

How to Know When to Facilitate, Train or Coach

As a consultant, you might provide a variety of types of consulting, such as management consulting or technical/specialized consulting. In addition, you might perform a variety of other roles, primarily the roles of facilitator, coach, expert or trainer. This is true whether you are an external or internal consultant. There are no specific indicators as to when you should fill a certain role. However, there are general guidelines from which you can get an indication as to which roles you might fill based on current conditions in a project.

When You Might Fill the Facilitator Role

Collaborative organizational consulting is about working, as much as possible, in partnership with your clients to accomplish powerful, long-lasting change in your client’s organization. That usually requires a highly facilitative role in your consulting. Facilitating is helping a group of people to decide what results they want to achieve together, how they want to achieve them and then helping the group to achieve them. Styles range from directive to indirectly suggestive. The conditions that often exist in an organizational project and require the consultant to fill the facilitator role include:

1. **When the project needs ongoing trust, commitment and participation of clients.**
Ongoing contributions usually do not come from clients during trainings or when receiving advice from experts. Instead, the buy-in of members comes from knowing that their beliefs and opinions are being solicited and valued. This can be especially important when a diverse group will be involved or impacted by the project. The essence of facilitation is to bring out those beliefs and opinions and to help members decide what they want to do and how they want to do it.
2. **When working to address complex problems or major goals with clients.**
The most accurate understanding of priorities in an organization often comes from considering the perspectives of as many members as possible. The most relevant, realistic and flexible strategies to address those priorities are developed and implemented from the active participation of members. Facilitation is the most powerful role from which to cultivate that participation.

When You Might Fill the Coaching Role

You might choose to fill the coaching role when the following conditions exist.

1. **An individual in the project seems stalled or troubled.**
Coaching can be a powerful means to guide and support an individual to clarify current challenges or priorities, identify suitable strategies to address the challenges and then to actually implement the strategies.
2. **To maximize an individual’s learning from experience.**
Individuals learn differently. Coaching can be a powerful means to guide and support individuals to reflect on their experiences and then use that learning to improve effectiveness.

When You Might Fill the Expert Role

You might choose to fill the expert role when the following conditions exist.

1. **The project needs general knowledge that would likely be the same in any context.**
There are certain types of general knowledge that would likely be the same, especially:
 - a) General frameworks from which to develop and/or operate systems, for example, performance management systems, financial systems or marketing systems.
 - b) Guidelines for conducting general practices, for example, planning, evaluation, organizational change, addressing ethical dilemmas, use of capacity building approaches or developing learning plans.
2. **The project needs knowledge that is highly specialized and proceduralized.**
For example, installing computers, conducting market research, conforming to laws and regulations, designing and providing certain services, financial processes and procedures, or use of specific tools for problem solving and decision making.

When You Might Fill the Trainer Role

Training is activities to help a learner or learners to develop or enhance knowledge, skills and attitudes to improve performance on current or future task or job. You might choose to fill the trainer role when the following conditions exist.

1. **Expert knowledge needs to be conveyed in a concise and timely manner.**
There may be times in your project where members need to learn certain expert-based knowledge and need to do so in a highly focused and efficient manner. The knowledge might be any form of expert-based knowledge as listed in the above topic.
2. **Knowledge needs to be conveyed to a group of people.**
Training is often most useful when a group of people need to learn expert-based knowledge. This can be quite common in projects, for example, when training project members about the nature of organizational change, the project’s change plans or methods of data collection.