

# DiSC® Facilitation Checklist

## 4 to 6 weeks before

- Know and review your objectives. Why is this training happening?
- Choose the right Everything DiSC product to meet your needs (*Workplace, Agile EQ, etc.*)
- Learn about your participants. Does the group have trust? Are they familiar with DiSC?
- Find out if anyone needs accommodations (captioning, etc.) and arrange them.
- Learn about your training space, whether in-person or virtual.
- Make training decisions: agenda, duration, whether you're co-facilitating, etc.

## 3 or 4 weeks before

- Order profiles, credits, facilitation kit, etc.
- Send access codes to participants and assign any pre-work.

## 7 to 10 days before

- Verify that all participants have completed their assessments.
- Run group reports, facilitator reports, or comparison reports as needed.
- Review participants' profiles. Knowing the predominant style of your group can help you prepare for their energy level, skepticism, etc.
- Send profiles, posters, etc., to print if using.
- Review facilitation kit, customize your slides, add speaker notes, etc.
- Review training supplies and order more, if needed (name tags, easels, etc.).

## 3 days before

- Test out all technology. Make sure videos work.
- Review your slides and notes. Proofread everything.
- Prepare your training evaluation form.
- In-person training: Assemble supplies, double-check room reservation, test equipment.
- Virtual: Test everything, see if Zoom needs updating, choose a background, build polls, check with producer, prep breakout rooms, etc.
- Make fall-back plans, for situations like losing your internet connection. →

# DiSC® Facilitation Checklist, continued

## Day of training

### *Before the session*

- Dress professionally and go through any routines that make you feel more confident.
- In-person: Arrive early to deal with anything unexpected. Set up materials.
- Virtual: Enter 30 minutes early. Check camera, headphones, speakers, lighting, etc.
- Turn off any automatic notifications that might show on your screen while you're sharing it.
- Virtual: Log into session as a participant with a second device, to see what they see.
- Assemble water, notepad, pen, reports, or whatever you want around you.
- Place any reminder notes where you can see them.

### *As the session begins*

- Welcome participants and introduce yourself.
- Ask for cell phones to be turned off or for the group to agree to phone etiquette.
- Point out locations of restrooms, say when breaks will be scheduled, etc.
- Explain your expectations for video, audio, and chat etiquette. (Should people stay muted and virtually raise their hands? Are you or your producer monitoring chat?)

### *During the session*

- Follow your notes, but improvise as needed.
- Watch your pacing, your tone, and audience responses. Adapt as needed.
- Take notes on anything you want to follow up on.
- Wrap up your session by providing clarity about next steps for the group.

### *After the session*

- Write up how it went, review evaluations, and make notes to improve for your next training.
- Respond to any requests taken offline or that you agreed to follow up on after the session.
- Send comparison reports, or a reminder of how to compare styles on Catalyst.
- Schedule a DiSC review session with the group.
- Ask for recommendations/testimonials for LinkedIn or your website.
- Let us know how it went! Give us a call or email or post on one of our social media accounts.