REPRESENTATIVE PORTFOLIO SAMPLE

From Complexity to Clarity: Virtual Workshop Facilitator Guide

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Workshop Purpose

This 45-minute virtual learning experience helps participants diagnose why a process feels harder than it should, distinguish training problems from non-training performance barriers, and select practical interventions that support real workplace performance.

Audience and Delivery

- Audience: frontline employees, new team members, supervisors, trainers, operations staff, or cross-functional teams working inside complex processes.
- Delivery: live virtual session with camera-on facilitation, chat, polling, small-group discussion, and individual reflection.
- Group size: 6-24 participants. Larger groups may require additional breakout support.

Learning Objectives

- Identify at least four causes of performance friction: people, process, technology, and performance context.
- Determine whether a situation calls for training, coaching, job aids, workflow simplification, or technology/support changes.
- Map a current-state process and identify where unnecessary cognitive load or information-access barriers appear.
- Commit to one practical next step for improving a real process.

Preparation Checklist

- Send calendar invitation with session goal and pre-work prompt: “Bring one process that feels harder than it should.”
- Prepare slide deck, poll, chat prompts, breakout-room instructions, and participant workbook.
- Confirm screen-sharing, chat, reactions, breakout rooms, and PDF links are working.
- Invite leaders to observe without dominating discussion; the goal is diagnosis before prescription.

45-Minute Agenda

Time	Segment	Facilitator Move	Participant Action
0-5	Opening	Set purpose and introduce the principle: not every performance problem is a training problem.	Name one process that feels harder than it should.
5-12	Four-Lens Model	Explain People, Process, Technology, and	Use chat to classify sample barriers.

		Performance using simple examples.	
12-22	Current-State Mapping	Model how to map a complicated process and locate friction points.	Map one real process in the workbook.
22-32	Scenario Practice	Facilitate small-group diagnosis of the scattered-resource scenario.	Decide whether the situation needs training, coaching, job aid, workflow redesign, or tech support.
32-40	Debrief and Transfer	Connect scenario decisions to participants' work environments.	Share one insight or one question.
40-45	Commitment	Guide action-planning and reinforcement discussion.	Write one next step and one support needed.

Facilitation Notes

Tone

Keep the session practical, curious, and non-blaming. The goal is to understand friction so the organization can remove barriers and support performance.

Opening Questions

- Where do people lose time, confidence, or consistency?
- What do people have to remember that could be supported instead?

Debrief Questions

- What evidence tells us this is a training problem?
- What evidence suggests the process or system itself is the barrier?
- What would make the correct action easier at the moment of need?

Transfer Questions

- What should a supervisor observe after training?
- What job aid or resource would reduce repeated questions?
- What workflow step could be simplified or eliminated?

Representative-Use Note

This guide is a representative portfolio sample based on Sasha Gilbert's experience in adult learning, virtual facilitation, onboarding, coaching, systems training, and performance support. Employer-specific information has been omitted or recreated.