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Effectiveness in Group Facilitation Training in the Hospitality Industry: A Case Study

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This paper aims at demonstrating that an acceptable level of performance as a group facilitator can be achieved by hospitality industry managers in a 35-hour course, to a maximum of fourteen trainees, experienced in group leadership but not in small-group facilitation or large-group coordination. Based on a six-step model for organizational intervention, the course was run in co-facilitation, using the effect of demonstration, modelling, and observation to improve performance at individual level. The course represents a mix of organizational behaviour and human resources management that has proved to be effective in preparing managers to improve organizational innovation and accelerate change in companies. Each step produced outputs, namely three innovation projects. Participants rated the course in every item of an extensive questionnaire as Good and Very Good, except the introduction (pre-consult), which was considered "too theoretical". Therefore, the course model proved to be adequate for the preparation of managers as coaches for organizational innovation in the hospitality industry. As to future developments, they will have to do mostly with the functioning of a matrix structure in the hospitality industry, so that the whole approach may have a full impact on the company.

Keywords: organizational innovation, organizational change, matrix organizations, management training, organizational intervention, group facilitation

Within the scope of a European-funded international project, and facing the need to prepare managers of a hotel corporation as coaches for organizational innovation, the authors draw up a training program based on a six-step model for organizational intervention (Sousa & Monteiro, 2020). The company, made of six hotels, had already collaborated with the university in providing objectives for the students to develop projects carried out during a semester, joining subjects, such as Organisational Behaviour, Hotel Management, Accounting, and Marketing into the same projects. Students were paired with hotel middle-managers and had the opportunity of working with their "avatars" during the semester. These projects resulted in reports that translated what would

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happen if the company decided to go forward with real projects. The management team, together with the university staff responsible for the subjects, graded the resulting student work. This project-based curriculum was important for the students, the university, and even the company, providing opportunities for creative expression and the use of facilitation techniques in teaching by using large-group methods (Sousa, Monteiro, & Pellissier, 2016).

After this experience, the hotel company became interested in a facilitation training programme for its managers that could provide hints for innovation and change through project development, leading us to offer such a programme adapted to its needs and time constraints. This is how we came to deliver a 35-hour facilitation training program, based on the four-step creative problem-solving (CPS) group technique, which prepared middle managers to act as coaches for organizational innovation. The course was supported by an intervention objective defined by management, and aimed at developing the company's innovative potential (Cebon, Newton, & Noble, 1999). This can be achieved by involving co-worker teams in projects, defined to solve problems that were identified together with management, while maintaining their functional routine tasks. Therefore, this paper aims at demonstrating that an acceptable level of performance as a facilitator can be achieved by managers in a 35-hour course, with a maximum of 14 trainees, experienced in group leadership but not in small-group facilitation or large-group coordination, and two trainers using the effect of demonstration, modelling, and observation to improve performance.

This article will address the intervention model (Diagnosis, Training the Facilitators, Company Forum, Project Implementation, Evaluation, and Process Appropriation), small and large-group facilitation, and matrix organizations. A second section will deal with training strategies for each step, followed by the procedure, results, discussion, and conclusions.

The Organizational Intervention Model

Notwithstanding the importance we attach to the technological and financial aspects of innovation, our objective focuses on the features related to organisational design, business model, external relations, work and employee organisation, which defines what we call *organisational innovation* or, in other words, how to mobilize, organise, and control material, knowledge, and human resources to generate new products and services (Steiber & Alänge, 2015). This type of innovation is better understood when considering the so-called "innovative potential", which consists in the involvement of co-worker teams, with diverse knowledge and responsibilities in projects defined to solve problems that were identified together with management, while maintaining routine tasks (Cebon et al., 1999). To carry on this process, a matrix structure can be developed to ensure the balance between the functional and the project-based structures. The functional structure is responsible for maintaining the company's routines and generating automatic forms of problem solving; the project structure refers to the organisation's ability to generate innovation and change (Saunila, Mäkimattila, & Salminen, 2014).

When we speak of organisational intervention, we are dealing with the execution of the various steps of a model for making a planned change (Mento, Jones, & Dirndorfer, 2002). When we want to refer to organisational change, we tend to address only planned or intentional change, resulting from an innovation process, or an organisational intervention. Thus, it is understood that not all change comes from innovation, since it may focus on issues not perceived as new (e.g., change of the shift system), or others related to the organization's natural process of maturation, social evolution, natural phenomena, etc., escaping the intentionality of innovation. We also speak of change as something cyclical, repeating itself in new forms, as a continually reborn living organism. For this reason, we often adopt Henry Mintzberg's statement (Mintzberg, 1991) that organizational change is nothing more than the reconstruction of reality from examples of the past, granting something predictable, planned or modifying what exists, and not just due to chance.

As organisational interventions aim at improving employee health and well-being (Nielsen & Abildgaard, 2013), they require an elaborate evaluation framework due to the complexity of organizational structures. The consideration of the context and intervention components is required, in order to be effective, together with the design, implementation process, and many other aspects. Following the process-oriented theory (Weick, 1979), which views organizations as a continuous collective of processes that connects various players, intervention can be evaluated in terms of change in attitudes, values, knowledge, organizational procedures, working conditions, productivity, and many other factors. This process perspective involves a shift from the fixed state (pre-intervention) to another state (post-intervention), following Kurt Lewin's rationale of unfreeze-change-refreeze (Bartunek & Woodman, 2015). And as change takes place before, during, and after the change episodes, we have to address organizations as self-organizing complex adaptive systems (Stacey, 1996), especially their organizational dynamics of power and political processes (Bushe & Marshak, 2014).

This approach to change requires the understanding of complex organisational factors, which go far beyond the scope of the training course we are dealing with. In this project, change analysis is limited to the outcomes of the planning and execution of innovation projects derived from a management-defined objective. From diagnosis to process appropriation, through a large-group forum involving all relevant stakeholders, this intervention model is strictly operational in its outcomes (Sousa & Monteiro, 2019). And even if we are well aware that change is related with the effects of innovation on people's attitudes and behaviours, we do not intend to control these factors, but only the outcome upon the organization. Although a comprehensive model is used (see Figure 1 below), we do not address organizational health and well-being, but only the aspects that are related to the performance needed to fulfil a defined management objective, materialized through the innovation projects that result from a large-group meeting (company forum).

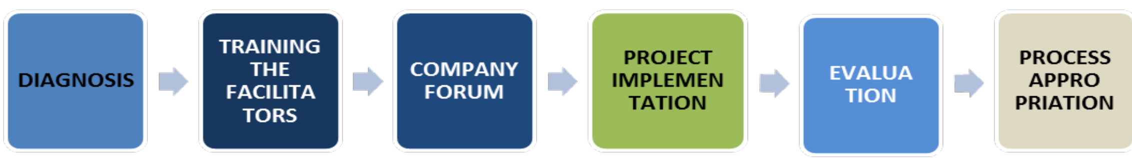

Figure 1. The six steps of the organizational intervention model.

Diagnosis

Diagnosis is the first action taken by an organisation wishing to initiate change. Diagnosis is the detection of dysfunctions to be corrected later, as well as the tentative to optimize the organisation and promote its members' well-being (Howard & Associates, 1994). Avoiding the diagnosis phase would be tantamount to adopting a treatment for a non-existent disease, as it would be the case if the diagnosis means were inadequate, or the treatment did not adjust to the problems. Nevertheless, the organisational diagnosis we carry out does not intend to detect organisational "diseases", but only reveal the distance between the management's vision about a certain intention of change and the employees' practices and interests regarding the hindrance of that intention. The diagnosis of this gap is management's responsibility, which will influence the decision to intervene in order to reach the desired objective. Therefore, the usual instruments available to the researcher, such as questionnaires and surveys, have little relevance here, since we do not want to detect any "illness" but only gather enough information to support or dictate the change in the objective initially proposed, if the co-workers' vision is too different from the management's perception.

Ideally, management's identification of the objective (challenge) should result from a rigorous market analysis and not just from a diffused feeling developed by the manager, based only on his or her intuition. Management must have ownership over the objective defined for change, meaning some control of possible outcomes. Since we deal with precise project outcomes, whenever management sets goals implying changes in complex cultures, individual attitudes and behaviours, or normalize individual differences, success is very uncertain and unstable. Therefore, the first question to ask a manager is whether he or she has sufficient control over the possible outputs in order to ensure that intentions can be successful. The diagnosis we developed is designated to foster a context of positive change, in line with the will of management and co-workers, where problems are transformed into challenges and dysfunctions are overcome by courses of action designed to improve organisational efficiency. In this sense, the purpose of diagnosis includes the detection of the existing weaknesses, but concentrates on clarifying the strengths and traits of the organisational culture, favourable to the desired future situation defined in the management's change objective.

When management takes the initiative to promote the intervention, implicitly it agrees to organise the company in a matrix structure, with the projects working simultaneously with functional routine tasks. Although this construction occurs only after the completion of the first project cycle, it is appropriate to consider this possibility from the beginning, anticipating its implications, especially in the area of people management, as we will see later. If the organisation engaging in this kind of transformation process already uses some form of project structure, the required changes will be easier to implement.

The diagnosis consists of the following steps: pre-consultation, document review, interviews, and collection of success stories (Figure 2). The resulting report will be presented to management and can give way to changes in the intervention objective.

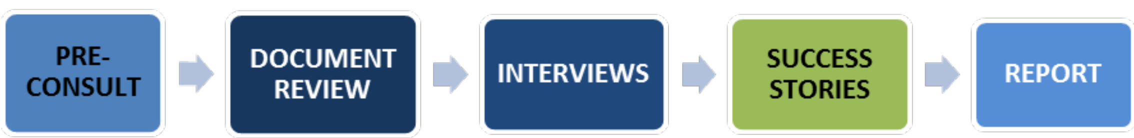

Figure 2. Diagnosis steps.

Pre-consult. The pre-consult aims to make a preliminary definition, together with management, of the aspects related with the "consultation" or organisational diagnosis. It begins with the elaboration of management's mind map, in order to allow the choice of the intervention's objective. It is also an opportunity to make a preliminary list of stakeholders to be invited to the business forum, to determine the composition of the steering committee, the facilitators to train, the possible dates for the forum and other logistics.

Mind map. After a brief introduction, the manager is asked to mention the objectives, concerns, and problems that, in his or her opinion, should guide a possible intervention, made to combine the wills, knowledge, and powers in a collaborative construction of innovative projects. The following interview will take the form of a mind map (Meier, 2007), using a mix of common interview principles, and techniques of problem definition in small groups. The method used is based on Min Basadur's (Basadur, Potworowski, Pollice, &

Fedorowicz, 2000) challenge mapping pre-consultation technique. From a central starting point, management develops other objectives linked to it, both superordinate, where more abstract objectives are defined; and subordinate, for more specific objectives. This gives way to a hierarchy of objectives that turns the final choice easier to make. It is the responsibility of management to identify what the most important objectives are and place them at the centre of the process. From the management's response to the "Why?" question, further objectives are written at the top, until the options are exhausted. The same happens downwards, under the question "What is stopping us?", until a considerable collection of possible objectives is raised. For each objective it is necessary to check if the answers have a one-to-one correspondence with the central premise so that an arrow indicating the reciprocal correspondence can be placed.

Once the objective is defined, it is necessary to obtain a list of documents in order to get a better knowledge of aspects of the organisation related with the objective, namely previous attempts to make it work and management views about it. Then, considering the preparation of the third step of the model (business forum), the manager is asked to designate the co-workers who will take part in it. Although this task can be carried out later, by the steering committee, the manager is responsible for helping to make a first appointment, designating the co-workers considered relevant for the success of the objective. It should be noted that some of these people will be interviewed later to support the diagnosis. The manager should also designate the composition of the steering committee and who should receive training to act as team facilitators during the forum. The competence of the person responsible for the whole project, who will lead the steering committee and, eventually, run the company forum, is very important for the success of the initiative. The steering committee will later include the project leaders resulting from the forum.

Lastly, management should provide an idea of the possible dates for the forum, location, and associated logistics that require budgeting (e.g., room rental, catering, audio-visual equipment).

Diagnosis report. Having interviewed management, it is advisable to start the document review to get a deeper knowledge of the "official" perspective, related with the defined objective, in order to help sustain the dialogue in the interviews that will follow. This knowledge can be obtained through official documents (e.g., quality manual, HR reports, accounting reports, newsletters, web site, social networks) and presentations that have been made about the company. With regard to the interviews, and given a forum gathering between 30 and 80 participants, it is acceptable to hold 12 to 25 interviews, which can be made by the steering team members.

These interviews should include the request for success stories, i.e., examples of moments that made the interviewee feel proud of working in the company. The story of any organisation is full of important events dictating its major changes and known by all the company members. The focus on positive experiences and positive emotions is central to the change process (Bushe & Marshak, 2014). However, the construction of the culture is made of less striking events, translated into stories that are seldom published but orally transmitted, person to person, and maintained, or altered, according to the present tendencies and the transformations of human memory.

As any intended change must consider the current corporate culture, to acknowledge the distance separating it from the intended culture, it is important to identify what stories translate the way of being in the company and connect each one to the business community. Later, a selection will be published in the forum or internal newsletter.

Having finished the interviews and collected the other diagnosis elements, a report should be prepared to be presented to management. It should reflect the main constraints likely to support or motivate a change of the objective.

The Construction of Four-Step, Small and Large-Group Methods

We started working with creativity and innovation in groups using the creative problem-solving (CPS) method. Since Alex Osborn introduced the brainstorming method to produce ideas, several methods were developed, and CPS was one of them. Back in the 1960s, Sidney Parnes and Ruth Noller, for example, completed a series of investigations that would turn CPS into one of the most used and investigated methods for creative work in organizations, as reported by Isaksen (2020).

A primary motivation for our research was the need for a CPS protocol that did not require more than a half-an-hour break between sessions, while maintaining its effectiveness, thus avoiding frequently experienced problems regarding team stability. The main reason for this problem was the difficulty in retaining company managers and specialists if there was a long break in between sessions.

We began our work by using a reduced two-day (16 hours) version of Basadur's CPS Simplex model (Basadur, 1987). Basadur's Simplex is a cyclic process in three distinct phases and eight steps (*problem finding, fact finding and problem definition; solution finding and decision making; action planning, acceptance planning and decision implementation*). In each step there is a moment for active divergence, where individuals or groups produce as many ideas or options they can find, in a supporting climate where judgment is deferred to allow the perception of new relationships between facts. During the divergence moments, everyone must make extended efforts to avoid stopping too early before all possible options have been produced. During active convergence, the participants will select one or more options to carry on to the next step. One last skill will allow the process to go on systematically through its eight steps and three phases, referred to as vertical deferral of judgment. This skill helps the participants distinguish between unclear situations and well-defined problems, in addition to defining a problem and solving a problem.

First, we reduced the Simplex method duration to 12 hours, then to eight hours, and finally to four hours, as explained in Sousa, Monteiro, Walton, and Pissarra (2014). As to the eight steps of Basadur's method, we reduced it first to five steps, within a three four-hour-session design: one training session; one fact-finding and problem-definition; and the last session to idea generation, decision making and producing an action plan. After several corporate trials, aimed at testing the model and collecting data, the time taken for the intervention was reduced to two four-hour sessions, and then to just one four-hour session, with a four-step model, comprising the steps: *objective-finding, problem-definition, action-planning* and the *action* itself. Even though the model is very simple to use, the facilitator's effectiveness depends a lot on details, which make it difficult to achieve an acceptable level of performance.

Regarding large-group methods, intended to bring innovation and change to organizations and communities, through the involvement of many people in the decision-making process, research is well documented (Bunker & Alban, 2006). Large-group methods are tailored to suit group interventions having between 30 and 150 participants or more (ideally 70-80), and meeting in sessions ranging from two to four days. Although these methods may deal with similar types of objectives, each has their own sequence of procedures. In general, sessions begin by asking the groups of eight for an analysis of the past and present, followed by a vision of the desirable future. This is done in order to understand the history of the organization and create the necessary tension in attaining the ideal future. The definition of strategic directions, required actions and timelines, together with follow-up procedures, generally close the sessions. Given the involvement of all stakeholders, in the same location at the same time, large-group methods allow a change to occur at a much quicker than normal pace. They also allow opportunities for conflict management by focusing on common ground rather than on differences, as well as promoting a flat hierarchy (Garcia, 2007).

Future Search was adopted as a reference methodology due to its suitability for group decision making, its extensive description in the literature (Weisbord & Janoff, 2010), and the authors' previous experience. The other method taken as a reference was Appreciative Inquiry (Cooperrider & Whitney, 2005), which has a similar design to Future Search, but lasts up to four days with no limit of participants.

The previously designed four-hour, small-group problem-solving method, was adapted to work with large groups in a study with higher education students, described in Sousa et al. (2016), aiming at bringing 62 participants, randomly arranged in 10 groups, to solve a challenge consisting in the preparation of a single common essay involving all students. The design methodology used was adapted to work as a small-group four-step model; first, during eight hours, then in just four hours. The four-hour session revealed to be too short in a company environment, thus it was later expanded to six hours (Sousa & Monteiro, 2019).

The training of CPS and other group methods produces effects on individual and group attitudes and behaviour (Puccio, Firestien, Coyle, & Masucci, 2006). Normally it includes aspects from facilitator training, where participants take turns as facilitators and learn by watching others facilitate, as it happens with other interactive activities (e.g., teaching, leading, negotiating). Nevertheless, this kind of training has other requirements besides observation, and is complex in its nature, as described by Isaksen (2020) in his three-level model for learning and applying CPS.

In general, large-group methods do not consider the need for previous training of small-group facilitators, which are designated by different groups in different periods of a meeting that lasts for several days. Nevertheless, the possibility of training small-group facilitators, to act within large-group sessions, revealed to be very important when the duration of these meetings is shortened. In these kinds of meetings, it is possible to have small-group trained facilitators coordinating the groups during the discussion. Although the groups may vary, the facilitators remain in their positions.

The Matrix Organization

The last step of the model has to do with process appropriation by the company, so that a system for continuous production of projects might be part of the company's organization, thus contributing to its innovation. Once a successful project cycle is completed, it is time to think about its continued development, generating more objectives, problems, and solution projects by using this methodology. This stresses the need to build an organisation by projects coexisting with the current functional organisation. In other words, a matrix organisation. However, this may create some problems related to the functioning of the structure that are worth examining.

The matrix organisation, theorized by renowned economists (Galbraith, 2009) and developed by leading companies such as Procter & Gamble, Unilever, IBM, Boeing, Intel or General Electric, diverges from the classical mechanistic model. It was born from the need of the American aerospace industry in the 1960s to meet several projects simultaneously (moon landing, Vietnam War, and supersonic flights) with scarce resources. In these matrixes, the engineers in charge of budgets and deadlines worked with those responsible for technical development, both reporting to their functional and project managers simultaneously. As with other processes becoming management trends, this one also peaked in the 1980s and declined in popularity due to poor utilization (Dunn, 2001). This was due to the human resources management process being not appropriately aligned to the matrix structure. For example, a lack of collaborative leadership, not incorporating enough teamwork, and not adapting an adjusted system of salaries and benefits, helped to bring about its decline in popularity.

At present it is difficult to find a company that does not have projects underway (Page, Rahnema, Murphy, & Mcdowell, 2016), mostly as a response to clients' demands. However, many cases are limited to occasional projects, gathering just a few co-workers, or restricted to the research and development area. Even so, it is possible to have a way of functioning that enhances the benefits of both the functional/hierarchical organization and the temporary structure of projects, thus ensuring the interaction between the different levels and the organisational units (Bazigos & Harter, 2016). The idea is to establish a matrix organisation coexisting with the functional organisation, allowing the creation of collaborative projects, thus maintaining the balance between the need for innovation and the maintenance of the fundamental company routines.

The matrix configuration requires managerial skills that include a focus on the entire company, the acceptance of uncertain environments, and the willingness to consider complicated tradeoffs and negotiate conflicts between both structures. Moreover, it will involve changes as to how projects should be triggered, as well as team member management, namely in terms of performance appraisal, awards, and career management (Bredin & Söderlund, 2011). Considering that the decision to implement a matrix organisation depends on the success of the initial projects, the procedure can focus on the generation of a new series of projects, using the methodology we presented. This new series should come from strategic objectives defined by management, segmenting the company's areas of innovation through objectives based on market analysis (Doyle, 1994). There will be no need to repeat the complete cycle, from diagnosis to results evaluation, as the procedure will certainly be simplified and automated, as the system develops.

As to the areas of human resource management, it is important that the work carried out in projects receives at least the same degree of importance as the work developed in the functional structure. However, the existence of two performance appraisal systems would be an unnecessary complication, as well as a source for conflict between managers. The responsibility should remain in the functional management of who will be kept abreast (by team leaders) of the performance evaluation related to the projects (Dunn, 2001). In fact, the performance evaluator should never try to justify someone else's evaluations, thus requiring the intervention of a project manager, or team leader, if needed (Waagen, 2014). If a good performance in the functional structure is important for the allocation of productivity bonuses, for example, good performance in the project structure is equally important for the attribution of new responsibilities and training opportunities (Appelbaum et al., 2008b). Notwithstanding granting cash rewards, resulting from profitable innovation, we know that the processes for turning projects into profitable innovations are slow and difficult to assign to individual merit. Thus, it is also possible to use project performance evaluation to manage and develop careers, since the good results should fundamentally be ascribed to teamwork, while the result of functional work may easily be restrained to an individualized evaluation (Zobal, 1999).

Evaluating the individual within the team produces better results, especially if a 360º process is used (Hurley, 1998; Zingheim & Schuster, 1995). This process is flexible enough to balance the individual within the team evaluation (Garbers & Konradt, 2014) when considering the model suggested here. The multi rater system is adequate, as recommended by Appelbaum, Nadeau, and Cyr (2008a), as it shares the responsibility held by the functional manager with project managers, co-workers, and even clients and suppliers. Nevertheless, translating matrix performance evaluations in salary benefits, in this type of matrix organizations, should be carefully addressed and adapted to the particular company situation.

The Training Approach

Making an Organizational Diagnosis

There was no specific strategy adopted for this kind of training, besides leading trainees to make a real diagnosis. Here it is more important to demonstrate how simple and fast this step might be accomplished by a small group, rather than providing a definite set of behaviors needed to accomplish the task. Practicing interview techniques, needed to maintain a conversation for 20-40 minutes, around the objective defined by management, serve well its purpose, which is to allow a group of three or four people to produce a report, and collect a dozen success stories, so that a meaningful selection may be done.

From our experience we knew that only a short percentage had experience of doing interviews, especially when using only one introductory question, according to the semi-structured technique (Ghiglione & Matalon, 1977). Therefore, during the session, we had to make time for training, with half-an-hour interviews in pairs, using verbal and nonverbal techniques, while taking notes. As homework, trainees were asked to do at least two interviews to a list of stakeholders made during the session. The integration of the interviews and the presentation of the report (to the senior manager) were also made in class.

Another difficulty that we knew could happen had to do with mind maps, where each additional objective must respond positively upwards and downwards, using the “Why?—What is stopping us?” criteria. When making the one-to-one objective correspondence, the way the questions are put, so that the answers can be a clear “yes” or “no”, requires some skills that not everyone possesses. A solution might be to give up the one-to-one correspondence, after a first attempt, and just draw the map according to the answers. Another solution can be the mind map being made by the trainers after an interview with the manager in class. This map is important to provide real company objectives for facilitation training, where one objective for every two participants is needed.

As an output of this first module, participants had to make the presentation of a diagnosis report to management, reflecting the main supportive arguments, as well as the constraints, likely to recommend the maintenance or a change of the intervention objective. This report included the documents review, results of stakeholders interviews, and success stories. From this report, a clear picture of management and co-worker discourses was obtained, thus expressing the extent of management alignment and ownership for the objective of the intended intervention.

Facilitation Training

Group facilitation, having its roots in Carl Rogers’ approach to T-Groups, and used to stimulate person growth, aims at making things easier and available for the group (Cilliers, 2000). It enables group members to reach their goals, by opening up communication and helping them to assume responsibilities in group results (Shaw, 1981). Group facilitation is making the complex simple, so that group members may learn to find answers to complex problems.

At present, companies often contract professional facilitators to run small and large group meetings

(Hogan, 2002) in order to maximize the potential of every team member. Professional facilitation education and training is extensively described in the literature (Arnold, 2005; Wardale, 2008) and considered to be a life-long process of improvement, with the need to master different methods and tools in order to face different group situations. Group facilitation requires not only time to learn and practice with real-world teams and situations, but also continuous education and refreshment training so that important competencies may be mastered (Thomas, 2005). Therefore, training company managers, in order to obtain satisfactory performance in group leadership, presents a considerable challenge for scholars and practitioners in the field of innovation and entrepreneurship. These managers may be competent in team leadership (push approach) but not in using a facilitative style of group coordination (pull approach), either with small-group or large-group facilitation. Although frequent in reality, the training of managers as facilitators is a difficult subject to find in the literature (Sasha, 2013).

When facilitators are not professional, but only middle or upper-level managers, who must facilitate meetings, little has been done regarding their preparation, especially in what concerns small group coordination in large group meetings. In fact, large-group methods do not even consider the need for training small group facilitators, as groups change during meetings and members take turns acting as the team spokesperson. Since the meetings last for several days, this reduces the need for effectiveness in small-group facilitation. Nevertheless, as all the work done in large groups is dependent upon small group contributions, its adequate facilitation becomes important, especially if the duration of the meeting is substantially reduced.

Given the little time available for the whole course (35 hours), we decided to eliminate theoretical issues and warm up or illustrating exercises that did not contribute directly to the desired outcome, suggesting further readings for those who would like to go deeper into the process. From Bandura’s social learning theory (Bandura, 1986), we chose demonstration, modelling, and observation as the main sources of learning. The theory indicates that the cognitive structure of mental representations has two basic functions: the first related to the production of a response, serving as an internal model of action; the second related to the formation of a reference standard for the detection and correction of mistakes in executing the skill. Using this reasoning, we made an adaptation from motor skills training (Tani, Bruzi, Bastos, & Chiviacowsky, 2011) in the use of role models whose proficiency is not very far from the trainee’s possibilities. In other words, instead of making the demonstrations ourselves, we started immediately by asking course participants to perform following our instructions. This reduces participant frustration for not being able to attain professional standards and enhances their attention to the colleagues’ performance. Such strategy is consistent with major learning theories, from Kurt Lewin experiential learning theory to John Dewey (Sheehan & Kearns, 1995). Kolb’s learning model (Kolb, 1984) also posits the immediate experience as the act that precedes observation and reflection, followed by the development of abstract concepts that are tested in new situations. These abstractions, or “theories”, are the basis for the definition of behaviour and attitudes, as explained by Kelly in his personal construct theory (Kelly, 1963). Kelly states that people perceive and interpret differently the outside reality, and this interpretation is guided by the way they anticipate events and the behaviour of others. As it happened with the participants in our course, all of them with experience in team leadership, they enter a learning situation with more or less articulated ideas about the topic at hand, making learning more a matter of integration and substitution rather than the creation of new concepts.

Another option was to use real life facilitation exercises, drawn out of participants’ work life, only after using abstract exercises, easy to understand by everyone. As the former concentrates people in the content, it may put the process in second priority, which is not convenient for initial training. Using abstract-situation exercises at first was also the way we had been trained, and it seemed logical to follow this procedure in the initial training, in spite of the fact that literature did not support this strategy. From football training, for example Ali (2011), it is clear that abstract or laboratory situations do not favour training effectiveness.

Even though we had doubts about our procedure, we did not have the option of going from simple to complex situations, as is advisable in training (Garganta et al., 2013), because it is difficult to control complexity in group problem-solving. It may depend on many factors, such as the nature of the problem, group composition, facilitator personality, and other aspects. We only control group dimension, and even that depends upon the number of trainers available. Given the time needed for individual practice (the individual training in problem solving takes about one hour), and the time available for training, each trainer cannot handle more than 78 trainees. This means that we cannot go from simple to complex in group facilitation, except by providing an easy abstract situation so that participants can concentrate more on the process.

The course was prepared to have at least 13 participants so that a large group could be simulated with three small groups and one facilitator. However, with only two trainers available, the course could not have more than 16 participants, which permitted the facilitation training to be individualized and allowed each participant to go over the two steps of the protocol-problem definition and action planning. When the group is split in two, each participant completes one step, followed by a colleague in the second step, thus allowing one complete problem-solving cycle for each pair of participants.

Following each performance, an after-action review (Boss, 2016) was made, so that proper feedback was provided twice to each trainee. Trainers changed when the groups completed the first round, for groups to be subjected to different training styles. Afterwards, participants split in three groups and received the task of preparing a scene picturing a facilitation mistake, followed by another scene with the correct behaviour. These scenes were filmed and commented by the whole group, thus serving as a video modelling training tool (Reed et al., 2018).

The three-group design was also used for the training of the large-group facilitation. One session was run by two participants (selected by their peers), each one running one of the steps (problem definition and action planning) under the trainers' guidance. Here, as well as during the making of the videos, role play and structured experiences were used extensively in order to support skill development, as suggested by Sheehan and Kearns (1995).

The Training of a Matrix Structure Implementation

As we are dealing with a case where the company does not have a matrix structure, there is no need for a specific approach to training concerning matrix appropriation, besides discussing aspects related to its implementation and management. The first issue is to provide objectives related to customer needs and market demands, and if this analysis is not provided by the company, participants have to come up with examples of these kinds of objectives, which may also be provided by the trainers. Furthermore, aspects of project management, structure coordination, performance evaluation, rewards, training needs, and career management should be subjected to discussion. Likewise, these adjustments require a transition of some human resource management responsibilities from the HR department to the line managers, which may not be the case of the company that supports the course.

Therefore, there is not much more to be done than provide discussion points for the last part of the course, related with process appropriation in the participants' company. These can be:

- How likely would it be to install a matrix organization in the company?
- What would be the required changes?
- What coordination measures would be required to assure good functioning of both structures?
- What would be the changes related to performance evaluation?
- What changes should happen related to salary and benefits?
- And what about career management?

A final exercise in sub-groups can be the preparation and dramatization of potential conflict situations, so that learning the proper behaviours and attitudes may take place. The preparation of memos related with the discussion may provide tips for the company manager.

Method

A hotel company (AP Hotels & Resorts) became interested in a facilitation training programme for its managers that could provide hints for innovation and change through project development. We offered to prepare such a programme, adapted to its needs and time constraints. This is how we came to deliver a 35-hour facilitation training program, based on the four-step creative problem-solving (CPS) group technique, in order to prepare middle managers to act as coaches for organizational innovation.

The Company

The Group AP Hotels & Resorts Group was created in 2015 as part of the MADRE Group, held by Antonio Parente, a well-known business entrepreneur in Portugal. The group has six hotels in the Algarve, South of Portugal, all standing out for being truly diverse, with each unit boasting its own personality. Eva Senses Hotel is a four-star unit in Faro, close to the city's marina, defined as a city and business hotel; Adriana Beach Club Hotel is a four-star resort, located in Albufeira, near the beach, with 438 rooms, spread over several blocks, dedicated to the all-inclusive segment and operating from February to November with a team of around 200 employees; Victoria Sport and Beach is also in Albufeira, surrounded by pine forest and sea, dedicated to athletes, with sports facilities and 121 apartments; the four-star Oriental Hotel in Portimao boasts a unique view to the Atlantic Ocean and has an exotic oriental style architecture, with 90 rooms rented by German nationals, who have become friends with the staff that has been welcoming them for over 20 years. In the city of Tavira, the group has another two hotels: Maria Nova Lounge Hotel opened throughout the year, with 144 rooms decorated in modern style; and Cabanas Park Resort, a superior four-star resort, located near a beach, a national park, and a river, with 96 modern bedrooms. Starting with Adriana Beach Hotel, in 2015, and acquiring its last units—Cabanas and Victoria—in 2017, the Group MADRE is now on its way to create common management standards and company spirit.

A total of 14 managers from the AP Group participated in the training. Four of them were hotel managers, two were deputy managers, and four were reception managers, one public relations manager, one house-keeping manager, the human resources director, and the management secretary.

Procedure

The strategy for the training of facilitation was submitted to previous tests, first with students, then with managers, again with students, and finally with our international project partners.

First course to students. The first attempt was made with university students. The purpose of testing was to see if facilitation performance would improve with observation and practice. Twelve master management students, with very diverse experiences, ages, and personal curricula, were tested. One hypothesis formulated was that those who performed last would do better than the ones at the beginning, due to observation repetition. Another hypothesis was that each one second performance (each student would facilitate one step at a time) would score better than the first performance. A simple evaluation form, where each student evaluated the performance of the facilitator against a Likert-type scale with ten points, together with the trainers' evaluation, was used to appraise performance. Even though some students improved from the first to the second performance, the whole result did not support either hypothesis, as the performance was dependent of several factors, the most important being the fact that the student had experience or not with team work in companies. It is possible that, if students had the opportunity of repeating the facilitation role, they would improve their performance, but we did not have the opportunity of testing it and, if we did, it would be something outside of a real possibility with companies, where training time is very limited. After this test, we considered that the training could be extended to companies.

First course to managers. A first two-day, 12-hour course was prepared for 12 participants, out of the 24 managers who had been designated by a large company as small-group facilitators in a large-group meeting, to be held four months afterwards. In that large-group meeting, each team would have six to eight "agents", i.e., other company members who had been chosen to develop company innovation projects. The facilitators were mostly male engineers with an average age of 37, high in the company hierarchy but just below department directors. Each designated facilitator could choose one out of two possible dates and places so that both groups had equal numbers.

The first program included a presentation and a demonstration of the whole CPS process (over an artificial situation), together with divergent thinking group exercises. The first day ended with a walking through the CPS process, in groups of two, where each participant would take turns as a facilitator. Each participant proposed the situations based on their day-to-day work. In the second day, the group was split in two so that each participant could run an hour session under the supervision of one of the trainers. Each facilitator's role-playing was followed by a debriefing.

In the end, participants evaluated the training with an average score of 8.5, out of 10, and suggested a better connection between their training and their role in the large-group meeting that was going to take place two months later. Furthermore, they pointed out the need to have some support besides the manual, through which they could reflect upon their performance. That was when the idea for producing videos arose, addressing facilitation critical situations as a sort of refreshment training.

Even though the second training course had included some of the improvements resulting from the first course, participants gave a lower rating to the trainers (7.5 out of 10) because, unlike the first session, the structure of the large-group meeting was kept present all the time, so they could see the details of what they were being prepared for. This caused an increase in anxiety, regarding their performance in the large-group session, which was to be held only one month afterwards, and this strategy prevented them from fully concentrating on learning the process.

Regarding the large-group meeting, trainers agreed that much of its success was due to the performance of the trained facilitators who, in spite of considerable individual differences, exhibited an entirely acceptable level of competency.

Making videos as a training tool. Another experiment was made to see if participants could improve by reflecting upon group facilitation. A class of 18 university students, from a management course, with an average age of 31, all working students taking night classes, agreed to take the part corresponding to the small-group facilitation, in two three-hour sessions, plus an extra one in which they would make the videos corresponding to 21 critical group facilitation situations that had been selected from our practice. The situations were separated in groups of seven for process, facilitation, and leadership incidents, in two to three-minute videos containing a performance with an error and another without. There was also an agreement that four students, who volunteered to act as facilitators during the videos, would have an extra three-hour session. The students gave a considerable amount of suggestions for improving the course and rated it in 10 points (out of 10). As expected, their performance improvement was very little since there had been no continuity (sessions were separated by several weeks and none of the students had had the opportunity of practicing group facilitation), and individual ability was, by far, the stronger predictor of performance.

Testing the course with international partners. As a result of the Flourish project, which sponsors the research that originated this article, the authors had to deliver a two-day course for the international partners. Sixteen participants, from six institutions, representing five countries, appointed by their institutions to carry out similar courses in their countries, gathered at Kaunas Technological Park (Lithuania) for a two-day (14-hour) course. Participants were mostly young women in their early thirties, experienced as trainers as well as in working with companies. The 35-hour course curriculum was contracted to 14 hours at the expense of an individual training approach. Every output (pre-consult analysis, diagnosis report, small-group action plan, project reports resulting from the forum) was produced as if it was a real course, and the final evaluation was very positive (nine out of 10 points, on average).

The course was important to test how it could be possible to include participants from diverse proveniences into the same project (to provide knowledge transfer in a virtual European-projects' company) in addition to stimulating the execution of projects derived from the company forum in just two hours. Even though the course success was based mainly in the participants' high ability and experience in these types of courses, it ended up by supporting the main strategies adopted, extensively explained in this article.

Procedure during the course made with Hotels AP. The course took place in one of the hotel units, closed for the season. Once the list of participants was set, a course syllabus, registering forms, initial slide presentation, and the course manual were sent to the trainees.

Following previous evolutions in small and large-group methods and the attempts just described, a fast-track training program was designed, focusing on practice and repetition as essential aspects of facilitation training, while removing every activity that did not contribute directly to improving behaviours, including theoretical information, concept discussion, and exercises. For training support purposes a manual was written, and the objective defined by the CEO—*to bring all hotel units closer to the company group*—was used to structure the course.

The course comprised three modules over five days (35 hours). Module I—Organisational Diagnosis—included the preparation of the organisational diagnosis, according to the objective defined by management, the collecting of success stories as anchors for future organisational culture, and the presentation of the report to the CEO. Module II—Team Facilitation—was dedicated to the individual preparation of participants as team facilitators in creative problem-solving. Module III—Organisational Forum—included the preparation of the handout for stakeholders, the facilitation of an organisational forum (large groups), the follow up of the resulting projects, presentation of the final results, and the evaluation debriefing. Finally, the last step of the model—appropriation of the process by the company—together with the final debriefing and course evaluation.

An initial step of organisational diagnosis was included in the course and the trainees had to make a full report of the management gap concerning the objective of bringing the hotel units closer to the corporate group, i.e., how close was the management view of the objective from the interests and actions of the employees. In the second module, each trainee had the opportunity of going over the whole problem-solving protocol, acting as a facilitator, and working on artificial problems, until the process was mastered. A short debriefing followed each presentation and the trainees had to prepare videos reporting critical incidents in facilitation. After the facilitation training, participants prepared and developed a simulation of a large-group company forum, resulting in three innovation projects that were developed in class, and the results presented to the CEO, who decided that at least one of the projects would go forward. A last step, concerning the discussion about the transition to an innovative matrix organization, ended the course. Nevertheless, due to the CEO's agenda, the presentation of the diagnosis and project results took place in the last session, limiting the time available for discussion of process appropriation. That discussion, however, made it clear that the absence of experience with matrix structures would made it difficult for the participants to picture how the company could ever adopt such an organization.

A questionnaire assessing five main areas tested the participants' attitudes towards the course. The first two questions addressed the familiarity with organizational innovation before and after the workshop. The third question measured the satisfaction with the learning content (with each module and overall satisfaction); the fourth area addressed the organisation of the course in 14 items (e.g., information before training, practice orientation or competence of the trainers); the next four items asked if the course met the participants' expectations and needs and if they acquired enough knowledge to apply its contents. The overall satisfaction with the curriculum, course manual, and the web platform were assessed. All these items provided a five-point scale for the answers (1-poor; 2-fair; 3-average; 4-good; 5-very good), and a sixth level for "Not applicable". Also, a qualitative question asked what was the most important learning outcome of the course.

Results and Discussion

Taking into consideration the evaluation by questionnaire, results show that the participants considered that the training contributed to their knowledge of organizational innovation, a subject that they were not at all familiar with before the course. There was a high level of global satisfaction with the course (all participants rated "Good" and "Very Good"), although when questioned about each module, the first one received lower, although positive rates. Some commented that they found the first module more theoretical and without application, either professionally or in their private life. Altogether satisfaction with the selection of topics was rated 4.2, with a low standard deviation ($\sigma = 0.4$), suggesting little differences in opinion. The questions about the course organization received a good evaluation ($\bar{x} = 4.2$; $\sigma = 0.4$), although the item addressing the information received before the course was rated more negatively by six participants (four rated "Average", one "Fair", and one "Poor"). Asked if the course met their expectations and needs, and if it is applicable to their profession, all participants answered positively ($\bar{x} = 4.3$; $\sigma = 0.3$). The last three questions about the learning materials also received the participants' approval.

As for the qualitative answers expressed in the questionnaire and during the final debriefing, participants referred that the beginning of the course was not easy, as they found it "too theoretical" without practical application. But, when entering the second module they understood it was a "practical training", "useful in daily life", and eight stated the will to try to apply it with their teams. Focusing on the method, they pointed out its novelty (four participants) and value to achieve an effective teamwork ("I was surprised to work by consensus in a team"; "We were able to think like a team"). Focusing on the skills, they learned "to listen" (3); "to promote everyone's participation" (5); "involve everyone in decision making" (3); "to lose the fear of speaking freely" (1). They focused on the importance of the method to identify and solve problems and of learning to facilitate their teams (6) and a forum (1). Some also emphasized the importance of the method for their private life (4). Another issue was the benefit of having worked on a real problem of their hotels.

The acquisition of the mind mapping skills proved to be difficult, so we simplified it. Putting the questions for the mind maps, where each additional objective must respond positively upwards and downwards, using the "Why?—What is stopping us?" criteria (Basadur et al., 2000), would benefit important facilitation tasks, where rephrasing becomes necessary. But this skill proved to be difficult to attain except for a short percentage of participants, as it requires some abstraction power and practice of formulating the necessary questions correctly. Although we maintained the mind maps as part of the course, we accepted to ask only for one-way correspondence, either downwards or upwards. Nevertheless, we kept an initial demonstration of the correct reciprocal correspondence, in order to have a list of objectives to work with during small group facilitation training.

Participants were organized in groups to present a full report about each hotel unit history, perspectives about the objective, and success stories. The reports were an extra class assignment, but the motivation to prepare a final report for the CEO helped to make a high-quality presentation. The delivery of the final report was scheduled to a session where the projects' results could also be presented. Another skill requiring training was the interview technique. Even if the full preparation, according to the principles of the semi-structured interview (Ghiglione & Matalon, 1977), is outside the scope of the course, the time dedicated to its practice proved to be fruitful, given the importance that managers attribute to these skills for their daily work. These skills also have to do with effective listening, which has a direct link with group facilitation.

As to small-group facilitation, everything went as planned. Every participant had the opportunity of making a group facilitation in problem definition and action planning, but the performance level spectrum was quite large. Higher ranking line managers, more used to teamwork and direct leadership, performed better than staff managers and middle-level managers. This was also evident when the manager was a foreigner, used to a more collaborative approach than the Portuguese managers. There is still the doubt of using a real or a fictitious objective during the first demonstration, when the class is still together, so that participants may concentrate on the process instead of content. Given the pros and cons, and taking into consideration theoretical suggestions (Ali, 2000), we should shift to using a real objective from the beginning.

Large-group facilitation was made by two participants, selected by their colleagues, after a ballot that included the trainers. Participants were split in three groups (random), simulating 60 stakeholders that had been designated during the preparation of the real forum. Starting with the objective of bringing the hotel units closer to the company group, a list of problems was made, and the CEO's representative chose some that gave rise to a series of possible projects. From that list the representative chose three: organize cross-training between units;

create an institutional presentation for the employee welcome program; and define the benefits of the co-worker card. These projects were executed in and outside class and, again, the fact that they were to be presented before the CEO led to a high-quality work, together with the promise that, at least one of the projects would be carried away. Large-group facilitation proved to be easier to do than small-group, and so it is possible to anticipate that the majority of participants would do a good performance. Large-group facilitation is more a matter of time-keeping, in order to comply with the agenda, and of interface with management, as described in Sousa and Monteiro (2019), which cannot take place in training, unless the manager decides to step in. Another high important skill is the ability to lead large groups in low structured situations but, as we could not have a large group in class, it was not possible to simulate the situation. Nevertheless, when we are dealing with managers used to manage difficult situations, we assume that large-group problem solving does not need extra skills from normal leadership under stress situations.

The making of the videos, with scenes filmed and commented by the whole group, provided a modeling training tool, as described by Reed et al. (2018). Role play and structured experiences were also used extensively to support skill development (Sheehan & Kearns, 1995), of which the results proved to be important.

As to limitations, the main one was that it was not possible to include a real intervention in the course. If participants could have organized a real company forum, with real stakeholders executing the projects, results could have been much more fruitful. Another limitation was due to a poor course introduction during the two first sessions. On our side, we assumed that concepts could be easily understood, and so we did not plan for a more thorough explanation (e.g., mind mapping). On the company side, there was an initial turbulence as to the group composition that should attend the course. Only in the third session (out of nine) the group remained stable. The fact that participants were led to read the course materials, especially the manual, was mandatory to provide a better integration of the concepts. In the words of the participants, they had never been subjected to this type of course, where theoretical concepts and long explanations were discarded, so the reading of the course materials was fundamental to its understanding.

As to the training of matrix structure implementation, there was little time to address it, as it coincided with the session where the CEO could be present, and the priority was given to the presentation of the diagnosis and projects report. Nevertheless, the distance between the organizational structure of the Hotel Group AP, and the one that would be needed for the matrix, is too long, and the discussion would have very little sustainability. In future courses, this issue cannot be addressed effectively unless participants have some experience in working in these types of organizations.

Conclusions

Overall, the training model, based on Bandura’s social learning theory (Bandura, 1986), and expressed by demonstration, modelling, and observation, as the main sources of learning, proved to be effective. Also, the adaptation we made from motor skills training (Tani et al., 2011), in the use of participants as role models, and of Kolb’s learning model (Kolb, 1984), as to the value of immediate experience as the act that precedes observation, produced good results. As participants initiate the training with related skills and knowledge, the abstractions they make out of the training, or “theories”, are the basis for the definition of further behavior and attitudes, as explained by Kelly in his personal construct theory (Kelly, 1963). These managers may be competent in team leadership (push approach), however not forceful in using a facilitative style of group coordination (pull approach), either with small-group or large-group facilitation. Nevertheless, by challenging their previous experience, the course produced better results than if they had to experience at all.

A particular added value of the course turned out to be the innovation projects that came out of the forum. Even if not planned to have a material output, the course served to demonstrate a methodology that provided innovative results and, we may assume, participants will use some of it in their daily work. If not in large group meetings (managers complained that it is not possible to assemble workers for hours, given the labor-intensive regime in the hotel industry), at least with smaller project teams it is expected that some kind of matrix structure, made out of innovation projects, may arise. This prevision, also supported by participants' evaluations, was not possible to verify, as the hotel industry had to shut down because of the Corona virus. Let us hope that, in the near future, the industry may regain its place also by providing the required innovation for completely new conditions. If this is so, the course will have played its role.

As a final conclusion, we can say that the course model we provided for the preparation of managers as coaches for organizational innovation in the hospitality industry proved to be adequate. Although it requires changes in the introduction, and elimination of abstract examples, its structure proved to be adequate. As to future developments, they will have to do mostly with the functioning of a matrix structure, so that the whole approach may have a full impact on the company. That is why this course should take place in companies that already have some initiatives in project development. If we succeed in bringing in the necessary expertise in human resource management, in matrix structures, we will have developed conditions to present an organizational behavior course syllabus, for managers and management students, which has proved to be effective.

As to the hotel industry, the reduction of its limitations to expand project development, due to its labor-intensive nature, will continue to dictate its ability to produce innovations that are not adopted from elsewhere. In the post-COVID 19 era, where collaboration will dictate much of the changes (Chesbrough, 2020), this cannot help but take place.

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