



# Facilitation Skills

**Self-scoring assessment to help you  
become an exceptional facilitator**

# 3 WAYS TO USE THIS ASSESSMENT

## For Self-Reflection

1.

Score yourself on all of the items in this assessment, and tally your scores to discover which areas you most need to focus on to become an exceptional facilitator and areas where you have strengths today.

## For Discussion with Your Manager

Ask your manager to assess your facilitation skills, using a copy of this assessment tool.

Meet to compare your scores. Where your scores are far apart, discuss possible reasons and seek clarification.

Agree on key goals for your upcoming facilitation skills training.

Brainstorm ways your manager can help support and reinforce your new skills during and after this learning program.

2.

## For Post-Training Assessment

3.

At an agreed-upon interval after the training program ends, have you and your manager re-take this assessment. We recommend at least one month after the formal end of the training.

Identify areas of greatest improvement, especially for areas that you and your manager saw as priorities.

Identify areas needing improvement, and create a plan for additional support, which may come in the form of additional training, shadowing, mentoring, or coaching from managers and/or peers.

Plan to re-take this assessment about once each quarter to review your progress.

# Assessing Your Facilitation Skills

Read each statement and rate how true this is for you on a scale from "0", meaning not at all true to "5", meaning you excel at this.

## SECTION 1: DESIGNING A REALISTIC AGENDA

STATEMENT	RATING
I consistently create agendas that clearly outline the meeting's objectives and topics	
I ensure the agenda is realistic and achievable within the allotted time.	
I include time for discussion, feedback, and decision-making in the agenda	
I seek input from stakeholders and participants when designing the agenda to ensure it meets their needs	
<b>SECTION 1 TOTAL</b>	

## SECTION 2: KEEPING PARTICIPANTS ACTIVELY ENGAGED

STATEMENT	RATING
I use a variety of facilitation techniques to keep participants actively engaged.	
I encourage participation from all attendees, not just the most vocal.	
I can read the room and adapt my facilitation style to maintain engagement, whether in person or virtual	
I know how to and when to pose questions that spark engaging conversations	

**SECTION 2 TOTAL**

### SECTION 3: MANAGING DIFFICULT MEETING DYNAMICS AND BEHAVIORS

STATEMENT	RATING
I handle conflicts or difficult behaviors calmly, diplomatically and assertively	
I set and enforce ground rules to manage meeting dynamics effectively	
I identify and proactively address underlying issues that may be causing disruptions.	
I provide all participants an opportunity to express their views safely	
<b>SECTION 3 TOTAL</b>	

### SECTION 4: STAYING ON TIME AND ON TRACK

STATEMENT	RATING
I start and end meetings on time	
I am able to steer discussions back on track when they go off-topic	
I use a “parking lot” for items that we don’t have time to discuss, which we review before the meeting ends	
I have a good sense about when it’s worth to let an unplanned conversation go on for a while, even if it means that we can’t cover all items in the agenda	
<b>SECTION 4 TOTAL</b>	

### SECTION 5: EFFECTIVE USE OF MEETING TECHNOLOGY

STATEMENT	RATING
I am proficient in taking advantage of meeting technology to facilitate discussions (e.g., video conferencing, screen sharing).	
I use asynchronous collaboration tools pre- and/or post-meetings	
I prepare and test all necessary technology before the meeting	
I make sure that all participants can access meeting recordings, notes and action items easily and quickly	
<b>SECTION 5 TOTAL</b>	

### SECTION 6: NOTES, FOLLOW-UP AND CONTINUING COMMUNICATION

STATEMENT	RATING
I assign action items to specific individuals with clear deadlines, when appropriate	
I review and confirm action items with participants before the meeting ends	
I follow up with participants to ensure action items are completed on time, when appropriate	
I use follow-up communications to reinforce key points and maintain momentum between meetings	
<b>SECTION 6 TOTAL</b>	

## SECTION 7: ADDITIONAL SKILLS

STATEMENT	RATING
I am confident in my ability to facilitate both in-person and virtual meetings	
I am confident in my ability to facilitate hybrid meetings	
I am continuously working to sharpen my facilitation skills, actively seeking feedback and implementing suggestions for improvement and educating myself on new techniques and approaches	
I can adapt my facilitation style to different types of meetings (e.g., brainstorming sessions, decision-making meetings).	
<b>SECTION 7 TOTAL</b>	

## SCORING

SECTION NUMBER	SCORE
Section 1	
Section 2	
Section 3	
Section 4	
Section 5	
Section 6	
Section 7	
<b>TOTAL SCORE</b>	

The results of your assessment indicate aspects of facilitation where you're already strong, those where you can use some improvement, and those where you need the most attention and focus right away.

Let's look at how you can use this assessment, whether working alone or with your manager.

-  Identify areas with the lowest scores and zero in on those where you'd most like to improve ASAP 
-  Identify areas with the highest scores to leverage your strengths 
-  Discuss your scores with your manager to see if you're aligned 
-  Agree on facilitation skills performance goals 
-  Create a shared plan for training, resources and management support needed to achieve your goals 



## HAVE YOU FOUND THIS ASSESSMENT HELPFUL?

Are you interested to learn more about how you and your organization can increase the capacity for skilled facilitators throughout the organization?

**We work with organizations that want to vastly improve the quality of meetings through skilled facilitation**

**1:1 Support  
Advice and Coaching**

**Small Group Programs  
for Peer Learning**

**Customized Team  
Training**

**Contact me** to learn more about how I can help you!

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