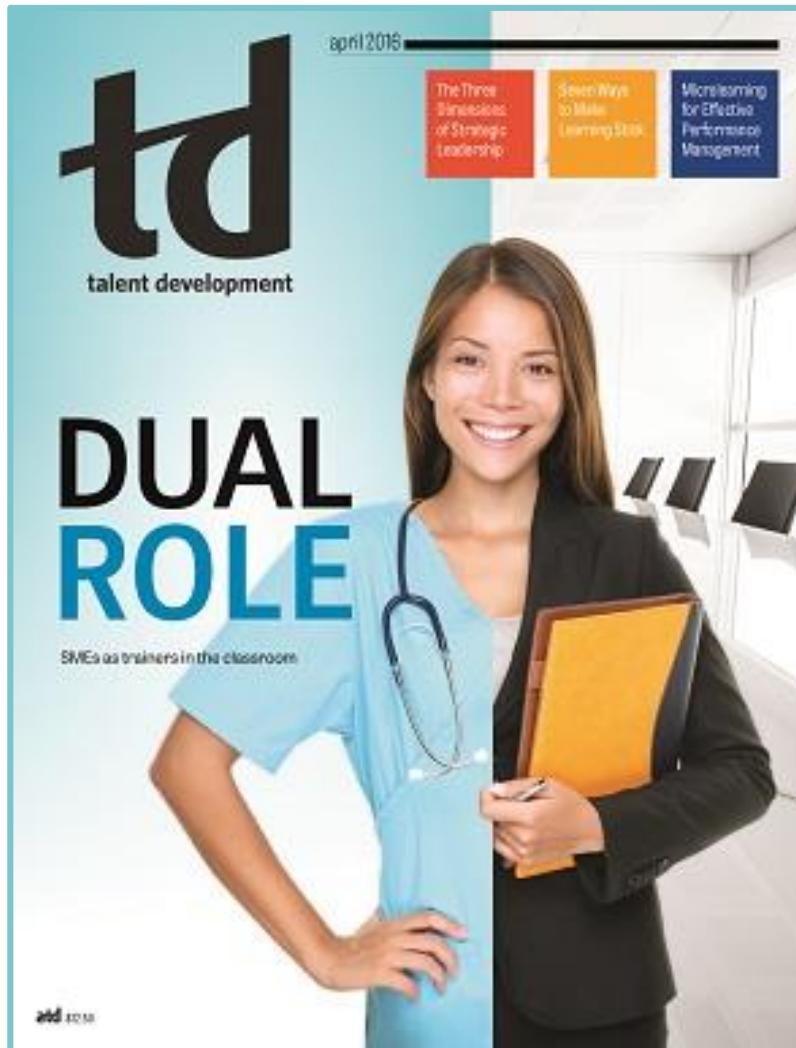
Build in blank slides with titles such as

“I remember when ...”

“In my experience ...”

“What I’ve learned ...”





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---

What?!



---

*Don't assume that including icebreakers, games, or humor will be welcomed by the SME.*



# The Danger of Activities

---

Feel irrelevant

Feel like wasted time

Task not completed

Confusion, frustration & resentment

Loss of credibility for facilitator/SME





---

Wait... what are we  
supposed to do now?



# Setting Up Activities

---

## Provide

- Context
- Clear instruction
- Learner benefits
- Time allotted
- Debrief expectations



# Help SMEs Debrief Activities

---

Listen


Hear from everyone or every group

Be efficient without rushing

Listen for nuance

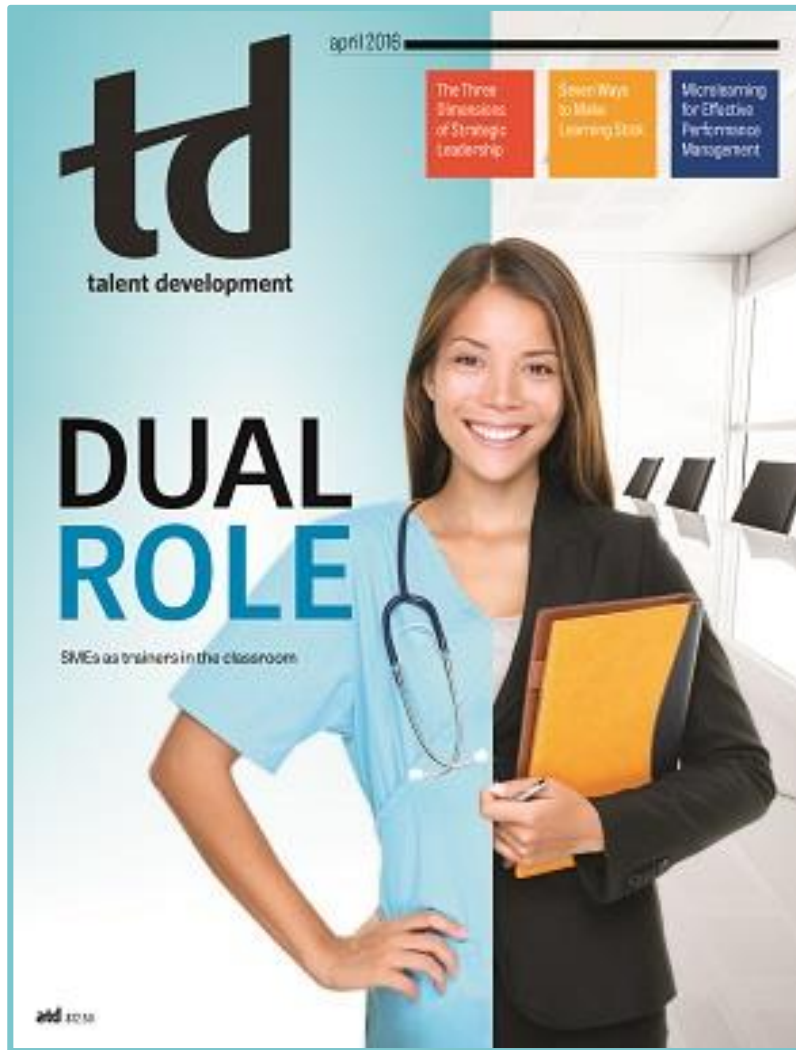
Dig deeper

It's not always about the right answer



**You know  
this. They  
may not.**





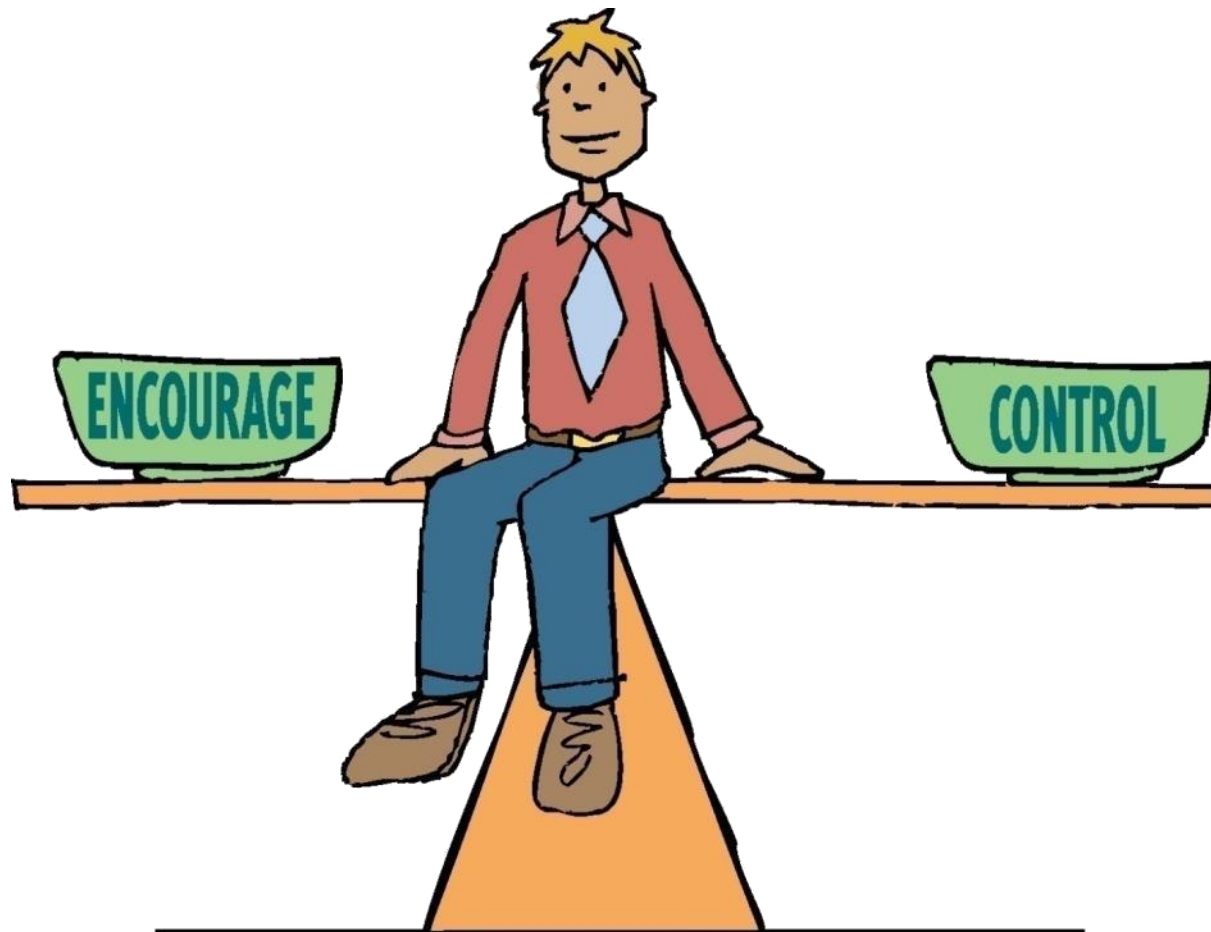
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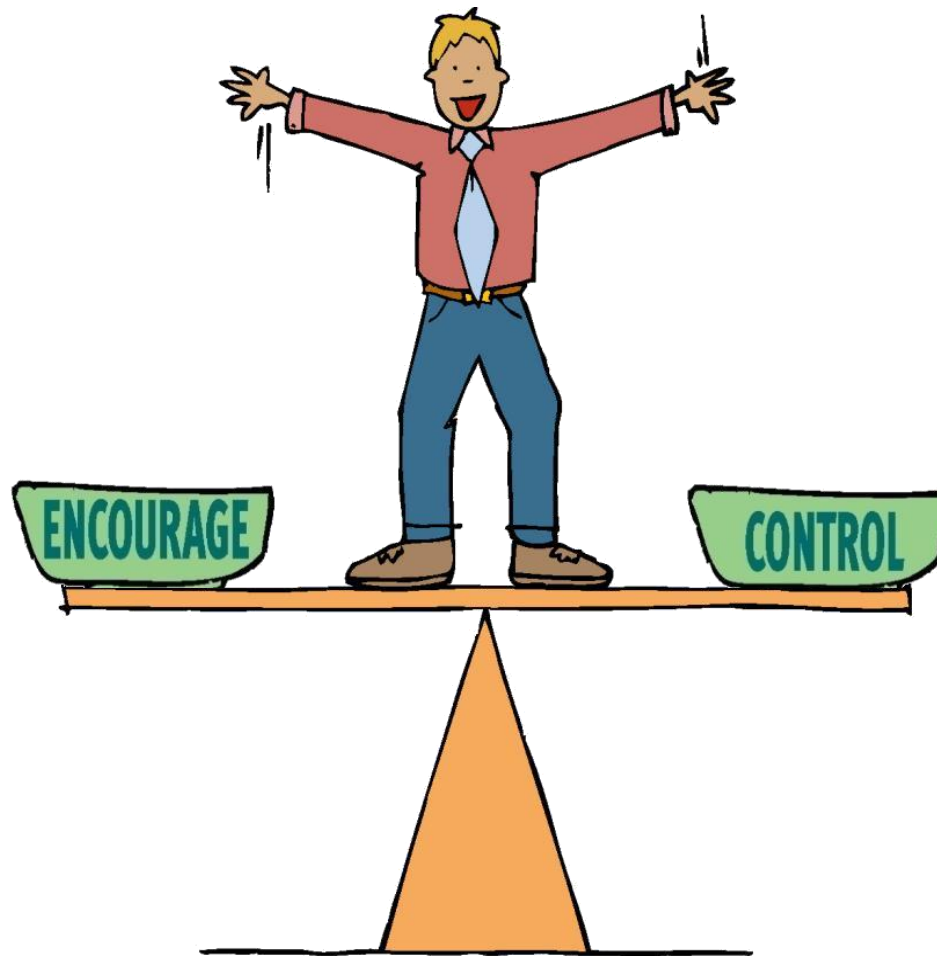
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# Manage the Orderly Conversation (Facilitation)

---



# It's an Active Process



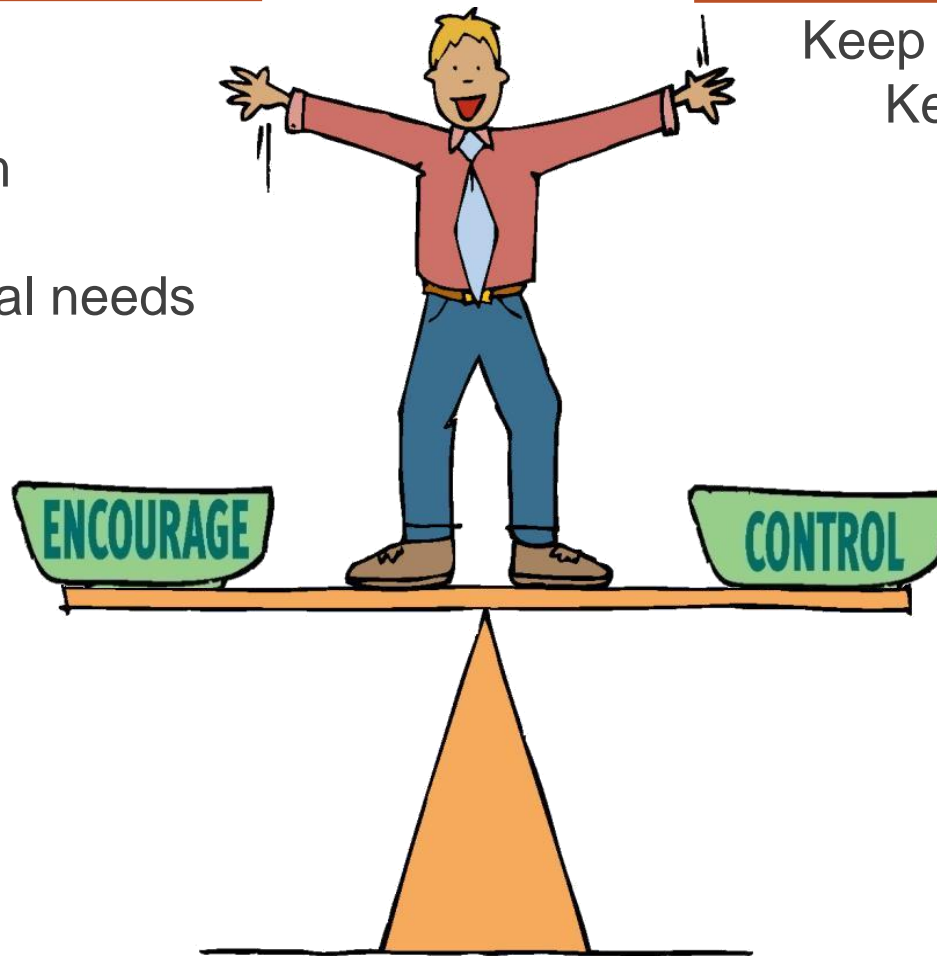
# Strike the Right Balance

## To Individuals

Appear open  
Listen  
Understand them  
Don't interrupt  
Respect individual needs

## To the Learning

Keep everyone in mind  
Keep them on track  
Make it relevant  
Meet your goals  
Keep it fruitful



# Takeaways


---

Fresh language & ideas for coaching SMEs

Help SMEs make instructor-led learning as fruitful as possible







The  
**Orderly**  
Conversation

Business  
Presentations  
Redefined

Dale Ludwig  
Greg Owen-Boger



\$5 Off with code  
**getbusinessdone**  
[www.theorderlyconversation.com](http://www.theorderlyconversation.com)



[engage@theorderlyconversation.com](mailto:engage@theorderlyconversation.com)



**TURPIN**  
COMMUNICATION

Questions ???



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# Mark Your Calendar: TD Webcast, Aug. 17, 2016

