

Facilitation Needs Assessment

Would it be beneficial to work with a professional facilitator at this time?

Consider the questions below. The more often you answer “yes,” the more likely an external facilitator will materially improve the outcome.

Stakes & Consequences - *If the stakes are high, process quality matters as much as content.*

- Is this a high-impact decision where getting it wrong -- or only partially right -- would be costly to the business, the relationships, or the culture?

Complexity of the Issue - *Complex problems benefit from skilled process design and facilitation.*

- Is this a complex issue with multiple perspectives, real trade-offs, and no obvious right answer — where the conversation itself is as challenging as the content?

History & Baggage - *When history is present, neutrality and trust become critical.*

- Does this issue carry history — previous failed attempts, unspoken tensions, or sensitive topics — that could make it hard for the group to engage openly?

Power & Role Dynamics - *A facilitator can create space for honesty without political cost.*

- Will power differences or dual roles (leading and participating) make it difficult for people to speak candidly or for leaders to both engage and manage the process?

Quality of Conversation - *Good facilitation turns conversation into shared thinking, not just airtime.*

- Do your conversations reliably lead to shared understanding and progress—or do they tend to stall, favor certain voices, or avoid real disagreement?

Decision Clarity - *Process clarity is often the difference between true alignment and tacit agreement.*

- Is there a risk that the group is unclear about how decisions are made, leading to weak buy-in, second-guessing, or decisions being revisited later?

Time & Focus - *Skilled facilitation accelerates progress without rushing judgment.*

- Is time limited and focus essential—such that you need to make the most of being together and reach meaningful outcomes efficiently?

Desired Outcomes - *Sometimes the how is as important as the what.*

- Is the goal not just a decision, but stronger trust, shared ownership, and a group that leaves aligned, committed, and energized?

RULE OF THUMB: If you answered “yes” to three or more questions, an outside facilitator will likely help both the quality of the conversation and the outcome.