Facilitator guide template

A facilitator guide template records what a trainer says, what participants do, and how to handle timing, materials and changes. Use the filled 30-minute example and blank sheets below, then follow the 45-minute writing and rehearsal process to prepare a guide another trainer can use.

45 minutes | 2–8 participants | Online and adaptable in person

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The outcome

Each pair leaves with a session brief, one fully written activity and a handover check that records missing instructions, an owner and a revision date.

Before the session

- For trainers, instructional designers and facilitators handing a session to someone else. The 45-minute process below develops one activity; allow separate time to complete and rehearse the rest of a longer session.
- Bring one existing session outline, its intended participant outcome and the actual materials. Work in pairs; for an odd number, use one trio with a separate observer. Agree who is designing and who is rehearsing.
- Share the blank guide brief and activity sheet in an accessible format in advance. Check editing permissions, offer captions and written contributions, and use fictional or anonymised examples.
- Use the 30-minute example as a model of the detail needed. Its audience is eight project coordinators; the 45-minute guide-writing process is for 2–8 trainers. Both timings are suggestions to test with your audience.

Included in this kit

A facilitator run of show, participant worksheets with real tables, reference tables, debrief questions, adaptation notes and a follow-up plan. Use the editable Word copy to tailor examples and prompts before delivery.

Original material by Superglue. Timings are suggestions; adjust them to your participants. This resource has not been independently evaluated.

What is inside

The participant sheets come first so you can print one page per person. Your own facilitator section follows them.

- Blank facilitator guide brief — Complete one brief per session.
- Blank activity instruction sheet — Duplicate this sheet for each activity.
- Handover rehearsal record — Record observations during the 10-minute rehearsal.
- Facilitator run of show, reference tables, debrief questions and adaptation notes — for you, after the participant sheets.

Blank facilitator guide brief

Complete one brief per session. Write enough context for a trainer who did not design it. The editable Word file lets you expand each cell.

Field	Your plan
Session name, guide owner, version and date	
Audience, prior knowledge and access needs	
What participants will be able to do	
Evidence you will observe or collect	
Materials, links, permissions and setup	
Producer duties and fallback channel	
What must stay fixed and what may change	
Review owner, rehearsal date and storage location	

Blank activity instruction sheet

Duplicate this sheet for each activity. Keep the spoken prompt separate from notes for the facilitator. Record minute-by-minute participant actions.

Field	Your instruction
Activity name, start and duration	
Purpose and participant output	
Exact instruction to say or paste	
What participants do, and how long	
Facilitator and producer actions	
Materials and permission check	
Check understanding and debrief question	
Fallback, time cut and transition	

Handover rehearsal record

Record observations during the 10-minute rehearsal. A question exposes a gap in the guide; it is not a score for the trainer.

Observation	Revision, owner and date
Instruction that was clear	
Question the trainer had to ask	
Access or timing gap	
Response to the contingency	
Remaining full-rehearsal check	

Facilitator run of show

1 Define the handover | 5 minutes

Name the next facilitator, audience and one participant outcome. Agree what evidence would show that outcome. Say: By the end, someone else should be able to give this activity without asking you to explain a missing step.

2 Complete the guide brief | 8 minutes

In pairs, fill the audience, outcome, materials, roles and version fields. Spend five minutes writing and three checking links and permissions. Mark unknowns with an owner rather than guessing. Specify what must stay fixed and what may change.

3 Write one activity in full | 12 minutes

Use the activity sheet for the hardest instruction in your session. Spend eight minutes writing the exact prompt, participant actions, timing, output and debrief; use four minutes to add a fallback and a transition. Separate what you say from private facilitator notes.

4 Rehearse the handover | 10 minutes

The incoming trainer gets two minutes to read, five to rehearse the opening instruction and handle one contingency, then three for feedback. The author plays a participant and notes each clarification requested. A trio assigns an observer. This is a rehearsal of the instruction, not the whole activity.

5 Revise and check | 7 minutes

Use four minutes to repair unclear instructions and three for a second read-through. Check that activity durations match the available time, the worksheet matches the spoken task, and the fallback preserves the intended outcome. Record any gap you cannot resolve today.

6 Assign the next review | 3 minutes

Spend one minute agreeing a version owner and two choosing a revision date and storage location. Each incoming trainer states one remaining question. Schedule a full rehearsal before first delivery; do not treat this short check as proof that the session works.

Reference tables

Filled guide brief

Field	Fictional worked example
Audience and outcome	Eight project coordinators practise clarifying a vague work request. Each writes a request with an output, owner and deadline.
People and materials	One facilitator and one producer; shared document, timer and the fictional request below. No slides required.
Fictional case	A colleague writes: Please get the launch update ready soon. Participants may invent answers, clearly marked as assumptions.
Preparation	Send the case and writing prompts in advance. Check guest editing access. Agree who keeps the notes and delete personal details.
Evidence of learning	A partner can identify the output, owner and deadline in the rewritten request and name any unresolved assumption.
Version and handover	Example v1.0; guide owner: training lead. Incoming facilitator checks access and rehearses the first instruction before delivery.

Filled 30-minute delivery guide

Minutes	Activity	Facilitator instruction	Output
0–5	Open and frame	Say: Rewrite a vague request so a colleague can act. Show the case and explain the output, owner and deadline check.	One shared understanding of the task.
5–10	Demonstrate	Ask: What output is needed? Who owns it? By when? Example answer: Draft a one-page launch update; Maya owns the draft; send by Thursday 15:00. Label these answers invented.	Three details and any assumptions made explicit.

Minutes	Activity	Facilitator instruction	Output
10–20	Practise in pairs	Allow 2 min to write, then two 3-min turns. Each speaker reads a rewrite; the partner checks the three details. Use the last 2 min to revise.	Each person has a revised request.
20–27	Compare and debrief	Take 2 min for quiet comparison, 3 min for two examples and 2 min to ask what still needs checking with the requester.	One uncertainty to check before acting.
27–30	Close	Allow 1 min to choose a real request to clarify and 2 min to record the first question and when to ask it. Do not share client details.	A private next step with a date.

Contingencies for the example

Situation	Response
No shared-document access	Producer pastes the case in chat; participants write locally and read only what they choose.
Odd number or someone prefers not to speak	Use one trio with two writers and a checker who also drafts privately; accept written feedback.
Five minutes lost	Keep the paired practice intact. Reduce the demonstration to 3 min and comparison/debrief to 4 min; record unanswered questions.
A real dispute enters the practice	Return to the fictional case. Offer an appropriate private follow-up; do not investigate complaints in the exercise.

Debrief and next steps

Questions for reflection

- Which instruction required an explanation that was absent from the guide?
- What participant output would show that the activity met its purpose?
- Which contingency preserved the purpose, and which would require redesign?

Adapt the session

- For solo preparation, record yourself giving the instruction, then follow only the written guide. Ask another trainer to review it before delivery.
- For remote pairs, put the instruction in chat as well as reading it. Allow silent written rehearsal and feedback; cameras are optional.
- For a long or specialist programme, work on one activity today. Arrange content-owner review and a full timed rehearsal before calling the complete guide ready.

After the session

The named owner updates the guide after rehearsal and records the version and changes. After first delivery, compare planned and actual timings, record participant questions, and revise unclear steps. Keep one current master and archive superseded copies so future trainers can identify the approved version.

Questions people ask

What should a facilitator guide include?

Include the audience, outcome, preparation, materials, timings, exact participant instructions, facilitator notes, expected outputs, debrief questions and fallback options. Add an owner and version date for handover.

How is a facilitator guide different from an agenda?

An agenda shows the sequence and time. A facilitator guide also explains how to deliver each activity, what to say, what to observe and what to do when the plan needs to change.

Is the example a 30-minute or 45-minute session?

The fictional delivery example lasts 30 minutes. The separate 45-minute process helps trainers write and rehearse one activity in their own guide. Neither is a full rehearsal of a longer programme.

Can I edit this in Word or Google Docs?

Subscribers receive the editable DOCX, which can be opened in Word or imported into Google Docs, plus an Excel workbook, CSV agenda and PDF. The PDF is available immediately without a subscription. No native Google Docs copy is supplied for this kit.

Do I need to script every word?

Write exact instructions where ambiguity could change the task, timing or participant output. Use concise notes for transitions and debrief follow-ups, leaving room to respond to the group.

Use and sharing

Free to use and adapt in your own training sessions, including paid client work. Do not resell or redistribute the unmodified download as a standalone product. Share the resource page instead.