ATD Workshop Series

# COMMUNICATION SKILLS
## training

Includes All the Activities, Handouts, Tools, and Assessments
You Need to Create and Deliver Powerful, Effective Training

MAUREEN OREY

# COMMUNICATION SKILLS
training

Association for
Talent Development

ATD Workshop Series

# COMMUNICATION SKILLS
## training

MAUREEN OREY

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# The ATD Workshop Series

Whether you are a professional trainer who needs to pull together a new training program next week, or someone who does a bit of training as a part of your job, you'll find the ATD Workshop Series is a timesaver.

Topics deliver key learning on today's most pressing business needs, including training for communication skills, leadership, coaching, new supervisors, customer service, new employee orientation, and more. The series is designed for busy training and HR professionals, consultants, and managers who need to deliver training quickly to optimize performance now.

Each ATD Workshop book provides all the content and trainer's tools you need to create and deliver compelling training guaranteed to

- **enhance** learner engagement
- **deepen** learner understanding
- **increase** learning application.

Each book in the series offers innovative and engaging programs designed by leading experts and grounded in design and delivery best practices and theory. It is like having an expert trainer helping you with each step in the workshop process. The straightforward, practical instructions help you prepare and deliver the workshops quickly and effectively. Flexible timing options allow you to choose from half-day, full-day, and two-day workshop formats, or to create your own, using the tips and strategies presented for customizing the workshops to fit your unique business environment. Each ATD Workshop book also comes with guidance on leveraging learning technologies to maximize workshop design and delivery efficiency and access to all the training materials you will need, including activities, handouts, tools, assessments, and PowerPoint slides.

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# Foreword

In 2002, we launched the ASTD Trainer's WorkShop Series—a collection of books authored by practitioners that focused on the design and delivery of training on popular soft-skills topics. The creation of this series was a departure for us. These workshops-in-a-book were created to help internal trainers expedite their program delivery by using appropriate and exceptionally designed content that could be adapted and repurposed.

These topics, dealing with issues ranging from customer service to leadership to manager skills, continue to be important training programs offered in companies and organizations of all sizes and across the globe. Twelve years later the ASTD Trainer's WorkShop Series has helped more than 60,000 trainers and occasional trainers deliver top-notch programs that meet business needs and help drive performance.

And while many things about the delivery of soft skills training have not changed in the last decade, there have been many advances in technology and its use in training. So, when we began talking about how to refresh this popular series, we knew we needed to incorporate technology and new topics. We also wanted to make sure that the new series was cohesively designed and had input from author-practitioners who are, after all, the heart and soul of this series.

With the publication of *Communication Skills Training* by Maureen Orey, I am pleased to announce the re-launch of a brand-new ATD Workshop Series. It is only appropriate that the series is publishing under our new ATD banner. Inside this volume, and each of the forthcoming titles in the series, you'll find innovative content and fresh program agendas to simplify your delivery of key training topics. You'll also find consistency between titles, with each presented in a contemporary manner, designed by peers, and reflecting the preferences of training professionals who conduct workshops.

We hope that you find tremendous value in the ATD Workshop Series.

Tony Bingham
President & CEO
Association for Talent Development (ATD)
November 2014

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# Preface

Everyone has something to say, but not everyone communicates well.

Whether you are a good speaker or not, every person has a message that should be communicated and heard. Learning to communicate your message is much more challenging than it may seem. It takes self-reflection to discover your voice, and it takes courage and skill to use it. It is a skill that does not always come automatically.

Communication affects almost every part of the workplace. It can help us improve relationships and increase performance, or it can reduce trust, damage relationships, and ultimately lead to the failure of projects, teams, and organizations. Improving your communication skills takes the willingness to assess yourself honestly and the courage to take action and change existing behaviors that do not enhance communication or build relationships.

Teaching others to have better communication skills is very rewarding and can even change lives! I once had a participant come to me a few months after attending a workshop on effective communication skills; she attended the workshop because she was struggling to communicate effectively with her boss. Then she shared with me how she implemented the new skills learned in the workshop, and as a result the relationship with her boss had improved and led to positive progress in her career growth! How cool is that?

As a facilitator, you too can enable others to gain valuable skills and grow personally. If you are a seasoned trainer, you are already using many of these designs and formats. I encourage you to augment your workshop with the fresh insights and tools I have created for this ATD Workshop Series book. But you don't need to be an expert on training or communication to help people strengthen their communication skills. The agendas and supplemental materials included here will provide all the tools you need to deliver programs that will improve communication skills for individuals, teams, and organizations. It is exciting work that ultimately can change lives!

Maureen Orey, CPLP
San Diego, CA
November 2014

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## Introduction

# How to Use This Book

**What's in This Chapter**

- Why communication skills matter
- What you need to know about training
- Estimates of time required
- A broad overview of what the book includes

---

## Why Do Communication Skills Matter?

In this world of constant change, effective communication is a crucial skill set for leaders and individual contributors. Communication is the key to both success and failure—making or breaking relationships, teams, or organizations. Poor communication reduces productivity, trust, and morale, whereas positive and respectful communication builds relationships and collaboration and increases productivity.

Verbal and nonverbal communication and attentive listening skills are valuable in the workplace. Good communication skills go beyond simply talking and conversations; communicating well in written reports and email is also essential. Workplace communication can be a challenging and difficult task. It takes a strong sense of self, emotional control, and personal confidence to allow yourself to become vulnerable with your colleagues. But without strong communication skills, developing successful working relationships is nearly impossible.

Communication is the vehicle for sharing information with colleagues; it is at the heart of team building, customer service, conflict management, and every other interaction in the workplace. The goal of all communication is to develop a common understanding of what was said and to ensure that the message that comes across is the same to all parties involved.

Understanding the benefits of effective communication helps companies focus on developing a workforce that is able to communicate with each other as well as with customers, vendors, and business partners. If you are searching to build a positive, collaborative, and trusting work environment, good communication skills must be your foundation.

The first edition of this book in 2004 approached the topic of communication skills somewhat differently, covering a wide variety of topics, with each topic presented at a very high level. This edition of the book offers a new approach. Fewer topics are covered overall, but each topic—listening skills, business writing, communicating your message, and verbal and nonverbal communication—is explored with a deeper dive into the content. In fact, each topic can stand alone as its own half-day workshop.

Providing your participants with a deeper, more nuanced understanding of communication will give them a solid foundation upon which to build strong skills and relationships in the workplace. The content, activities, and tools offered here are designed to help you to start this critical learning immediately.

## What Do I Need to Know About Training?

The ATD Workshop Series is designed to be adaptable for many levels of both training facilitation and topic expertise. Circle the answers below that most closely align with your levels of expertise and your organization's commitment to learning. Each question circled in the column labeled 3 gets three points, and so on. Sum up your total score.

**QUICK ASSESSMENT: HOW EXPERT DO I NEED TO BE?**

| Question | 3 | 2 | 1 |
|---|---|---|---|
| What is your expertise as a facilitator? | Expert (more than 5 years, always awesome evaluations) | Some experience (1–5 years, sometimes talk too much) | Beginner (less than 1 year, no idea what to do) |
| How familiar are you with the topic? | Evolving expert (have taken courses, read books, created materials, *and* it is my passion) | Some experience (have taken courses, read books, created materials) | Beginner (had a course in school) |
| How committed is your company to investing in training or performance improvement? | Integral part of our corporate culture | Depends on the topic—this one is hot right now | Cheap and fast |
| TOTAL: | | | |

**If you scored 1-3 (novice at both training and topic):** Your best bet is to stick as closely as possible to the materials as they are. Spend extra time with the content to learn as much as possible about it. Also, closely read Chapter 8 on training delivery and consider practicing with a colleague before delivering the program.

**If you scored 4-6 (topic expert):** Use the outline and materials, but feel free to include materials you have developed and believe are relevant to the topic.

**If you scored 7-9 (training expert):** Feel free to adapt the agendas and materials as you see fit and use any materials that you have already developed, or simply incorporate training activities, tools, handouts, and so forth into your own agenda.

For more on facilitation skills, see Chapter 8 in this volume. Chapter 12 includes a comprehensive assessment instrument that will help you manage your professional development and increase the effectiveness of your communication skills training sessions (see Assessment 4: Facilitator Competencies).

## How Much Time Will Preparation Take?

Putting together and facilitating a training workshop, even when the agendas, activities, tools, and assessments are created for you, can be time consuming. For planning purposes, estimate about four days preparation time for a two-day course.

## What Are the Important Features of the Book?

Section I includes the various workshop designs (from a half day to two days) with agendas and thumbnails from PowerPoint slides as well as a chapter on customizing the workshop for your circumstances. The chapters included are

- Chapter 1. Two-Day Workshop (15 hours program time) + Agenda + PPT (thumbnails)
- Chapter 2. One-Day Workshop (7.5 hours program time) + Agenda + PPT (thumbnails)
- Chapter 3. Half-Day Workshop (3 to 4 hours program time) + Agenda + PPT (thumbnails)
- Chapter 4. Customizing the Communication Skills Workshop.

The workshop chapters include advice, instructions, workshop at-a-glance tables, as well as full program agendas.

Section II is standard from book to book in the ATD Workshop Series as a way to provide a consistent foundation of training principles. This section's chapters follow the ADDIE model—the classic instructional design model named after its steps (analysis, design, development, implementation, and evaluation). The chapters are based on best practices and crafted with input from experienced training practitioners. They are meant to help you get up to speed as quickly as possible. Each chapter includes several additional recurring features to help you understand the concepts and ideas presented. The Bare Minimum gives you the bare bones of what you need to know about the topic. Key Points summarize the most important points of each chapter. What to Do Next guides you to your next action steps. And, finally, the Additional Resources section at the end of each chapter gives you options for further reading to broaden your understanding of training design and delivery. Section II chapters include

- Chapter 5. Identifying Needs for Communication Skills Training
- Chapter 6. Understanding the Foundations of Training Design
- Chapter 7. Leveraging Technology to Maximize and Support Design and Delivery
- Chapter 8. Delivering Your Communication Skills Workshop: Be a Great Facilitator
- Chapter 9. Evaluating Workshop Results.

Section III covers information about post-workshop learning:

- Chapter 10. The Follow-Up Coach.

Section IV includes all the supporting documents and online guidance:

- Chapter 11. Learning Activities
- Chapter 12. Assessments
- Chapter 13. Handouts
- Chapter 14. Online Tools and Downloads.

The book includes everything you need to prepare for and deliver your communication skills workshop:

- **Agendas,** the heart of the series, are laid out in three columns for ease of delivery. The first column shows the timing, the second gives the presentation slide number and image for quick reference, and the third gives instructions and facilitation notes. These are designed to be straightforward, simple agendas that you can take into the training room and use to stay on track. They include cues on the learning activities, notes about tools or handouts to include, and other important delivery tips. You can download the agendas from the website (see Chapter 14) and print them out for easy use.

- **Learning activities,** which are more detailed than the agendas, cover the objectives of the activity, the time and materials required, the steps involved, variations on the activity in some cases, and wrap-up or debriefing questions or comments.
- **Assessments, handouts, and tools** are the training materials you will provide to learners to support the training program. These can include scorecards for games, instructions, reference materials, samples, self-assessments, and so forth.
- **Presentation media** (PowerPoint slides) are deliberately designed to be simple so that you can customize them for your company and context. They are provided for your convenience. Chapter 7 discusses different forms of technology that you can incorporate into your program, including different types of presentation media.

All the program materials are available for download, customization, and duplication. See Chapter 14 for instructions on how to access the materials.

## How Are the Agendas Laid Out?

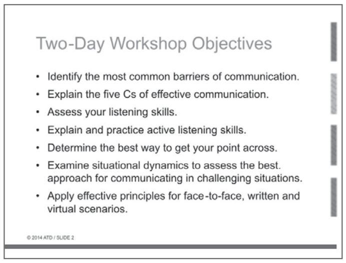
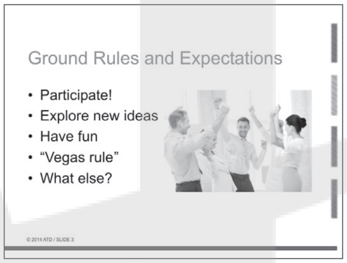
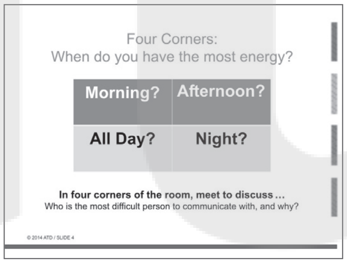
The following agenda is a sample from the two-day communication skills workshop.

### Two-Day Workshop Agenda

The focus of day one is face-to-face communication and listening skills.

### Day One: (8:00 a.m. to 4:00 p.m.)

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 8:00 a.m.<br>(10 min) | Slide 1<br> <br>ATD<br>Workshop<br>Effective Communication Skills<br>© 2014 ATD / SLIDE 1 | **Welcome and Introduction**<br>Arrive early to set up the room and make sure everything works properly. Adjust the room set-up as needed.<br>Welcome participants as they arrive. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 8:10 a.m.<br>(15 min) | Slide 2<br><br>Two-Day Workshop Objectives<br>• Identify the most common barriers of communication.<br>• Explain the five Cs of effective communication.<br>• Assess your listening skills.<br>• Explain and practice active listening skills.<br>• Determine the best way to get your point across.<br>• Examine situational dynamics to assess the best. approach for communicating in challenging situations.<br>• Apply effective principles for face-to-face, written and virtual scenarios.<br>© 2014 ATD / SLIDE 2 | **Learning Activity 1: Objective Decision**<br>• **Handout 1a: Objective Decision**<br>This activity provides an innovative way to facilitate the discussion about session objectives rather than simply reading them to the participants. Follow the instructions in the learning activity and handout. |
| 8:25 a.m.<br>(10 min) | Slide 3<br><br>Ground Rules and Expectations<br>• Participate!<br>• Explore new ideas<br>• Have fun<br>• "Vegas rule"<br>• What else?<br>© 2014 ATD / SLIDE 3 | **Ground Rules and Expectations**<br>Facilitate the discussion about ground rules and expectations for the course. Adjust times for starting, breaks, and lunches as needed to accommodate your environmental factors. |
| 8:35 a.m.<br>(15 min) | Slide 4<br><br>Four Corners:<br>When do you have the most energy?<br>Morning? Afternoon?<br>All Day? Night?<br>**In four corners of the room, meet to discuss …**<br>Who is the most difficult person to communicate with, and why?<br>© 2014 ATD / SLIDE 4 | **Learning Activity 2: Four Corners**<br>• **Handout 2: The Most Difficult Person in the World**<br>Get participants thinking by using Handout 2 and then follow the instructions in the learning activity. Or you can facilitate this activity without the handout; four corners and a discussion question will get the conversation going. |

## How Do I Use This Book?

If you've ever read a "Choose Your Own Adventure" book, you will recognize that this book follows a similar principle. Think back to the self-assessment at the beginning of this introduction:

- If you chose *training expert*, you can get right to work preparing one of the workshops in Section I. Use Section II as a reference. Each of the chapters features a sidebar or other information written by the author who has much experience in the topic under consideration. This advice can help guide your preparation, delivery, and evaluation of training.
- If you chose *topic expert*, read Section II in depth and skim the topic content.
- If you chose *novice at training and the topic,* then spend some serious time familiarizing yourself with both Sections I and II.

Once you have a general sense of the material, assemble your workshop. Select the appropriate agenda and then modify the times and training activities as needed and desired. Assemble the materials and familiarize yourself with the topic, the activities, and presentation media.

## Key Points

- Oral and written communication skills are essential to individual and organizational success.
- Effective listening skills help build positive relationships.
- The workshops in this book are designed to be effective at all levels of trainer expertise.
- Good training requires an investment of time.
- The book contains everything you need to create a workshop, including agendas, learning activities, presentation media, assessments, handouts, and tools.

## What to Do Next

- Review the agendas presented in Section I and select the best fit for your requirements, time constraints, and budget.
- Based on your level of expertise, skim or read in-depth the chapters in Section II.
- Consider what kind of follow-up learning activities you will want to include with the workshop by reviewing Section III.

## Additional Resources

Biech, E. (2008). *10 Steps to Successful Training*. Alexandria, VA: ASTD Press.

Biech, E., ed. (2014). *ASTD Handbook: The Definitive Reference for Training & Development,* 2nd edition. Alexandria, VA: ASTD Press.

Emerson, T., and M. Stewart. (2011). *The Learning and Development Book.* Alexandria, VA: ASTD Press.

McCain, D.V., and D.D. Tobey. (2004). *Facilitation Basics.* Alexandria, VA: ASTD Press.

Piskurich, G. (2003). *Trainer Basics.* Alexandria, VA: ASTD Press.

Stolovitch, H.D., and E.J. Keeps. (2011). *Telling Ain't Training,* 2nd edition. Alexandria, VA: ASTD Press.

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# SECTION I

## The Workshops

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## Chapter 1

# Two-Day Communication Skills Workshop

**What's in This Chapter**

- Objectives of the two-day Communication Skills Workshop
- Summary chart for the flow of content and activities
- Two-day program agenda

---

Whether you choose a two-day, one-day, half-day, or custom workshop format, time spent on developing communication skills will bring solid results in personal and organizational performance. There are, however, a number of benefits in conducting longer workshops. In two days, participants get to know each other, build rapport, delve deeper into a topic, practice the skills they are learning, and discuss and reflect on the application and relevance to workplace scenarios.

A well-designed workshop accounts for and anticipates the natural and predictable "low energy" times during the day. It is essential to incorporate activities that engage participants, getting them out of their seats and actively participating in relevant and meaningful activities, small group discussion, and practice.

Facilitating a two-day (or longer) workshop requires the facilitator to have a high level of energy, focus, and a keen ability to read the energy level of the participants throughout the duration of the program. A great way to keep the participants engaged and the energy high is to manage the flow of activities, presentations, and small- or large-group discussions. Just like frequency of commercial breaks on televised programs, consider changing your training method every 10 to 15 minutes.

This chapter provides a comprehensive two-day workshop agenda using the principles of active training. It is designed to keep the content relevant, meaningful, and interactive. Day one focuses on oral communication and how to listen and deliver your message effectively. Day two focuses on effective written communication and the strategies for getting your message across in writing.

## Two-Day Workshop Objectives

By the end of the two-day workshop, participants will be able to

- Identify the most common barriers for communication
- Explain the Five Cs of Effective Communication
- Assess their personal listening skills
- Explain and practice active listening skills
- Determine the best way to get their point across
- Examine situational dynamics to assess the best approach for communicating in challenging situations
- Apply effective principles for face-to-face, written, and virtual scenarios.

## Two-Day Workshop Overview

### Day-One Overview

| TOPICS | TIMING |
|---|---|
| Welcome and Introduction | 10 minutes |
| Learning Activity 1: Objective Decision | 15 minutes |
| Ground Rules and Expectations | 10 minutes |
| Learning Activity 2: Four Corners | 15 minutes |
| Communication Process | 15 minutes |
| Learning Activity 3: Identify the Noise | 15 minutes |
| The Communication Pie (Three Modes of Communication) | 10 minutes |
| Learning Activity 4: Impression Improv | 15-20 minutes |
| Congruent and Incongruent Communication | 10 minutes |
| **BREAK** | **15 minutes** |
| Vocal Tone and Word Emphasis | 5-10 minutes |

| | |
|---|---|
| The Role of Emotion in Communication | 5 minutes |
| Discussion/Brainstorm: Symptoms of Fear and Anger | 10-15 minutes |
| The Emotional and Rational Brain | 10 minutes |
| Emotional Hijacking and the Reptilian Brain | 5 minutes |
| Discussion: Strategies for Gaining Emotional Control | 20-30 minutes |
| Discussion: Indicators of Relaxation | 10 minutes |
| Managing the Emotion | 5 minutes |
| Communication Awareness Model | 5-10 minutes |
| Learning Activity 5: Surgical Analysis of Your Story | 30-40 minutes |
| Discussion: Five Steps to Effective Communication | 10-15 minutes |
| Morning Debrief | 5-10 minutes |
| **LUNCH** | **60 minutes** |
| Assessment 1: Listening Behavior Assessment | 15 minutes |
| Learning Activity 6: Listening Is More Than Hearing | 30 minutes |
| Basic Listening | 5-10 minutes |
| Learning Activity 7: The Listening Stick (Part 1) | 15 minutes |
| Principles of Active Listening (Part 1) | 20 minutes |
| **BREAK** | **15 minutes** |
| Principles of Active Listening (Part 2) | 10 minutes |
| Learning Activity 8: Listening Stick (Part 2) | 20 minutes |
| Small-Group Brainstorm: Barriers to Listening | 15 minutes |
| Reflection and Action Plan | 10 minutes |
| Day-One Summary: Gallery Walk | 10-15 minutes |
| Close: Final Q & A, Day-Two Reminders, and Informal Evaluations | 5-10 minutes |
| **TOTAL** | **480 minutes (8 Hours)** |

## Day-Two Overview

| TOPICS | TIMING |
|---|---|
| Welcome and Reconnect | 10 minutes |
| Revisit Ground Rules and Expectations | 15 minutes |
| Learning Activity 9: Alpha Beta Exercise | 55 minutes |
| Activity Debrief: Alpha Beta Exercise | 10 minutes |
| Discussion: Model for Effective Business Writing | 15 minutes |
| Learning Activity 10: Personal Case Scenario | 10 minutes |
| Planning Your Writing Content | 15 minutes |
| Learning Activity 11: Document Planning Mind Map | 20 minutes |
| **BREAK** | **15 minutes** |
| Discussion: Brainstorm . . . Brainstorming! | 10 minutes |
| Five Cs of Effective Communication | 5 minutes |

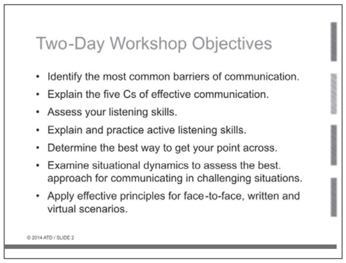
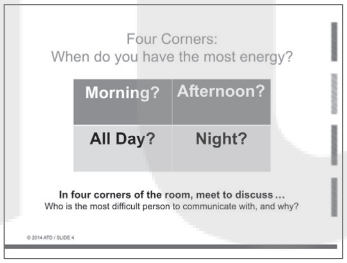
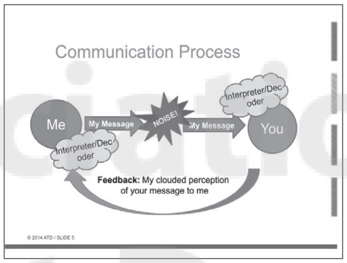
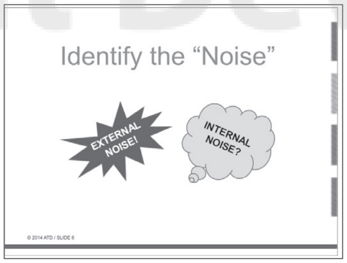
| TOPICS | TIMING |
|---|---|
| Learning Activity 12: Five Cs and Four Corners | 15 minutes |
| Learning Activity 13: Clear Communication | 25 minutes |
| Learning Activity 14: Concise Communication | 15 minutes |
| Learning Activity 15: Complete Communication | 15 minutes |
| **LUNCH** | **60 minutes** |
| Learning Activity 16: Correct Communication | 15 minutes |
| Learning Activity 17: Considerate Communication: Circles of Influence | 20-25 minutes |
| **BREAK** | **15 minutes** |
| Learning Activity 18: Identify Your Reader's Needs | 15 minutes |
| Learning Activity 19: Draft Your Message | 30 minutes |
| Discussion: Most Commonly Forgotten Communication Factors | 10-15 minutes |
| Design the Document | 20 minutes |
| Reflection and Action Plan | 15 minutes |
| Day-Two Summary | 15 minutes |
| Close: Final Q & A and Course Evaluation | 15 minutes |
| **TOTAL** | **480 minutes (8 Hours)** |

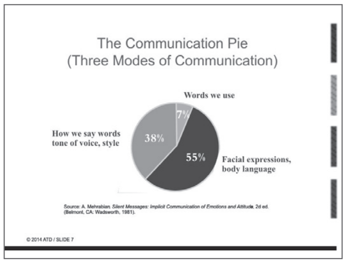
## Two-Day Workshop Agenda: Day One

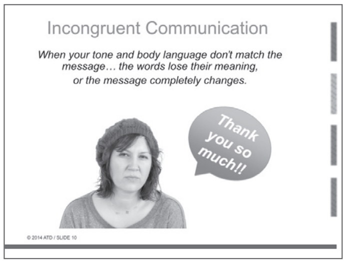
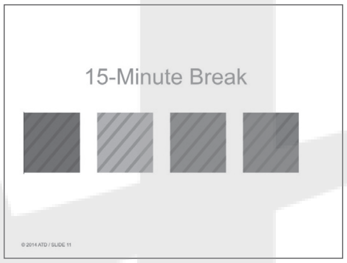
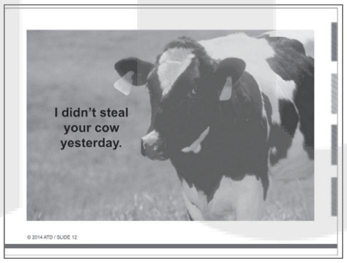
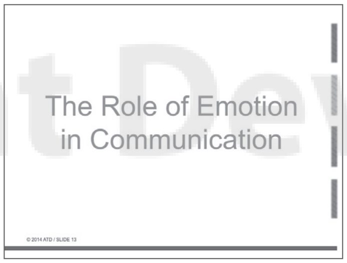
The focus of day one is face-to-face communication and listening skills.

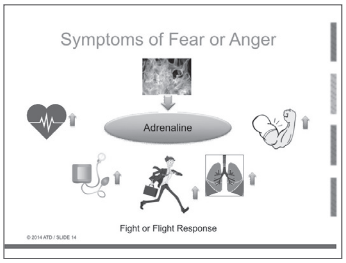
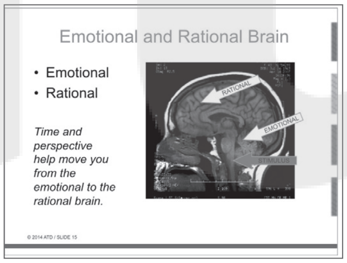
### Day One: (8:00 a.m. to 4:00 p.m.)

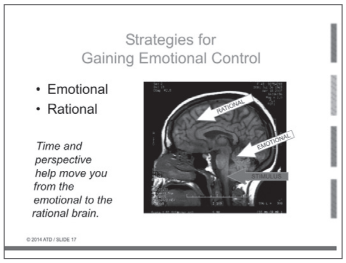
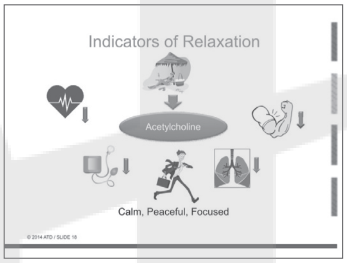
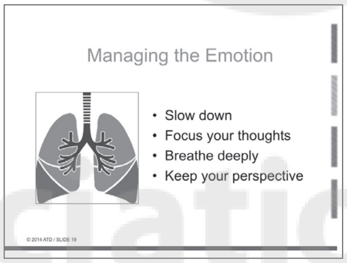
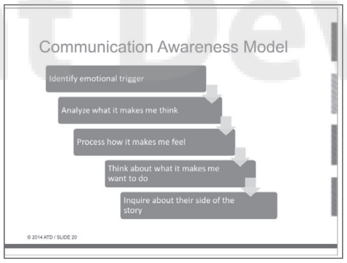
| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 8:00 a.m.<br>(10 min) | Slide 1<br> <br>ATD<br>Workshop<br>Effective Communication Skills | **Welcome and Introduction**<br>Arrive early to set up the room and make sure everything works properly. Adjust the room set-up as needed.<br>Welcome participants as they arrive. |

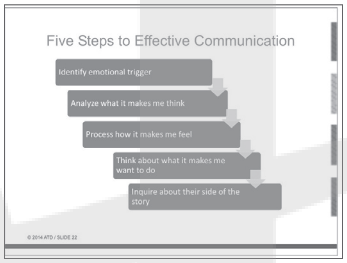
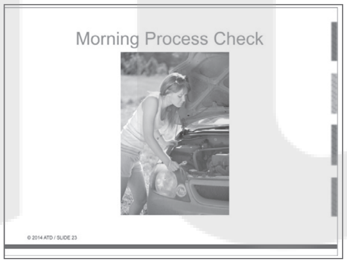
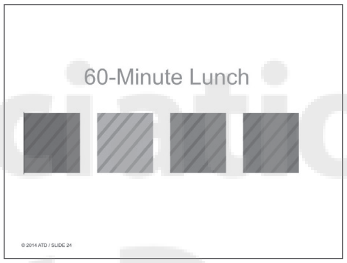
| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 8:10 a.m.<br>(15 min) | Slide 2<br><br>Two-Day Workshop Objectives<br>• Identify the most common barriers of communication.<br>• Explain the five Cs of effective communication.<br>• Assess your listening skills.<br>• Explain and practice active listening skills.<br>• Determine the best way to get your point across.<br>• Examine situational dynamics to assess the best. approach for communicating in challenging situations.<br>• Apply effective principles for face-to-face, written and virtual scenarios.<br>© 2014 ATD / SLIDE 2 | **Learning Activity 1: Objective Decision**<br>• **Handout 1a: Objective Decision**<br>This activity provides an innovative way to facilitate the discussion about session objectives rather than simply reading them to the participants. Follow the instructions in the learning activity and handout. |
| 8:25 a.m.<br>(10 min) | Slide 3<br> <br>Ground Rules and Expectations<br>• Participate!<br>• Explore new ideas<br>• Have fun<br>• "Vegas rule"<br>• What else?<br>© 2014 ATD / SLIDE 3 | **Ground Rules and Expectations**<br>Facilitate the discussion about ground rules and expectations for the course. Adjust times for starting, breaks, and lunches as needed to accommodate your environmental factors. If you are new to training, it is important to establish a positive learning environment. |
| 8:35 a.m.<br>(15 min) | Slide 4<br><br>Four Corners:<br>When do you have the most energy?<br>Morning? Afternoon?<br>All Day? Night?<br>**In four corners of the room, meet to discuss …**<br>Who is the most difficult person to communicate with, and why?<br>© 2014 ATD / SLIDE 4 | **Learning Activity 2: Four Corners**<br>• **Handout 2: The Most Difficult Person in the World**<br>Get participants thinking by using Handout 2 and then follow the instructions in the learning activity. Or you can facilitate this activity without the handout; four corners and a discussion question will get the conversation going. |
| 8:50 a.m.<br>(15 min) | Slide 5<br><br>Communication Process<br>Me<br>My Message<br>NOISE!<br>My Message<br>You<br>Interpreter/Decoder<br>Interpreter/Decoder<br>**Feedback:** My clouded perception of your message to me<br>© 2014 ATD / SLIDE 5 | **Learning Content/Lecture**<br>**Communication Process**<br>Present the diagram of the communication process. Explain the process of miscommunication and how "noise"—real and perceived—can have an impact on the communication process. |
| 9:05 a.m.<br>(15 min) | Slide 6<br><br>Identify the "Noise"<br>EXTERNAL NOISE!<br>INTERNAL NOISE?<br>© 2014 ATD / SLIDE 6 | **Learning Activity 3: Identify the Noise**<br>• **Handout 3: Causes of Miscommunication**<br>Instruct participants to work together to identify and discuss the sources of noise that create miscommunication. Facilitate discussion around the debriefing questions in the learning activity. |

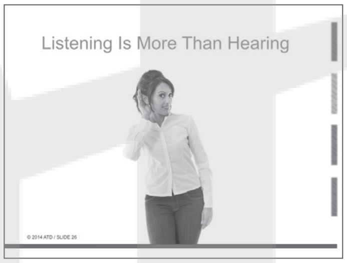
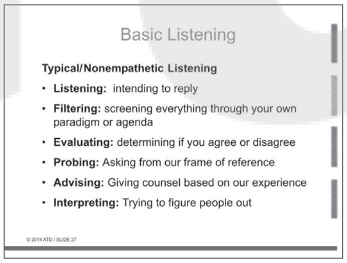
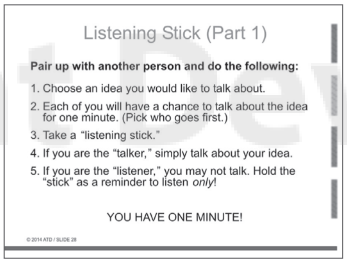
| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 9:20 a.m.<br>(10 min) | Slide 7<br><br>The Communication Pie<br>(Three Modes of Communication)<br> <br>Source: A. Mehrabian, *Silent Messages: Implicit Communication of Emotions and Attitude*, 2d ed. (Belmont, CA: Wadsworth, 1981).<br>© 2014 ATD / SLIDE 7 | **Learning Content/Lecture**<br>**The Communication Pie (Three Modes of Communication)**<br>- **Handout 4: The Importance of Body Language**<br>Present the Communication Pie and explain the importance of how attitude and emotion are conveyed through nonverbal communication.<br>**Emphasize the fact that 93 percent of communication is nonverbal.**<br>Note: Data on the share of communication that is verbal versus nonverbal has been debated for decades, including the Mehrabian data presented here (1981). The exact share, give or take a few percentage points, is not as important as the understanding that *most* communication is nonverbal. As a result, nonverbal behavior is the most crucial aspect of communication—to what degree depends on both the situation and the individual. |
| 9:30 a.m.<br>(15-20 min) | Slide 8<br> <br>Impression Improv!<br> What messages do you send?<br>© 2014 ATD / SLIDE 8 | **Learning Activity 4: Impression Improv**<br>- **Handout 5: Impression Improv**<br>In this activity, participants have fun demonstrating and identifying what impression people create based on a combination of *what* they say, *how* they say it, and *what they do* while saying it. |
| 9:45 a.m.<br>(10 min) | Slide 9<br> <br>Congruent Communication<br>*Say what you mean, and mean what you say.*<br> Thank you so much!!<br>© 2014 ATD / SLIDE 9 | **Learning Content/Lecture**<br>**Congruent Communication**<br>- **Handout 6: Impact of Congruent Communication**<br>Present information about being congruent when you communicate. When your body language and tone matches the words in your message, you are credible and believable.<br>(Slide 1 of 2) |

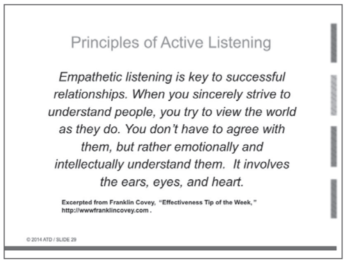
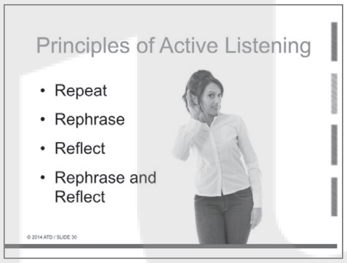
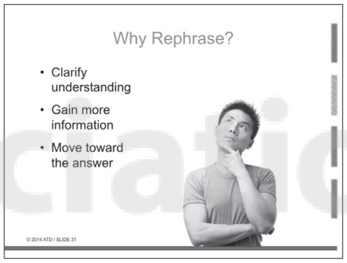
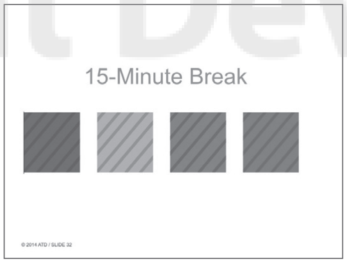
| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| | Slide 10<br><br>Incongruent Communication<br>*When your tone and body language don't match the message… the words lose their meaning, or the message completely changes.*<br> <br>© 2014 ATD / SLIDE 10 | **Learning Content/Lecture**<br>**Incongruent Communication**<br>When communication is incongruent, your body language and tone *do not* match the words in your message, and you will come across as insincere, disingenuous, and possibly manipulative.<br>(Slide 2 of 2) |
| 9:55 a.m.<br>(15 min) | Slide 11<br><br>15-Minute Break<br>© 2014 ATD / SLIDE 11 | **BREAK** |
| 10:10 a.m.<br>(5-10 min) | Slide 12<br><br>I didn't steal your cow yesterday.<br>© 2014 ATD / SLIDE 12 | **Learning Content/Lecture/Demonstration**<br>**Vocal Tone and Word Emphasis**<br>The key learning here is that your words send different messages depending on the tone and emphasis you use to deliver the message.<br>Repeat the phrase: *I Didn't Steal Your Cow Yesterday.* Each time emphasize a different word (*I, steal, your, cow,* and *yesterd*ay). For example, when you emphasize "I," it can sound as if you didn't steal the cow, but you know who did. To create class interaction, you can ask different participants to say the sentence and each emphasize a different word. |
| 10:15 a.m.<br>(5 min) | Slide 13<br><br>The Role of Emotion in Communication<br>© 2014 ATD / SLIDE 13 | **Learning Content/Lecture**<br>**The Role of Emotion in Communication**<br>• **Handout 7: The Role of Emotion in Communication**<br>This transition slide helps you shift the focus to discuss the relationship between emotion and communication. Briefly discuss how quickly strong emotions can derail communication.<br>Perhaps even tell a story about when it happened to you.<br>(Slide 1 of 7) |

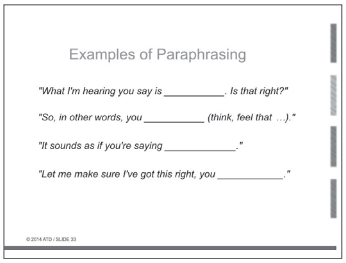
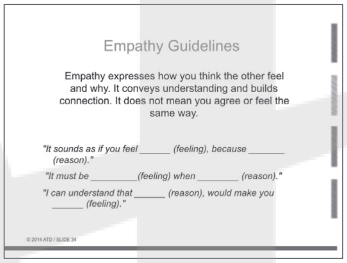
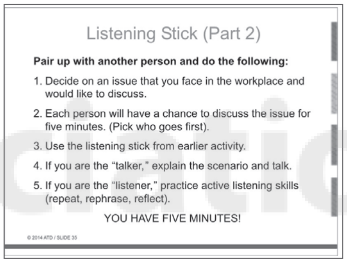
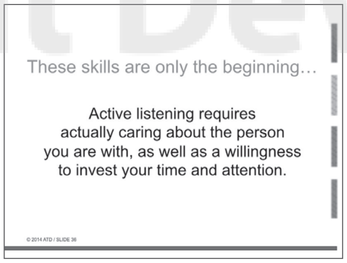
| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 10:20 a.m.<br>(10-15 min) | Slide 14<br><br>Symptoms of Fear or Anger<br>Adrenaline<br>Fight or Flight Response<br>© 2014 ATD / SLIDE 14 | **Learning Content/Discussion/Brainstorm**<br>**Discussion/Brainstorm: Symptoms of Fear and Anger**<br>Lead a brief, large-group brainstorming session to identify the symptoms of fear and anger. The goal is to identify the physical symptoms of fear. Record participant responses on chart paper.<br>Explain that when you feel fear or anger, your fight-or-flight response kicks in, flooding your body with adrenaline. Your body responds accordingly: increasing your heart rate, blood pressure, anxiety, and breathing. The increased blood flow is directed to the big muscle groups in preparation for the fight, flight, or freeze response. The end result of this reaction is that your brain now has less oxygen to use, and you cannot think as clearly in this emotional state.<br>(Slide 2 of 7) |
| 10:30 a.m.<br>(10 min) | Slide 15<br><br>Emotional and Rational Brain<br>• Emotional<br>• Rational<br>*Time and perspective help move you from the emotional to the rational brain.*<br> <br>© 2014 ATD / SLIDE 15 | **Learning Content/Lecture**<br>**The Emotional and Rational Brain**<br>• **Handout 8: Emotions and the Brain**<br>Explain the roles of the emotional and rational brain. To make good decisions we need our whole brain to work effectively, yet our emotional brain receives the information first. If we overreact to input, we may find it difficult to handle a situation effectively.<br>Direct participants to record their notes and insights in part one of the handout.<br>(Slide 3 of 7) |
| 10:40 a.m.<br>(5 min) | Slide 16<br> <br>Avoid Using Your Reptilian Brain<br>When overcome with emotion, we have a tendency to revert to our untrained nature.<br>© 2014 ATD / SLIDE 16 | **Learning Content/Lecture**<br>**Emotional Hijacking and the Reptilian Brain**<br>Present the concept of emotional hijacking and the role of our reptilian (somewhat animalistic and unedited) brain. When we are overcome with emotion, it's as if we are "hijacked" and cannot think clearly. You can learn more about emotional hijacking online by using the search term *amygdala hijack*.<br>(Slide 4 of 7) |

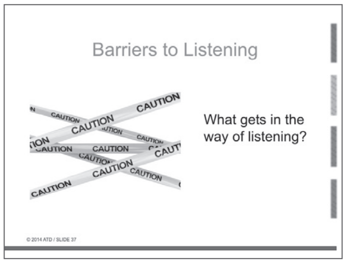
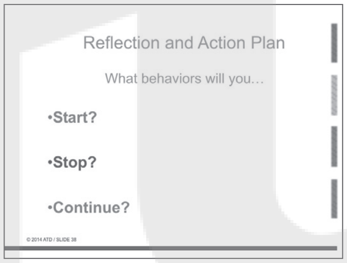
| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 10:45 a.m.<br>(20-30 min) | Slide 17<br><br>Strategies for Gaining Emotional Control<br>• Emotional<br>• Rational<br>*Time and perspective help move you from the emotional to the rational brain.*<br>© 2014 ATD / SLIDE 17<br> RATIONAL<br>EMOTIONAL<br>STIMULUS | **Learning Content/Discussion**<br>**Strategies for Gaining Emotional Control**<br>• **Handout 8: Emotions and the Brain**<br>Facilitate a discussion around this question: What are your best strategies for gaining control when emotions run high?<br>Direct participants to record their notes and insights in part two of the handout.<br>(Slide 5 of 7) |
| 11:05 a.m.<br>(10 min) | Slide 18<br><br>Indicators of Relaxation<br>Acetylcholine<br>Calm, Peaceful, Focused<br>© 2014 ATD / SLIDE 18 | **Learning Content/Discussion**<br>**Indicators of Relaxation**<br>Facilitate a short discussion about the physical indicators of relaxation as a contrast to the earlier discussion of the physical symptoms of fear.<br>Explain that peace and calm trigger the opposite reaction of fear or anger. When your body is relaxed, acetylcholine is produced, which decreases your heart rate, blood pressure, anxiety, and breathing rate. Calm ultimately enables your brain to stay focused and think clearly.<br>(Slide 6 of 7) |
| 11:15 a.m.<br>(5 min) | Slide 19<br><br>Managing the Emotion<br>• Slow down<br>• Focus your thoughts<br>• Breathe deeply<br>• Keep your perspective<br>© 2014 ATD / SLIDE 19 | **Learning Content/Summary**<br>**Managing the Emotion**<br>Share these four techniques for managing the impact of emotions on communication. Explain that implementing techniques such as breathing deeply can help buy some time to reframe your perspective and respond to the situation more effectively.<br>(Slide 7 of 7) |
| 11:20 a.m.<br>(5-10 min) | Slide 20<br><br>Communication Awareness Model<br>Identify emotional trigger<br>Analyze what it makes me think<br>Process how it makes me feel<br>Think about what it makes me want to do<br>Inquire about their side of the story<br>© 2014 ATD / SLIDE 20 | **Learning Content/Lecture**<br>**Communication Awareness Model**<br>Review the Communication Awareness Model to present the five steps to better communication.<br>It is helpful if you can share a real story to demonstrate the model. |

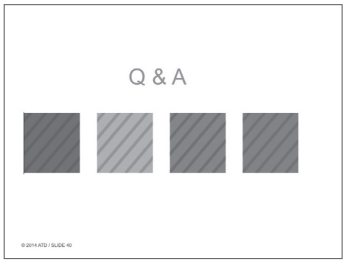
| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 11:25 a.m.<br>(30-40 min) | Slide 21<br> <br>Surgical Analysis<br>© 2014 ATD / SLIDE 21 | **Learning Activity 5: Surgical Analysis of Your Story**<br>- **Handout 9: Surgical Analysis of Your Story**<br>Ask participants to reflect on a recent difficult situation; then use the five-step Communication Awareness Model to analyze a challenging conversation. |
| 11:55 a.m.<br>(10-15 min) | Slide 22<br><br>Five Steps to Effective Communication<br>Identify emotional trigger<br>Analyze what it makes me think<br>Process how it makes me feel<br>Think about what it makes me want to do<br>Inquire about their side of the story<br>© 2014 ATD / SLIDE 22 | **Table Team Discussion**<br>**Five Steps to Effective Communication**<br>Once the participants have had a chance to use the five-step tool on a specific situation, ask them to discuss at their tables what they learned about the effectiveness of approaching difficult conversations this way. |
| 12:05 p.m.<br>(5-10 min) | Slide 23<br><br>Morning Process Check<br>© 2014 ATD / SLIDE 23 | **Morning Debrief**<br>As a morning process check, conduct a large-group discussion about emotion, communication, and having difficult conversations. |
| 12:10 p.m.<br>(60 min) | Slide 24<br><br>60-Minute Lunch<br>© 2014 ATD / SLIDE 24 | **LUNCH** |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 1:10 p.m.<br>(15 min) | Slide 25<br> <br>Listening Behavior Assessment<br>© 2014 ATD / SLIDE 25 | **Assessment 1: Listening Behavior Assessment**<br>Instruct participants to complete assessment on listening behaviors. Instructions to score the assessment are included at the top of the tool.<br>Facilitate a large-group discussion once all participants have completed the instrument.<br>Ask:<br>1) What did you notice about yourself?<br>2) What were you surprised about?<br>3) What should you do differently? |
| 1:25 p.m.<br>(30 min) | Slide 26<br><br>Listening Is More Than Hearing<br>© 2014 ATD / SLIDE 26 | **Learning Activity 6: Listening Is More Than Hearing**<br>Follow the instructions provided in the learning activity. |
| 1:55 p.m.<br>(5-10 min) | Slide 27<br><br>Basic Listening<br>**Typical/Nonempathetic Listening**<br>• **Listening:** intending to reply<br>• **Filtering:** screening everything through your own paradigm or agenda<br>• **Evaluating:** determining if you agree or disagree<br>• **Probing:** Asking from our frame of reference<br>• **Advising:** Giving counsel based on our experience<br>• **Interpreting:** Trying to figure people out<br>© 2014 ATD / SLIDE 27 | **Learning Content/Lecture**<br>**Basic Listening**<br>• **Handout 10: Mistakes in Listening**<br>Explain and define the features involved in typical, nonempathic listening shown on the slide. The listening skills content starts with "typical" listening and in later slides moves into active listening skills.<br>Encourage participants to capture notes and insights on the handout. |
| 2:00 p.m.<br>(15 min) | Slide 28<br><br>Listening Stick (Part 1)<br>**Pair up with another person and do the following:**<br>1. Choose an idea you would like to talk about.<br>2. Each of you will have a chance to talk about the idea for one minute. (Pick who goes first.)<br>3. Take a "listening stick."<br>4. If you are the "talker," simply talk about your idea.<br>5. If you are the "listener," you may not talk. Hold the "stick" as a reminder to listen *only*!<br>YOU HAVE ONE MINUTE!<br>© 2014 ATD / SLIDE 28 | **Learning Activity 7: Listening Stick (Part 1)**<br>The objective of this activity is for the participants to experience *ineffective* listening. Display the slide with the instructions (in brief) for the participants. Refer to the instructions (in full) in the learning activity for direction on the facilitation process. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 2:15 p.m.<br>(20 min) | Slide 29<br>Principles of Active Listening<br>*Empathetic listening is key to successful relationships. When you sincerely strive to understand people, you try to view the world as they do. You don't have to agree with them, but rather emotionally and intellectually understand them. It involves the ears, eyes, and heart.*<br>**Excerpted from Franklin Covey, "Effectiveness Tip of the Week," http://wwwfranklincovey.com .**<br>© 2014 ATD / SLIDE 29 | **Learning Content/Lecture**<br>**Principles of Active Listening (Part 1)**<br>Share the Franklin Covey quote about active/empathetic listening to introduce the concept of active listening (in contrast to typical listening, which is usually a more common experience). Explain that empathetic/active listening is<br>• motivated by a sincere desire to understand<br>• built one step at a time<br>• founded on character and trust<br>• interactive, sincere dialogue<br>• focused on understanding, not "fixing."<br>(Slide 1 of 3) |
|  | Slide 30<br>Principles of Active Listening<br>• Repeat<br>• Rephrase<br>• Reflect<br>• Rephrase and Reflect<br>© 2014 ATD / SLIDE 30 | **Learning Content/Lecture**<br>**Principles of Active Listening (Part 1): Skills**<br>**• Handout 11: Active Listening**<br>Present the four skills at the heart of active, empathetic listening: repeat, rephrase, reflect, rephrase/reflect.<br>Encourage participants to follow along with the notes on this topic in handout.<br>(Slide 2 of 3) |
|  | Slide 31<br>Why Rephrase?<br>• Clarify understanding<br>• Gain more information<br>• Move toward the answer<br>© 2014 ATD / SLIDE 31 | **Learning Content/Lecture**<br>**Principles of Active Listening (Part 1): Rephrasing**<br>**• Handout 11: Active Listening**<br>Explain why rephrasing is important to active listening. Ask participants if they can think of other reasons.<br>(Slide 3 of 3) |
| 2:35 p.m.<br>(15 min) | Slide 32<br>15-Minute Break<br>© 2014 ATD / SLIDE 32 | **BREAK** |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 2:50 p.m.<br>(10 min) | Slide 33<br><br>Examples of Paraphrasing<br>*"What I'm hearing you say is ___________. Is that right?"*<br>*"So, in other words, you ___________ (think, feel that …)."*<br>*"It sounds as if you're saying _____________."*<br>*"Let me make sure I've got this right, you ____________."*<br>© 2014 ATD / SLIDE 33 | **Learning Content/Lecture**<br>**Principles of Active Listening (Part 2): Paraphrasing**<br>- **Handout 11: Active Listening**<br>Present tips on rephrasing/paraphrasing. Emphasize the importance of personalizing the approach so you don't sound scripted or insincere.<br>(Slide 1 of 2) |
|  | Slide 34<br><br>Empathy Guidelines<br>Empathy expresses how you think the other feel and why. It conveys understanding and builds connection. It does not mean you agree or feel the same way.<br>*"It sounds as if you feel ______ (feeling), because _______ (reason)."*<br>*"It must be _________(feeling) when ________ (reason)."*<br>*"I can understand that ______ (reason), would make you ______ (feeling)."*<br>© 2014 ATD / SLIDE 34 | **Learning Content/Lecture**<br>**Principles of Active Listening (Part 2): Empathy Guidelines**<br>- **Handout 11: Active Listening**<br>Define *empathy* for the participants: Empathy expresses how you think the other feels and why. It does not mean that you agree or feel the same way.<br>Present guidelines for communicating with empathy. Explain that these sample phrases are meant to be starters to help you practice. It is always better to find your own words so you don't sound scripted or rehearsed.<br>(Slide 2 of 2) |
| 3:00 p.m.<br>(20 min) | Slide 35<br><br>Listening Stick (Part 2)<br>**Pair up with another person and do the following:**<br>1. Decide on an issue that you face in the workplace and would like to discuss.<br>2. Each person will have a chance to discuss the issue for five minutes. (Pick who goes first).<br>3. Use the listening stick from earlier activity.<br>4. If you are the "talker," explain the scenario and talk.<br>5. If you are the "listener," practice active listening skills (repeat, rephrase, reflect).<br>YOU HAVE FIVE MINUTES!<br>© 2014 ATD / SLIDE 35 | **Learning Activity 8: Listening Stick (Part 2)**<br>The objective of this activity is for participants to experience and practice *active* listening.<br>Display the slide with the instructions (in brief) for the participants. Refer to the instructions (in full) in the learning activity for direction on the facilitation process.<br>(Slide 1 of 2) |
|  | Slide 36<br><br>These skills are only the beginning…<br>Active listening requires actually caring about the person you are with, as well as a willingness to invest your time and attention.<br>© 2014 ATD / SLIDE 36 | Display slide and share this key learning about active listening.<br>(Slide 2 of 2) |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 3:20 p.m.<br>(15 min) | Slide 37<br><br>Barriers to Listening<br>What gets in the way of listening?<br>© 2014 ATD / SLIDE 37 | **Small Group Brainstorm**<br>**Barriers to Listening**<br>• **Handout 12: Barriers to Effective Listening**<br>Separate participants into groups of three or four (by table or mix them up randomly). Display question on slide and ask them to brainstorm a list of things that get in the way of listening.<br>Have them record their ideas on the handout. Bring groups back together and ask them to report what barriers to listening they identified.<br>As participants share, capture their ideas on a flip chart. Perhaps you can even tell a story about a time you experienced a barrier to listening, and what happened as a result. |
| 3:35 p.m.<br>(10 min) | Slide 38<br><br>Reflection and Action Plan<br>What behaviors will you…<br>•Start?<br>•Stop?<br>•Continue?<br>© 2014 ATD / SLIDE 38 | **Reflection and Action Plan**<br>• **Handout 13: Action Plan and Reflection**<br>Ask participants this question: What will you do differently as a result of this class? Allow participants time to reflect and complete the action plan. This will help them to solidify their learning. |
| 3:45 p.m.<br>(10-15 min) | Slide 39<br> <br>SUMMARY<br>© 2014 ATD / SLIDE 39 | **Day-One Summary: Gallery Walk**<br>To conduct a gallery walk, simply ask participants to stand up and walk the perimeter of the room to view the charts you have posted throughout the day. This is a great way to wrap up and review the concepts presented on day one. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 3:55 p.m.<br>(5-10 min)<br>End 4:00 p.m. | Slide 40<br><br>Q & A<br>© 2014 ATD / SLIDE 40 | **Close: Final Q & A, Day-Two Reminders, and Informal Evaluations**<br>Field questions about the day-one workshop topics. Share reminders for day-two workshop. Assign homework and conduct informal evaluations if applicable.<br>**Optional:**<br>• **Assessment 2: Communication Style Inventory**<br>One fabulous homework assignment is the Communication Style Inventory included in this book. This tool provides a comprehensive assessment of individual communication styles. If you choose to assign homework, remember to debrief the assignment on day two.<br>• **Learning Activity 26: Informal Evaluations**<br>You may also choose to conduct informal day-one evaluations. See learning activity for some easy and innovative ideas. |

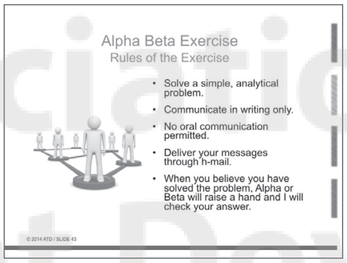
## What to Do Between Workshop Days

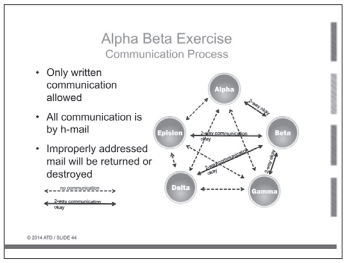
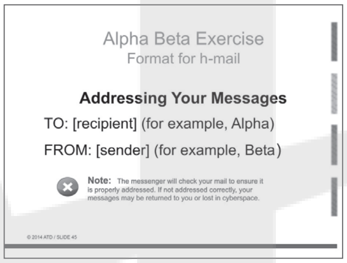
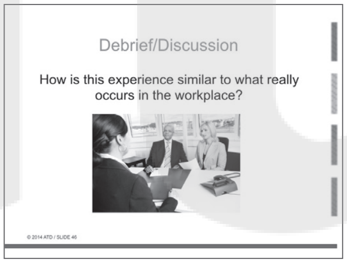
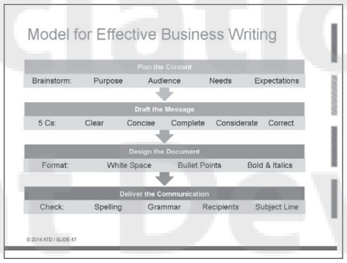
- Make notes on any questions or follow-up you need to do so you don't forget.
- Capture facilitator lessons learned from the first day of the workshop. Adjust day-two materials if needed.
- Deal with any equipment, room setup, catering, or other learning environment issues you weren't able to address during the workshop.
- Get a good night's sleep so you can arrive early, refreshed, and ready to go for day two.

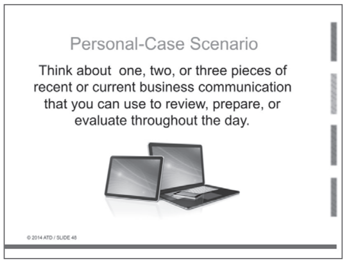
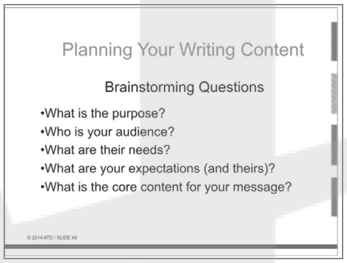
## Two-Day Workshop Agenda: Day Two

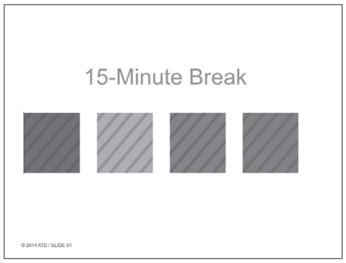
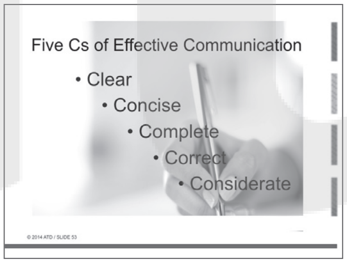
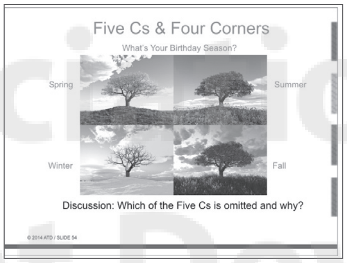
The focus of day two is written communication skills.

### Day Two: (8:00 a.m. to 4:00 p.m.)

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 8:00 a.m.<br>(10 min) | Slide 41<br> <br>ATD<br>Workshop<br>Effective Communication Skills<br>Day-Two Reconnect<br>© 2014 ATD / SLIDE 41 | **Welcome and Reconnect**<br>Arrive early to set up room and make sure everything is still working properly. Adjust room configuration as needed.<br>Welcome participants individually as they arrive. |
| 8:10 a.m.<br>(15 min) | Slide 42<br> <br>Revisit Ground Rules and Expectations<br>• Participate!<br>• Explore new ideas<br>• Have fun<br>• "Vegas rule"<br>• What else?<br>© 2014 ATD / SLIDE 42 | **Revisit Ground Rules and Expectations**<br>Reconfirm ground rules and program expectations. Check on progress toward objectives. An effective way to check progress is to revisit the flip chart on objectives from day one (during Learning Activity 1 when you listed objectives and then invited the participants to vote on them).<br>If you assigned homework, acknowledge their work and answer any of their questions concerning the activity. |
| 8:25 a.m.<br>(55 min) | Slide 43<br><br>Alpha Beta Exercise<br>Rules of the Exercise<br>• Solve a simple, analytical problem.<br>• Communicate in writing only.<br>• No oral communication permitted.<br>• Deliver your messages through h-mail.<br>• When you believe you have solved the problem, Alpha or Beta will raise a hand and I will check your answer.<br>© 2014 ATD / SLIDE 43 | **Learning Activity 9: Alpha Beta Exercise**<br>• **Handout 14: Alpha Beta Exercise**<br>This activity seems more complicated than it is, so be sure to use the full facilitation process and follow instructions in the learning activity. It is a silent activity, so once you explain the directions all participant communication is in writing. Show slide and present the rules for this exercise. Encourage participants to use handout as a reference during the activity.<br>(Slide 1 of 4) |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
|  | Slide 44<br><br>Alpha Beta Exercise<br>Communication Process<br>• Only written communication allowed<br>• All communication is by h-mail<br>• Improperly addressed mail will be returned or destroyed<br> no communication<br>2-way communication okay<br>Alpha<br>Beta<br>Gamma<br>Delta<br>Epislon<br>2-way okay<br>2-way communication okay<br>2-way communication okay<br>2-way okay<br>© 2014 ATD / SLIDE 44 | **Learning Activity 9: Alpha Beta Exercise**<br>• **Handout 14: Alpha Beta Exercise**<br>Show slide and present the rules for the communication process to be used in this exercise. It's important that the organizational hierarchy is strictly followed. Encourage them to use handout as a reference during the activity.<br>(Slide 2 of 4) |
|  | Slide 45<br><br>Alpha Beta Exercise<br>Format for h-mail<br>**Addressing Your Messages**<br>TO: [recipient] (for example, Alpha)<br>FROM: [sender] (for example, Beta)<br>**Note:** The messenger will check your mail to ensure it is properly addressed. If not addressed correctly, your messages may be returned to you or lost in cyberspace.<br>© 2014 ATD / SLIDE 45 | **Learning Activity 9: Alpha Beta Exercise**<br>• **Handout 14: Alpha Beta Exercise**<br>Show slide and present the format to be used for h-mail in this exercise (be prepared with a lot of note paper for this activity). Encourage participants to use handout as a reference during the activity.<br>(Slide 3 of 4) |
| 9:20 a.m.<br>(10 min) | Slide 46<br><br>Debrief/Discussion<br>How is this experience similar to what really occurs in the workplace?<br>© 2014 ATD / SLIDE 46 | **Learning Activity 9: Alpha Beta Exercise**<br>**Activity Debrief**<br>• **Handout 14: Alpha Beta Exercise**<br>This activity has the potential for very rich discussion. Using the debriefing questions provided in the learning activity, facilitate a discussion about the exercise. Encourage participants to record their insights on the handout.<br>(Slide 4 of 4) |
| 9:30 a.m.<br>(15 min) | Slide 47<br><br>Model for Effective Business Writing<br>Plan the Content<br>Brainstorm: Purpose Audience Needs Expectations<br>Draft the Message<br>5 Cs: Clear Concise Complete Considerate Correct<br>Design the Document<br>Format: White Space Bullet Points Bold & Italics<br>Deliver the Communication<br>Check: Spelling Grammar Recipients Subject Line<br>© 2014 ATD / SLIDE 47 | **Learning Content/Discussion**<br>**Model for Effective Business Writing**<br>• **Handout 15: Model for Effective Business Writing**<br>Before you show this slide, facilitate a large-group discussion about the features of good writing and record the responses on chart paper. Then introduce the Model for Effective Business Writing and summarize the steps. Encourage participants to follow along on the slide or handout. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 9:45 a.m.<br>(10 min) | Slide 48<br><br>Personal-Case Scenario<br>Think about one, two, or three pieces of recent or current business communication that you can use to review, prepare, or evaluate throughout the day.<br>© 2014 ATD / SLIDE 48 | **Learning Activity 10: Personal Case Scenario**<br>- **Handout 16: Personal Case Scenario Worksheet**<br>Ask participants to think about one, two, or three recent or current business communications that they can use to review, prepare, or evaluate throughout the day. |
| 9:55 a.m.<br>(15 min) | Slide 49<br><br>Planning Your Writing Content<br>Brainstorming Questions<br>•What is the purpose?<br>•Who is your audience?<br>•What are their needs?<br>•What are your expectations (and theirs)?<br>•What is the core content for your message?<br>© 2014 ATD / SLIDE 49 | **Learning Content/Lecture**<br>**Plan Your Writing Content**<br>Using the brainstorming questions on this slide, demonstrate the mind-mapping technique on chart paper for the group. Each main "limb" of the map is used for building on the original concept and "branching out" by adding relevant ideas to the main concept:<br>1) Choose a topic to place in the center of the map (for example, an upcoming event).<br>2) Label the first limb "audience" and then add additional branches for each stakeholder member identified.<br>3) Label the next limb "need" and add branches with answers in that category.<br>4) Label another "expectations" and add branches.<br>5) Label another "content" and add branches. |
| 10:10 a.m.<br>(20 min) | Slide 50<br> <br>Document Planning Mind Map<br>Planning to write . . .<br>•Purpose?<br>•Audience?<br>•Needs?<br>•Expectations?<br>•Core message?<br>Activity: Create a Mind Map<br>© 2014 ATD / SLIDE 50 | **Learning Activity 11: Document Planning Mind Map**<br>- **Handout 17: Mind Map: Plan Your Content**<br>Now it is your participants' turn. Instruct them to choose one personal case scenario from Handout 16 and map all content planning considerations. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 10:30 a.m.<br>(15 min) | Slide 51<br><br>15-Minute Break<br>© 2014 ATD / SLIDE 51 | **BREAK** |
| 10:45 a.m.<br>(10 min) | Slide 52<br> <br>Brainstorm… Brainstorming!<br>© 2014 ATD / SLIDE 52 | **Learning Content/Discussion**<br>**Brainstorm . . . Brainstorming!**<br>• **Handout 18: Brainstorm Other Brainstorming Methods**<br>Create small groups to brainstorm other brainstorming techniques besides mind mapping. Instruct participants to record their insights on the handouts, which also include best practices for productive brainstorming. |
| 10:55 a.m.<br>(5 min) | Slide 53<br><br>Five Cs of Effective Communication<br>• Clear<br>• Concise<br>• Complete<br>• Correct<br>• Considerate<br>© 2014 ATD / SLIDE 53 | **Learning Content/Lecture**<br>**Five Cs of Effective Communication**<br>• **Handout 19: Five Cs of Effective Communication**<br>Present the Five Cs of Effective Communication. Participants can follow along and take additional notes on the handout. |
| 11:00 a.m.<br>(15 min) | Slide 54<br><br>Five Cs & Four Corners<br>What's Your Birthday Season?<br>Spring<br>Summer<br>Winter<br>Fall<br>Discussion: Which of the Five Cs is omitted and why?<br>© 2014 ATD / SLIDE 54 | **Learning Activity 12: Five Cs and Four Corners**<br>In this activity you will revisit "The Most Difficult Person in the World" exercise from day one (Handout 2) using the Five Cs to identify communication pitfalls. Follow facilitation instructions given in the learning activity. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
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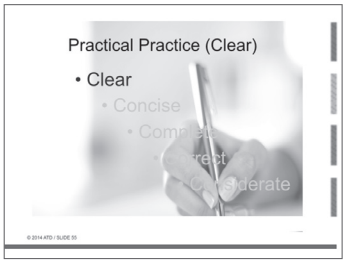
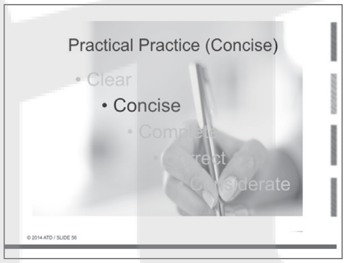
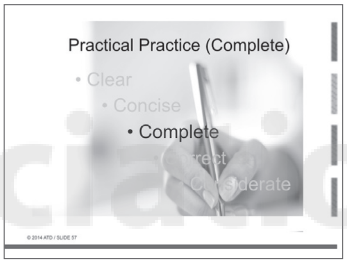
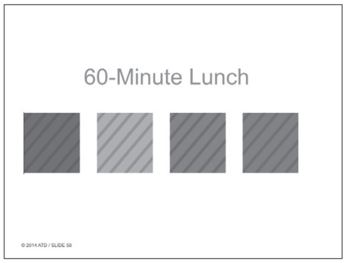
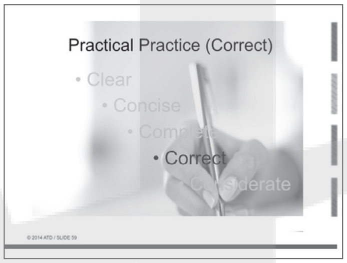
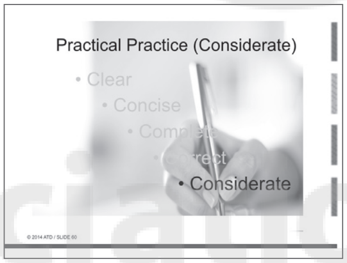
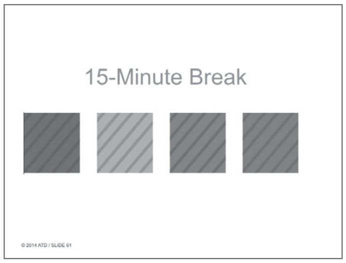
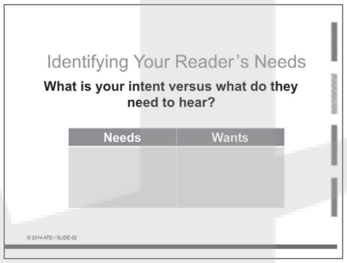
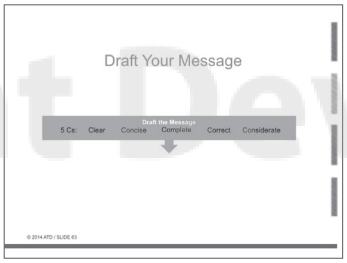
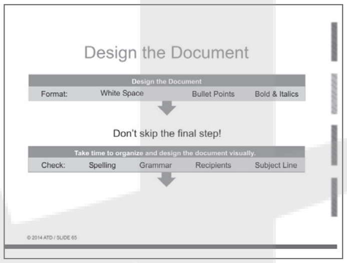
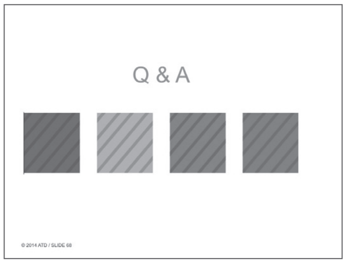
| 11:15 a.m.<br>(25 min) | Slide 55<br><br>Practical Practice (Clear)<br>• Clear<br>• Concise<br>• Complete<br>• Correct<br>• Considerate<br>© 2014 ATD / SLIDE 55 | **Learning Activity 13: Clear Communication**<br>• **Handout 20: Practical Practice—Clear Communication**<br>This exercise will give participants practice writing with clarity by assigning them an unexpected task: writing instructions for a Martian!<br>Direct them to work together in pairs so they can check each other's work. Ask for volunteers to share their instructions with the class.<br>Close the activity with a debriefing discussion. Follow full facilitation instructions in the learning activity. |
| 11:40 a.m.<br>(15 min) | Slide 56<br><br>Practical Practice (Concise)<br>• Clear<br>• Concise<br>• Complete<br>• Correct<br>• Considerate<br>© 2014 ATD / SLIDE 56 | **Learning Activity 14: Concise Communication**<br>• **Handout 21: Practical Practice—Concise Communication**<br>This exercise will give participants practice rewriting wordy phrases to include only relevant information and no unnecessary repetition.<br>Direct them to work together in pairs so they can check each other's work. Close the activity with a debriefing discussion. Follow full facilitation instructions in the learning activity. |
| 11:55 a.m.<br>(15 min) | Slide 57<br><br>Practical Practice (Complete)<br>• Clear<br>• Concise<br>• Complete<br>• Correct<br>• Considerate<br>© 2014 ATD / SLIDE 57 | **Learning Activity 15: Complete Communication**<br>• **Handout 22: Practical Practice—Complete Communication**<br>This exercise will give participants practice rewriting a business document so that it provides complete information.<br>Direct them to work together in pairs so they can check each other's work. Close the activity with a debriefing discussion. Follow full facilitation instructions in the learning activity. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 12:10 p.m.<br>(60 min) | Slide 58<br><br>60-Minute Lunch<br>© 2014 ATD / SLIDE 58 | **LUNCH** |
| 1:10 p.m.<br>(15 min) | Slide 59<br><br>Practical Practice (Correct)<br>• Clear<br>• Concise<br>• Complete<br>• Correct<br>• Considerate<br>© 2014 ATD / SLIDE 59 | **Learning Activity 16: Correct Communication**<br>• **Handout 23: Practical Practice—Checklist for Correct Communication**<br>This handout provides a checklist of ideas that are often forgotten when drafting a message. This will be used as a tool when drafting a business document so that it provides correct information.<br>Direct participants to work together in pairs to review the checklist and add any additional ideas that are relevant to their situation.<br>Close the activity with a debriefing discussion. Follow full facilitation instructions in the learning activity. |
| 1:25 p.m.<br>(20 min) | Slide 60<br><br>Practical Practice (Considerate)<br>• Clear<br>• Concise<br>• Complete<br>• Correct<br>• Considerate<br>© 2014 ATD / SLIDE 60 | **Learning Activity 17: Considerate Communication: Circles of Influence**<br>• **Handout 24: Practical Practice—Your Role in Considerate Communication**<br>This activity helps participants to explore influences that have shaped them into the people they are today and to identify cultural biases and filters that can affect considerate communication.<br>Emphasize that each person has a role to play in considerate communication. Follow facilitation instructions in Learning Activity 17. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 1:50 p.m.<br>(15 min) | Slide 61<br>15-Minute Break<br>© 2014 ATD / SLIDE 61 | **BREAK** |
| 2:05 p.m.<br>(15 min) | Slide 62<br>Identifying Your Reader's Needs<br>**What is your intent versus what do they need to hear?**<br>Needs \| Wants<br>© 2014 ATD / SLIDE 62 | **Learning Activity 18: Identify Your Reader's Needs**<br>• **Handout 25: The Wants and Needs of Your Reader**<br>Facilitate a discussion around the wants versus the needs of readers. Have participants begin by considering what *they* themselves want and need as readers and then extrapolate to their audience. This conversation is very helpful to encourage them to consider and plan the content of their written messages.<br>Your audience is looking to answer these questions:<br>• What is this about, and does it matter to me?<br>• What do I have to do now, and when is it due?<br>• What data do I need to know from this?<br>• How does this make me feel?<br>• And of course . . . can I skip this all together?<br>For variety you could have participants work in pairs or triads to brainstorm the list using the handout. |
| 2:20 p.m.<br>(30 min) | Slide 63<br>Draft Your Message<br>Draft the Message<br>5 Cs: Clear Concise Complete Correct Considerate<br>© 2014 ATD / SLIDE 63 | **Learning Activity 19: Draft Your Message**<br>• **Handout 26: Draft Your Message**<br>This activity helps participants to practice drafting a document that considers the needs of the reader and conforms to the Five Cs (clear, concise, complete, correct, and considerate). Follow facilitation instructions in the learning activity. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 2:50 p.m.<br>(10-15 min) | Slide 64<br> <br>Discussion<br>What Are the Most Commonly Forgotten Communication Factors?<br>© 2014 ATD / SLIDE 64 | **Learning Content/Discussion**<br>**Most Commonly Forgotten Communication Factors**<br>It is helpful to discuss the Five Cs from a big-picture perspective. This slide is a focal point for a final "wrap up" conversation before the last step of designing the document. |
| 3:00 p.m.<br>(10 minutes) | Slide 65<br><br>Design the Document<br>Design the Document<br>Format: White Space Bullet Points Bold & Italics<br>Don't skip the final step!<br>Take time to organize and design the document visually.<br>Check: Spelling Grammar Recipients Subject Line<br>© 2014 ATD / SLIDE 65 | **Learning Content/Lecture**<br>**Design the Document**<br>Once crafted, great communication goes an extra step and incorporates design—not only what it says, but what it looks like. Review design considerations with participants: white space, paragraph length, fonts, bullet points, and so on. |
| 3:10 p.m.<br>(15 minutes) | Slide 66<br> <br>Reflection and Action Plan<br>What behaviors will you…<br>•Start?<br>•Stop?<br>•Continue?<br>© 2014 ATD / SLIDE 66 | **Reflection and Action Plan**<br>• **Handout 27: Reflection and Action Plan**<br>Ask participants this question: What will you do differently as a result of this class?<br>Allow participants time to reflect and complete the action plan. This will help them solidify their learning. |
| 3:25 p.m.<br>(15 minutes) | Slide 67<br> <br>Summary<br>© 2014 ATD / SLIDE 67 | **Discussion: Day-Two Summary**<br>Facilitate a discussion and solicit feedback about the best "take-aways" from the course. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 3:40 p.m.<br>(15 minutes)<br>End 4:00 p.m. | Slide 68<br><br>Q & A<br>© 2014 ATD / SLIDE 68 | **Close: Final Q & A and Evaluation**<br>• **Assessment 3: Course Evaluation**<br>Field questions about the day-two topics or about the workshop as a whole. Share any final details or follow-up activities (see Chapter 10 for ideas for follow-up coaching).<br>Distribute the session evaluations (Assessment 3).<br>Consider including an inspiring quote or story to close the workshop on a positive note. |

## What to Do Next

- Determine the schedule for training classes; reserve location and any catering you may wish to provide.
- Identify and invite participants.
- Inform participants about pre-work if you will be using it in the class. Consider using self-assessment instruments such as Assessment 1: Listening Behavior Assessment or Assessment 2: Communication Style Inventory provided in this volume.
- Review the workshop objectives, activities, and handouts to plan the content you will use.
- Prepare copies of the participant materials and any activity-related "extras." Refer to Chapter 14 for information on how to access and use the supplemental materials provided for this workshop.
- Gather any "fidgets" (quiet toys such as chenille stems, koosh balls, and so on) to place on the tables for your participants. See Chapter 8 for other ideas to enhance the learning environment of your workshop.
- Prepare yourself both emotionally and physically. Make sure you have taken care of any scheduling conflicts or personal challenges (as best you can), so that you can be fully present to facilitate the class.
- Get a good night's sleep before you facilitate your workshop so that you have the energy and focus to deliver a great class!

## Reference

Mehrabian, A. (1981). *Silent Messages: Implicit Communication of Emotions and Attitudes*, 2nd ed. Belmont, CA: Wadsworth.

## Chapter 2

# One-Day Communication Skills Workshop

**What's in This Chapter**

- Objectives of the one-day Communication Skills Workshop
- Summary chart for the flow of content and activities
- One-day program agenda

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There are a couple of different approaches to holding a one-day workshop. You can choose a theme and provide a deep dive into one aspect of communication, or you can take a broader look at a variety of topics such as listening, oral communication, virtual communication, challenging discussions, or written communication. The challenge of the latter approach of including a number of different aspects of communication in a one-day workshop is that there is very little time to explore the topics in depth or to practice the skills; at the end of the day the participant may leave the workshop with a lot of information and very little practiced skill.

For that reason, this one-day workshop is deliberately designed with the deep-dive approach in mind. In one day, participants can explore a concentrated topic more thoroughly, as well as have the opportunity to practice the skills they are learning. There is also more time for discussion and reflection to enhance learning and retention. As with the two-day workshop design, an effective one-day workshop must account for and anticipate the natural and predictable "low energy" times during the day. Activities that engage participants in relevant and meaningful activities, small-group discussion, and practice are essential to a successful training event.

A full-day workshop requires the facilitator to have a high level of energy and focus and a keen ability to read the energy level of the participants throughout the duration of the program. You can keep your participants engaged and the energy high by managing the flow of activities, presentations, and small- or large-group discussions. Consider changing your training method every 10 to 15 minutes.

This chapter provides a one-day workshop agenda using active training techniques. It is designed to keep the content relevant, meaningful, and interactive. The day begins with one of the most important aspects of communication: listening. Throughout the day, the content focuses on how to listen actively and how to deliver your message effectively.

## One-Day Workshop Objectives

By the end of the one-day workshop, participants will be able to

- Assess their personal listening skills
- Explain and practice active listening skills
- Determine the best way to get their points across
- Identify the most common barriers to communication
- Explore the role emotion plays in communication and discuss strategies and techniques for managing its impact.

## One-Day Workshop Overview

| TOPICS | TIMING |
|---|---|
| Welcome and Introduction | 10 minutes |
| Learning Activity 1: Objective Decision | 15 minutes |
| Ground Rules and Expectations | 10 minutes |
| Learning Activity 2: Four Corners | 15 minutes |
| Assessment 1: Listening Behavior Assessment | 15 minutes |
| Learning Activity 6: Listening Is More Than Hearing | 30 minutes |
| Basic Listening | 15 minutes |
| Learning Activity 7: Listening Stick (Part 1) | 15 minutes |
| Principles of Active Listening (Part 1) | 20 minutes |
| **BREAK** | **15 minutes** |
| Principles of Active Listening (Part 2) | 10 minutes |
| Learning Activity 8: Listening Stick (Part 2) | 20 minutes |
| Small-Group Brainstorm: Barriers to Listening | 15 minutes |

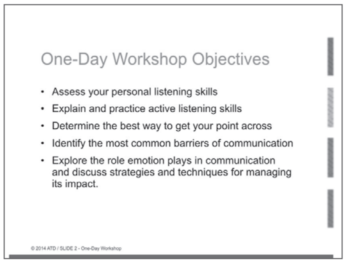
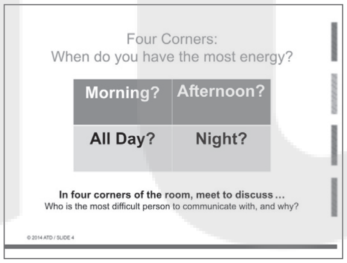
|  |  |
|---|---|
| Morning Process Check | 10 minutes |
| **LUNCH** | **60 minutes** |
| Communication Process | 15 minutes |
| Learning Activity 3: Identify the Noise | 15 minutes |
| The Communication Pie (Three Modes of Communication) | 10 minutes |
| Learning Activity 4: Impression Improv | 20 minutes |
| Congruent and Incongruent Communication | 10 minutes |
| **BREAK** | **15 minutes** |
| Vocal Tone and Word Emphasis | 10 minutes |
| The Role of Emotion in Communication | 5 minutes |
| The Emotional and Rational Brain | 5 minutes |
| Emotional Hijacking and the Reptilian Brain | 5 minutes |
| Discussion: Strategies for Gaining Emotional Control | 15 minutes |
| Managing the Emotion | 5 minutes |
| Communication Awareness Model | 10 minutes |
| Learning Activity 5: Surgical Analysis of Your Story | 35 minutes |
| Action Plan and Reflection | 10 minutes |
| Summary: Gallery Walk | 10 minutes |
| Close: Final Q & A and Evaluations | 10 minutes |
| **TOTAL** | **480 minutes (8 hours)** |

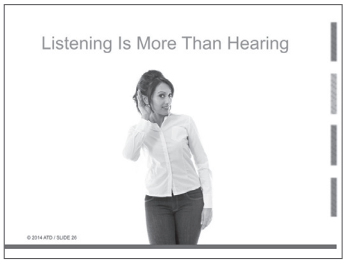
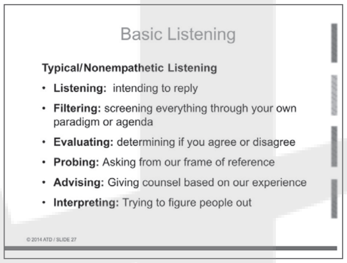
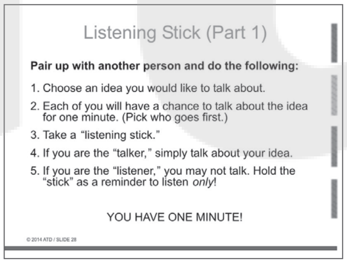
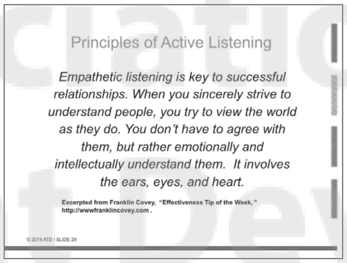
## One-Day Workshop Agenda

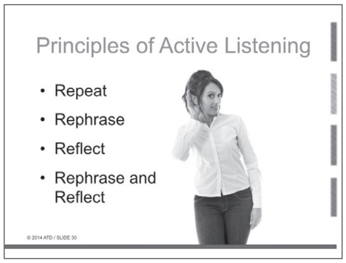
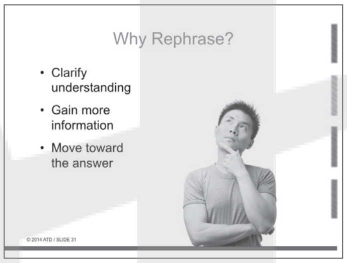
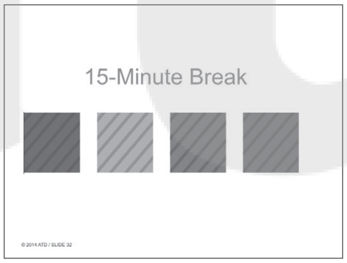
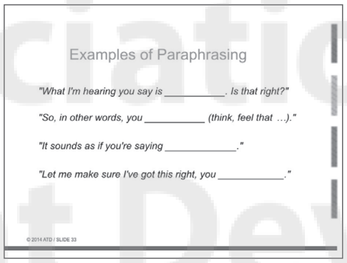
The focus of the one-day workshop is face-to-face oral communication and effective listening skills.

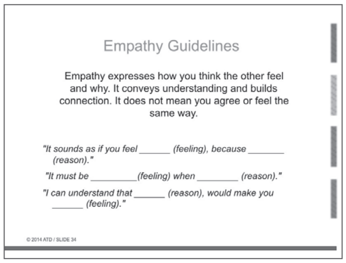
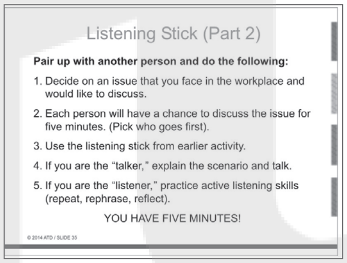
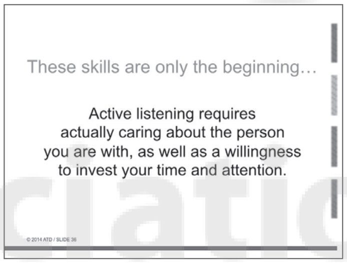
### Day One: (8:00 a.m. to 4:00 p.m.)

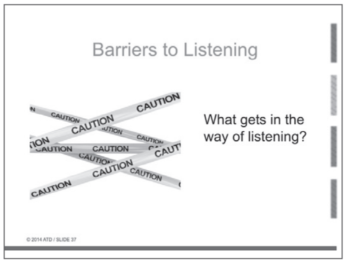
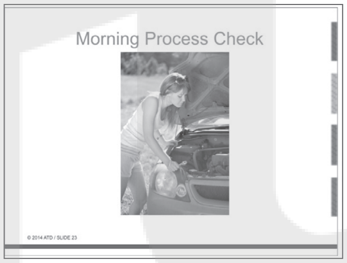
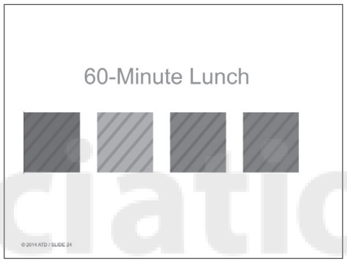
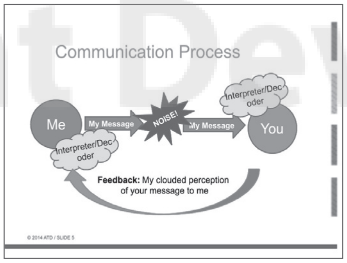
| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 8:00 a.m.<br>(10 min) | Slide 1<br> <br>ATD<br>Workshop<br>Effective Communication Skills<br>© 2014 ATD / SLIDE 1 | **Welcome and Introduction**<br>Arrive early to set up the room and make sure everything works properly. Adjust the room set-up as needed.<br>Welcome participants as they arrive. |

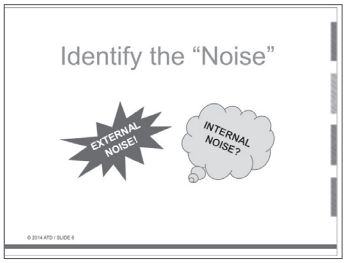
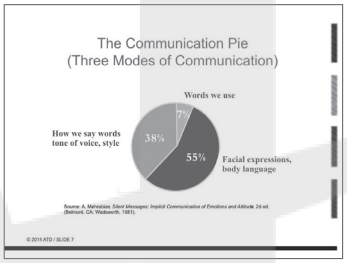
| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 8:10 a.m.<br>(15 min) | Slide 2b<br><br>One-Day Workshop Objectives<br>• Assess your personal listening skills<br>• Explain and practice active listening skills<br>• Determine the best way to get your point across<br>• Identify the most common barriers of communication<br>• Explore the role emotion plays in communication and discuss strategies and techniques for managing its impact.<br>© 2014 ATD / SLIDE 2 - One-Day Workshop | **Learning Activity 1: Objective Decision**<br>• **Handout 1b: Objective Decision**<br>This activity provides an innovative way to facilitate the discussion about session objectives rather than simply reading them to the participants. Follow the instructions in the learning activity and handout. |
| 8:25 a.m.<br>(10 min) | Slide 3<br> <br>Ground Rules and Expectations<br>• Participate!<br>• Explore new ideas<br>• Have fun<br>• "Vegas rule"<br>• What else?<br>© 2014 ATD / SLIDE 3 | **Ground Rules and Expectations**<br>Facilitate the discussion about ground rules and expectations for the course. Adjust times for starting, breaks, and lunches as needed to accommodate your environmental factors. |
| 8:35 a.m.<br>(15 min) | Slide 4<br><br>Four Corners:<br>When do you have the most energy?<br>Morning? Afternoon?<br>All Day? Night?<br>**In four corners of the room, meet to discuss …**<br>Who is the most difficult person to communicate with, and why?<br>© 2014 ATD / SLIDE 4 | **Learning Activity 2: Four Corners**<br>• **Handout 2: The Most Difficult Person in the World**<br>Get participants thinking by using Handout 2 and then follow the instructions in the learning activity. Or you can facilitate this activity without the handout; four corners and a discussion question will get the conversation going. |
| 8:50 a.m.<br>(15 min) | Slide 25<br> <br>Listening Behavior Assessment<br>© 2014 ATD / SLIDE 25 | **Assessment 1: Listening Behavior Assessment**<br>Direct participants to complete assessment on listening behaviors. Instructions to complete and score the assessment are included at the top of the tool.<br>Facilitate a large-group discussion once all participants have completed the task.<br>Ask:<br>1) What did you notice about yourself?<br>2) What were you surprised about?<br>3) What should you do differently? |

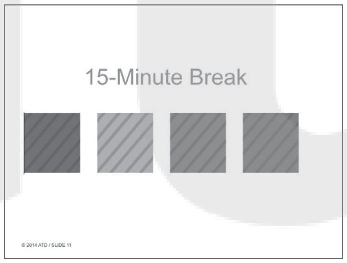
| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 9:05 a.m.<br>(30 min) | Slide 26<br><br>Listening Is More Than Hearing<br>© 2014 ATD / SLIDE 26 | **Learning Activity 6: Listening Is More Than Hearing**<br>Follow the instructions provided in the learning activity to set up and facilitate as designed. |
| 9:35 a.m.<br>(15 min) | Slide 27<br><br>Basic Listening<br>**Typical/Nonempathetic Listening**<br>• **Listening:** intending to reply<br>• **Filtering:** screening everything through your own paradigm or agenda<br>• **Evaluating:** determining if you agree or disagree<br>• **Probing:** Asking from our frame of reference<br>• **Advising:** Giving counsel based on our experience<br>• **Interpreting:** Trying to figure people out<br>© 2014 ATD / SLIDE 27 | **Learning Content/Lecture**<br>**Basic Listening**<br>• **Handout 10: Mistakes in Listening**<br>Explain and define the features involved in typical, nonempathetic listening shown on the slide. The listening skills content starts with "typical" listening and then moves into active listening skills.<br>Encourage participants to capture notes and insights on the handout. |
| 9:50 a.m.<br>(15 min) | Slide 28<br><br>Listening Stick (Part 1)<br>**Pair up with another person and do the following:**<br>1. Choose an idea you would like to talk about.<br>2. Each of you will have a chance to talk about the idea for one minute. (Pick who goes first.)<br>3. Take a "listening stick."<br>4. If you are the "talker," simply talk about your idea.<br>5. If you are the "listener," you may not talk. Hold the "stick" as a reminder to listen *only*!<br>YOU HAVE ONE MINUTE!<br>© 2014 ATD / SLIDE 28 | **Learning Activity 7: Listening Stick (Part 1)**<br>The objective of this activity is for the participants to experience typical, nonempathetic listening. Display the slide with the instructions (in brief) for the participants. Refer to the learning activity for direction on the facilitation process. |
| 10:05 a.m.<br>(20 min) | Slide 29<br><br>Principles of Active Listening<br>*Empathetic listening is key to successful relationships. When you sincerely strive to understand people, you try to view the world as they do. You don't have to agree with them, but rather emotionally and intellectually understand them. It involves the ears, eyes, and heart.*<br>**Excerpted from Franklin Covey, "Effectiveness Tip of the Week," http://wwwfranklincovey.com .**<br>© 2014 ATD / SLIDE 29 | **Learning Content/Lecture**<br>**Principles of Active Listening (Part 1)**<br>Share the Franklin Covey quote about active/empathetic listening to introduce the concept of active listening (in contrast to typical listening, which is usually a more common experience). Explain that empathetic/active listening is<br>• motivated by a sincere desire to understand<br>• built one step at a time<br>• founded on character and trust<br>• interactive, sincere dialogue<br>• focused on understanding, not "fixing."<br>(Slide 1 of 3) |

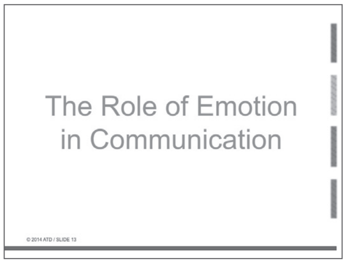
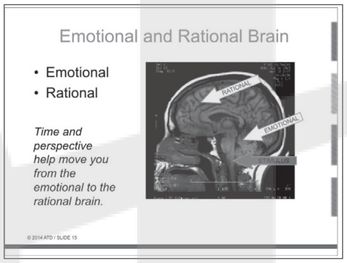
| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| | Slide 30<br><br>Principles of Active Listening<br>• Repeat<br>• Rephrase<br>• Reflect<br>• Rephrase and Reflect<br>© 2014 ATD / SLIDE 30 | **Learning Content/Lecture**<br>**Principles of Active Listening (Part 1): Skills**<br>• **Handout 11: Active Listening**<br>Present the four skills at the heart of active, empathetic listening: repeat, rephrase, reflect, rephrase/reflect.<br>Encourage participants to follow along with the notes on this topic in handout.<br>(Slide 2 of 3) |
| | Slide 31<br><br>Why Rephrase?<br>• Clarify understanding<br>• Gain more information<br>• Move toward the answer<br>© 2014 ATD / SLIDE 31 | **Learning Content/Lecture**<br>**Principles of Active Listening (Part 1): Rephrasing**<br>• **Handout 11: Active Listening**<br>Explain why rephrasing is important to active listening. Ask participants for other reasons to rephrase.<br>(Slide 3 of 3) |
| 10:25 a.m.<br>(15 min) | Slide 32<br><br>15-Minute Break<br>© 2014 ATD / SLIDE 32 | **BREAK** |
| 10:40 a.m.<br>(10 min) | Slide 33<br><br>Examples of Paraphrasing<br>*"What I'm hearing you say is __________. Is that right?"*<br>*"So, in other words, you __________ (think, feel that …)."*<br>*"It sounds as if you're saying ____________."*<br>*"Let me make sure I've got this right, you ___________."*<br>© 2014 ATD / SLIDE 33 | **Learning Content/Lecture**<br>**Principles of Active Listening (Part 2): Paraphrasing**<br>• **Handout 11: Active Listening**<br>Present tips on rephrasing/paraphrasing. Emphasize the importance of personalizing the approach so you don't sound scripted or insincere.<br>(Slide 1 of 2) |

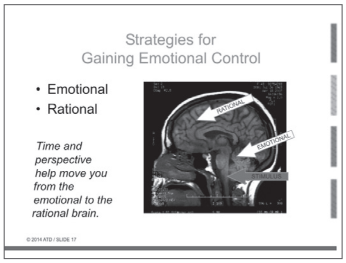
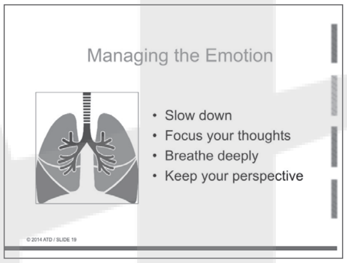
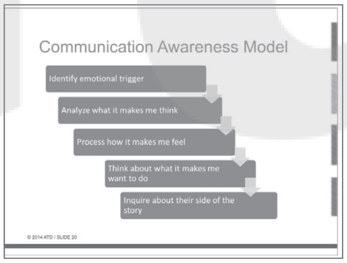
| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
|  | Slide 34<br><br>Empathy Guidelines<br>Empathy expresses how you think the other feel and why. It conveys understanding and builds connection. It does not mean you agree or feel the same way.<br>*"It sounds as if you feel ______ (feeling), because _______ (reason)."*<br>*"It must be _________(feeling) when ________ (reason)."*<br>*"I can understand that ______ (reason), would make you ______ (feeling)."*<br>© 2014 ATD / SLIDE 34 | **Learning Content/Lecture**<br>**Principles of Active Listening (Part 2): Empathy Guidelines**<br>- **Handout 11: Active Listening**<br>Define *empathy* for the participants: Empathy expresses how you think the other feels and why. It does not mean that you agree or feel the same way.<br>Present guidelines for communicating with empathy. Explain that these sample phrases are meant to be starters to help you practice. It is always better to find your own words so you don't sound scripted or rehearsed.<br>(Slide 2 of 2) |
| 10:50 a.m.<br>(20 min) | Slide 35<br><br>Listening Stick (Part 2)<br>**Pair up with another person and do the following:**<br>1. Decide on an issue that you face in the workplace and would like to discuss.<br>2. Each person will have a chance to discuss the issue for five minutes. (Pick who goes first).<br>3. Use the listening stick from earlier activity.<br>4. If you are the "talker," explain the scenario and talk.<br>5. If you are the "listener," practice active listening skills (repeat, rephrase, reflect).<br>YOU HAVE FIVE MINUTES!<br>© 2014 ATD / SLIDE 35 | **Learning Activity 8: Listening Stick (Part 2)**<br>The objective of this activity is for participants to experience and practice *active* listening.<br>Display the slide with the instructions (in brief) for the participants. Refer to the learning activity for direction on the facilitation process.<br>(Slide 1 of 2) |
|  | Slide 36<br><br>These skills are only the beginning…<br>Active listening requires actually caring about the person you are with, as well as a willingness to invest your time and attention.<br>© 2014 ATD / SLIDE 36 | Display slide and share this key learning about active listening.<br>(Slide 2 of 2) |

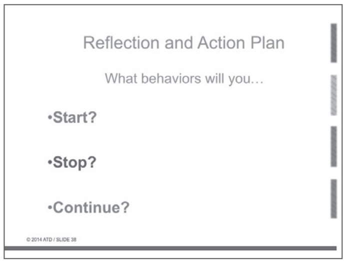
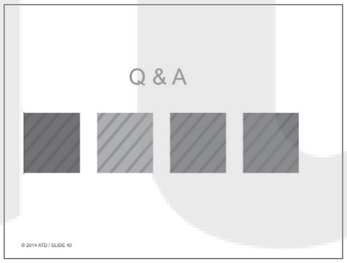
| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 11:10 a.m.<br>(15 min) | Slide 37<br><br>Barriers to Listening<br>What gets in the way of listening?<br>CAUTION<br>© 2014 ATD / SLIDE 37 | **Small Group Brainstorm**<br>**Barriers to Listening**<br>• **Handout 12: Barriers to Effective Listening**<br>Separate participants into groups of three or four (by table or mix them up randomly). Display question on slide and ask them to brainstorm a list of things that get in the way of listening.<br>Have them record their ideas on the handout. Bring groups back together and ask them to report what barriers to listening they identified.<br>As participants share, capture their ideas on a flip chart. Perhaps you can even tell a story about a time you experienced a barrier to listening, and what happened as a result. |
| 11:25 a.m.<br>(10 min) | Slide 23<br><br>Morning Process Check<br>© 2014 ATD / SLIDE 23 | **Morning Process Check**<br>As a morning process check, conduct a large-group discussion about emotion, communication, and having difficult conversations. |
| 11:35 a.m.<br>(60 min) | Slide 24<br><br>60-Minute Lunch<br>© 2014 ATD / SLIDE 24 | **LUNCH** |
| 12:35 p.m.<br>(15 min) | Slide 5<br><br>Communication Process<br>Me<br>My Message<br>NOISE!<br>My Message<br>Interpreter/Decoder<br>You<br>Interpreter/Decoder<br>**Feedback:** My clouded perception of your message to me<br>© 2014 ATD / SLIDE 5 | **Learning Content/Lecture**<br>**Communication Process**<br>Present the diagram of the communication process. Explain the process of miscommunication and how "noise"—real and perceived—can have an impact on the communication process. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 12:50 p.m.<br>(15 min) | Slide 6<br><br>Identify the "Noise"<br> <br>© 2014 ATD / SLIDE 6 | **Learning Activity 3: Identify the Noise**<br>• **Handout 3: Causes of Miscommunication**<br>Instruct participants to work together to identify and discuss the sources of noise that create miscommunication. Facilitate discussion around the debriefing questions in the learning activity. |
| 1:05 p.m.<br>(10 min) | Slide 7<br><br>The Communication Pie<br>(Three Modes of Communication)<br> <br>Source: A. Mehrabian, *Silent Messages: Implicit Communication of Emotions and Attitude*, 2d ed. (Belmont, CA: Wadsworth, 1981).<br>© 2014 ATD / SLIDE 7 | **Learning Content/Lecture**<br>**The Communication Pie (Three Modes of Communication)**<br>• **Handout 4: The Importance of Body Language**<br>Present the Communication Pie and explain the importance of how attitude and emotion are conveyed through nonverbal communication.<br>Emphasize the fact that 93 percent of communication is nonverbal.<br>Note: Data on the share of communication that is verbal versus nonverbal has been debated for decades, including the Mehrabian data presented here (1981). The exact share, give or take a few percentage points, is not as important as the understanding that *most* communication is nonverbal. As a result, nonverbal behavior is the most crucial aspect of communication—to what degree depends on both the situation and the individual. |
| 1:15 p.m.<br>(20 min) | Slide 8<br> <br>Impression Improv!<br>What messages do you send?<br>© 2014 ATD / SLIDE 8 | **Learning Activity 4: Impression Improv**<br>• **Handout 5: Impression Improv**<br>In this activity, participants have fun demonstrating and identifying what impression people create based on a combination of *what* they say, *how* they say it, and *what they do* while saying it. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 1:35 p.m.<br>(10 min) | Slide 9<br> <br>Congruent Communication<br>*Say what you mean, and mean what you say.*<br> Thank you so much!!<br>© 2014 ATD / SLIDE 9 | **Learning Content/Lecture**<br>**Congruent and Incongruent Communication**<br>• **Handout 6: Impact of Congruence**<br>Present information about being congruent when you communicate. When your body language and tone matches the words in your message, you are credible and believable.<br>(Slide 1 of 2) |
| | Slide 10<br> <br>Incongruent Communication<br>*When your tone and body language don't match the message… the words lose their meaning, or the message completely changes.*<br> Thank you so much!!<br>© 2014 ATD / SLIDE 10 | **Learning Content/Lecture**<br>**Incongruent Communication**<br>When communication is incongruent, your body language and tone *do not* match the words in your message, and you will come across as insincere, disingenuous, and possibly manipulative.<br>(Slide 2 of 2) |
| 1:45 p.m.<br>(15 min) | Slide 11<br><br>15-Minute Break<br>© 2014 ATD / SLIDE 11 | **BREAK** |
| 2:00 p.m.<br>(10 min) | Slide 12<br> <br>I didn't steal your cow yesterday.<br>© 2014 ATD / SLIDE 12 | **Learning Content/Lecture/Demonstration**<br>**Vocal Tone and Word Emphasis**<br>The key learning here is that your words send different messages depending on the tone and emphasis you use to deliver the message.<br>Repeat the phrase: *I Didn't Steal Your Cow Yesterday.* Each time emphasize a different word (*I, steal, your, cow,* and *yester*day). For example, when you emphasize "I," it can sound as if you didn't steal the cow, but you know who did. To create class interaction, you can ask different participants to say the sentence and each emphasize a different word. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 2:10 p.m.<br>(5 min) | Slide 13<br><br>The Role of Emotion in Communication<br>© 2014 ATD / SLIDE 13 | **Learning Content/Lecture**<br>**The Role of Emotion in Communication**<br>This transition slide helps you shift the focus to discuss the relationship between emotion and communication. Briefly discuss how quickly strong emotions can derail communication.<br>Perhaps even tell a story about when it happened to you.<br>(Slide 1 of 5) |
| 2:15 p.m.<br>(5 min) | Slide 15<br><br>Emotional and Rational Brain<br>- Emotional<br>- Rational<br>*Time and perspective help move you from the emotional to the rational brain.*<br> <br>© 2014 ATD / SLIDE 15 | **Learning Content/Lecture**<br>**The Emotional and Rational Brain**<br>- **Handout 8: Emotions and the Brain**<br>Explain the roles of the emotional and rational brain. To make good decisions we need our whole brain to work effectively, yet our emotional brain receives the information first. If we overreact to input, we may find it difficult to handle a situation effectively.<br>Direct participants to record their notes and insights in part one of the handout.<br>(Slide 2 of 5) |
| 2:20 p.m.<br>(5 min) | Slide 16<br> <br>Avoid Using Your Reptilian Brain<br>When overcome with emotion, we have a tendency to revert to our untrained nature.<br>© 2014 ATD / SLIDE 16 | **Learning Content/Lecture**<br>**Emotional Hijacking and the Reptilian Brain**<br>Present the concept of emotional hijacking and the role of our reptilian (somewhat animalistic and unedited) brain. When we are overcome with emotion, it's as if we are "hijacked" and cannot think clearly. You can learn more about emotional hijacking online by using the search term *amygdala hijack*.<br>(Slide 3 of 5) |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 2:25 p.m.<br>(15 min) | Slide 17<br><br> RATIONAL<br>EMOTIONAL<br>Strategies for Gaining Emotional Control<br>• Emotional<br>• Rational<br>*Time and perspective help move you from the emotional to the rational brain.*<br>© 2014 ATD / SLIDE 17 | **Learning Content/Discussion**<br>**Strategies for Gaining Emotional Control**<br>• **Handout 8: Emotions and the Brain**<br>Facilitate a discussion around this question: What are your best strategies for gaining control when emotions run high?<br>Direct participants to record their notes and insights in part two of the handout.<br>(Slide 4 of 5) |
| 2:40 p.m.<br>(5 min) | Slide 19<br><br>Managing the Emotion<br>• Slow down<br>• Focus your thoughts<br>• Breathe deeply<br>• Keep your perspective<br>© 2014 ATD / SLIDE 19 | **Learning Content/Summary**<br>**Managing the Emotion**<br>Share these four techniques for managing the impact of emotions on communication. Explain that implementing techniques such as breathing deeply can help buy some time to reframe your perspective and respond to the situation more effectively.<br>(Slide 5 of 5) |
| 2:45 p.m.<br>(10 min) | Slide 20<br><br>Communication Awareness Model<br>Identify emotional trigger<br>Analyze what it makes me think<br>Process how it makes me feel<br>Think about what it makes me want to do<br>Inquire about their side of the story<br>© 2014 ATD / SLIDE 20 | **Learning Content/Lecture**<br>**Communication Awareness Model**<br>Review the Communication Awareness Model to present the five steps to better communication.<br>It is helpful if you can share a real story to demonstrate the model. |
| 2:55 p.m.<br>(35 min) | Slide 21<br> <br>Surgical Analysis<br>© 2014 ATD / SLIDE 21 | **Learning Activity 5: Surgical Analysis of Your Story**<br>• **Handout 9: Surgical Analysis of Your Story**<br>Ask participants to reflect on a recent difficult situation; then use the five-step Communication Awareness Model to analyze a challenging conversation. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 3:30 p.m.<br>(10 min) | Slide 38<br><br>Reflection and Action Plan<br>What behaviors will you…<br>•Start?<br>•Stop?<br>•Continue?<br>© 2014 ATD / SLIDE 38 | **Action Plan and Reflection**<br>• **Handout 13: Action Plan and Reflection**<br>Ask participants this question: What will you do differently as a result of this class? Allow participants time to reflect and complete the action plan. This will help them to solidify their learning. |
| 3:40 p.m.<br>(10 min) | Slide 39<br> <br>SUMMARY<br>© 2014 ATD / SLIDE 39 | **Summary: Gallery Walk**<br>To conduct a gallery walk, simply ask participants to stand up and walk the perimeter of the room to view the charts you have posted throughout the day. This is a great way to wrap up and review the concepts presented during the workshop. |
| 3:50 p.m.<br>(10 min)<br>End 4:00 p.m. | Slide 40<br><br>Q & A<br>© 2014 ATD / SLIDE 40 | **Close: Final Q & A and Evaluations**<br>Field questions about the workshop topics. Conduct informal evaluations if applicable. Share plans for follow-up coaching if applicable (see Chapter 10 for ideas to follow up the training with support and activities).<br>Consider including an inspiring quote or story to close the workshop on a positive note.<br>**Optional:**<br>• **Learning Activity 26: Informal Evaluations**<br>• **Assessment 3: Course Evaluation**<br>You may also choose to conduct informal evaluations (see Learning Activity 26 for easy and innovative ideas) or you can distribute Assessment 3 for a more formal evaluation the participants can complete. |

## What to Do Next

- Determine the schedule for training classes; reserve location and any catering you may wish to provide.
- Identify and invite participants.
- Inform participants about pre-work if you will be using it in the class. Consider using self-assessment instruments such as Assessment 1: Listening Behavior Assessment or Assessment 2: Communication Style Inventory provided in this volume.
- Review the workshop objectives, activities, and handouts to plan the content you will use.
- Prepare copies of the participant materials and any activity related "extras." Refer to Chapter 14 for information on how to access and use the supplemental materials provided for this workshop.
- Gather any "fidgets" (quiet toys such as chenille stems, koosh balls, and so on) to place on the tables for your participants. See Chapter 8 for other ideas to enhance the learning environment of your workshop.
- Prepare yourself both emotionally and physically. Make sure you have taken care of any scheduling conflicts or personal challenges (as best you can), so that you can be fully present to facilitate the class.
- Get a good night's sleep before you facilitate your workshop so that you have the energy and focus to deliver a great class!

## Reference

Mehrabian, A. (1981). *Silent Messages: Implicit Communication of Emotions and Attitudes*, 2nd ed. Belmont, CA: Wadsworth.

# Chapter 3

# Half-Day Communication Skills Workshop

**What's in This Chapter**

- Objectives of the half-day Communication Skills Workshop
- Summary chart for the flow of content and activities
- Half-day program agenda

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When creating a half-day workshop, the time constraints present you with two choices: choose one communication theme and explore it more thoroughly, or choose a variety of communication topics and cover them in less depth. The challenge with the scattershot approach is that there is very little time to practice the skills; at the end of the day participants may leave the workshop with a lot of information and very little practiced skill.

If you choose a deeper dive into a specific theme, however, participants have the opportunity to practice the skills they are learning. For that reason, the content for the half-day workshop presented in this chapter focuses on organizational communication and the impact of assumptions and poorly communicated messages. If your needs analysis revealed that the learners in a particular organization needed more emphasis on *written* communication, you could instead choose to modify and use the day-two agenda from the two-day workshop. In addition, Chapter 4 gives many options for customizing the content and activities for specific business needs that would fit easily into a half-day format. (See Chapter 5 for more on identifying needs for communication skills training.)

Any workshop, regardless of length, benefits from incorporating the principles of active training. This workshop is designed to present activities that engage participants in relevant and meaningful learning experiences, small group discussion, and skills practice. Be sure to allow time for discussion and reflection to enhance learning and retention.

## Half-Day Workshop Objectives

By the end of the half-day workshop, participants will be able to

- Identify the most common barriers of organizational communication
- Examine organizational dynamics to assess the best approach for communicating in challenging situations
- Explain the Five Cs of Effective Communication (clear, concise, complete, correct, and considerate)
- Draft a message that uses all Five Cs.

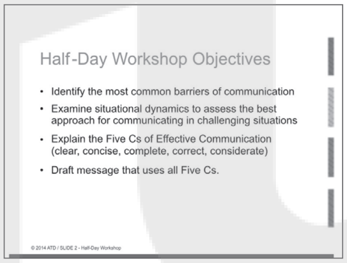
## Half-Day Workshop Overview

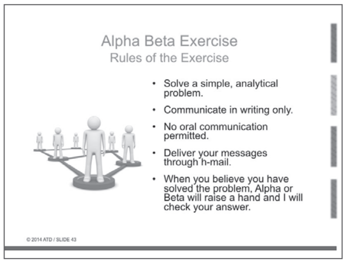
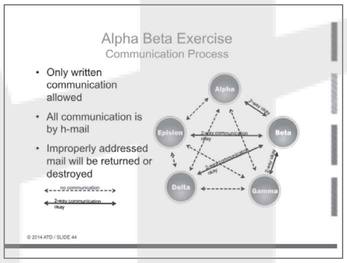
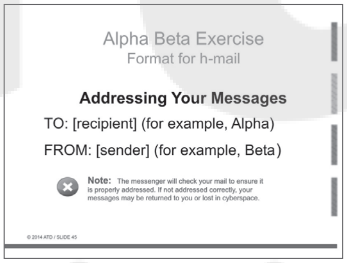
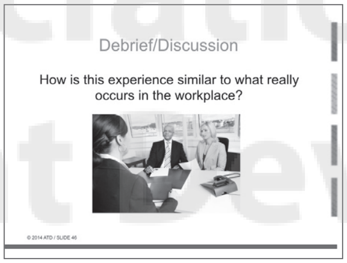
| TOPICS | TIMING |
|---|---|
| Welcome and Introduction | 10 minutes |
| Learning Activity 1: Objective Decision | 15 minutes |
| Ground Rules and Expectations | 5 minutes |
| Learning Activity 9: Alpha Beta Exercise | 55 minutes |
| Activity Debrief: Alpha Beta Exercise | 10-15 minutes |
| Discussion: Model for Effective Business Writing | 10-15 minutes |
| Learning Activity 10: Personal Case Scenario | 10 minutes |
| **BREAK** | **15 minutes** |
| Plan Your Writing Content | 15 minutes |
| Learning Activity 11: Document Planning Mind Map | 20 minutes |
| Brainstorm . . . Brainstorming! | 10 minutes |
| Five Cs of Effective Communication | 5 minutes |
| Learning Activity 12: Five Cs and Four Corners | 10 minutes |
| Learning Activity 18: Identify Your Reader's Needs | 10 minutes |
| Discussion: Most Commonly Forgotten Communication Factors | 5 minutes |
| Learning Activity 19: Draft Your Message | 20 minutes |
| Reflection and Action Plan | 10 minutes |
| Session Summary and Q & A | 5 minutes |
| **TOTAL** | **240 Minutes (4 Hours)** |

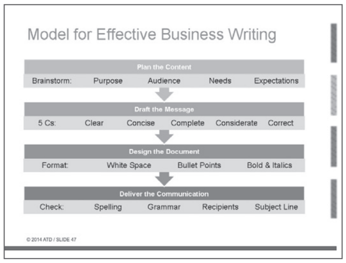
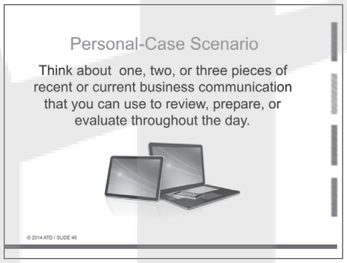
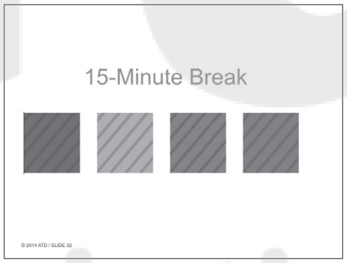
## Half-Day Workshop Agenda

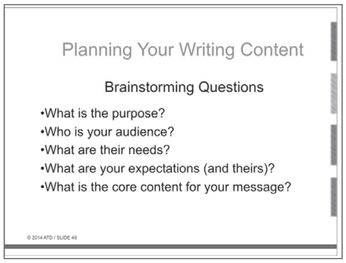
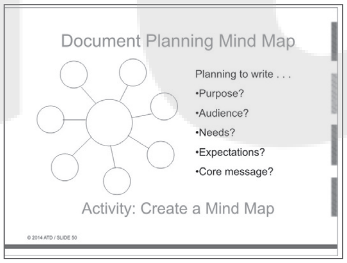
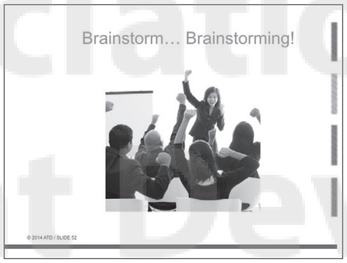
The focus of the half-day workshop is on organizational communication.

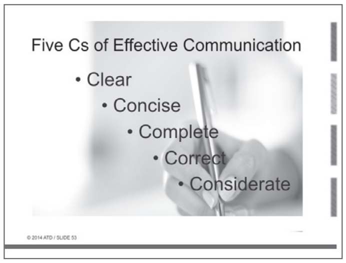
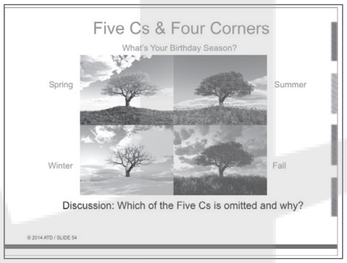
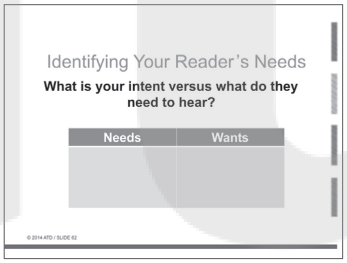
### Half Day: (8:00 a.m. to 12:00 p.m.)

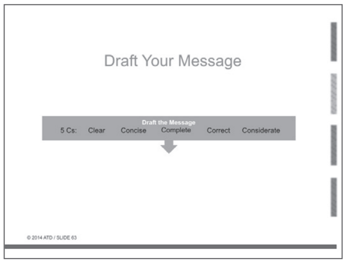
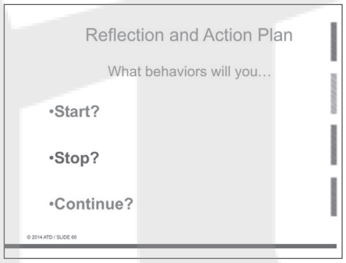
| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 8:00 a.m.<br>(10 min) | Slide 1<br> <br>ATD<br>Workshop<br>Effective Communication Skills<br>© 2014 ATD / SLIDE 1 | **Welcome and Introduction**<br>Arrive early to set up the room and make sure everything works properly. Adjust the room set-up as needed.<br>Welcome participants as they arrive. |
| 8:10 a.m.<br>(15 min) | Slide 2c<br><br>Half-Day Workshop Objectives<br>• Identify the most common barriers of communication<br>• Examine situational dynamics to assess the best approach for communicating in challenging situations<br>• Explain the Five Cs of Effective Communication (clear, concise, complete, correct, considerate)<br>• Draft message that uses all Five Cs.<br>© 2014 ATD / SLIDE 2 - Half-Day Workshop | **Learning Activity 1: Objective Decision**<br>• **Handout 1c: Objective Decision**<br>This activity provides an innovative way to facilitate the discussion about session objectives rather than simply reading them to the participants. Follow the instructions in the learning activity and handout. |
| 8:25 a.m.<br>(5 min) | Slide 3<br> <br>Ground Rules and Expectations<br>• Participate!<br>• Explore new ideas<br>• Have fun<br>• “Vegas rule”<br>• What else?<br>© 2014 ATD / SLIDE 3 | **Ground Rules and Expectations**<br>Facilitate the discussion about ground rules and expectations for the course. Adjust times for starting, breaks, and lunches as needed to accommodate your environmental factors. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 8:30 a.m.<br>(55 min) | Slide 43<br><br>Alpha Beta Exercise<br>Rules of the Exercise<br>• Solve a simple, analytical problem.<br>• Communicate in writing only.<br>• No oral communication permitted.<br>• Deliver your messages through h-mail.<br>• When you believe you have solved the problem, Alpha or Beta will raise a hand and I will check your answer.<br>© 2014 ATD / SLIDE 43 | **Learning Activity 9: Alpha Beta Exercise**<br>• **Handout 14: Alpha Beta Exercise**<br>This activity seems more complicated than it is, so be sure to utilize the full facilitation process and follow instructions in the learning activity. It is a silent activity, so once you explain the directions all participant communication is in writing. Show slide and present the rules for this exercise. Encourage participants to use handout as a reference during the activity.<br>(Slide 1 of 4) |
| | Slide 44<br><br>Alpha Beta Exercise<br>Communication Process<br>• Only written communication allowed<br>• All communication is by h-mail<br>• Improperly addressed mail will be returned or destroyed<br> no communication<br>2-way communication okay<br>Alpha<br>2-way okay<br>Epision<br>2-way communication okay<br>Beta<br>2-way communication okay<br>2-way okay<br>Delta<br>Gamma<br>© 2014 ATD / SLIDE 44 | **Learning Activity 9: Alpha Beta Exercise**<br>• **Handout 14: Alpha Beta Exercise**<br>Show slide and present the rules for the communication process to be used in this exercise. It's important that the organizational hierarchy is strictly followed. Encourage them to use handout as a reference during the activity.<br>(Slide 2 of 4) |
| | Slide 45<br><br>Alpha Beta Exercise<br>Format for h-mail<br>**Addressing Your Messages**<br>TO: [recipient] (for example, Alpha)<br>FROM: [sender] (for example, Beta)<br>**Note:** The messenger will check your mail to ensure it is properly addressed. If not addressed correctly, your messages may be returned to you or lost in cyberspace.<br>© 2014 ATD / SLIDE 45 | **Learning Activity 9: Alpha Beta Exercise**<br>• **Handout 14: Alpha Beta Exercise**<br>Show slide and present the format to be used for h-mail in this exercise (be prepared with a lot of note paper for this activity). Encourage participants to use handout as a reference during the activity.<br>(Slide 3 of 4) |
| 9:25 a.m.<br>(10-15 min) | Slide 46<br><br>Debrief/Discussion<br>How is this experience similar to what really occurs in the workplace?<br>© 2014 ATD / SLIDE 46 | **Learning Activity 9: Alpha Beta Exercise**<br>**Activity Debrief**<br>• **Handout 14: Alpha Beta Exercise**<br>This activity has the potential for very rich discussion. Using the debriefing questions provided in the learning activity, facilitate a discussion about the exercise. Encourage participants to record their insights on the handout.<br>(Slide 4 of 4) |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 9:35 a.m.<br>(10-15 min) | Slide 47<br><br>Model for Effective Business Writing<br>Plan the Content<br>Brainstorm: Purpose Audience Needs Expectations<br>Draft the Message<br>5 Cs: Clear Concise Complete Considerate Correct<br>Design the Document<br>Format: White Space Bullet Points Bold & Italics<br>Deliver the Communication<br>Check: Spelling Grammar Recipients Subject Line<br>© 2014 ATD / SLIDE 47 | **Learning Content/Discussion**<br>**Discussion: Model for Effective Business Writing**<br>• **Handout 15: Model for Effective Business Writing**<br>Before you show this slide, facilitate a large group discussion about the features of good writing and record the responses on chart paper. Then introduce the Model for Effective Business Writing and summarize the steps. Encourage participants to follow along on the slide or handout. |
| 9:45 a.m.<br>(10 min) | Slide 48<br><br>Personal-Case Scenario<br>Think about one, two, or three pieces of recent or current business communication that you can use to review, prepare, or evaluate throughout the day.<br>© 2014 ATD / SLIDE 48 | **Learning Activity 10: Personal Case Scenario**<br>• **Handout 16: Personal Case Scenario Worksheet**<br>Ask participants to think about one, two, or three recent or current business communications that they can use to review, prepare, or evaluate throughout the day. |
| 9:55 a.m.<br>(15 min) | Slide 32<br><br>15-Minute Break<br>© 2014 ATD / SLIDE 32 | **BREAK** |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 10:10 a.m.<br>(15 min) | Slide 49<br>Planning Your Writing Content<br>Brainstorming Questions<br>•What is the purpose?<br>•Who is your audience?<br>•What are their needs?<br>•What are your expectations (and theirs)?<br>•What is the core content for your message?<br>© 2014 ATD / SLIDE 49 | **Learning Content/Lecture**<br>**Plan Your Writing Content**<br>Using the brainstorming questions on this slide, demonstrate the mind-mapping technique on chart paper for the group. Each main "limb" of the map is used for building on the original concept and "branching out" by adding relevant ideas to the main concept:<br>1) Choose a topic to place in the center of the map (for example, an upcoming event).<br>2) Label the first limb "audience" and then add additional branches for each stakeholder member identified.<br>3) Label the next limb "need" and add branches with answers in that category.<br>4) Label another "expectations" and add branches.<br>5) Label another "content" and add branches. |
| 10:25 a.m.<br>(20 min) | Slide 50<br>Document Planning Mind Map<br>Planning to write . . .<br>•Purpose?<br>•Audience?<br>•Needs?<br>•Expectations?<br>•Core message?<br>Activity: Create a Mind Map<br>© 2014 ATD / SLIDE 50 | **Learning Activity 11: Document Planning Mind Map**<br>• **Handout 17: Mind Map: Plan Your Content**<br>Now it is your participants' turn. Instruct them to choose one personal case scenario from Handout 16 and map all content planning considerations. |
| 10:45 a.m.<br>(10 min) | Slide 52<br>Brainstorm… Brainstorming!<br>© 2014 ATD / SLIDE 52 | **Learning Content/Discussion**<br>**Brainstorm . . . Brainstorming!**<br>• **Handout 18: Brainstorm Other Brainstorming Methods**<br>Create small groups to brainstorm other brainstorming techniques besides mind mapping. Instruct participants to record their insights on the handouts, which also include best practices for productive brainstorming. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 10:55 a.m.<br>(5 min) | Slide 53<br><br>Five Cs of Effective Communication<br>• Clear<br>• Concise<br>• Complete<br>• Correct<br>• Considerate<br>© 2014 ATD / SLIDE 53 | **Learning Content/Lecture**<br>**Five Cs of Effective Communication**<br>• **Handout 19: Five Cs of Effective Communication**<br>Present the Five Cs of Effective Communication. Participants can follow along and take additional notes on the handout. |
| 11:00 a.m.<br>(10 min) | Slide 54<br><br>Five Cs & Four Corners<br>What's Your Birthday Season?<br>Spring<br>Summer<br>Winter<br>Fall<br>Discussion: Which of the Five Cs is omitted and why?<br>© 2014 ATD / SLIDE 54 | **Learning Activity 12: Five Cs and Four Corners**<br>In this activity participants will use the Five Cs to identify communication pitfalls. Follow facilitation instructions given in the learning activity. |
| 11:10 a.m.<br>(10 min) | Slide 62<br><br>Identifying Your Reader's Needs<br>**What is your intent versus what do they need to hear?**<br>Needs \| Wants<br>© 2014 ATD / SLIDE 62 | **Learning Activity 18: Identify Your Reader's Needs**<br>• **Handout 25: The Wants and Needs of Your Reader**<br>Facilitate a discussion around the wants versus the needs of the readers. Have participants begin by considering what *they* themselves want and need as readers and then extrapolate to their audience. This conversation is very helpful to encourage them to consider and plan the content of their written messages.<br>For variety you could have participants work in pairs or triads to brainstorm the list using the handout. |
| 11:20 a.m.<br>(5 min) | Slide 64<br> <br>Discussion<br>What Are the Most Commonly Forgotten Communication Factors?<br>© 2014 ATD / SLIDE 64 | **Learning Content/Discussion**<br>**Most Commonly Forgotten Communication Factors**<br>It is helpful to discuss the Five Cs from a big-picture perspective. This slide is a focal point for a "wrap-up" conversation before participants draft a document. |

| TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS |
|---|---|---|
| 11:25 a.m.<br>(20 min) | Slide 63<br><br>Draft Your Message<br>Draft the Message<br>5 Cs: Clear Concise Complete Correct Considerate<br>© 2014 ATD / SLIDE 63 | **Learning Activity 19: Draft Your Message**<br>• **Handout 26: Draft Your Message**<br>This activity helps participants to practice drafting a document that considers the needs of the reader and conforms to the Five Cs (clear, concise, complete, correct, and considerate). Follow facilitation instructions in the learning activity.<br>In the half-day format, there is less time for drafting and reviewing participant work. Allow 10 minutes to draft the document and 10 minutes to partner with another participant to review each other's work. |
| 11:45 a.m.<br>(10 min) | Slide 66<br><br>Reflection and Action Plan<br>What behaviors will you…<br>•Start?<br>•Stop?<br>•Continue?<br>© 2014 ATD / SLIDE 66 | **Reflection and Action Plan**<br>• **Handout 27: Reflection and Action Plan**<br>Ask participants this question: What will you do differently as a result of this class?<br>Allow participants time to reflect and complete the action plan. This will help them solidify their learning. |
| 11:55 a.m.<br>(5 min)<br>End 12:00 p.m. | Slide 67<br> <br>Summary<br>© 2014 ATD / SLIDE 67 | **Session Summary and Q & A**<br>Facilitate a discussion and solicit feedback about the best "take-aways" from the course. |

## What to Do Next

- Determine the schedule for training classes; reserve location and any catering you may wish to provide.
- Identify and invite participants.
- Inform participants about pre-work if you will be using it in the class. Consider using self-assessment instruments such as Assessment 1: Listening Behavior Assessment or Assessment 2: Communication Style Inventory provided in this volume.
- Review the workshop objectives, activities, and handouts to plan the content you will use.

- Prepare copies of the participant materials and any activity related "extras." Refer to Chapter 14 for information on how to access and use the supplemental materials provided for this workshop.
- Gather any "fidgets" (quiet toys such as chenille stems, koosh balls, and so on) to place on the tables for your participants. See Chapter 8 for other ideas to enhance the learning environment of your workshop.
- Prepare yourself both emotionally and physically. Make sure you have taken care of any scheduling conflicts or personal challenges (as best you can), so that you can be fully present to facilitate the class.
- Get a good night's sleep before you facilitate your workshop so that you have the energy and focus to deliver a great class!

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## Chapter 4

# Customizing the Communication Skills Workshop

**What's in This Chapter**

- Ideas for creating a communication skills workshop series
- Creative approaches for developing lunch-and-learn seminars
- Suggestions for designing theme-based workshops

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Many organizations find it difficult to have employees away from the workplace for an entire day or two, even if it is for professional and skill development. As a result you may need to adjust and adapt your workshop to the scheduling needs of the organization. Additionally, organizations often prefer to select the content and topics to match the needs of the employees attending the training. Your training needs analysis will help you prioritize and select the content and activities of highest value for your participants. For more on needs analysis, see Chapter 5 in this volume.

The materials in this ATD Workshop Series volume are designed to meet a variety of training needs. They cover a range of topics related to communication skills training and can be offered in many timeframes and formats. Although lengthy immersion in a learning environment can enhance and increase the depth of learning experiences, the challenges of the workplace sometimes demand that training be done in short, small doses.

By using the expertly designed learning content and activities provided here as a foundation, you can modify and adapt the learning experience by customizing the content and activities, customizing the workshop format, and customizing delivery with technology.

## Customizing the Content and Activities

As mentioned in the introduction of this book, your level of expertise with training facilitation and communication skills will determine how much customization you should do with the workshops presented here. If you are new to both training and the topic, you'll want to follow the workshops as closely as possible.

If you are a new trainer but an expert in communication skills, use the outline and materials as designed but feel free to include relevant materials you have developed.

And, finally, if you are an expert facilitator, feel free to adapt the agenda and materials as you see fit. Add any new materials that you have developed to augment the learning. Or you can simply incorporate the learning activities, assessments, handouts, and tools into your own agenda.

As you become more confident with both the topic and facilitation, you will be able to introduce more of your own personal style into the workshop. You will also be better able to tailor the workshops to specific organizational needs and business imperatives.

Here are some other ways to introduce new elements into your training workshop:

- **Explore Variations in Learning Activities.** Many of the learning activities describe ideas for variations to a given activity. Try out some of these alternatives to see which ones resonate with your facilitation style and your participants' preferences.
- **Use the Bonus Materials Included with This Book.** To help provide variety and enable flexibility in your workshops, we have included several bonus learning activities and assessments. Table 4-1 shows a list of bonus materials that are not used in the half-, one-, or two-day workshop agendas but can be used to customize the workshop experience.

**Table 4-1. Bonus Learning Materials**

| TYPE | TOPIC |
|---|---|
| Learning Activities | 20. Identical Structures (Team Communication)<br>21. Charades: Nonverbal Communication<br>22. Effective Virtual Teams (Part 1)<br>23. Effective Virtual Teams (Part 2)<br>24. Ten Questions About Conflict<br>25. Choices |
| Learner Assessments | 2. Communication Style Inventory<br>5. Interpersonal Skills<br>8. Nonverbal Communication Self-Assessment<br>9. Skills Application Reflection<br>10. Skills Mastery Assessment |
| Facilitator Assessments | 3. Course Evaluation<br>4. Facilitator Competencies<br>6. Learning Needs Assessment Sheet<br>7. Needs Analysis Discussion Form |

## Customizing the Workshop Format

Using the content from the two-day workshop (Chapter 1), you can adapt the workshop format to build a series of two-hour workshops, lunchtime seminars, or thematic workshops.

### Communication Skills Workshop Series

To address the need to provide learning in shorter segments, Table 4-2 breaks down the content into a series of eight two-hour workshops. These workshops can be offered on a daily, weekly, biweekly, or monthly basis, depending on the scheduling needs of the organization.

Consider using Assessment 9: Skills Application Reflection or Assessment 10: Skills Mastery Assessment to help solidify the learning for sessions of the series. Each of these instruments provides a way to help participants quickly bring the learning back to the workplace.

### Small Bites—Lunch-and-Learn Seminars

Sometimes small means big impact. Table 4-3 shows topics that could be delivered effectively in one-hour sessions. The key to doing these bite-sized chunks successfully is to have a clear design with the right amount of content. Trying to cram in too much content can make a seminar seem shallow and rushed. Ask yourself one key question when creating a session of this size: What is one key concept I would like the participants to remember after this workshop?

**Table 4-2. Communication Skills Workshop Series**

| SESSION | TWO-HOUR WORKSHOP TOPICS |
|---|---|
| 1 | • Communication Process<br>• Identify the Noise<br>• Communication Pie<br>• Impression Improv |
| 2 | • Impact of Body Language<br>• Congruent and Incongruent Communication<br>• The Emotional and Rational Brain<br>• Strategies for Gaining Emotional Control |
| 3 | • Communication Awareness Model<br>• Five Steps to Effective Communication<br>• Surgical Analysis of Your Story<br>• Personal Case Scenario |
| 4 | • Typical Listening<br>• Listening Stick (Part 1)<br>• Barriers to Listening |
| 5 | • Principles of Active Listening<br>• Listening Stick (Part 2) |
| 6 | • Alpha Beta Communication<br>• Model for Effective Business Writing<br>• Planning Your Writing Content |
| 7 | • Five Cs of Effective Communication<br>• Clear, Concise, Complete, Correct, Considerate |
| 8 | • Circles of Communication Influence<br>• Identifying Your Reader's Needs<br>• Drafting Your Message and Designing Your Document |

**Table 4-3. Lunch-and-Learn Seminars**

| TOPICS FOR ONE-HOUR LUNCHTIME SEMINARS |
|---|
| • Communication Process<br>• Identify the Noise |
| • Communication Pie<br>• Impression Improv |
| • Impact of Body Language<br>• Congruent and Incongruent Communication |
| • Role of Emotion in Communication<br>• Symptoms of Fear or Anger |
| • Emotional and Rational Brain<br>• Strategies for Gaining Emotional Control |
| • Communication Awareness Model<br>• Five Steps to Effective Communication<br>• Surgical Analysis of Your Story |
| • Basic Listening<br>• Listening Stick (Part 1) |
| • Principles of Active Listening<br>• Listening Stick (Part 2)<br>• Barriers to Listening |
| • Communicating in Writing<br>• Alpha Beta Communication |
| • Model for Effective Business Writing<br>• Planning Your Writing |
| • Five Cs of Effective Communication<br>• Clear, Concise, Complete, Correct, Considerate |
| • Circles of Communication Influence<br>• Identifying Your Reader's Needs |
| • Drafting Your Message and Designing Your Document<br>• Clear, Concise, Complete, Correct, Considerate |

## Theme-Based Workshops

Communication is a topic that permeates and affects most other workplace learning topics. Table 4-4 shows five major communication skill themes around which you can create training: leadership, listening, virtual teams, business writing, and cultural considerations. Mix and match the content topics and activities in the second column to create a focused workshop on key aspects of communication skills training.

### Table 4-4. Theme-Based Workshops

| THEME | WORKSHOP TOPICS |
|---|---|
| Leadership | • Communication Process<br>• Alpha Beta Exercise<br>• Identify the Noise<br>• Communication Pie<br>• Impression Improv<br>• Emotional and Rational Brain<br>• Strategies for Gaining Emotional Control<br>• Choices Activity |
| Listening Skills | • Typical Listening<br>• Listening Stick (Part 1)<br>• Barriers to Listening<br>• Principles of Active Listening<br>• Listening Stick (Part 2)<br>• Impact of Body Language<br>• Congruent and Incongruent Communication<br>• Emotional and Rational Brain<br>• Strategies for Gaining Emotional Control<br>• Nonverbal Communication Self-Assessment |
| Virtual Teams | • Communication Awareness Model<br>• Identical Structures Activity<br>• Five Steps to Effective Communication<br>• Surgical Analysis of Your Story<br>• Personal Case Scenario<br>• Effective Virtual Teams (Parts 1 and 2)<br>• Interpersonal Skills Assessment |
| Business Writing | • Communicating in Writing<br>• Alpha Beta Communication<br>• Five Cs of Effective Communication<br>• Clear, Concise, Complete, Correct, Considerate<br>• Model for Effective Business Writing<br>• Planning Your Writing<br>• Identifying Your Reader's Needs<br>• Drafting Your Message and Designing Your Document |

| | |
|---|---|
| Cultural Considerations | • Circles of Influence<br>• Barriers to Listening<br>• Impact of Body Language<br>• Congruent and Incongruent Communication<br>• Ten Questions About Conflict |

## Customizing Delivery with Technology

Learning technologies can play an important role in adapting workshops to fit your organization. They have the potential to enhance learners' abilities to understand and apply workshop concepts. Examples include webinars, wikis, email groups, online surveys, and teleconferencing, to name just a few. Learn more about how to use technology to maximize learning in Chapter 7 of this volume.

## The Bare Minimum

With any of these customization options, always keep in mind the essentials of training design (Chapter 6) and delivery (Chapter 8). At a bare minimum, remember to

- **Prepare, Prepare, Prepare.** Ready the room, the handouts, the equipment, and you. Familiarize yourself with the content, materials, and equipment. Practice can only make you a better facilitator. The more comfortable you feel, the more open and relaxed you will be for your participants.
- **Start Well.** The beginning of a session is a crucial time in the workshop dynamic. How the participants respond to you, the facilitator, can set the mood for the remainder of the workshop. Get to the classroom at least 30 to 60 minutes before the session is to begin. Be ready to welcome the participants, not deal with problems; be free and available to ask them simple questions while they are settling in to start building rapport. After introducing yourself, provide an activity in which participants can meet each other. The more time they spend getting to know each other, the more all of you will benefit as the session begins.
- **Don't Lecture Too Long!** Adult learners like to have fun and participate in interactive learning opportunities. Be sure to vary the learning and teaching method regularly (recommended every 10-15 minutes) to keep the pace active and engaging.
- **End Strong.** Providing time for participants to reflect and create an action plan at the end of a module or session will help solidify learning. Don't skip this opportunity to encourage participants to take action on something they have learned. Use the action plan worksheet (Handouts 13 and 27) so they have a written record of their goals. Or

consider using the instruments on skills application and skills mastery (Assessments 9 and 10, respectively).

## What to Do Next

- When customizing a workshop, it is important to have a clear understanding of the learning objectives. Conduct a needs analysis to identify the gap between what the organization needs and what the employees are able to do and then determine how best to bridge that gap. At the minimum, you should identify who wants the training, how the results will be defined, why the training is being requested now, and what the budget is. Chapter 5 provides more guidance on identifying training needs.
- Modify or add your own content to an existing agenda from Chapters 1-3 or create your own agenda using the learning support documents included in this volume. There is no one way to flow communications skills content, but you must ensure that the topics build on one another and that you solidly connect the concepts and ideas together to leverage the most of the learning opportunity.
- Make sure to incorporate interactive practice activities into the design of the workshop.
- Compile and review all learning activities, handouts, and slides you will use for the session.
- Build a detailed plan for preparing for this session, including scheduling and room reservations, invitations, supply list, teaching notes, and time estimates.

# SECTION II

## ESSENTIALS OF EFFECTIVE COMMUNICATION SKILLS TRAINING

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## Chapter 5

# Identifying Needs for Communication Skills Training

**What's in This Chapter**

- Discovering the purpose of needs analysis
- Introducing some data-gathering methods
- Determining the bare minimum needed to deliver training

Ideally, you should always carry out a needs analysis before designing and creating a workshop to address a performance gap. The cost of *not* identifying and carefully considering the performance requirement can be high: wasted training dollars, unhappy staff going to boring or useless sessions, increased disengagement of employees, and so forth. But the world of training is rarely ideal, and the existence of this book, which essentially provides a workshop in a box, is testament to that. This chapter describes the essential theory and techniques for a complete needs analysis to provide the fundamentals of the process and how it fits into designing learning. However, because the decision to train may already be out of your hands, the last part of this chapter provides a bare-bones list of things you need to know to train effectively even if someone just handed you this book and told you to put on a workshop.

## Why Needs Analysis?

In short, as a trainer, learning professional, performance consultant, or whatever job title you hold, your role is to ensure that the employees of your organization know how to do the work that will make the organization succeed. That means you must first identify the skills, knowledge, and abilities that the employees need for optimal performance and then determine where these are lacking in the employee population to bridge that gap. A training needs analysis helps you do this (see Figure 5-1). Methods to identify this information include strategic needs analysis, structured interviews, focus groups, and surveys.

### Strategic Needs Analysis

An analysis of future directions usually identifies emerging issues and trends with a major potential effect on a business and its customers over a two- to three-year period. The analysis helps a business develop goals and programs that proactively anticipate and position the organization to influence the future.

To conduct such an analysis, organizations look at issues such as expected changes within the business (for example, technology and professional requirements) and expected changes outside the company (for example, the economy, demographics, politics, and the environment).

**Figure 5-1. Introducing the ADDIE Model**

A needs analysis is the first step in the classic instructional design model called ADDIE, which is named after its steps: analysis, design, development, implementation, and evaluation. Roughly speaking, the tasks involved in ADDIE are

1. **Analysis:** Gather data about organizational and individual needs as well as the gap between the goals the organization means to accomplish and the skills and knowledge needed to accomplish those goals.
2. **Design:** Identify and plan the topics and sequence of learning to accomplish the desired learning.
3. **Development:** Create the components of the learning event, such as learning activities and materials.
4. **Implementation:** Put on the learning event or launch the learning materials.
5. **Evaluation:** Gather data to determine the outcome of the learning to improve future iterations of the learning, enhance materials and facilitation, and justify budget decisions.

Instructional design models such as ADDIE are a systematic approach to developing learning and could also be viewed as a project management framework for the project phases involved in creating learning events.

Results of an analysis provide a rationale for developing company and departmental goals and for making policy and budgetary decisions. From the analysis comes a summary of key change dynamics that will affect the business.

These questions often are asked in strategic needs analysis:

- What information did previous organizational analyses impart?
- Are those issues and trends still relevant?
- Do the results point to what may need to be done differently in the future?
- How has the organization performed in achieving results?
- What is the present workforce like?
- How will it change or need to change?
- What does the organization know about future changes in customer needs?
- Are customer surveys conducted, and if so, what do they reveal?
- How might the organization have to change to serve customers better?
- Is the company's organizational structure working to achieve results?
- What are the strengths and limitations of the company?
- What are the opportunities for positive change?
- What do competitors do or say that might have implications for the organization?
- What are the most important opportunities for the future?
- What are the biggest problems?
- Is the organization in a competitive marketplace?
- How does the organization compare with competitors?
- The results can be summarized in a SWOT analysis model (strengths, weaknesses, opportunities, threats—see Figure 5-2). Action plans are then developed to increase the strengths, overcome the weaknesses, plan for the opportunities, and decrease the threats.

**Figure 5-2. SWOT Analysis Model**

| | STRENGTHS | WEAKNESSES |
|---|---|---|
| INTERNAL | | |
| | OPPORTUNITIES | THREATS |
| EXTERNAL | | |

## Structured Interviews

Start structured interviews as high up in the organization as you can go, with the CEO if possible. Make sure that you include input from human resource personnel and line or operations managers and supervisors. Managers and supervisors will want to tell you what they have seen and what they consider the most pressing issues in the organization. Use Assessment 6: Learning Needs Assessment Sheet to capture your notes from the interviews.

## Focus Groups

Focus groups can be set up to give people opportunities to brainstorm ideas about issues in the organization and to realize the potential of team involvement. One comment may spark another and so on. Focus groups should begin with questions that you prepare. It is important to record the responses and comments on a flipchart so everyone can see them. If that is not possible, you may simply take notes. Results of the sessions should be compiled. A needs analysis discussion form (Assessment 7) is provided in Chapter 12 to help focus group members prepare for the discussion.

### Surveys

Surveys, whether paper- or web-based, gather information from a large or geographically dispersed group of employees. The advantages of surveys are speed of data collection, objectivity, repeatability, and ease of analysis.

### A Note from the Author

When conducting a needs analysis around communication skills, it is important to keep in mind the various aspects of communication challenges. Here is a list of questions to ask to help guide your analysis:

- Does the organizational culture set a tone for open and honest communication?
- Has the organization conducted many employee surveys without taking action on the results?
- Are the managers skilled in handling difficult conversations?
- Do employees have a process or vehicle to communicate their concerns?

## Individual Learning Needs Analysis

While identifying organizational learning needs is critical to making the best use of an organization's training budget, analyzing individual learning needs is also important. Understanding the training group's current skills and knowledge can help to focus the training on those areas that require most work—this also helps to avoid going over what the individuals already know, thus wasting their time, or losing them by jumping in at too advanced a level. In addition, individual learning needs analysis can uncover unfavorable attitudes about training that trainers will be better able to address if they are prepared for them. For example, some learners may see the training as a waste of time, as an interruption to their normal work, or as a sign of potentially frightening organizational change.

Many of the same methods used to gather data for organizational learning needs are used for individual learning needs analysis. Analyzing employee learning needs should be carried out in a thoughtful, sensitive, and inclusive manner. Here are potential pitfalls to avoid:

- **Don't analyze needs you can't meet.** Training needs analysis raises expectations. It sends a message to employees that the organization expects them to be competent in particular areas.

- **Involve employees directly.** Sometimes employees don't see a value in participating in training. In assessing needs, trainers need to prepare employees to buy into the training. Asking useful questions and listening carefully to stated needs are excellent methods for accomplishing both of those goals. Ask these questions: "To what degree would you like to learn how to do [X] more effectively?" and "To what degree would you seriously consider participating in training to improve your competency in [X]?"
- **Make the identified needs an obvious part of your training design.** Trainees should be able to see that they have influenced the content and emphasis of the training session. A good practice is briefly to summarize the local trends discovered in the training needs analysis when you introduce the goals of the session.
- **Don't think of training as a "magic bullet."** Sometimes a given employee needs coaching, counseling, or consulting, which is best carried out one on one and customized to the individual and the situation. Still other times, the problem is caused by equipment or processes that need upgrading, not people who need training.

## The Bare Minimum

As noted, in an ideal world, you would have gathered all this data about the needs of the organization and the employees and determined that training was the right way to connect those dots. However, even if the decision to put on this workshop has already been made, you still need a bare minimum of information to be successful:

- **Who is your project sponsor (who wants to do this, provides the budget, and so on)?** In fact, if you don't have a project sponsor, *stop* the project. Lack of a project sponsor indicates that the project isn't important to the business. Optimally, the project sponsor should come from the business side of the organization. If the project sponsor is the head of training, then the mentality behind the training—"build it and they will come"—is likely wrong. Even compliance training should have a functional sponsor.
- **What does the sponsor want the learners to be able to do when they are done with training?** How does the sponsor define measures of success? Answering these critical questions brings clarity to the sponsor's expectations and thus to the workshop design.
- **What are the objectives of the training?** Use the guideline ABCD to prepare objectives: identify the Audience, describe the Behavior (what will they be able to do that they can't do now), describe the Condition (what are the circumstances under which they need to be able to do the task, for example, will they have a job aid), and then specify to what Degree (level of quality).
- **Why does the sponsor want this right now?** Is something going on in the organization of which you should be aware?
- **What is the budget?** How much time and money will be invested in the training?

## Key Points

- Needs analysis identifies the gap between what the organization needs and what the employees are able to do and then determines how best to bridge that gap.
- Methods of data gathering for needs analysis include strategic needs analysis, structured interviews, surveys, focus groups, and others.
- Sometimes, needs analysis is not an option, but some minimum information is necessary, including who wants the training, how the results will be defined, why the training is being requested now, and what the budget is.

## What to Do Next

- If you have the option, carry out a needs analysis to determine if this training is really what your organization requires to succeed. If it isn't, prepare to argue against wasting time, money, and effort on training that will not support the organization's goals.
- If you don't have the option of a needs analysis, make sure that you seek out at least the bare minimum information to conduct effective training.
- Prepare the learning objectives using ABCD (identifying audience, behavior, condition, and degree).
- If you have little training background, read the next chapter (Chapter 6) to learn about the theories and concepts that are at the root of training design. If you are an experienced trainer, skim Chapter 6 on design theory or go straight to Chapters 7 and 8 for tips on leveraging technology and delivering training, respectively.

## Additional Resources

Biech, E., ed. (2014). *ASTD Handbook: The Definitive Reference for Training & Development.* Alexandria, VA: ASTD Press.

Biech, E., ed. (2008). *ASTD Handbook for Workplace Learning Professionals.* Alexandria, VA: ASTD Press.

Russo, C. "Be a Better Needs Analyst." ASTD Infoline no. 258502. Alexandria, VA: ASTD Press.

Tobey, D. (2005). *Needs Assessment Basics.* Alexandria, VA: ASTD Press.

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## Chapter 6

# Understanding the Foundations of Training Design

**What's in This Chapter**

- Introducing adult learning theory
- Exploring multiple intelligences
- Incorporating whole brain learning
- Learning how theory enters into practice

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Because this book provides a fully designed workshop, you don't need to know all the details of designing a course—the design has already been done for you. However, understanding some of the principle design and learning theories that underpin this workshop is useful and helpful—especially if you are somewhat new to the field of workplace training and development. To effectively deliver training to learners requires a core understanding of how and why people learn. This gives you the flexibility to adapt a course to the unique learners in the room as needed.

When designing a communication skills workshop, paying attention to content flow is especially important. While there is no one right way to flow communication skills content, you must ensure that the topics build on one another and that you solidly connect the concepts and ideas together so you leverage the most of the learning opportunity. Great communication skills require practice, so always include interactive practice sessions in the design of the workshop. Short but well-designed activities can have significant impact.

## Basic Adult Learning Theory

The individual trainee addressed in these workshops is typically an adult with learning needs that differ in many (but not all) ways from children. Much has been documented about how adults learn best. A key figure in adult education is Malcolm Knowles, who is often regarded as the father of adult learning. Knowles made several contributions to the field but is best known for popularizing the term *andragogy*, which refers to the art and science of teaching adults. Here are six assumptions about adult learners noted in *The Adult Learner: A Neglected Species* (1984):

- Adults need to know why learning something is important before they learn it.
- Adults have a concept of self and do not like others imposing their will on them.
- Adults have a wealth of knowledge and experience and want that knowledge to be recognized.
- Adults open up to learning when they think that the learning will help them with real problems.
- Adults want to know how the learning will help them in their personal lives.
- Adults respond to external motivations, such as the prospect of a promotion or an increase in salary.

Given these principles of adult learning, designing sessions that are highly interactive and engaging is critical (see sidebar on page 79 for more tips). Forcing anyone to learn anything is impossible, so the goal of effective training design is to provide every opportunity and encouragement to the potential learner. Involvement of the learner is the key. As an old Chinese proverb says, “Tell me and I will forget. Show me and I may remember. Involve me and I will understand.” The designs in this book use several methods to convey information and engage participants. By incorporating varied training media—such as presentation media, discussion sessions, small-group work, structured exercises, and self-assessments—these designs maximize active participant involvement and offer something for every learning style.

### Tips for Adult Learning

To reach adult learners, incorporate these ideas into your next training session:

- Incorporate self-directed learning activities in the session design.
- Avoid overuse of lectures and "talking to." Emphasize discussion.
- Use interactive methods such as case studies, role playing, and so forth.
- Make the content and materials closely fit assessed needs.
- Allow plenty of time to "process" the learning activities.
- Include applications planning in each learning activity.
- Promote inquiry into problems and affirm the experience of participants.
- Give participants a rationale for becoming involved and provide opportunities for success.
- Promote getting acquainted and interpersonal linkages.
- Diagnose and prioritize learning needs and preferences before and during the session.
- Use learning groups as "home bases" for participants.
- Include interpersonal feedback exercises and opportunities to experiment.
- Use subgroups to provide safety and readiness to engage in open interchange.
- Make all learner assessment self-directed.
- Provide activities that focus on cognitive, affective, and behavioral change.

In addition to engaging the interest of the learner, interactive training allows you to tap into another source of learning content: the participants themselves. In a group-learning situation, a good learning environment encourages participants to share with others in the group so the entire group's cumulative knowledge can be used.

## More Theoretical Ideas Important to Learning

Research on how people learn and how the brain works occurs continuously. A few ideas that come up frequently in training design and delivery are multiple intelligences and whole brain learning.

### Multiple Intelligences

Multiple intelligences reflect how people prefer to process information. Howard Gardner, from Harvard University, has been challenging the basic beliefs about intelligence since the early

1980s. Gardner initially described a list of seven intelligences. In 1987, he added three additional intelligences to his list, and he expects the list to continue to grow. The intelligences are

- **interpersonal:** aptitude for working with others
- **logical/mathematical:** aptitude for math, logic, deduction
- **spatial/visual:** aptitude for picturing, seeing
- **musical:** aptitude for musical expression
- **linguistic/verbal:** aptitude for the written and spoken word
- **intrapersonal:** aptitude for working alone
- **bodily kinesthetic:** aptitude for being physical
- **emotional:** aptitude for identifying emotion
- **naturalist:** aptitude for being with nature
- **existential:** aptitude for understanding one's purpose.

How do multiple intelligences affect your learning? Gardner believes that most people are comfortable in three or four of these intelligences and avoid the others. For example, if you are not comfortable working with other people, doing group case studies may interfere with your ability to process new material. Video-based instruction will not be good for people with lower spatial/visual aptitudes. People with strong bodily/kinesthetic aptitudes prefer to move around while they are learning.

Allowing your learners to use their own strengths and weaknesses helps them process and learn. Here's an example: Suppose you are debriefing one of the exercises in the material. The exercise has been highly interpersonal (team activity), linguistic (lots of talking), spatial/visual (the participants built an object), musical (music was playing), logical/mathematical (there were rules and structure), and kinesthetic (people moved around). You've honored all the processing styles except intrapersonal, so the people who process information in this manner probably need a return to their strength of working alone. Start the debriefing by asking people to quietly work on their own, writing down five observations of the activity. Then ask them to share as a group.

## Whole Brain Learning

Ned Herrmann pioneered the concept of whole brain learning in the 1970s, developing the Herrmann Whole Brain Model, which divides the brain into four distinct types of thinking: analytical, sequential, interpersonal, and imaginative. Each individual tends to favor one type of thinking over another, and this thinking preference evolves continually throughout a person's life. In fact, the brain changes all the time with new input and new ways of thinking—a feature that is known as *plasticity*.

Although each person has a preferred thinking style, he or she may prefer it to varying degrees. To identify a person's thinking preference, Herrmann developed the Herrmann Brain Dominance Instrument in 1979. Learning about your own thinking and learning preferences can motivate you to learn new ways to learn and think. For trainers and facilitators, learning about your own preferences can help you identify where you may be neglecting other styles or preferences in your training design and delivery. As Ann Herrmann-Nehdi, daughter of Ned Herrmann and researcher in her own right, notes in the *ASTD Handbook for Workplace Learning Professionals*, "Effective learning is whole brained—designing, delivering, and evaluating the learning to best meet the varying needs of diverse learners" (2008, p. 215).

Herrmann-Nehdi continues, "Our knowledge of the brain and its inherent uniqueness shows that each individual is a unique learner with learning experiences, preferences, and avoidances that will be different from those of other learners. This means that learning designs must somehow factor in the uniqueness of the individual learner" (2008, p. 221). That is to say that effective facilitation must provide a blend of learning activities that addresses various thinking processes from analytical to sequential to interpersonal to imaginative. Because each individual has a unique combination of varying preferences for different types of learning, such a blend can engage most learners even when they are not directly learning in their preferred style. Engaging varied thinking styles ensures *whole brain learning*, rather than a narrow focus on one or two thinking styles.

Here are some tips for incorporating whole brain learning into your facilitation:

- Identify your own thinking preferences to avoid getting too one-sided in your presentation. Deliberately include styles you don't typically prefer.
- Recognize that your learners have unique brains that have continually changed as a result of a lifetime of experiences, learning, and ways of thinking.
- Address those variations in learning and thinking preferences by learning different ways to deliver learning, including facts, case studies, metaphors, brainstorming, simulations, quizzes, outlines, procedures, group learning, role plays, and so on to engage their whole brains.
- Avoid diminishing learners' motivation to learn.
- Avoid overwhelming the brain or causing stress. Stick to need-to-know rather than nice-to-know.

## Theory into Practice

These theories (and more that are not addressed here) affect the way the content of the workshop is put together. Some examples of training features that derive from these theories include handouts, research references, and presentation media to read; quiet time to write notes and reflect; opportunities for listening and talking; and exercises for practicing skills. The workshop activities and materials for the programs in this book have taken these theories to heart in their design, providing content, activities, and tools that will appeal to and engage many learning and thinking styles. Additional ways to translate learning and design theory into practice include the following:

### Establishing a Framework

For learners to understand the goals of training and how material relates to real work situations, a framework can be helpful. When presenting the training in the context of a framework, trainers should provide an overview of why the organization has decided to undertake the training and why it is important. This explanation should also highlight what the trainer hopes to accomplish and how the skills learned in this training will be useful back on the job.

Objectives and goals of the programs and learning activities are described in this workbook; share those objectives with the learners when discussing the purposes of specific exercises. Handouts will also help provide a framework for participants.

### Identifying Behaviors

Within any training goal are many behaviors. For example, listening and giving clear directions are necessary behaviors for good customer service. Customer service does not improve simply because employees are told to do so—participants need to understand the reasons and see the relevant parts of the equation. For these reasons, facilitators should identify and discuss relevant behaviors throughout the program.

Training helps people identify the behaviors that are important, so that those behaviors can be targeted for improvement. Learning activities enable participants to analyze different skills and behaviors and to separate the parts from the whole. The learning activities in this book, with their clearly stated objectives, have been carefully crafted to take these considerations into account.

## Practicing

Practice is crucial for learning because learning takes place by doing and by seeing. In the training designs included in this workbook, practice occurs in written exercises, verbal exercises, and role playing. Role playing helps participants actually practice the behaviors that are being addressed. Role-play exercises bring skills and behaviors to life for those acting out particular roles and for those observing the scenarios.

Learning a new skill takes a lot of practice. Some participants learn skills more quickly than others. Some people's attitudes might prevent them from being open to trying new behaviors. Your job is to facilitate the session to the best of your ability, taking different learning styles into account. The rest is up to the participants.

## Providing Feedback

A key aspect of training is the feedback trainers give to participants. If delivered in a supportive and constructive manner, feedback helps learners develop a deeper understanding of the content you are presenting and the behaviors they are practicing. Feedback in role plays is especially powerful because this is where "the rubber hits the road." In role plays, observers can see if people are able to practice the behaviors that have been discussed, or whether habitual responses will prevail.

## Making It Relevant

Throughout the program you will discuss how to use skills and new behaviors on the job. These discussions will help answer the question "So what?" Exercises and action plans help participants bring new skills back to actual work situations. This is also important in addressing the adult need for relevancy in learning.

# The Bare Minimum

- **Model it.** Communication is one of those unique topics that require designers to "practice what they preach." All correspondence and communications with the participants should be well written and free of typographical errors. Supplemental workshop materials such as slides, handouts, and activities should be clear, concise, complete, correct, and considerate—demonstrating the Five Cs of Effective Communication.
- **Keep the focus on self-reflection.** Be purposeful in designing content that encourages participants to analyze their own behaviors instead of what others do wrong.

- **Build practice into the design.** As with many skills, communication improves with practice. Provide your participants with hands-on, engaging opportunities to practice the correct skills.

## Key Points

- Adults have specific learning needs that must be addressed in training to make it successful.
- People also have different intelligences; that is, different areas in which they are more comfortable and competent. Addressing different intelligences in the workshop keeps more people engaged in more ways.
- People take in new information in different ways; so addressing a variety of different thinking styles can help everyone learn more effectively.
- Some important ways of bringing theory into practice are creating a framework, identifying behaviors, practicing, providing feedback, and making the learning relevant.

## What to Do Next

- Look through the training materials to identify how they address the learning theories presented in this book. If you make modifications to the material, consider whether those modifications leave out an intelligence or a thinking style. Can you address more intelligences without making the material cumbersome?
- Read the next chapter to identify how to incorporate technology into the workshop to make it more effective.

## Additional Resources

Biech, E., ed. (2008). *ASTD Handbook for Workplace Learning Professionals.* Alexandria, VA: ASTD Press.

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Gardner, H. (2006). *Multiple Intelligences: New Horizons in Theory and Practice.* New York: Basic Books.

Gardner, H. (2011). *Frames of Mind: The Theory of Multiple Intelligences.* New York: Basic Books.

Herrmann, N. (1988). *Creative Brain.* Lake Lure, NC: Brain Books.

Herrmann, N. (1996). *Whole Brain Business Book.* San Francisco: McGraw-Hill.

Herrmann-Nehdi, A. (2008). "The Learner: What We Need to Know." In E. Biech, ed., *ASTD Handbook for Workplace Learning Professionals*, 2nd edition. Alexandria, VA: ASTD Press.

Jones, J.E., W.L. Bearley, and D.C. Watsabaugh. (1996). *The New Fieldbook for Trainers: Tips, Tools, and Techniques.* Amherst, MA: HRD Press.

Knowles, M.S. (1984). *The Adult Learner: A Neglected Species.* Houston, TX: Gulf Publishing.

Russell, L. (1999). *The Accelerated Learning Fieldbook: Making the Instructional Process Fast, Flexible, and Fun.* San Francisco: Jossey-Bass/Pfeiffer.

## Chapter 7

# Leveraging Technology to Maximize and Support Design and Delivery

**What's in This Chapter**

- Recognizing the importance of technology tools
- Determining when to use learning technologies
- Identifying types of learning technologies
- Enhancing learner engagement
- Deepening learner understanding
- Increasing learning application

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The workshops offered in this book are designed to be facilitated in person. Even so, learning technologies can and should play a role in adapting workshops to fit your organization, reinforce learning, and measure effectiveness. Technology is an important learning component, but it can also become an expensive distraction. The key is whether and how well technology enhances learners' abilities to understand and apply workshop concepts.

Your use of technology should also align with your organization's culture and readiness. For example, using webinars and wikis in a high-tech environment where employees are familiar with these tools may be logical and welcome, but you might need to introduce these tools more slowly at another company where email is the primary technology used for communication (see Figure 7-1 for some do's and don'ts of recording webinars).

The most important factor to consider when deciding whether to use learning technologies is how they can best support your workshop's learning objectives. This is particularly critical (and not at all straightforward) when delivering this workshop's soft skills training because personal and interpersonal habits and skills tend to require participants to challenge their beliefs and shift their mindsets. This deeper level of self-reflection, though tougher to do in a virtual setting, can be done if you select the right tool and use it at the right time in the learning process.

In the previous chapter, you learned about the adult learning theories and learning styles that underpin the workshops in this volume. Keep these in mind as you assess and weigh opportunities to use learning technologies. In this chapter, you will explore where technology can augment learning transfer and application in your workshop. Please note that the information has been kept general for two reasons. First, each organization has access to specific and limited technologies, and you should learn about them and creatively use what you have. Second, recommendations for specific technologies are likely to become obsolete quickly; so instead, let's focus on the types of learning technologies that might best augment in-person workshops.

**Figure 7-1. Do's and Don'ts of Recording Webinars**

To increase your chances of a successful webinar, consider and incorporate these tips.

**Do**

- Introduce yourself and the topic.
- Keep recorded webinars short. Ideally 20 minutes or less.
- Use a conversational voice to increase interest.
- Use adequate numbers of slides so that you do not stay on one slide for more than 30 or 45 seconds.
- Address simple, focused topics with five or fewer key points.
- Use pictures and minimal text on slides.

**Don't**

- Use your computer's microphone to record; instead, invest in a good headset.
- Use a recorded webinar that has poor audio quality; instead, re-record if needed.
- Use too much text or small fonts.
- Assume that participants are just watching the webinar; you have to keep their interest or they will get distracted.
- Try to cover a complex topic using a recorded webinar; the webinar should be focused on one topic with a few main points.

## Why Consider Learning Technologies?

You have decided to provide in-person workshops and will use the agendas offered in this book to plan and conduct the training. Learning technologies can be essential tools in your tool kit. Most learning does not occur in the classroom. The workshop is important, but it must be supported by strong pre- and post-course reinforcement. To learn something, learners need many points of contact with the new skills and concepts, such as presentation, reflection, discussion, practice, feedback, and exploration. Moreover, most of your participants are very busy and unable to attend multiple in-person pre- or post-course sessions. So to ensure learning transfer, you can augment in-person activities with technology-based engagement. The good news is that you can use technology in many ways to enhance learning, even of soft skills.

## Opportunities to Use Learning Technologies

Whether you have many or few technology resources upon which to draw for learning, start by asking yourself this question: For this topic or series, how can I best use technology to increase

### A Note from the Author: Using Technology for Communication Skills Training

We communicate around the world every day through emails, social media, video conferencing, and countless other technology-based means. Using technology to deliver communications training seems a natural fit. If you work in a global environment regularly, you will need to develop "live" or synchronous facilitation skills to be able to meet the diverse needs of your participants and the organizations they serve.

Communications for teams in a virtual environment can present unique challenges. Learning Activities 22 and 23 provide learning experiences to help build effective virtual teams. The first activity uses social media to foster collaboration and expertise-sharing among team members. The second uses web conferencing to strengthen relationships among team members and build confidence using a web-conferencing tool.

But not all communication skills topics are well served in a virtual environment. The trick is to match the delivery media with the topic. For example, training on how to have a difficult conversation may be best done in a face-to-face environment. Difficult or sensitive topics are better absorbed with practice and role-playing scenarios.

learner engagement, understanding, and application? You will use these criteria to discover and evaluate potential ways technology might provide value in the learning process, including

- when designing the training
- before the training
- during the training
- after the training
- while building a learner community.

Note that this chapter offers ways to use technology to enhance traditional learning workshops (blended learning). We assume you will be consulting with a technology partner if you are considering a technology-driven training program—such as a workplace simulation or self-directed online learning. That said, the content found in this training series could be adapted for use in an online learning platform. For more information on how to use the online tools and downloads, see Chapter 14.

## Designing Training

The ATD Workshop Series offers fully designed training you can use with minimal preparation and solid facilitation skills. Even so, you will be creating a learning implementation plan that is an important part of the design process.

*To increase engagement:* You have to know your audience members to engage them, because engagement is a choice driven by interest, challenge, and relevance of the topic. Use learning technologies to ensure that you understand where your audience is coming from and the learning approaches they will most value. Email groups, online surveys, teleconferencing, and web meetings with polling can help you ascertain their wants and needs before you solidify your training plan.

*To deepen understanding:* When in the planning stage, make sure that you have not tried to cram too much presentation into the learning process and that you have planned sufficient time and attention to engaging participants. Flowcharting or mind-mapping software can help you visualize and communicate your learning plan and ensure that you allow for maximum engagement and practice.

*To increase application:* Increasing retention and application requires buy-in from sponsors and managers to ensure that what is learned is welcomed and applied on the job. Use email groups, online surveys, teleconferencing, and web meetings with polling to communicate with sponsors and managers about what they want out of the training and to identify ways to apply the learning back on the job. Having this information is also valuable in developing the training plan.

## Before Training

You want to prime your participants' minds for the topic you will be presenting during the workshop. Pre-work does not have to be something arduous and unwelcome. In fact, a great pre-work assignment can help maximize precious time in the classroom and allow you to focus on the topics that require thorough discussion.

*To increase engagement:* Tap into the most fascinating aspects of the workshop topic and introduce these through video clips, blog posts, and online resources (see Figure 7-2 about the legal use of video clips, images, and so forth). Avoid boring participants with long "how-to" articles or book chapters before the workshop. In fact, do the opposite and ensure that the pre-work is interesting, provocative (even controversial), and brief. You might select a blog post or video clip that offers a counterpoint to the training or something that inspires your participants to think about the topic before attending training.

*To deepen understanding:* If you know that the workshop topic will be challenging to some of your participants, prepare and share a brief recorded webinar, video clip, or article that

**Figure 7-2. Copyright Beware**

Copyright law is a sticky, complex area that is beyond the scope of this book to address in detail. For legal advice, consult your legal department.

However, it's very important to note a few things about copyright, fair use, and intellectual property:

- Just because you found an image, article, music, or video online doesn't mean that you can use it in training without permission. Make sure you obtain permission from the copyright owner before you use it (sometimes the copyright owner is not obvious and you will need to do some research).
- Fair use is pretty limited. Although most fair use allows an educational exception, that does *not* include corporate or organizational training. Other exceptions relate to how much material relative to the original was used, the nature of the original work (creative work generally has more protection), and the effect on the market for the original (Swindling and Partridge 2008). Once again, your best bet is to get written permission.
- Just because something doesn't have a copyright notice on it doesn't mean that it isn't copyright protected. All original material is protected under copyright law as soon as it is published or created.

Don't despair. Plenty of online sources of images, videos, text, and so forth exist that you can use for free or for a minimal fee. Just search on the terms "copyright free" or "open source." Another place to look is Wikimedia Commons, which has millions of freely usable media files. For more information about how copyright law affects your use of materials in this volume, please see Chapter 14 on how to use the online materials and downloads.

introduces the topic. For example, if your managers tend to tell versus coach, try sharing one or two external resources that discuss the value of service-oriented coaching conversations.

*To increase application:* You can improve the chances that your participants will apply what they learn by ensuring they identify real-world work challenges in which they can apply their new skills. Start with a one- or two-question pre-workshop survey (using Survey Monkey or similar) that requires they identify these opportunities and then use the responses to enhance your in-workshop discussions. If your organization has an internal social network or ways to create collaboration groups, use the pre-work questions to begin an online discussion of the topic. The conversations will help your participants think about the topic and will help you prepare for a great workshop (and will give you a beneficial "heads-up" on potential areas of conflict or disagreement).

## During Training

Learning technologies can help make your workshops more interesting and can help enhance understanding of the material. Beware, however, that you always want to have a "Plan B" in case of technology glitches or breakdowns. Another critical point to make here is that technology does not change how people learn. Learning and performance drive the technology choice, not the other way around.

*To increase engagement:* The perennial favorite technology for spicing up a workshop is the use of a great video. Boring videos don't help! If you can find short video clips that reinforce your most important points, please do so. In addition to adding contrast to the workshop flow, having other "experts" say what you want participants to hear is helpful. Another way to increase engagement is to use some kind of audience-response system or electronic polling. Although this might not be practical for small groups (the technology can be a bit pricey), some less expensive alternatives use texting schemas you might want to check out. Your participants will love seeing their collective responses instantly populate your PowerPoint charts. (For more on PowerPoint, see Figure 7-3 and Chapter 8.)

*To deepen understanding:* Videos can also help improve understanding. If your participants have access to computers during the workshop, consider short technology-based games and short simulations that reinforce the points. You can also ask participants to fill out worksheets and surveys online during the class. Share animated models, flowcharts, or mind maps to help explain key concepts or how they connect together.

*To increase application:* Learning simulations and practice sessions help prepare participants to apply new skills. You can do these in person, and you can use technology to facilitate practices. This depends a lot on the topic.

## After Training

Your participants are busy, and the new skills and concepts they learned in the workshop will become a distant memory without follow-up. Just as you did before the training, you can and should use learning technologies to augment the learning that occurs during the workshop.

*To increase engagement:* Learners engage when they perceive something as interesting, relevant right now, or challenging. Use tools such as video, blogs, social networks, chat, websites, and email to increase interest in the topic and to provide challenge.

*To deepen understanding:* Use post-workshop surveys and polling tools to assess understanding so you can address any gap. Add to the participants' understanding of the topic by posting materials on a SharePoint site or through blog posts that you push to their email inboxes using an RSS feed.

*To increase application:* Provide a just-in-time online resource where participants find quick reference sheets and get application tips using a group site, social network, or SharePoint site. Request or require that participants report how they have used new skills through an online project management collaboration site, wiki, or email group.

## Building a Learning Community

Creating an ongoing network of learners is extremely valuable, especially for soft skills. The in-person workshop is just the beginning of the learning journey and so keeping learners

**Figure 7-3. PowerPoint or Prezi or Other?**

Although PowerPoint is the most common presentation software, other platforms you might want to consider include Prezi, GoAnimate, Google Docs, mind-mapping programs, or others. Here are a few key considerations that will help you choose:

- Aside from the in-class workshop, where will you want to share the presentation?
- If you will be sharing the presentation with others, consider whether new software will be required.
- Which presentation platform is best for the content you are presenting, or does it matter?
- What are the costs and resources required for each platform?
- Which platform will partner well with technology tools you will use to reinforce the learning?
- What might be the advantage of using two or more platforms throughout the learning process?

engaged is helpful. In addition, you want to create a safe place where learners can discuss challenges, provide encouragement, and share their best practices. Learning technologies are particularly useful for building community among learners and teams.

*To increase engagement:* Busy people value community but often can't make the time to attend follow-up sessions or network with peers. They might, however, be able to take 10 minutes to check in on an internal social network, group site, or blog to learn from and share with others. If your organization does not have social networking or collaboration software, you might need to get creative. Talk to your technology department about the tools you do have—whether they are SharePoint, blog software, internal messaging, a wiki-type project management collaboration tool, or other. You can even use email groups to connect learners. Look for ways you can create pull (they choose when to engage) and push (they get updates), such as using RSS feeds.

*To deepen understanding:* After the workshop, use web meetings, teleconferencing, and messaging to connect learning partners or mentors and facilitate their sharing real-time application stories. Periodically facilitate online discussion groups to reinforce the learning and bring participants back together.

*To increase application:* Use a collaborative online project site or social network to set expectations about post-workshop peer discussions and reinforce engagement. Poll participants and assign sub-teams to lead a portion of each web meeting.

## The Bare Minimum

- **Know what resources you have available.** Many organizations have widely varying resources; don't assume that you know everything that is available.
- **Stretch yourself.** Be willing to try something new; develop your skills to use technology, in innovative ways to facilitate learning.
- **Know your participants.** They may be far ahead of you in their skills with technology or they may be far behind. If you plan to use learning technologies, do your best to assess their skill level before designing the workshop.
- **Be prepared for challenges.** It seems that no matter the skill level of the group, technology glitches are unavoidable. Be sure to cultivate good working relationships with technology support staff.

## Key Points

- Most learning does not happen in a classroom but through multiple points of reinforcement. Learning technologies are an efficient way to augment learning.
- You can use learning technologies your organization already has if you are creative and partner with your technology team.
- Use learning technologies throughout the learning process to increase engagement, understanding, and application.

## What to Do Next

- **Highlight the portions of this chapter that seem most relevant to your learning plan.** Meet with your technology team and get its input on the most applicable tools you might use.
- **Create a plan for how you will use learning technologies to reinforce your workshop.** Ensure that you select only those tools and activities that will enhance the overall learning objectives and be mindful of your organization's culture and comfort level with technology.
- **Test, test, test!** Practice using technology tools to ensure they will deliver what you hope.
- **Read the next chapter to learn ways you can improve your facilitation skills.** Many of these skills will also be useful when using learning technologies, especially collaboration tools.

## Additional Resources

Bozarth, J. (2014). "Effective Social Media for Learning." In E. Biech, ed., *ASTD Handbook: The Definitive Reference for Training & Development,* 2nd edition. Alexandria, VA: ASTD Press.

Chen, J. (2012). *50 Digital Team-Building Games: Fast, Fun Meeting Openers, Group Activities and Adventures Using Social Media, Smart Phones, GPS, Tablets, and More*. Hoboken, NJ: Wiley.

Halls, J. (2012). *Rapid Video Development for Trainers: How to Create Learning Videos Fast and Affordably.* Alexandria, VA: ASTD Press.

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# Chapter 8

# Delivering Your Communication Skills Workshop: Be a Great Facilitator

**What's in This Chapter**

- Defining the facilitator's role
- Creating an effective learning environment
- Preparing participant materials
- Using program preparation checklists
- Starting and ending on a strong note
- Managing participant behaviors

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Let's get one thing clear from the get-go: Facilitating a workshop—facilitating learning—is *not* lecturing. The title of ATD's best-selling book says it all: *Telling Ain't Training* (Stolovitch and Keeps 2011). A facilitator is the person who helps learners open themselves to new learning and makes the process easier. The role requires that you avoid projecting yourself as a subject matter expert (SME) and that you prepare activities that foster learning through "hands-on" experience and interaction.

Before you can help someone else learn, you must understand the roles you will embody when you deliver training: trainer, facilitator, and learner. When a workshop begins, you are the trainer, bringing to the learning event a plan, structure, experience, and objectives. This is only possible because you have a strong, repeatable logistics process. As you ask the learners to prioritize the learning objectives, you slowly release control, inviting them to become partners in their own learning. As you move from the trainer role into the facilitator role, the objectives are the contract between the learners and the facilitator. All great facilitators also have a third role in the classroom—the role of learner. If you are open, you can learn many new things when you are in class. If you believe you must be the expert as a learning facilitator, you will not be very effective.

To be most successful as a learning facilitator, consider this checklist:

- ☐ Identify the beliefs that limit your ability to learn and, therefore, to teach.
- ☐ Learning is a gift for you and from you to others.
- ☐ Choose carefully what you call yourself and what you call your outcomes.
- ☐ Clarify your purpose to better honor your roles at a learning event.
- ☐ If you can't teach with passion, don't do it.

This last point is especially important. Not everyone is destined to be a great facilitator and teacher, but you can still have enormous impact if you are passionate about the topic, the process, and about helping people improve their working lives. If you are serious about becoming a great facilitator, Chapter 12 provides a comprehensive assessment instrument to help you manage your personal development and increase the effectiveness of your communication skills training (see Assessment 4). You can use this instrument for self-assessment, end-of-course feedback, observer feedback, or as a professional growth tracker.

With these points firmly in mind—facilitating is not lecturing and passion can get you past many facilitator deficiencies—let's look at some other important aspects of facilitating, starting with how to create an engaging and effective learning environment.

## The Learning Environment

Colors, seating, tools, environmental considerations (such as temperature, ventilation, lighting), and your attitude, dress, preparation, and passion all enhance—or detract from—an effective and positive learning environment. This section describes some ways to maximize learning through environmental factors.

## A Note from the Author

You don't need to be a subject matter expert to facilitate a course on communication skills, but your audience does expect you to be a good communicator. Be sure to model effective written and oral communication with all pre-workshop communication messages. There are few things worse than typographical or grammatical errors in promotional messages or participant materials for a workshop espousing effective communication skills.

In addition, you should fully understand each activity so that you are comfortable facilitating it. Communication skills workshops are more engaging when facilitators share relevant (and sometimes personal) stories about a skill that they are teaching; storytelling in training helps solidify the learning.

**Color.** Research has shown that bland, neutral environments are so unlike the real world that learning achieved in these "sensory deprivation chambers" cannot be transferred to the job. Color can be a powerful way to engage the limbic part of the brain and create long-term retention. It can align the right and left brains. Ways to incorporate color include artwork, plants, and pictures that help people feel comfortable and visually stimulated. Consider printing your handouts and assessments in color. The training support materials provided in this book are designed in color but can be printed either color or in grayscale (to reduce reproduction costs).

**Room Setup.** Because much learning requires both individual reflection and role playing, consider seating that promotes personal thought and group sharing. One way to accomplish this is to set up groups of three to five at round or square tables, with each chair positioned so the projection screen can easily be seen. Leave plenty of room for each person so that when he or she does need to reflect, there is a feeling of privacy. Keep in mind that comfortable chairs and places to write help people relax to learn. Figure 8-1 details more room configurations that you can use to accomplish specific tasks or purposes in training.

**Tools of the Trade.** Lots of flipcharts (one per table is optimal) with brightly colored markers create an interactive environment. Flipcharts are about as basic and low tech as tools get, but they are also low cost and do the trick. Consider putting colorful hard candy on the tables (include sugar-free options), with bright cups of markers, pencils, and pens. Gather pads of colorful sticky notes and "fidgets" (quiet toys such as chenille stems, koosh balls, and others) to place on the table as well. For the right level of trust to exist, your learners must feel welcome.

**Figure 8-1. Seating Configurations**

Select a room setup that will best support the needs of your learners:

- **Rounds.** Circular tables are particularly useful for small-group work when you have 16 to 24 participants.
- **U-Shaped.** This setup features three long rectangular tables set up to form a U, with you at the open end. It is good for overall group interaction and small-group work (two to three people). This setup also helps you establish rapport with your learners.
- **Classroom.** This setup is a traditional grade school format characterized by rows of tables with all the participants facing forward toward the trainer. Avoid this setup as much as possible because you become the focal point rather the learners, and your ability to interact with learners is extremely limited. Problems of visibility also occur when rows in the back are blocked by rows in the front.
- **Chevron.** Chevron setup features rows of tables as in the classroom setup but the tables are angled to form a V-shape. This opens up the room to allow you to interact more with the learners and accommodates a larger group of learners without sacrificing visibility. However, it shares many of the drawbacks of the classroom setup.
- **Hybrid or Fishbone.** This setup combines a U-shaped configuration with that of a chevron. It is useful when there are too many learners to form a good U and there is room enough to broaden the U to allow tables to be set up as chevrons in the center of the U. This hybrid approach allows for interaction and enables the trainer to move around.

Source: Drawn from D.V. McCain and D.D. Tobey. (2004). *Facilitation Basics*. Alexandria, VA: ASTD Press.

**Your Secret Weapon.** Finally, the key to establishing the optimal learning environment is *you*. You set the tone by your attitude, the way you greet people, the clothes you wear, your passion, and your interest and care for the participants. You set the stage for learning with four conditions that only you as the facilitator can create to maximize learning:

1. **Confidentiality.** Establish the expectation that anything shared during the training program will remain confidential among participants and that as the facilitator you are committed to creating a safe environment. An important step in learning is first admitting ignorance, which has some inherent risk. Adult learners may resist admitting their learning needs because they fear the repercussions of showing their weaknesses. You can alleviate these concerns by assuring participants that the sole purpose of the training is to build their skills, and that no evaluations will take place. Your workshop must be a safe place to learn and take risks.
2. **Freedom from distractions.** Work and personal demands cannot be ignored during training, but to maximize each participant's learning, and as a courtesy to others, outside demands should be minimized.
    a. Select a training site away from the workplace to help reduce distractions.

   b. Acknowledge that participants probably feel they shouldn't be away from work; remind them that the purpose of the training is to improve their work lives.
   c. Ask that cell phones and pagers be turned off or set to silent alerts.
   d. Emphasize that because they are spending this time in training, trainees should immerse themselves in the learning experience and thereby maximize the value of their time away from work responsibilities.
3. **Personal responsibility for learning.** A facilitator can only create the *opportunity* for learning. Experiential learning requires that participants actively engage with and commit to learning—they cannot sit back and soak up information like sponges.
4. **Group participation.** Each participant brings relevant knowledge to the training program. Through discussion and sharing of information, a successful training session will tap into the knowledge of each participant. Encourage all participants to accept responsibility for helping others learn.

## Program Preparation Checklist

Preparation is power when it comes to facilitating a successful workshop, and a checklist is a powerful tool for effective preparation. This checklist of activities will help you prepare your workshop:

- ☐ Write down all location and workshop details when scheduling the workshop.
- ☐ Make travel reservations early (to save money, too), if applicable.
- ☐ Send a contract to the client to confirm details, or if you are an internal facilitator, develop guidelines and a workshop structure in conjunction with appropriate supervisors and managers.
- ☐ Specify room and equipment details in writing and then confirm by telephone.
- ☐ Define goals and expectations for the workshop.
- ☐ Get a list of participants, titles, roles, and responsibilities.
- ☐ Send participants a questionnaire that requires them to confirm their goals for the workshop.
- ☐ Send the client (or the participants, if you are an internal facilitator) an agenda for the workshop, with times for breaks and meals.
- ☐ Recommend that lunch or dinner be offered in-house, with nutritious food provided.
- ☐ Make a list of materials that you will need in the room (pads of paper, pens, pencils, markers, flipcharts, and so forth). Make sure to plan for some extras.

☐ Design the room layout (for example, U-shaped, teaching style, auditorium set-up, or half-circle).

☐ Confirm whether you or your internal/external client will prepare copies of the workshop handouts. The workshop handouts should include all tools, training instruments, assessments, and worksheets. You may choose also to include copies of the PowerPoint slides as part of the participant guide. All the supplemental materials you need to conduct the workshops in this book are available for download (see Chapter 14 for instructions).

☐ Find out if participants would like to receive pre-reading materials electronically before the session.

☐ Prepare assessments, tools, training instruments, and workshop materials at least one week before the workshop so that you have time to peruse and check them and assemble any equipment you may need (see the next two sections).

## Participant Materials

Participant materials support participant learning throughout the workshop and provide continuing references after the workshop has ended. There are several kinds of participant materials. Here are some options:

### Handouts

The development and "look" of your handouts are vital to help participants understand the information they convey. To compile the handouts properly, first gather all assessments, tools, training instruments, activities, and PowerPoint slides and arrange them in the order they appear in the workshop. Then bind them together in some fashion. There are several options for compiling your material, ranging from inexpensive to deluxe. The kind of binding is your choice—materials can be stapled, spiral bound, or gathered in a ring binder—but remember that a professional look supports success. Your choice of binding will depend on your budget for the project. Because first appearances count, provide a cover with eye-catching colors and appropriate graphics.

Using the agendas in Chapters 1–3, select the presentation slides, learning activities, handouts, tools, and assessments appropriate to your workshop (see Chapter 14: Online Tools and Downloads). If you choose to print out the presentation slides for your participants, consider printing no more than three slides per handout page to keep your content simple with sufficient white space for the participants to write their own notes. Use the learning objectives for each workshop to provide clarity for the participants at the outset. Remember to number the pages, to add graphics for interest (and humor), and to include tabs for easy reference if the packet of materials has multiple sections.

Some participants like to receive the handouts before the workshop begins. You may want to email participants to determine if they would like to receive the handouts electronically.

## Presentation Slides

This ATD Workshop Series book includes presentation slides to support the two-day, one-day, and half-day agendas. They have been crafted to adhere to presentation best practices. If you choose to reorder or otherwise modify the slides, keep in mind these important concepts.

When you use PowerPoint software as a teaching tool, be judicious in the number of slides that you prepare. In a scientific lecture, slides are usually a necessity for explaining formulas or results, but a communication workshop relies on interaction so keep the slide information simple. Also, do not include more than five or six bullet points per slide. See more tips for effective PowerPoint slides in Figure 8-2.

A message can be conveyed quickly through the use of simple graphics. For example, an illustration of two people in conversation may highlight interpersonal communication; a photo of a boardroom-style meeting may illustrate a group engaged in negotiation.

When you use presentation slides ask yourself: What will a slide add to my presentation? Ensure that the answer that comes back is "it will enhance the message." If slides are simply used to make the workshop look more sophisticated or technical, the process may not achieve the desired results.

It can be frustrating when a facilitator shows a slide for every page that the participants have in front of them. The dynamics of the class are likely to disconnect. If the information you are teaching is in the handouts or workbook, work from those media alone and keep the workshop personally interactive.

## Workbooks and Journals

A participant journal can be included in the binder with your handouts, or it may be a separate entity. Throughout the workshop participants can assess their progress and advance their development by entering details of their personal learning in the journal. The benefit of this journal to participants is that they can separate their personal discoveries and development from the main workshop handouts and use this journal as an action plan if desired.

**Figure 8-2. Tips for Effective PowerPoint Slides**

Presentation slides can enhance your presentation. They can also detract from it by being too cluttered, monotonous, or hard to read. Here are some tips for clear, effective slides:

**Fonts**

- Use sans-serif fonts such as Arial, Calibri, or Helvetica; other fonts are blurry when viewed from 20 feet or more and are more easily read on LCD screens and in video/web presentations.
- Use the same sans-serif font for most (if not all) of the presentation.
- Use a font size no smaller than 24 points. (This will also help keep the number of bullets per slide down.)
- Consider using a 32-point font—this is the easiest for web/video transmission.
- Limit yourself to one font size per slide.

**Colors**

- Font colors should be black or dark blue for light backgrounds and white or yellow on dark backgrounds. Think high contrast for clarity and visual impact.
- Avoid using red or green. It doesn't project well, doesn't transfer well when used in a webinar, and causes issues for people who suffer color blindness.

**Text and Paragraphs**

- Align text left or right, not centered.
- Avoid cluttering a slide—use a single headline and a few bullet points.
- Use no more than six words to a line; avoid long sentences.
- Use sentence case—ALL CAPS ARE DIFFICULT TO READ AND CAN FEEL LIKE YELLING.
- Avoid abbreviations and acronyms.
- Limit use of punctuation marks.

Source: Cat Russo (2014).

## Videos

If you show a video in your workshop, ensure that the skills it contains are up to date and that the video is less than 20 minutes long. Provide questions that will lead to a discussion of the information viewed. Short video clips can be effective learning tools.

## Toys, Noisemakers, and Other Props

Experienced facilitators understand the value of gadgets and games that advance the learning, provide a break from learning, or both.

Adults love to play. When their minds are open they learn quickly and effectively. Something as simple as tossing a rubber ball from person to person as questions are asked about elements studied can liven up the workshop and help people remember what they've learned.

Case studies and lively exercises accelerate learning. Bells and whistles are forms of communication; use them when you pit two teams against each other or to indicate the end of an activity.

## Facilitator Equipment and Materials

When all details for the workshop have been confirmed, it is time to prepare for the actual facilitation of the workshop at the site. You may know the site well because you are providing in-house facilitation. If, however, you are traveling off site to facilitate, important elements enter the planning. Here's a checklist of things to consider:

- ☐ Pack a data-storage device that contains your handouts and all relevant workshop materials. In the event that your printed materials do not reach the workshop location, you will have the electronic files to reprint on site.
- ☐ Pack the proper power cords, a spare battery for the laptop, and a bulb for the LCD or overhead projector in the event that these items are not available at the workshop location. This requires obtaining the make and model of all audiovisual and electronic equipment from the client or the training facility during your planning process.
- ☐ Bring an extension cord.
- ☐ Bring reference materials, books, article reprints, and ancillary content. Take advantage of all technology options, such as Kindles or other readers to store reference materials. As a facilitator, you will occasionally need to refer to materials other than your own for additional information. Having the materials with you not only provides correct information about authors and articles, but it also positively reinforces participants' impressions of your knowledge, training, openness to learning, and preparedness.
- ☐ Bring flipcharts, painter's tape and sticky notes.
- ☐ Pack toys and games for the workshop, a timer or bell, and extra marking pens.
- ☐ Bring duct tape. You may need it to tape extension cords to the floor as a safety precaution. The strength of duct tape also ensures that any flipchart pages hung on walls (with permission) will hold fast. Or, worst-case scenario, the duct tape can be used to contain unruly participants!

You can ship these items to the workshop in advance, but recognize that the shipment may not arrive in time, and that even if it does arrive on time, you may have to track it down at the venue. Also, take some time identifying backups or alternatives in case materials, technology, and so on do not conform to plan. What are the worst-case scenarios? How could you manage such a situation? Prepare to be flexible and creative.

## A Strong Start: Introduction, Icebreakers, and Openers

The start of a session is a crucial time in the workshop dynamic. How the participants respond to you, the facilitator, can set the mood for the remainder of the workshop. To get things off on the right foot, get to the training room early, at least 30 to 60 minutes before the workshop. This gives you time not only to set up the room if that has not already been done, but also to test the environment, the seating plan, the equipment, and your place in the room. Find out where the restrooms are. When participants begin to arrive (and some of them come very early), be ready to welcome them. Don't be distracted with problems or issues; be free and available to them.

While they are settling in, engage them with simple questions:

- How was your commute?
- Have you traveled far for this workshop?
- Was it easy to find this room?
- May I help you with anything?

When the participants have arrived and settled, introduce yourself. Write a humorous introduction, if that's your style, because this will help you be more approachable. Talk more about what you want to accomplish in the workshop than about your accomplishments. If you have a short biographical piece included in the handouts or in the workbook, it may serve as your personal introduction.

At the conclusion of your introduction, provide an activity in which participants can meet each other (often called an icebreaker). Because participants sometimes come into a training session feeling inexperienced, skeptical, reluctant, or scared, using icebreaker activities to open training enables participants to interact in a fun and nonthreatening way and to warm up the group before approaching more serious content. Don't limit the time on this too much unless you have an extremely tight schedule. The more time participants spend getting to know each other at the beginning of the workshop, the more all of you will benefit as the session proceeds.

## Feedback

Feedback is the quickest, surest way for you, the facilitator, to learn if the messages and instruction are reaching the participants and if the participants are absorbing the content. It is also important for you to evaluate the participants' rate of progress and learning. Answers to the questions you ask throughout the workshop will help you identify much of the progress, but these answers come from only a few of the participants at a time. They're not a global snapshot of the entire group's comprehension and skills mastery.

When you lead a workshop, the participants walk a fine line between retention and deflection of knowledge. Continuing evaluations ensure that learning is taking root. Three levels of questions—learning comprehension, skills mastery, and skills application—help you determine where the training may not be achieving the intended results.

- Learning comprehension checks that the participants understand and grasp the skills being taught (see Figure 8-3).
- Skills mastery means that the participants are able to demonstrate their newly acquired knowledge by some activity, such as teaching a portion of a module to their fellow participants or delivering their interpretation of topic specifics to the class (see Figure 8-4). See also Assessment 10: Skills Mastery Assessment for an instrument to help your participants address this issue.
- Skills application is the real test. You may choose to substantiate this through role plays or group case studies. When the participants have the opportunity to verbally communicate the skills learned and to reach desired results through such application, then skills application is established (see Figure 8-5). See also Assessment 9: Skills Application Reflection for an instrument to help your participants identify ways to apply the skills they've learned back in the workplace.

The questions in Figures 8-3 to 8-5 are designed for written answers so you can incorporate them into the takeaway workbook you create. (See Assessments 9 and 10.) The questions concerning skills mastery and skills application could be set as homework if the workshop is longer than one day. Keep in mind that you will also reevaluate after each day of a multiday session.

**Figure 8-3. Learning Comprehension Questions**

Here are some questions that can be asked to determine each participant's level of *learning comprehension*:

- Give a brief overview of your learning in this workshop. (Begin your phrases with "I have learned. . . ." This will assist you in focusing your responses.)
- How/where will you apply this knowledge in your workplace?
- Did you acquire this knowledge through lectures/practice/discussion or a combination of all methods?
- Do you feel sufficiently confident to pass on this knowledge to your colleagues?
- Are there any areas that will require additional learning for you to feel sufficiently confident?

**Figure 8-4. Skills Mastery Questions**

Now let's look at some questions you can use to evaluate your trainees' *skills mastery*:

- If you were asked to teach one skill in this workshop, which skill would it be?
- What would your three key message points be for that skill?
- Describe the steps you would take to instruct each message point (for example, lecture, group discussion, PowerPoint presentation, and so forth).
- What methods would you use to ensure that your participants comprehend your instruction?
- Would feedback from your participants, both positive and negative, affect the development of your skills mastery? If yes, illustrate your response and the changes you would make.

**Figure 8-5. Skills Application Questions**

And finally, let's consider some questions that identify participants' *ability to apply the skills* they've learned in the workshop:

- Please describe a situation at your workplace where you could employ one specific communication skill from this workshop.
- How would you introduce this skill to your colleagues?
- How would you set goals to measure the improvement in this skill?
- Describe the input and participation you would expect from your colleagues.
- How would you exemplify mastery of the skill?

Let's now look at other forms of in-class learning assessments: role plays, participant presentations, ball toss, and journaling.

## Role Plays

Role plays are an effective tool for assessing learning comprehension. If two or more participants conduct a role play that reveals their understanding of the information, with an outcome that reflects that understanding, then it becomes a "live feed," instantaneous learning for all.

You must set up the role play carefully. It is often wise for you to be a part of the first role-play experience to show participants how it's done and to make them more comfortable with the activity. Ensure that you explain all the steps of the role play and the desired outcome. It is insightful to role-play a negative version first, followed by participant discussion; then role-play a positive aspect the second time. For example, if confrontational communication is the topic and the situation under discussion involves a line manager and his or her supervisor, first enact the role play using the verbal and body language that is causing the negative result. Discuss this as a class to identify the specific language that needs improvement. Then enact the role play again, this time using positive language.

Frequently it is helpful for a participant who has been on the receiving end of negative communication in his or her workplace to adopt the role of deliverer. Walking in the other person's shoes leads to a quicker understanding of the transaction. This positive role play should also be followed by whole-group discussion of the elements that worked. Participants can be invited to write about the process and its results to give them a real-life example to take back to the workplace.

### Participant Presentations

You might ask a participant to present a module of learning to the workshop. This allows the facilitator to observe the participants from a different perspective—both as listeners and as presenters. Be ready to assist or to answer questions. For example, a participant may choose assertive communication as his or her module, and the specific issue on return to the workplace may be a request for promotion. The participant defines and delivers the steps required to ask for the promotion while the facilitator and other participants observe and evaluate the success of the approach and demonstration of confidence and assertiveness.

### Ball Toss

A quick method for evaluating a class's knowledge of the material presented is to ask the participants to form a standing circle. The facilitator throws out a soft rubber ball to an individual and asks a question about the previous learning activity. When the catcher gives the right answer, he or she throws the ball to another participant who answers another question. The facilitator can step out of this circle and let the participants ask as well as answer questions to review the skills as a group. Candy for all as a reward for contributions is always enjoyed by the participants (consider keeping some sugar-free treats on hand as well).

### Journaling

Keeping a journal is a quiet, introspective way for participants to get a grip on their learning. When you complete an activity, have everyone take five minutes to write a summary of the skill just learned and then ask them to share what they've written with a partner. Invite the partner to correct and improve the material if necessary or appropriate.

## Questioning Skills

When participants are asking questions, they are engaged and interested. Your responses to questions will augment the learning atmosphere. The way in which you respond is extremely important. Answers that are evasive can disturb a class because they cast doubts on your credibility. Glib or curt answers are insulting. Lengthy responses break the rhythm of the class and often go off track. When dealing with questions, the value of effective communication is in hearing the question, answering the question asked, and moving on. Repeat questions so that all participants hear them. In addition, this can ensure that you have heard the question correctly.

However, don't rush to answer. Take time to let everyone absorb the information. When time is of the essence, don't be tempted to give long, complicated answers that embrace additional topics. Be courteous and clear. Check that your answer has been understood. When a question comes up that could possibly derail the session or that is beyond the scope of the topic, you can choose to record it on a "parking lot" list and then revisit it later at an assigned time. A parking lot can be as simple as a list on a flipchart. However, whenever possible, answer a question at the time it is asked. Consider answering with analogies when they are appropriate because these often help elucidate challenging concepts.

Effective questions that prompt answers are open ended:

- What have you learned so far?
- How do you feel about this concept?
- How would you handle this situation?

Any question that begins with "what" or "how" promotes a more extensive answer. Questions that begin with "why"—as in "why do you think that way?"—can promote defensiveness.

When a participant asks a confrontational or negative question, handle it with dignity and do not become aggressive. It's helpful to ask open-ended questions of the participant to try to clarify the original question. For example, ask, "What do you mean by . . . ?" or "Which part of the activity do you find challenging?" This form of open-ended questioning requires additional accountability from the participant. The reason for the confrontation may have arisen from confusion about the information or the need to hear his or her own thoughts aloud. When you are calm and patient, the altercation is more likely to be resolved. If the participant persists, you may wish to ask him or her to discuss the specifics in a private setting. More ideas for dealing with difficult participants are provided later in this chapter.

Some participants enjoy being questioned because it gives them an opportunity to show their knowledge. Others are reticent for fear of looking foolish if they don't know the answer. Because your trainees have unique styles and personalities, always have a purpose for asking questions:

Will these questions test the participants' knowledge? Are these questions appropriate? Are you asking them in the style that suits the participant?

## Training Room and Participant Management

When everything is in place and ready for the session, it's time to review the "soft skills" portion of your responsibilities—that is, how you conduct the workshop and interact with participants. Here are some things to consider:

- **"Respect and respond" should be a facilitator's mantra.** At all times respect the participants and respond in a timely manner.
- **Learn participants' names at the beginning of the workshop.** Focus on each participant, give a firm handshake, repeat the name in your greeting, and then mentally write the name on the person's forehead. When you have time, survey the room and write down every name without looking at nametags or name tents on the tables.
- **Manage workshop program time.** This is vital because it ensures that the goals will be met in the time allotted.
- **Read the participants' body language.** This will help you know when to pause and ask questions or to give them a stretch break.
- **Answer questions fully and effectively.** If you don't know an answer, open the question up to the participants or offer to get back to the questioner. Make a note to remind yourself to do so.
- **Add a "parking lot" to the room**—a large sheet of paper taped to one of the walls (use your own artistic prowess to draw a vehicle of some sort). When questions arise that are out of step with the current communication activity, ask the participant to write the question on a sticky note and put it in the parking lot. When the current activity is completed, you can address the questions parked there.
- **Control unruly participants through assertiveness of vocal tone and message.** When appropriate, invite them to help you with tasks because frequently they just need to be more physically involved. If the unruliness gets out of hand, accompany the person out of the room to discuss the situation.
- **Be sure to monitor a participant who is slower to assimilate the information.** If time permits, give that trainee some one-on-one time with you.
- **Keep your energy high.** Inject humor wherever possible. Ensure the learning is taking root.

## A Word About Dealing with Difficult Participants

Much of the preparation you do before a training session will help you minimize disruptive behavior in your training session. But, sadly, you are still likely at some point to have difficult participants in your training room. Beyond preparation, you may need some specific strategies to help you manage disruptions and keep the learning on track. Figure 8-6, drawn from McCain and Tobey's *Facilitation Basics* (2004), identifies many of these behaviors and gives strategies for nipping them in the bud.

**Figure 8-6. Managing Difficult Participants**

| THE PROBLEM | THE SOLUTION |
|---|---|
| Carrying on a Side Conversation | • Don't assume the talkers are being disrespectful; depersonalize the behavior by thinking: "Maybe they are unclear about a point in the material, or the material is not relevant to their needs."<br>• Ask the talkers if they don't understand something.<br>• Walk toward the talkers as you continue to make your point; this stops many conversations dead in their tracks. |
| Monopolizing the Discussion | • Some participants tend to take over the conversation; while the enthusiasm is great, you don't want to leave other learners out.<br>• Tell the monopolizer that her comments are valuable and interesting, but you would like to open up the discussion to others in the group. Then call on another person by name.<br>• Enlist the monopolizer to help you by being a gatekeeper and ensuring that no one monopolizes the conversation. |
| Complaining | • Don't assume someone who complains doesn't have a valid reason to do so.<br>• Ask the rest of the group if they feel the same way. If they do, try to address the issue as appropriate.<br>• If they don't, talk to the individual in the hallway during the break. |
| Challenging Your Knowledge | • Determine if this person really knows more than you do, or is just trying to act as though he does.<br>• If he does know more, try to enlist his help in the training.<br>• If he doesn't, ask him to provide expertise and he will usually realize he can't and back down. |
| Daydreaming | • Use the person's name in an example to get her attention.<br>• Switch to something more active.<br>• If behavior affects more than just one person, try to find out if something work-related is causing it and have a brief discussion about it. |

| THE PROBLEM | THE SOLUTION |
|---|---|
| Heckling | • Don't get upset or start volleying remarks.<br>• Try giving the person learning-oriented attention: "John, you clearly have some background in this area; would you care to share your thoughts with the rest of the group?"<br>• Get the attention off you by switching to a group-oriented activity. |
| Clowning Around | • Give the person attention in a learning-oriented way by calling on her to answer a question or be a team leader.<br>• If a joke is intended to relieve tension in the room and others seem to be experiencing it, deal with the tension head on by bringing it up.<br>• If it is just a joke, and it's funny and appropriate, laugh! |
| Making an Insensitive Remark | • Remember that if the person truly didn't intend offense, you don't want to humiliate him. But you do need to ensure that the person and everyone else in the room know that you will not tolerate bigoted or otherwise inappropriate remarks.<br>• Give the person a chance to retract what he said by asking if that is what he meant to say. If it wasn't, then move on.<br>• If it was, you need to let the person know that the comment is not in line with the values of your organization and it can't be allowed to continue.<br>• If the person persists, speak to him in the hallway, or as a last resort, ask him to leave. |
| Doing Other Work | • Talk to the person at a break to find out if the workshop is meeting her needs.<br>• If the person is truly under too much pressure, offer to have her come to another session. |
| Not Talking | • If you can tell the person is engaged because he is taking notes, maintaining eye contact, or leaning forward, let him alone.<br>• Give the person opportunities to interact at a greater comfort level by participating in small groups or in pairs. |
| Withdrawing | • Talk to the person at break to find out if something is going on. Deal with the issue as appropriate.<br>• If the person feels excluded, have her act as a team leader for a turn, or ensure that all members of teams are given opportunities to participate. |
| Missing the Point | • If someone misses the point, be sensitive in dealing with him or her. Try to find something to agree with in his point.<br>• Try to identify what the person is having trouble grasping and clear up the point with an analogy or an example.<br>• Never laugh at the person or otherwise humiliate him. |

*Continued on next page*

**Figure 8-6. Managing Difficult Participants, *continued***

| THE PROBLEM | THE SOLUTION |
|---|---|
| Playing with Technology | • Minimize distractions by setting specific ground rules for technology use in the training room. (See Chapter 7 for creative ways to use technology to enhance training.)<br>• Direct a training-related question to the person.<br>• If the behavior persists, talk to the person at break to determine if there is an issue with which you can help. |

Source: McCain and Tobey (2004).

When all else fails, you have a few last resorts, although you would clearly rather not get to that point. One option is to simply pull aside the individual who is disrupting the class and talk to her privately. Dick Grote suggests in "Dealing with Miscreants, Snivelers, and Adversaries" that you can often catch someone off guard by asking: "Is it personal?" The direct question will usually cause the individual to deny that it is personal. Next, you tell the person that the behavior is unacceptable and that you will speak to a supervisor or training sponsor if it continues. This often works.

However, if it does not work, you can ask to have the person removed or cancel the program and speak to the person's supervisor. Clearly, these are not options to be taken lightly, but realize that they are available when you are faced with truly recalcitrant behavior.

Follow up when you have faced a difficult situation. Take some time to reflect on the event and write down the details of what happened. If possible, get perspectives and feedback from participants who witnessed it. If outside perspectives are not an option, think about the event from the points of view of the disruptive individual and other participants and ask yourself: What went wrong? What went well? How could I manage the situation better next time?

## An Unforgettable End

In Biech (2008), contributor Mel Silberman explains that

> [m]any training programs run out of steam in the end. In some cases, participants are marking time until the close is near. In other cases, facilitators are valiantly trying to cover what they haven't got to before time runs out. How unfortunate! What happens at the end needs to be "unforgettable." You want participants to remember what they've learned. You also want participants to think what they've learned has been special. (p. 315)

Silberman suggests considering four areas when preparing to end your workshop:

- How will participants review what you've taught them?
- How will participants assess what they have learned?
- What will participants do about what they have learned?
- How will participants celebrate their accomplishments?

For example, consider what you've learned in this chapter. You've developed a well-rounded picture of what it takes to create an optimal, effective learning environment, from creating an inviting and engaging space to preparing and gathering materials that will make you feel like an organizational champ. You're ready to get the training off to a productive start, to manage difficult participants and situations, and to pull it all together in a powerful way. Now jump down to the end of the chapter to determine what the next steps are and take pride in the preparation that will enable you to adapt and thrive in the training room.

## The Bare Minimum

- **Keep things moving.** Create an engaging, interactive environment.
- **Pay attention to the energy in the room.** Be prepared to adjust the activities as needed. Build in content that can be delivered standing or through networking activities to get participants out of their seats when needed.
- **Have fun!** If you create an upbeat tone and enjoy yourself, the participants are likely to have fun as well.

## Key Points

- Facilitation is not lecturing. It's providing learning activities and support to make learning easier for the participant.
- Facilitation is not about the facilitator—it's about the learner.
- An inviting space and a safe, collaborative environment are necessary for learning to occur.
- Good facilitation starts with passion and significant attention to preparation.
- A good start sets the tone for the whole training session.
- A strong ending helps learners to remember the training and carry lessons forward into their work.

## What to Do Next

- Prepare, modify, and review the training agenda. Use one of the agendas in Section I as a starting point.
- Review the program preparation checklist and work through it step by step.
- Make a list of required participant materials and facilitator equipment and begin assembling them.
- Review all learning activities included in the agenda and start practicing your delivery.

## Additional Resources

Biech, E. (2006). *90 World-Class Activities by 90 World-Class Trainers.* San Francisco: John Wiley/Pfeiffer.

Biech, E. (2008). *10 Steps to Successful Training.* Alexandria, VA: ASTD Press.

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Duarte, N. (2010). *Resonate: Present Visual Stories That Transform Audiences.* Hoboken, NJ: Wiley.

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Thiagarajan, S. (2005). *Thiagi's Interactive Lectures: Power Up Your Training With Interactive Games and Exercises.* Alexandria, VA: ASTD Press.

Thiagarajan, S. (2006). *Thiagi's 100 Favorite Games.* San Francisco: John Wiley/Pfeiffer.

# Chapter 9

# Evaluating Workshop Results

**What's in This Chapter**

- Exploring the reasons to evaluate your program
- Introducing the levels of measurement and what they measure

---

Evaluation represents the last letter of the ADDIE cycle of instructional design (analysis, design, development, implementation, and evaluation). Although evaluation is placed at the end of the model, an argument could be made for including it far earlier, as early as the design and development phase and perhaps even in the analysis phase. Why? Because the goals of the training, or the learning objectives (see Chapter 5), provide insight into what the purpose of the evaluation should be. In fact, business goals, learning goals, and evaluation of those goals are useful subjects to address with organizational leaders or the training sponsor. Trainers often begin a program without thinking about how the program fits into a strategic plan or how it supports and promotes specific business goals, but these are critical to consider before implementing the program.

However, this chapter is not about that upfront evaluation of the program design and materials; it is about evaluating the program after it has been delivered and reporting the results back to the training sponsor. This form of evaluation allows you to determine whether the program objectives were achieved and whether the learning was applied on the job and had an impact on the business. Evaluation can also serve as the basis for future program and budget discussions with training sponsors.

## A Note from the Author

Measuring the impact of any soft skills training can be challenging, even more so with communication skills training because so many factors can affect communication. Start early in the design process to include organizational goals as well as individual learning goals. Clarifying expectations of which specific communication skills are needed in an organization will not only improve your program design but will also help you decide what to measure and at what level to measure it.

## Levels of Measurement

No discussion of measurement would be complete without an introduction to the concepts that underpin the field of evaluation. The following is a brief primer on a very large and detailed subject that can be somewhat overwhelming. If your organization is committed to measuring beyond Level 2, take some time to read the classics of evaluation.

In 1956/57, Donald Kirkpatrick, one of the leading experts in measuring training results, identified four levels of measurement and evaluation. These four levels build successively from the simplest (Level 1) to the most complex (Level 4) levels of evaluation and are based on information gathered at previous levels. For that reason, determining upfront at what level to evaluate a program is important. A general rule of thumb is that the more important or fundamental the training is and the greater the investment in it, the higher the level of evaluation to use. The four basic levels of evaluation are

- **Level 1—Reaction:** Measures how participants react to the workshop.
- **Level 2—Learning:** Measures whether participants have learned and understood the content of the workshop.
- **Level 3—Behavior (also referred to as application):** Measures on-the-job changes that have occurred because of the learning.
- **Level 4—Results:** Measures the impact of training on the bottom line.

These four levels correspond with the evaluation methods described below.

### Level 1. Measuring Participant Reactions

One of the most common ways trainers use to measure participants' reactions is by administering end-of-session evaluation forms, often called "smile sheets" (for a sample, see Assessment 3:

Course Evaluation). The main benefit of using smile sheets is that they are easy to create and administer. If you choose this method, consider the suggestions below, but first decide the purpose of evaluating. Do you want to know if the participants enjoyed the presentation? How they felt about the facilities? Or how they reacted to the content?

Here are a few suggestions for creating evaluation forms:

- Keep the form to one page.
- Make your questions brief.
- Leave adequate space for comments.
- Group types of questions into categories (for example, cluster questions about content, questions about the instructor, and questions about materials).
- Provide variety in types of questions (include multiple-choice, true-false, short-answer, and open-ended items).
- Include relevant decision makers in your questionnaire design.
- Plan how you will use and analyze the data and create a design that will facilitate your analysis.
- Use positively worded items (such as, “I listen to others,” instead of “I don’t listen to others”).

You can find additional tips for creating smile sheets and evaluating their results in “Making Smile Sheets Count” by Nancy S. Kristiansen (2004).

Although smile sheets are used frequently, they have some inherent limitations. For example, participants cannot judge the *effectiveness* of training techniques. In addition, results can be overly influenced by the personality of the facilitator or participants’ feelings about having to attend training. Be cautious of relying solely on Level 1 evaluations.

## Level 2. Measuring the Extent to Which Participants Have Learned

If you want to determine the extent to which participants have understood the content of your workshop, testing is an option. Comparing pre-training and post-training test results indicates the amount of knowledge gained. Or you can give a quiz that tests conceptual information 30 to 60 days after the training to see if people remember the concepts. Because most adult learners do not generally like the idea of tests, you might want to refer to these evaluations as “assessments.”

Another model of testing is criterion-referenced testing (CRT), which tests the learner's performance against a given standard, such as "greets the customer and offers assistance within one minute of entering the store" or "initiates the landing gear at the proper time and altitude." Such testing can be important in determining whether a learner can carry out the task, determining the efficacy of the training materials, and providing a foundation for further levels of evaluation. Coscarelli and Shrock (2008) describe a five-step method for developing CRTs that include

1. Determining what to test (analysis)
2. Determining if the test measures what it purports to measure (validity)
3. Writing test items
4. Establishing a cut-off or mastery score
5. Showing that the test provides consistent results (reliability).

## Level 3. Measuring the Results of Training Back on the Job

The next level of evaluation identifies whether the learning was actually used back on the job. It is important to recognize that application on the job is where learning actually begins to have real-world effects and that application is not solely up to the learner. Many elements affect transfer and application, including follow-up, manager support, and so forth. For example, consider a sales training attendee who attends training and learns a new, more efficient way to identify sales leads. However, upon returning to work, the attendee's manager does not allow the time for the attendee to practice applying those new skills in the workplace. Over time, the training is forgotten, and any value it may have had does not accrue.

Methods for collecting data regarding performance back on the job include reports by people who manage participants, reports from staff and peers, observations, quality monitors, and other quality and efficiency measures. In "The Four Levels of Evaluation," Don Kirkpatrick (2007) provides some guidelines for carrying out Level 3 evaluations:

- Use a control group, if practical.
- Allow time for behavior change to take place.
- Evaluate before and after the program, if possible.
- Interview learners, their immediate managers, and possibly their subordinates and anyone else who observes their work or behavior.
- Repeat the evaluation at appropriate times.

## Level 4. Measuring the Organizational Impact of Training

Level 4 identifies how learning affects business measures. Consider an example related to management training. Let's say a manager attends management training and learns several new and valuable techniques to engage employees and help keep them on track. Upon return, the manager gets support in applying the new skills and behaviors. As time passes, the learning starts to have measurable results: Retention has increased, employees are demonstrably more engaged and are producing better-quality goods, and sales increase because the quality has increased. Retention, engagement, quality, and sales are all measurable business results improved as a result of the training.

Measuring such organizational impact requires working with leaders to create and implement a plan to collect the data you need. Possible methods include customer surveys, measurements of sales, studies of customer retention or turnover, employee satisfaction surveys, and other measurements of issues pertinent to the organization.

Robert Brinkerhoff, well-known author and researcher of evaluation methods, has suggested the following method to obtain information relevant to results:

- Send out questionnaires to people who have gone through training, asking: To what extent have you used your training in a way that has made a significant business impact? (This question can elicit information that will point to business benefits and ways to use other data to measure accomplishments.)
- When you get responses back, conduct interviews to get more information.

## Return on Investment

Measuring return on investment (ROI)—sometimes referred to as Level 5 evaluation—is useful and can help "sell" training to leaders. ROI measures the monetary value of business benefits such as those noted in the discussion about Level 4 and compares them with the fully loaded costs of training to provide a percentage return on training investment. Hard numbers such as these can be helpful in discussions with organizational executives about conducting further training and raise the profile of training.

ROI was popularized by Jack Phillips. More in-depth information can be found in the *ASTD Handbook of Measuring and Evaluating Training* (Phillips 2010).

## Reporting Results

An important and often under-considered component of both ROI and Level 4 evaluations is reporting results. Results from these types of evaluation studies have several different audiences, and it is important to take time to plan the layout of the evaluation report and the method of delivery with the audience in question. Consider the following tasks in preparing communications:

- **Purpose:** The purposes for communicating program results depend on the specific program, the setting, and unique organizational needs.
- **Audience:** For each target audience, understand the audience and find out what information is needed and why. Take into account audience bias, and then tailor the communication to each group.
- **Timing:** Lay the groundwork for communication before program implementation. Avoid delivering a message, particularly a negative message, to an audience unprepared to hear the story and unaware of the methods that generated the results.
- **Reporting format:** The type of formal evaluation report depends on how much detailed information is presented to target audiences. Brief summaries may be sufficient for some communication efforts. In other cases, particularly those programs that require significant funding, more detail may be important.

## The Bare Minimum

- If formal measurement techniques are not possible, consider using the simple, interactive, informal measurement activities found in Learning Activity 26: Informal Evaluations.
- Empower the participants to create an action plan to capture the new skills and ideas they plan to use. Ultimately, the success of any training event will rest on lasting positive change in participants' behavior.

## Key Points

- The four basic levels of evaluation cover reaction, learning, application, and organizational impact.
- A fifth level covers return on investment.
- Reporting results is as important as measuring them. Be strategic in crafting your results document, taking into consideration purpose, audience, timing, and format.

## What to Do Next

- Identify the purpose and level of evaluation based on the learning objectives and learning goals.
- Prepare a training evaluation form, or use the one provided in Chapter 12.
- If required, develop plans for follow-up evaluations to determine skills mastery, on-the-job application, and business impact.

## Additional Resources

Biech, E., ed. (2014). *ASTD Handbook: The Definitive Reference for Training & Development,* 2nd edition. Alexandria, VA: ASTD Press.

Brinkerhoff, R.O. (2006). *Telling Training's Story: Evaluation Made Simple, Credible, and Effective.* San Francisco: Berrett-Koehler.

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Kirkpatrick, D., and J.D. Kirkpatrick. (2006). *Evaluating Training Programs: The Four Levels,* 3rd edition. San Francisco: Berrett-Koehler.

Kirkpatrick, D., and J.D. Kirkpatrick. (2007). *Implementing the Four Levels: A Practical Guide for Effective Evaluation of Training Programs.* San Francisco: Berrett-Koehler.

Kristiansen, N.S. (2004). "Making Smile Sheets Count." *Infoline* No. 0402, Alexandria, VA: ASTD Press.

Phillips, P.P., ed. (2010). *ASTD Handbook of Measuring and Evaluating Training.* Alexandria, VA: ASTD Press.

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# SECTION III

## POST-WORKSHOP LEARNING

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## Chapter 10

# The Follow-Up Coach

**What's in This Chapter**

- Increasing training results through follow-up coaching
- What to do after the workshop
- Eight ideas for follow-up coaching
- Creating an open culture for communication

---

Learning to be an effective communicator is a lifelong endeavor. Attending workshops can certainly help employees communicate better; however, as with many skills, it is only with continued practice and follow-up coaching that behavior and results are refined and improved. It takes time for people to process new information, break old patterns of behavior, and start applying new skills.

## Increasing Training Results Through Follow-Up: What to Do After the Workshop

The benefits of training are lost if behavioral change doesn't occur. To achieve real behavioral change, it is important that the ideas delivered in the learning environment continue to be supported, an idea that is borne out in research on training. One study that looked at the benefits of training with and without follow-up coaching found that training alone improved performance by 22 percent, but training with follow-up coaching improved performance by 88 percent—a dramatic increase in return on investment (Olivero, Bane, and Kopelmann 1997). It is also clear that learning is not a once-and-done event. To support continued learning, managers need to support behavioral change and keep the discussion alive by incorporating key communication competencies into discussions in meetings, performance expectations, individual coaching conversations, and messaging in employee communications.

One way to look at the relationship between training and follow-up coaching is to think back to when you learned to ride a bike. First you received the initial instruction on how to ride the bike. As you practiced your new skills, you likely received additional encouragement and support to help you become an even stronger rider. That same formula works for becoming a skilled communicator. Learning to communicate effectively takes good instruction or training, repeated practice, as well as follow-up coaching and guidance. See the sidebar for eight ideas to help keep the learning alive.

## Follow-Up Action Planning

Each workshop agenda in this book, whether half-day, one-day, or two-day, provides an action plan at the conclusion of the workshop to help solidify the learning. These action plans help participants set goals and identify specific actions they can take to apply the learning back on their jobs. One effective technique to ensure that an action plan is taken seriously is to encourage the supervisor of the learner to get involved in meaningful ways. Here are a couple of options to consider:

- Ask a high-level manager to kick off each workshop session, stressing the importance of the action plan.
- Invite different leadership team members throughout the workshop to share their stories about some key competencies and why they are critical to success of the organization.
- Ask learners to set up a meeting with their supervisors to go over their actions plans as homework after the workshop is completed.

For any of these options to work, however, supervisors must have attended the training already so they are well aware of the competencies, have examined their own strengths and gaps, and empathize with the learner. Supervisors must also be willing to take criticism from the learners as they begin to demand more effective communication from others as their own skills continue to grow.

## Follow-Up Coaching Sessions

Offering coaching, either in person or virtually, can help learners further develop their communication skills. A coach's role is to be a mirror—to listen and to ask questions—which helps those being coached see more clearly their own beliefs, obstacles, and desires. A coach should

### Eight Ideas for Follow-Up Coaching

1. Define the behavioral objectives desired for change and develop a weekly or biweekly coaching plan so that there is a structured list of topics to discuss consistently.
2. Identify peer-to-peer subgroups to support ongoing communication about the competencies and objectives for behavioral change.
3. Encourage managers and other organizational leaders to incorporate discussions about progress and challenges of the change process in departmental or team meetings.
4. Create specific communication competencies to include in performance expectations.
5. Conduct individual coaching conversations. Supervisors, internal coaches, or external coaches can facilitate these conversations depending on budget considerations.
6. Craft a series of email messages (daily, weekly, or monthly) to deliver to session participants that support the identified competencies and objectives.
7. Revisit the action plans that participants completed during the workshop. These will provide ample discussion centered on behavioral objectives and will promote accountability among participants.
8. Develop an online learning community where participants can hold asynchronous objective-focused discussions, ask questions, and support each other as they work to improve their skills.

be completely neutral (supervisors may or may not be the right people to play this role because they are also responsible for reviewing the learner). Outside coaches tend to work best because they may be easier to open up to. The most critical aspect is that the coach be a listener and an asker, not a teller.

## Follow-Up Workshops

After your communication skills training sessions are completed, you may find it useful to bring people back together again at three- or six-month intervals. Becoming a stronger, more effective communicator is a very personal journey, and people like to reconnect with and support others who have been through the same thing. Follow-up sessions could be done in person or virtually through teleconferencing, webinars, or other online community tools.

Schedule the first follow-up within three months of the initial workshop for maximum reinforcement of learning. For each follow-up session, create an agenda that encourages participants to discuss challenges they are encountering and share resources they have found to be helpful. Ask learners to bring a sample of their work to discuss (this could be something they are particularly proud of or something that they would like input and help with).

You may have a situation in which the company is willing to invest in significant follow-up. When this is the case, follow up with a half- or full-day workshop. Or try some of the customizing options from Chapter 4. A series of one-hour theme-based sessions or lunch-and-learns can be highly effective in tuning up skills and learning new ones.

In addition, encourage supervisors and leaders to attend the follow-up sessions. Recruit them as guest experts or invite them for a lunch or coffee break.

## Creating an Open Culture for Effective Communication

Culture change can be a slow and difficult process, and communication style is one of the deepest and most impactful aspects of an organizational culture. The best way to support behavioral change is for employees to see and hear actions and messages from executive leadership and managers that support the ideas communicated during the training program. Workplace leaders must truly model the desired behavior to build trust, or they risk the training program they are paying for quickly losing credibility.

## Key Points

- Remember that improving communication skills is a journey—not an event.
- Be creative and consistent. Your commitment to your participants' learning will inspire their own.
- Follow-up, with multiple offerings, helps learners implement their action plans and make real progress toward improving behavior and achieving results. Management involvement, though difficult to get at first, is critical to organizational change.

## What to Do Next

- Select one or two of the follow-up ideas and make a plan to implement them in your next workshop.

- Follow through on your follow-up plan. Demonstrate your commitment to your participants' continued learning by your willingness to continue on the journey with them long after the workshop is completed.

## Additional Resource

Olivero, G., K. Bane, and R. Kopelmann. (1997). "Executive Coaching as a Transfer of Training Tool: Effects on Productivity in a Public Agency." *Public Personnel Management* 26(4).

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# SECTION IV

## WORKSHOP SUPPORTING DOCUMENTS AND ONLINE SUPPORT

# Chapter 11

# Learning Activities

**What's in This Chapter**

- Twenty-six learning activities to use in your workshops
- Refer to Chapter 14 for instructions to download full-size handouts

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To help you facilitate adult learning, we have designed learning activities to deploy regularly throughout the workshop. Their purpose is to challenge and engage learners by breaking up monotony, providing stimulation for different types of learners, and actively helping them acquire new knowledge. Such activities enliven and invigorate the experience, and they help learning "stick."

Each learning activity provides detailed information about learning objectives, materials required, timeframe, step-by-step instructions, and variations and debriefing questions if required. Follow the instructions in each learning activity to prepare your workshop agenda, identify and gather materials needed, and successfully guide learners through the activity. The experiences provided by the learning activities help support the topics covered in the workshop. Bonus activities that are not part of the half-, one-, or two-day workshop agendas are also included here. You can use them to modify the existing agenda or to support your own. See Chapter 14 for complete instructions on how to download the workshop support materials.

# Learning Activities Included in *Communication Skills Training*

Learning Activity 1: Objective Decision

Learning Activity 2: Four Corners

Learning Activity 3: Identify the Noise

Learning Activity 4: Impression Improv (created by Sharon Wingron)

Learning Activity 5: Surgical Analysis of Your Story

Learning Activity 6: Listening Is More Than Hearing (created by Ken Phillips)

Learning Activity 7: Listening Stick (Part 1)

Learning Activity 8: Listening Stick (Part 2)

Learning Activity 9: Alpha Beta Exercise

Learning Activity 10: Personal Case Scenario

Learning Activity 11: Document Planning Mind Map

Learning Activity 12: Five Cs and Four Corners

Learning Activity 13: Clear Communication

Learning Activity 14: Concise Communication

Learning Activity 15: Complete Communication

Learning Activity 16: Correct Communication

Learning Activity 17: Considerate Communication: Circles of Influence

Learning Activity 18: Identify Your Reader's Needs

Learning Activity 19: Draft Your Message

Learning Activity 20: Identical Structures (created by Rick Hicks)

Learning Activity 21: Charades: Nonverbal Communication (created by Dawn Mahoney)

Learning Activity 22: Effective Virtual Teams (Part 1) (created by Dawn Mahoney)

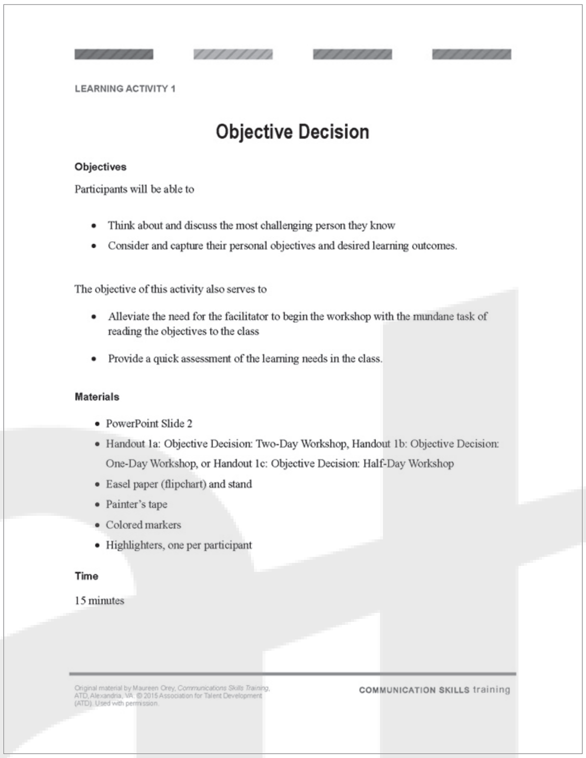
Learning Activity 23: Effective Virtual Teams (Part 2) (created by Dawn Mahoney)

Learning Activity 24: Ten Questions About Conflict

Learning Activity 25: Choices (created by Rick Hicks)

Learning Activity 26: Informal Evaluations

## Learning Activity 1: Objective Decision



LEARNING ACTIVITY 1

### Objective Decision

**Objectives**

Participants will be able to

- Think about and discuss the most challenging person they know
- Consider and capture their personal objectives and desired learning outcomes.

The objective of this activity also serves to

- Alleviate the need for the facilitator to begin the workshop with the mundane task of reading the objectives to the class
- Provide a quick assessment of the learning needs in the class.

**Materials**

- PowerPoint Slide 2
- Handout 1a: Objective Decision: Two-Day Workshop, Handout 1b: Objective Decision: One-Day Workshop, or Handout 1c: Objective Decision: Half-Day Workshop
- Easel paper (flipchart) and stand
- Painter's tape
- Colored markers
- Highlighters, one per participant

**Time**

15 minutes

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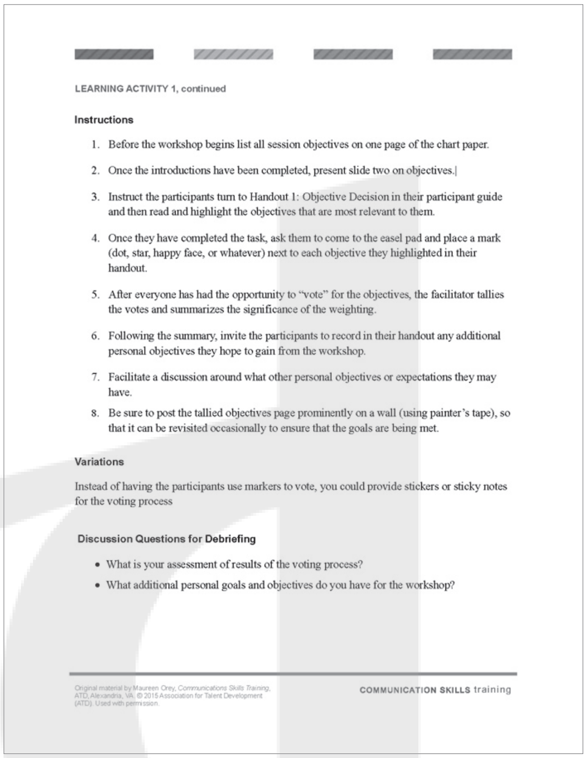
**COMMUNICATION SKILLS** training

## Learning Activity 1, *continued*



LEARNING ACTIVITY 1, continued

**Instructions**

1. Before the workshop begins list all session objectives on one page of the chart paper.
2. Once the introductions have been completed, present slide two on objectives.
3. Instruct the participants turn to Handout 1: Objective Decision in their participant guide and then read and highlight the objectives that are most relevant to them.
4. Once they have completed the task, ask them to come to the easel pad and place a mark (dot, star, happy face, or whatever) next to each objective they highlighted in their handout.
5. After everyone has had the opportunity to "vote" for the objectives, the facilitator tallies the votes and summarizes the significance of the weighting.
6. Following the summary, invite the participants to record in their handout any additional personal objectives they hope to gain from the workshop.
7. Facilitate a discussion around what other personal objectives or expectations they may have.
8. Be sure to post the tallied objectives page prominently on a wall (using painter's tape), so that it can be revisited occasionally to ensure that the goals are being met.

**Variations**

Instead of having the participants use markers to vote, you could provide stickers or sticky notes for the voting process

**Discussion Questions for Debriefing**

- What is your assessment of results of the voting process?
- What additional personal goals and objectives do you have for the workshop?

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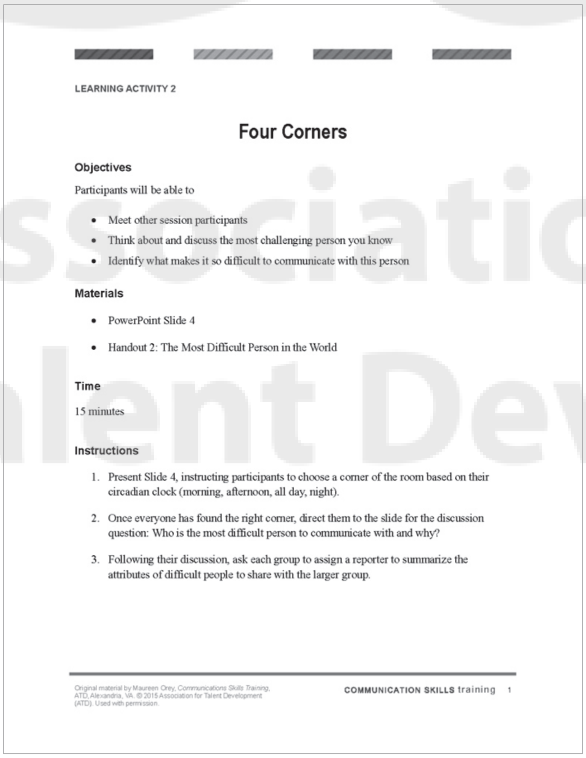
**COMMUNICATION SKILLS** training

## Learning Activity 2: Four Corners



LEARNING ACTIVITY 2

### Four Corners

**Objectives**

Participants will be able to

- Meet other session participants
- Think about and discuss the most challenging person you know
- Identify what makes it so difficult to communicate with this person

**Materials**

- PowerPoint Slide 4
- Handout 2: The Most Difficult Person in the World

**Time**

15 minutes

**Instructions**

1. Present Slide 4, instructing participants to choose a corner of the room based on their circadian clock (morning, afternoon, all day, night).
2. Once everyone has found the right corner, direct them to the slide for the discussion question: Who is the most difficult person to communicate with and why?
3. Following their discussion, ask each group to assign a reporter to summarize the attributes of difficult people to share with the larger group.

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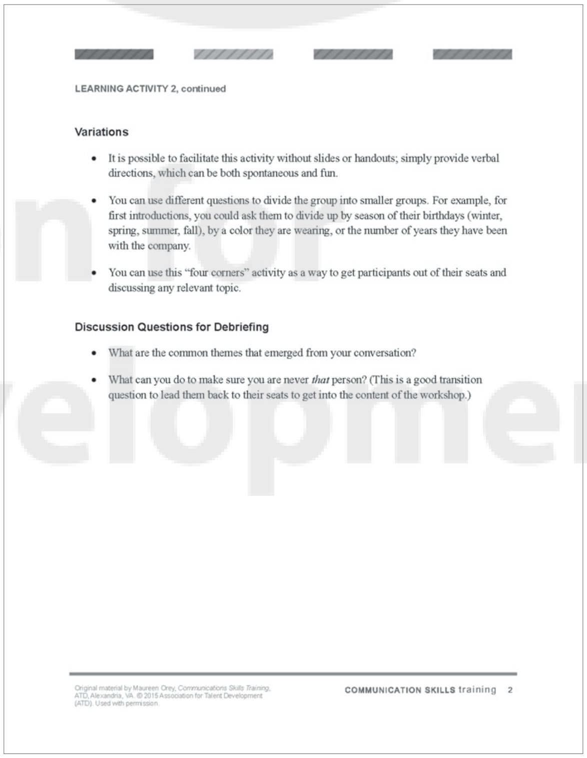
**COMMUNICATION SKILLS** training 1

## Learning Activity 2, *continued*



LEARNING ACTIVITY 2, continued

**Variations**

- It is possible to facilitate this activity without slides or handouts; simply provide verbal directions, which can be both spontaneous and fun.
- You can use different questions to divide the group into smaller groups. For example, for first introductions, you could ask them to divide up by season of their birthdays (winter, spring, summer, fall), by a color they are wearing, or the number of years they have been with the company.
- You can use this "four corners" activity as a way to get participants out of their seats and discussing any relevant topic.

**Discussion Questions for Debriefing**

- What are the common themes that emerged from your conversation?
- What can you do to make sure you are never *that* person? (This is a good transition question to lead them back to their seats to get into the content of the workshop.)

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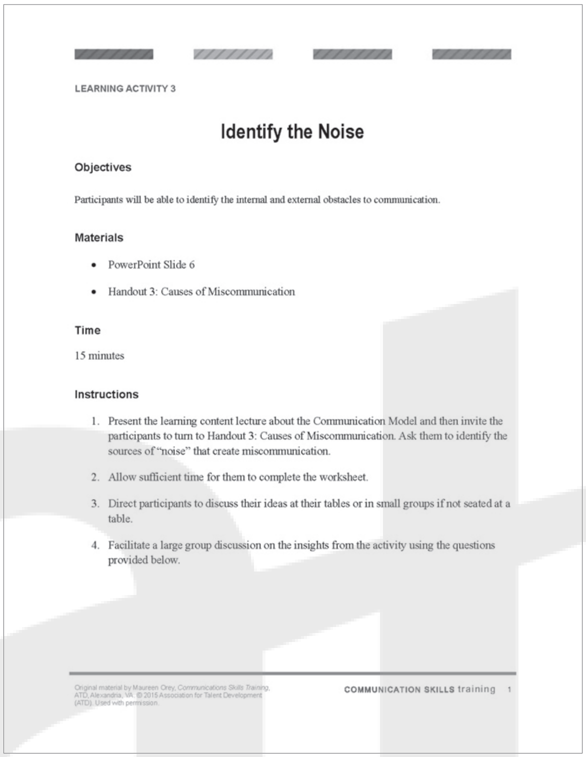
**COMMUNICATION SKILLS** training 2

## Learning Activity 3: Identify the Noise



LEARNING ACTIVITY 3

### Identify the Noise

**Objectives**

Participants will be able to identify the internal and external obstacles to communication.

**Materials**

- PowerPoint Slide 6
- Handout 3: Causes of Miscommunication

**Time**

15 minutes

**Instructions**

1. Present the learning content lecture about the Communication Model and then invite the participants to turn to Handout 3: Causes of Miscommunication. Ask them to identify the sources of "noise" that create miscommunication.
2. Allow sufficient time for them to complete the worksheet.
3. Direct participants to discuss their ideas at their tables or in small groups if not seated at a table.
4. Facilitate a large group discussion on the insights from the activity using the questions provided below.

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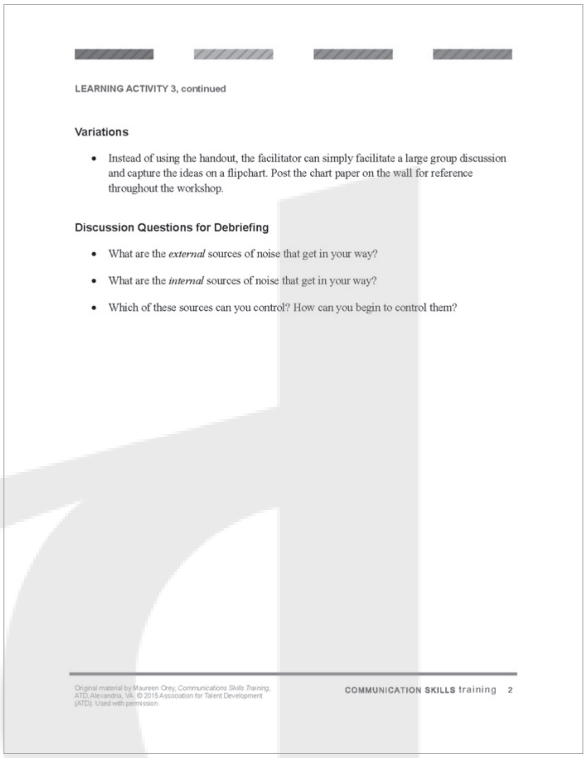
**COMMUNICATION SKILLS** training 1

## Learning Activity 3, *continued*



LEARNING ACTIVITY 3, continued

**Variations**

- Instead of using the handout, the facilitator can simply facilitate a large group discussion and capture the ideas on a flipchart. Post the chart paper on the wall for reference throughout the workshop.

**Discussion Questions for Debriefing**

- What are the *external* sources of noise that get in your way?
- What are the *internal* sources of noise that get in your way?
- Which of these sources can you control? How can you begin to control them?

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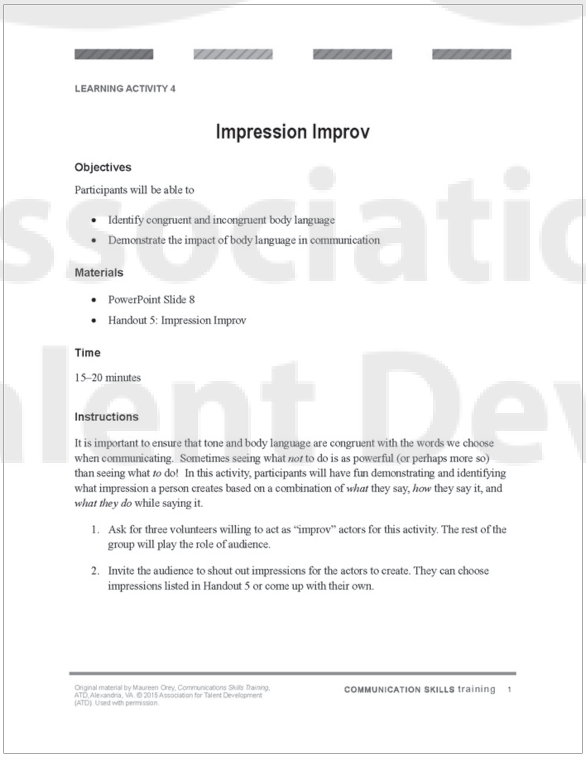
**COMMUNICATION SKILLS** training 2

## Learning Activity 4: Impression Improv (created by Sharon Wingron)



LEARNING ACTIVITY 4

### Impression Improv

**Objectives**

Participants will be able to

- Identify congruent and incongruent body language
- Demonstrate the impact of body language in communication

**Materials**

- PowerPoint Slide 8
- Handout 5: Impression Improv

**Time**

15–20 minutes

**Instructions**

It is important to ensure that tone and body language are congruent with the words we choose when communicating. Sometimes seeing what *not* to do is as powerful (or perhaps more so) than seeing what *to* do! In this activity, participants will have fun demonstrating and identifying what impression a person creates based on a combination of *what* they say, *how* they say it, and *what they do* while saying it.

1. Ask for three volunteers willing to act as "improv" actors for this activity. The rest of the group will play the role of audience.
2. Invite the audience to shout out impressions for the actors to create. They can choose impressions listed in Handout 5 or come up with their own.

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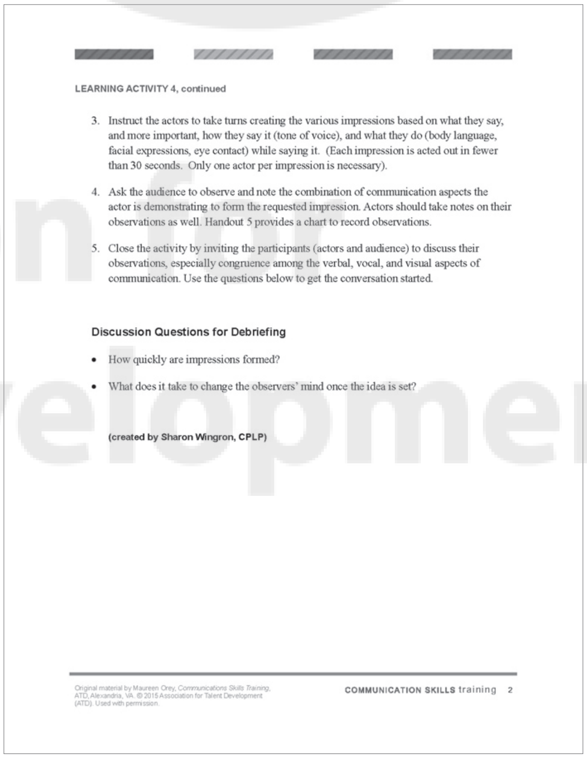
**COMMUNICATION SKILLS** training 1

## Learning Activity 4, *continued*



LEARNING ACTIVITY 4, continued

3. Instruct the actors to take turns creating the various impressions based on what they say, and more important, how they say it (tone of voice), and what they do (body language, facial expressions, eye contact) while saying it. (Each impression is acted out in fewer than 30 seconds. Only one actor per impression is necessary.)
4. Ask the audience to observe and note the combination of communication aspects the actor is demonstrating to form the requested impression. Actors should take notes on their observations as well. Handout 5 provides a chart to record observations.
5. Close the activity by inviting the participants (actors and audience) to discuss their observations, especially congruence among the verbal, vocal, and visual aspects of communication. Use the questions below to get the conversation started.

**Discussion Questions for Debriefing**

- How quickly are impressions formed?
- What does it take to change the observers' mind once the idea is set?

**(created by Sharon Wingron, CPLP)**

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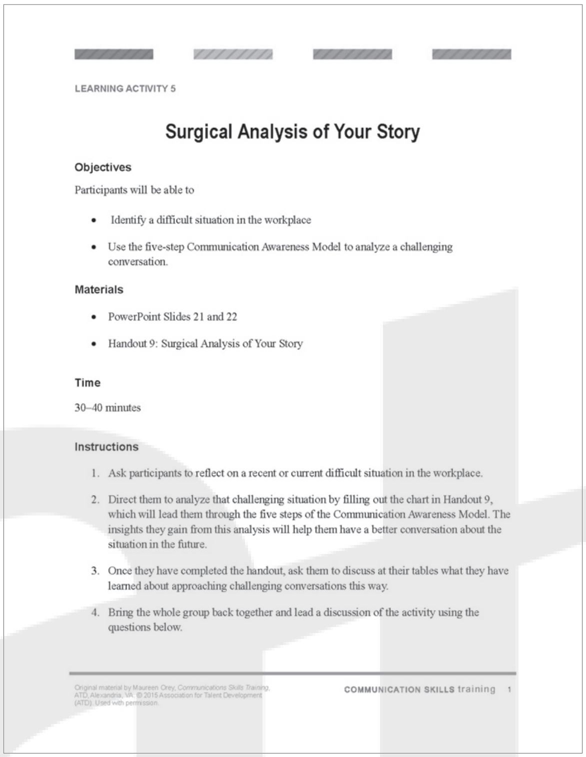
**COMMUNICATION SKILLS** training 2

## Learning Activity 5: Surgical Analysis of Your Story



LEARNING ACTIVITY 5

### Surgical Analysis of Your Story

**Objectives**

Participants will be able to

- Identify a difficult situation in the workplace
- Use the five-step Communication Awareness Model to analyze a challenging conversation.

**Materials**

- PowerPoint Slides 21 and 22
- Handout 9: Surgical Analysis of Your Story

**Time**

30–40 minutes

**Instructions**

1. Ask participants to reflect on a recent or current difficult situation in the workplace.
2. Direct them to analyze that challenging situation by filling out the chart in Handout 9, which will lead them through the five steps of the Communication Awareness Model. The insights they gain from this analysis will help them have a better conversation about the situation in the future.
3. Once they have completed the handout, ask them to discuss at their tables what they have learned about approaching challenging conversations this way.
4. Bring the whole group back together and lead a discussion of the activity using the questions below.

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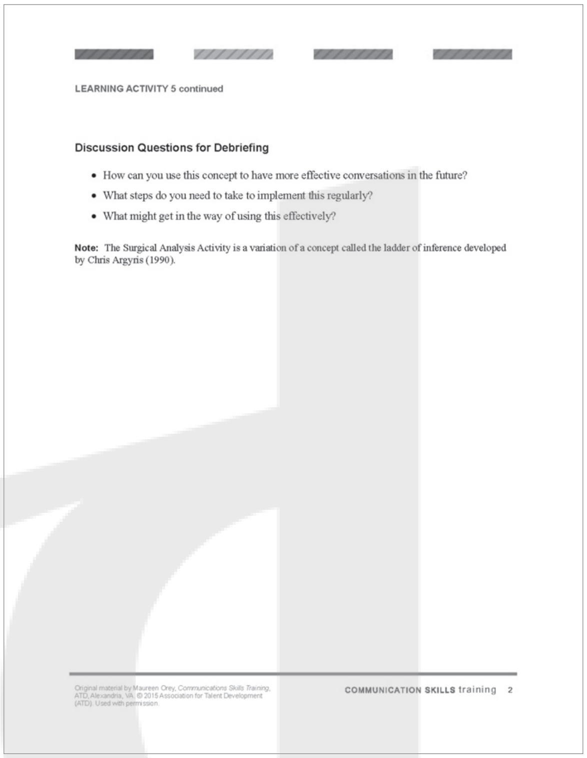
**COMMUNICATION SKILLS** training 1

## Learning Activity 5, *continued*



LEARNING ACTIVITY 5 continued

**Discussion Questions for Debriefing**

- How can you use this concept to have more effective conversations in the future?
- What steps do you need to take to implement this regularly?
- What might get in the way of using this effectively?

**Note:** The Surgical Analysis Activity is a variation of a concept called the ladder of inference developed by Chris Argyris (1990).

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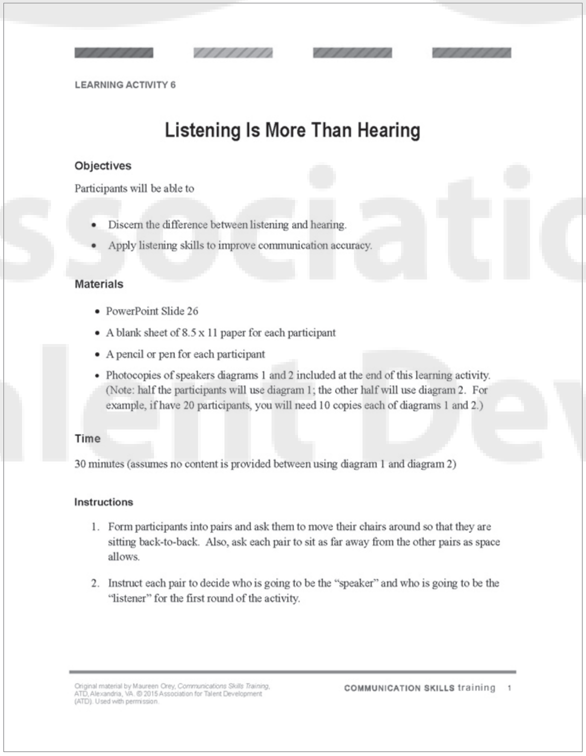
**COMMUNICATION SKILLS** training 2

## Learning Activity 6: Listening Is More Than Hearing



LEARNING ACTIVITY 6

### Listening Is More Than Hearing

**Objectives**

Participants will be able to

- Discern the difference between listening and hearing.
- Apply listening skills to improve communication accuracy.

**Materials**

- PowerPoint Slide 26
- A blank sheet of 8.5 x 11 paper for each participant
- A pencil or pen for each participant
- Photocopies of speakers diagrams 1 and 2 included at the end of this learning activity. (Note: half the participants will use diagram 1; the other half will use diagram 2. For example, if have 20 participants, you will need 10 copies each of diagrams 1 and 2.)

**Time**

30 minutes (assumes no content is provided between using diagram 1 and diagram 2)

**Instructions**

1. Form participants into pairs and ask them to move their chairs around so that they are sitting back-to-back. Also, ask each pair to sit as far away from the other pairs as space allows.
2. Instruct each pair to decide who is going to be the "speaker" and who is going to be the "listener" for the first round of the activity.

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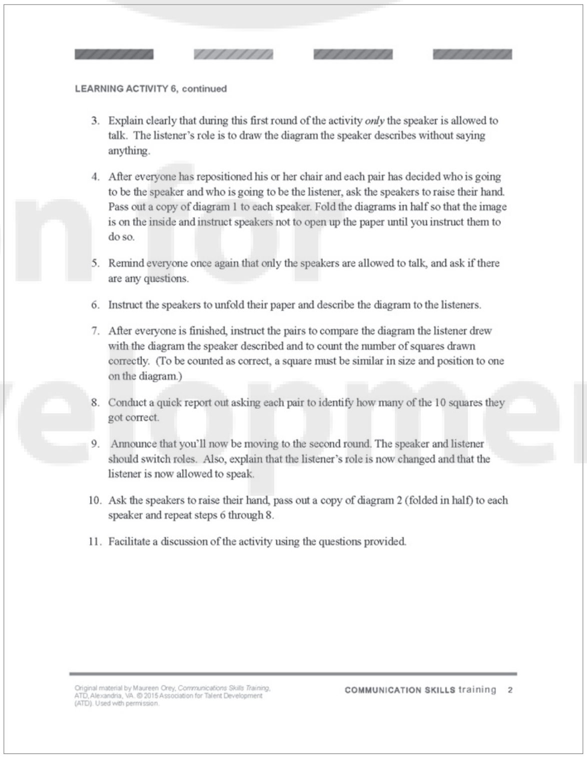
**COMMUNICATION SKILLS** training 1

## Learning Activity 6, *continued*



LEARNING ACTIVITY 6, continued

3. Explain clearly that during this first round of the activity *only* the speaker is allowed to talk. The listener's role is to draw the diagram the speaker describes without saying anything.
4. After everyone has repositioned his or her chair and each pair has decided who is going to be the speaker and who is going to be the listener, ask the speakers to raise their hand. Pass out a copy of diagram 1 to each speaker. Fold the diagrams in half so that the image is on the inside and instruct speakers not to open up the paper until you instruct them to do so.
5. Remind everyone once again that only the speakers are allowed to talk, and ask if there are any questions.
6. Instruct the speakers to unfold their paper and describe the diagram to the listeners.
7. After everyone is finished, instruct the pairs to compare the diagram the listener drew with the diagram the speaker described and to count the number of squares drawn correctly. (To be counted as correct, a square must be similar in size and position to one on the diagram.)
8. Conduct a quick report out asking each pair to identify how many of the 10 squares they got correct.
9. Announce that you'll now be moving to the second round. The speaker and listener should switch roles. Also, explain that the listener's role is now changed and that the listener is now allowed to speak.
10. Ask the speakers to raise their hand, pass out a copy of diagram 2 (folded in half) to each speaker and repeat steps 6 through 8.
11. Facilitate a discussion of the activity using the questions provided.

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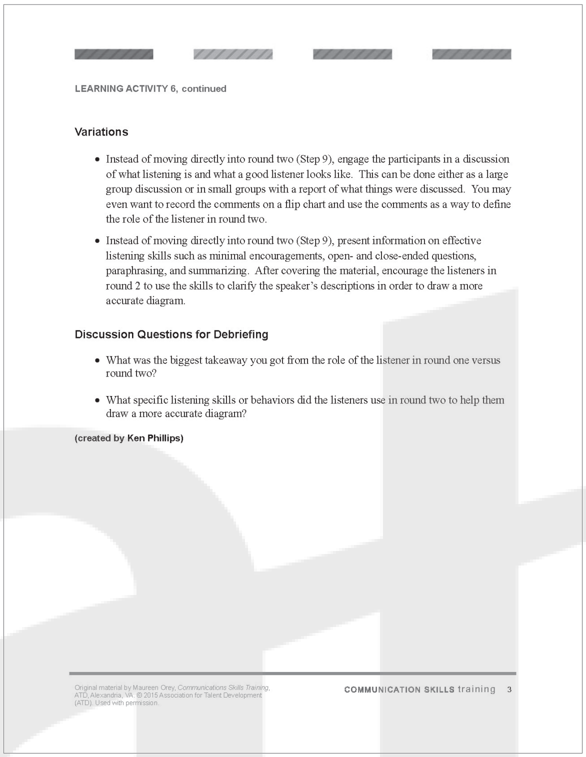
**COMMUNICATION SKILLS** training 2

## Learning Activity 6, *continued*



LEARNING ACTIVITY 6, continued

**Variations**

- Instead of moving directly into round two (Step 9), engage the participants in a discussion of what listening is and what a good listener looks like. This can be done either as a large group discussion or in small groups with a report of what things were discussed. You may even want to record the comments on a flip chart and use the comments as a way to define the role of the listener in round two.
- Instead of moving directly into round two (Step 9), present information on effective listening skills such as minimal encouragements, open- and close-ended questions, paraphrasing, and summarizing. After covering the material, encourage the listeners in round 2 to use the skills to clarify the speaker's descriptions in order to draw a more accurate diagram.

**Discussion Questions for Debriefing**

- What was the biggest takeaway you got from the role of the listener in round one versus round two?
- What specific listening skills or behaviors did the listeners use in round two to help them draw a more accurate diagram?

**(created by Ken Phillips)**

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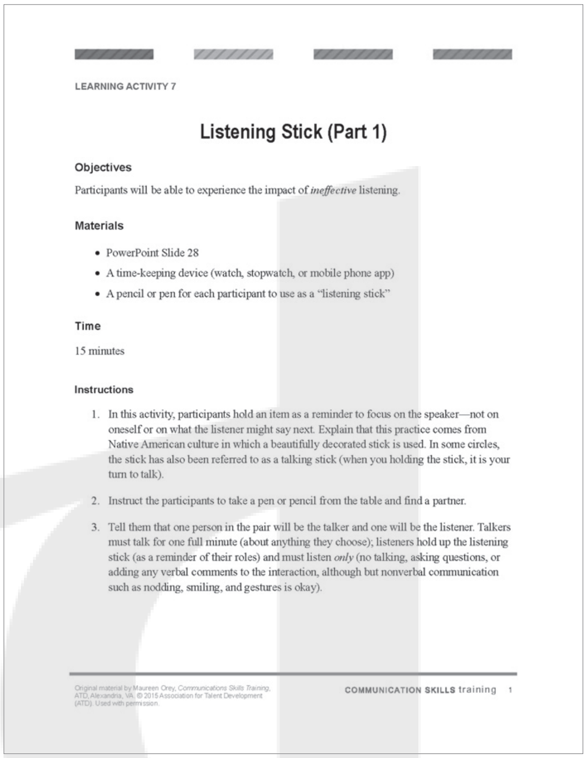
**COMMUNICATION SKILLS** training 3

## Learning Activity 7: Listening Stick (Part 1)



LEARNING ACTIVITY 7

**Listening Stick (Part 1)**

**Objectives**

Participants will be able to experience the impact of *ineffective* listening.

**Materials**

- PowerPoint Slide 28
- A time-keeping device (watch, stopwatch, or mobile phone app)
- A pencil or pen for each participant to use as a "listening stick"

**Time**

15 minutes

**Instructions**

1. In this activity, participants hold an item as a reminder to focus on the speaker—not on oneself or on what the listener might say next. Explain that this practice comes from Native American culture in which a beautifully decorated stick is used. In some circles, the stick has also been referred to as a talking stick (when you holding the stick, it is your turn to talk).
2. Instruct the participants to take a pen or pencil from the table and find a partner.
3. Tell them that one person in the pair will be the talker and one will be the listener. Talkers must talk for one full minute (about anything they choose); listeners hold up the listening stick (as a reminder of their roles) and must listen *only* (no talking, asking questions, or adding any verbal comments to the interaction, although but nonverbal communication such as nodding, smiling, and gestures is okay).

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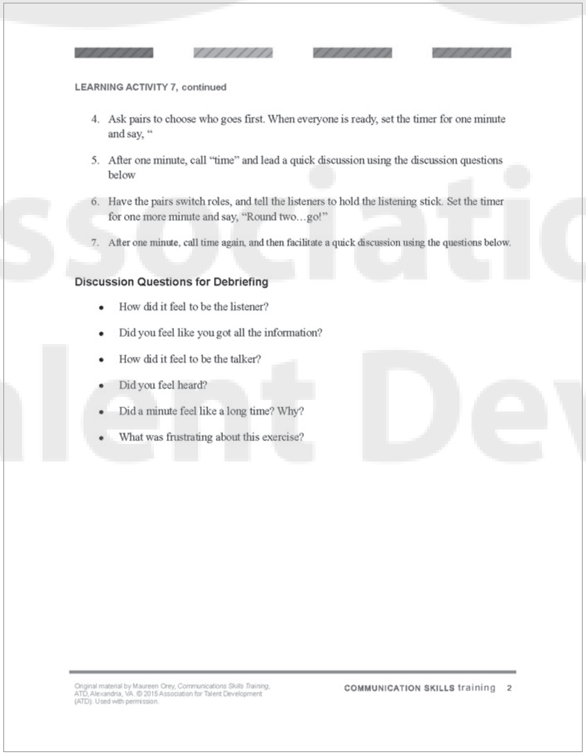
**COMMUNICATION SKILLS** training 1

## Learning Activity 7, *continued*



LEARNING ACTIVITY 7, continued

4. Ask pairs to choose who goes first. When everyone is ready, set the timer for one minute and say, "
5. After one minute, call "time" and lead a quick discussion using the discussion questions below
6. Have the pairs switch roles, and tell the listeners to hold the listening stick. Set the timer for one more minute and say, "Round two…go!"
7. After one minute, call time again, and then facilitate a quick discussion using the questions below.

**Discussion Questions for Debriefing**

- How did it feel to be the listener?
- Did you feel like you got all the information?
- How did it feel to be the talker?
- Did you feel heard?
- Did a minute feel like a long time? Why?
- What was frustrating about this exercise?

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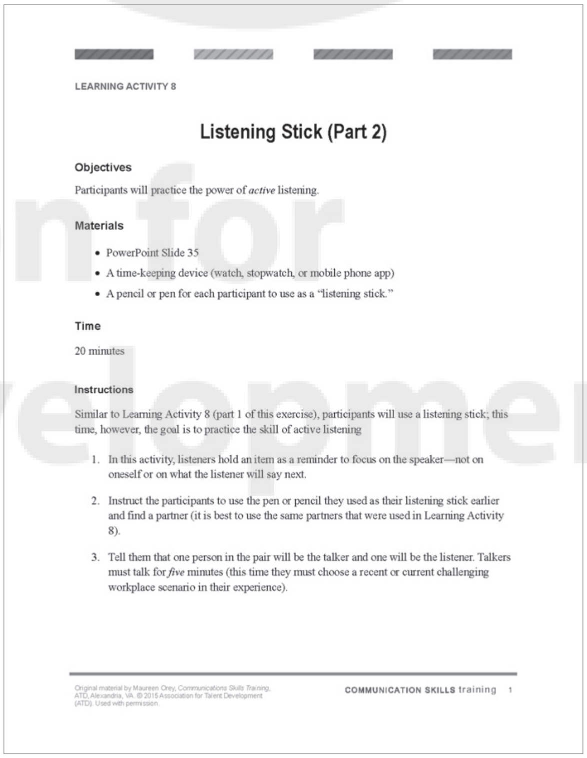
**COMMUNICATION SKILLS** training 2

## Learning Activity 8: Listening Stick (Part 2)



LEARNING ACTIVITY 8

**Listening Stick (Part 2)**

**Objectives**

Participants will practice the power of *active* listening.

**Materials**

- PowerPoint Slide 35
- A time-keeping device (watch, stopwatch, or mobile phone app)
- A pencil or pen for each participant to use as a "listening stick."

**Time**

20 minutes

**Instructions**

Similar to Learning Activity 8 (part 1 of this exercise), participants will use a listening stick; this time, however, the goal is to practice the skill of active listening

1. In this activity, listeners hold an item as a reminder to focus on the speaker—not on oneself or on what the listener will say next.
2. Instruct the participants to use the pen or pencil they used as their listening stick earlier and find a partner (it is best to use the same partners that were used in Learning Activity 8).
3. Tell them that one person in the pair will be the talker and one will be the listener. Talkers must talk for *five* minutes (this time they must choose a recent or current challenging workplace scenario in their experience).

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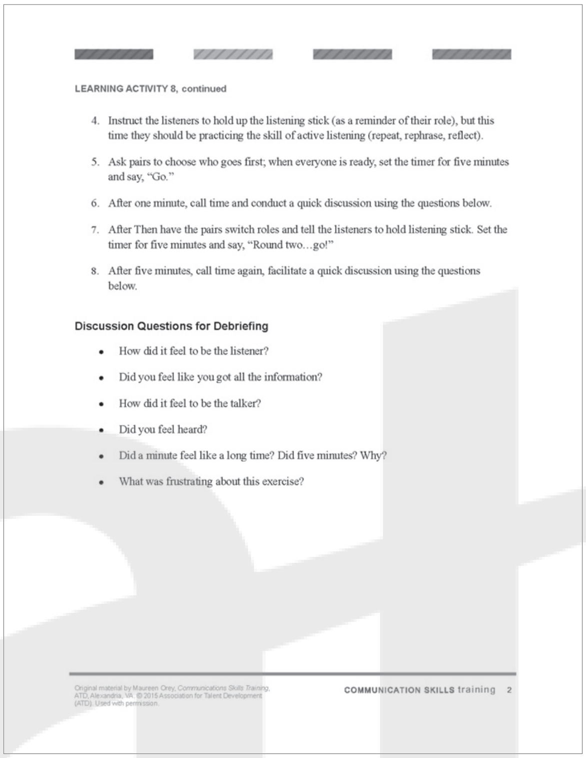
**COMMUNICATION SKILLS** training 1

## Learning Activity 8, *continued*



LEARNING ACTIVITY 8, continued

4. Instruct the listeners to hold up the listening stick (as a reminder of their role), but this time they should be practicing the skill of active listening (repeat, rephrase, reflect).
5. Ask pairs to choose who goes first; when everyone is ready, set the timer for five minutes and say, "Go."
6. After one minute, call time and conduct a quick discussion using the questions below.
7. After Then have the pairs switch roles and tell the listeners to hold listening stick. Set the timer for five minutes and say, "Round two…go!"
8. After five minutes, call time again, facilitate a quick discussion using the questions below.

**Discussion Questions for Debriefing**

- How did it feel to be the listener?
- Did you feel like you got all the information?
- How did it feel to be the talker?
- Did you feel heard?
- Did a minute feel like a long time? Did five minutes? Why?
- What was frustrating about this exercise?

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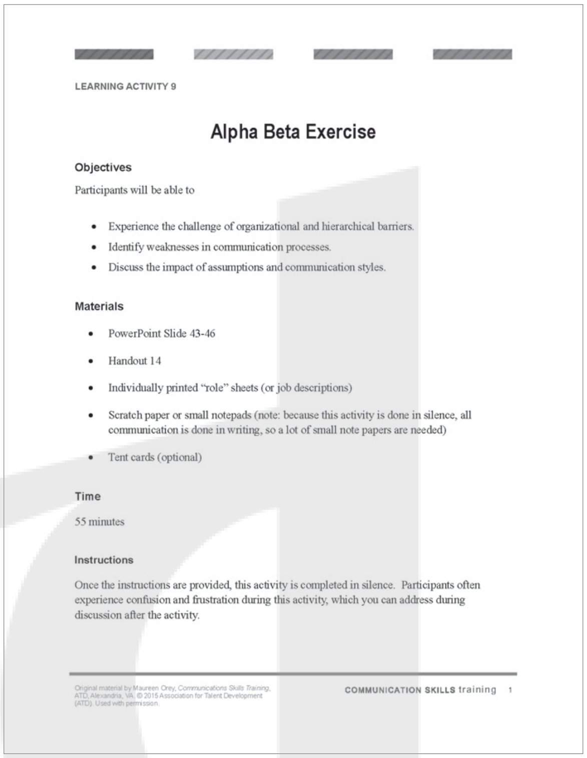
## Learning Activity 9: Alpha Beta Exercise



LEARNING ACTIVITY 9

### Alpha Beta Exercise

**Objectives**

Participants will be able to

- Experience the challenge of organizational and hierarchical barriers.
- Identify weaknesses in communication processes.
- Discuss the impact of assumptions and communication styles.

**Materials**

- PowerPoint Slide 43-46
- Handout 14
- Individually printed "role" sheets (or job descriptions)
- Scratch paper or small notepads (note: because this activity is done in silence, all communication is done in writing, so a lot of small note papers are needed)
- Tent cards (optional)

**Time**

55 minutes

**Instructions**

Once the instructions are provided, this activity is completed in silence. Participants often experience confusion and frustration during this activity, which you can address during discussion after the activity.

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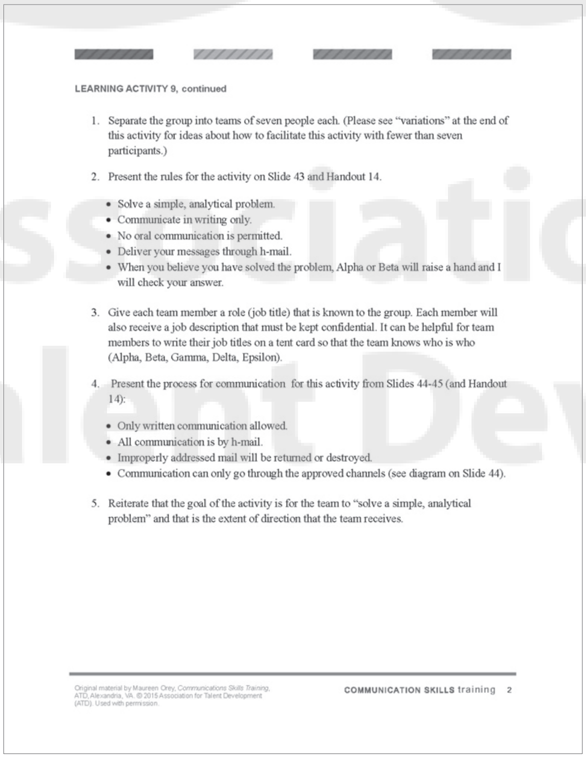
## Learning Activity 9, *continued*



LEARNING ACTIVITY 9, continued

1. Separate the group into teams of seven people each. (Please see "variations" at the end of this activity for ideas about how to facilitate this activity with fewer than seven participants.)
2. Present the rules for the activity on Slide 43 and Handout 14.
   - Solve a simple, analytical problem.
   - Communicate in writing only.
   - No oral communication is permitted.
   - Deliver your messages through h-mail.
   - When you believe you have solved the problem, Alpha or Beta will raise a hand and I will check your answer.
3. Give each team member a role (job title) that is known to the group. Each member will also receive a job description that must be kept confidential. It can be helpful for team members to write their job titles on a tent card so that the team knows who is who (Alpha, Beta, Gamma, Delta, Epsilon).
4. Present the process for communication for this activity from Slides 44-45 (and Handout 14):
   - Only written communication allowed.
   - All communication is by h-mail.
   - Improperly addressed mail will be returned or destroyed.
   - Communication can only go through the approved channels (see diagram on Slide 44).
5. Reiterate that the goal of the activity is for the team to "solve a simple, analytical problem" and that is the extent of direction that the team receives.

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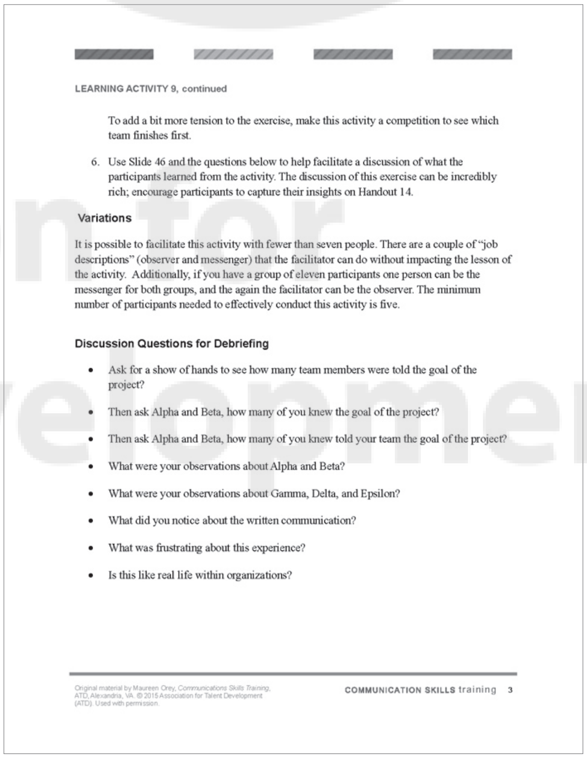
## Learning Activity 9, *continued*



LEARNING ACTIVITY 9, continued

To add a bit more tension to the exercise, make this activity a competition to see which team finishes first.

6. Use Slide 46 and the questions below to help facilitate a discussion of what the participants learned from the activity. The discussion of this exercise can be incredibly rich; encourage participants to capture their insights on Handout 14.

**Variations**

It is possible to facilitate this activity with fewer than seven people. There are a couple of "job descriptions" (observer and messenger) that the facilitator can do without impacting the lesson of the activity. Additionally, if you have a group of eleven participants one person can be the messenger for both groups, and the again the facilitator can be the observer. The minimum number of participants needed to effectively conduct this activity is five.

**Discussion Questions for Debriefing**

- Ask for a show of hands to see how many team members were told the goal of the project?
- Then ask Alpha and Beta, how many of you knew the goal of the project?
- Then ask Alpha and Beta, how many of you knew told your team the goal of the project?
- What were your observations about Alpha and Beta?
- What were your observations about Gamma, Delta, and Epsilon?
- What did you notice about the written communication?
- What was frustrating about this experience?
- Is this like real life within organizations?

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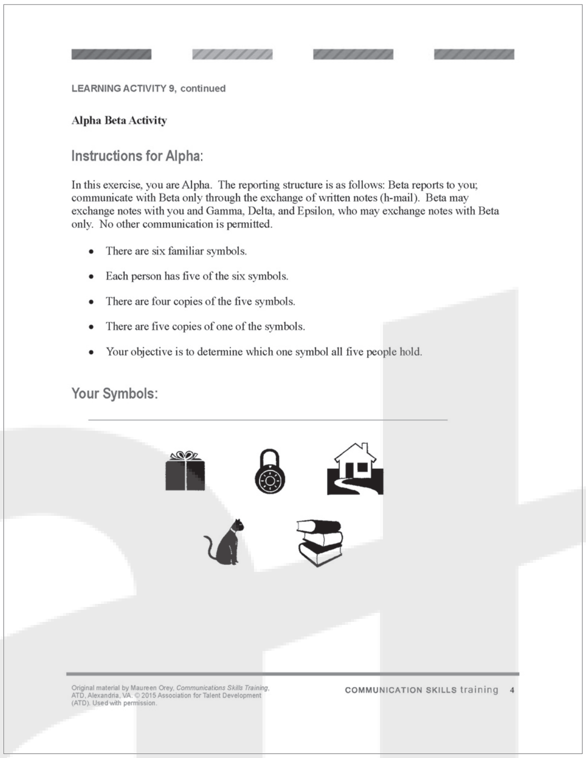
## Learning Activity 9, *continued*



LEARNING ACTIVITY 9, continued

**Alpha Beta Activity**

### Instructions for Alpha:

In this exercise, you are Alpha. The reporting structure is as follows: Beta reports to you; communicate with Beta only through the exchange of written notes (h-mail). Beta may exchange notes with you and Gamma, Delta, and Epsilon, who may exchange notes with Beta only. No other communication is permitted.

- There are six familiar symbols.
- Each person has five of the six symbols.
- There are four copies of the five symbols.
- There are five copies of one of the symbols.
- Your objective is to determine which one symbol all five people hold.

**Your Symbols:**

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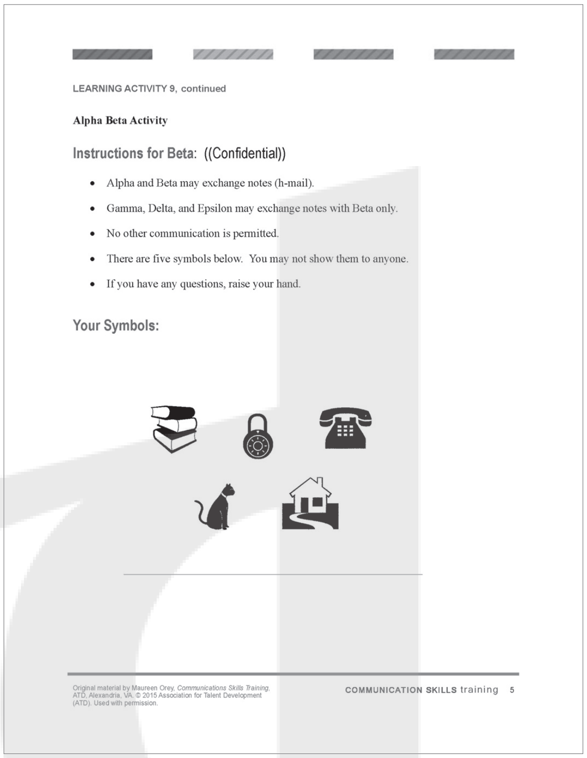
COMMUNICATION SKILLS training 4

## Learning Activity 9, *continued*



LEARNING ACTIVITY 9, continued

**Alpha Beta Activity**

### Instructions for Beta: ((Confidential))

- Alpha and Beta may exchange notes (h-mail).
- Gamma, Delta, and Epsilon may exchange notes with Beta only.
- No other communication is permitted.
- There are five symbols below. You may not show them to anyone.
- If you have any questions, raise your hand.

**Your Symbols:**

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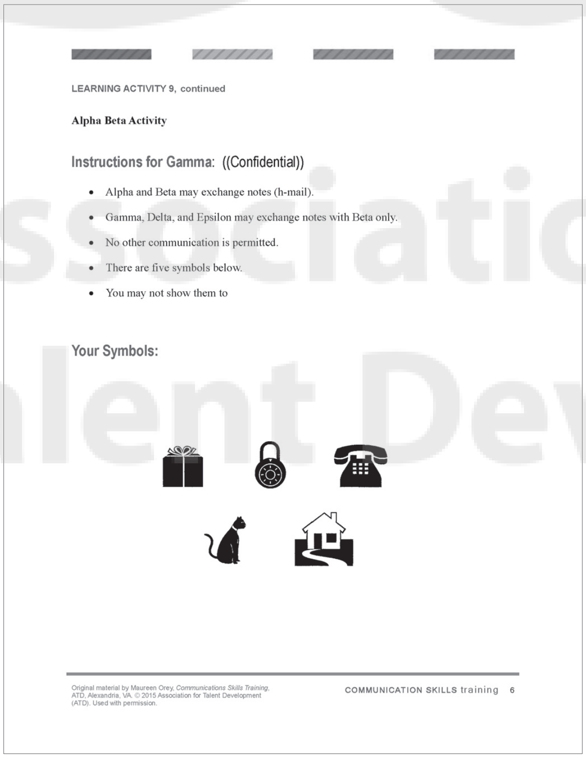
COMMUNICATION SKILLS training 5

## Learning Activity 9, *continued*



LEARNING ACTIVITY 9, continued

**Alpha Beta Activity**

### Instructions for Gamma: ((Confidential))

- Alpha and Beta may exchange notes (h-mail).
- Gamma, Delta, and Epsilon may exchange notes with Beta only.
- No other communication is permitted.
- There are five symbols below.
- You may not show them to

**Your Symbols:**

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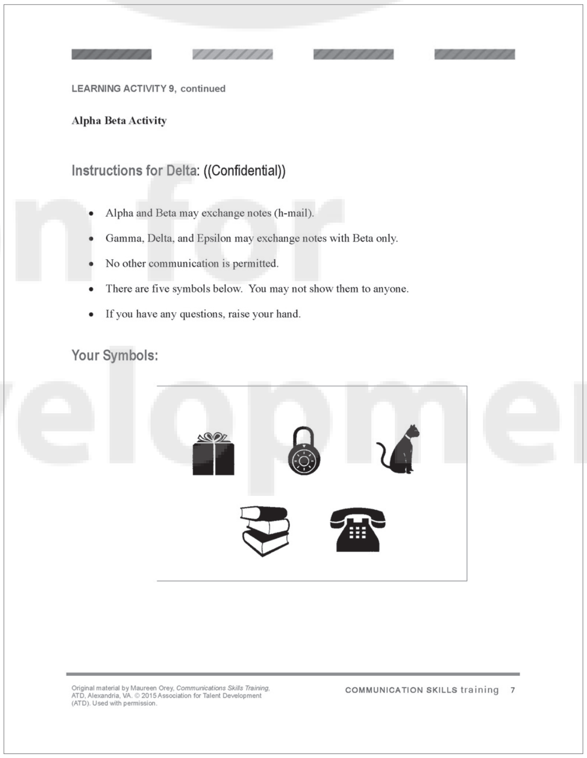
COMMUNICATION SKILLS training 6

## Learning Activity 9, *continued*



LEARNING ACTIVITY 9, continued

**Alpha Beta Activity**

### Instructions for Delta: ((Confidential))

- Alpha and Beta may exchange notes (h-mail).
- Gamma, Delta, and Epsilon may exchange notes with Beta only.
- No other communication is permitted.
- There are five symbols below. You may not show them to anyone.
- If you have any questions, raise your hand.

**Your Symbols:**

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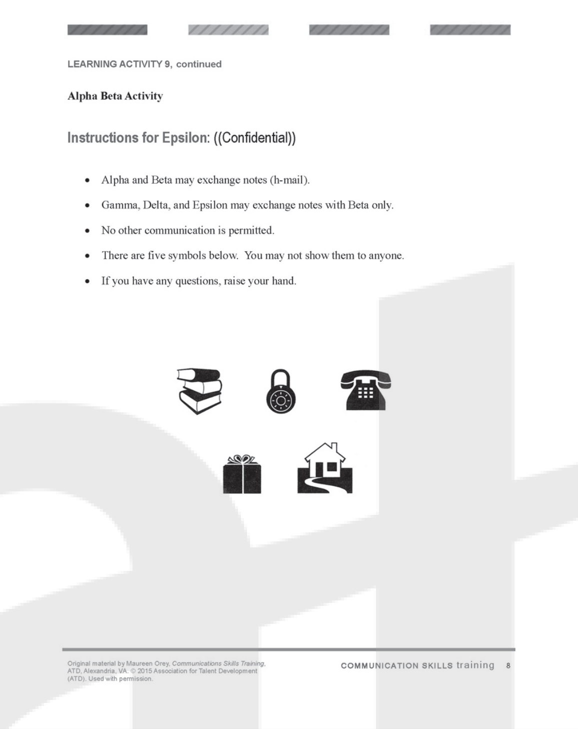
COMMUNICATION SKILLS training 7

## Learning Activity 9, *continued*



LEARNING ACTIVITY 9, continued

**Alpha Beta Activity**

**Instructions for Epsilon:** ((Confidential))

- Alpha and Beta may exchange notes (h-mail).
- Gamma, Delta, and Epsilon may exchange notes with Beta only.
- No other communication is permitted.
- There are five symbols below. You may not show them to anyone.
- If you have any questions, raise your hand.

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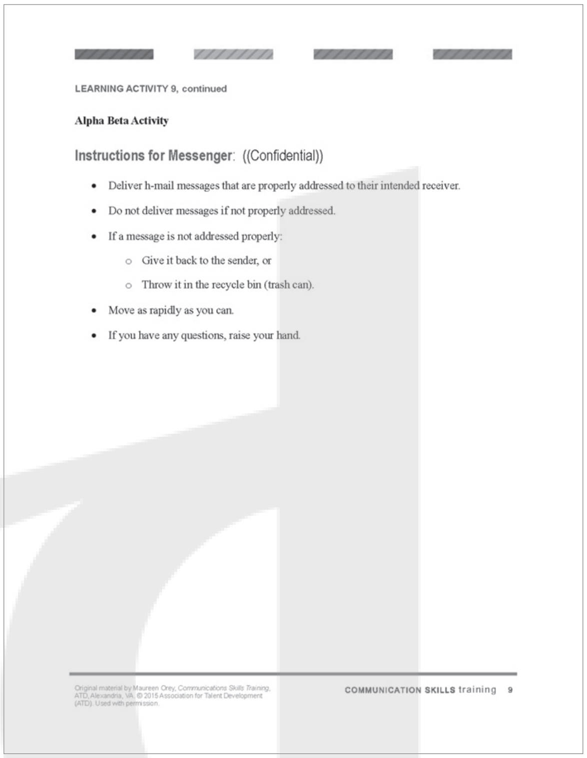
COMMUNICATION SKILLS training 8

## Learning Activity 9, *continued*



LEARNING ACTIVITY 9, continued

**Alpha Beta Activity**

**Instructions for Messenger**: ((Confidential))

- Deliver h-mail messages that are properly addressed to their intended receiver.
- Do not deliver messages if not properly addressed.
- If a message is not addressed properly:
  - Give it back to the sender, or
  - Throw it in the recycle bin (trash can).
- Move as rapidly as you can.
- If you have any questions, raise your hand.

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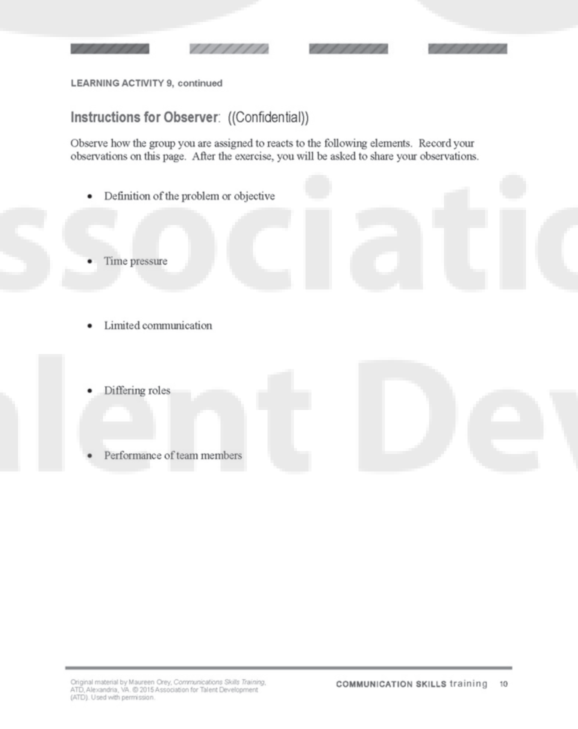
COMMUNICATION SKILLS training 9

## Learning Activity 9, *continued*



LEARNING ACTIVITY 9, continued

**Instructions for Observer**: ((Confidential))

Observe how the group you are assigned to reacts to the following elements. Record your observations on this page. After the exercise, you will be asked to share your observations.

- Definition of the problem or objective
- Time pressure
- Limited communication
- Differing roles
- Performance of team members

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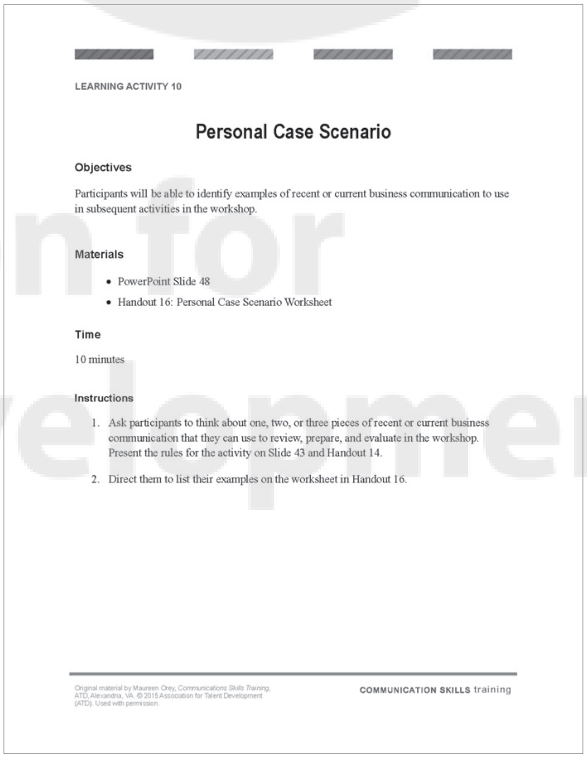
COMMUNICATION SKILLS training 10

## Learning Activity 10: Personal Case Scenario



LEARNING ACTIVITY 10

**Personal Case Scenario**

**Objectives**

Participants will be able to identify examples of recent or current business communication to use in subsequent activities in the workshop.

**Materials**

- PowerPoint Slide 48
- Handout 16: Personal Case Scenario Worksheet

**Time**

10 minutes

**Instructions**

1. Ask participants to think about one, two, or three pieces of recent or current business communication that they can use to review, prepare, and evaluate in the workshop. Present the rules for the activity on Slide 43 and Handout 14.
2. Direct them to list their examples on the worksheet in Handout 16.

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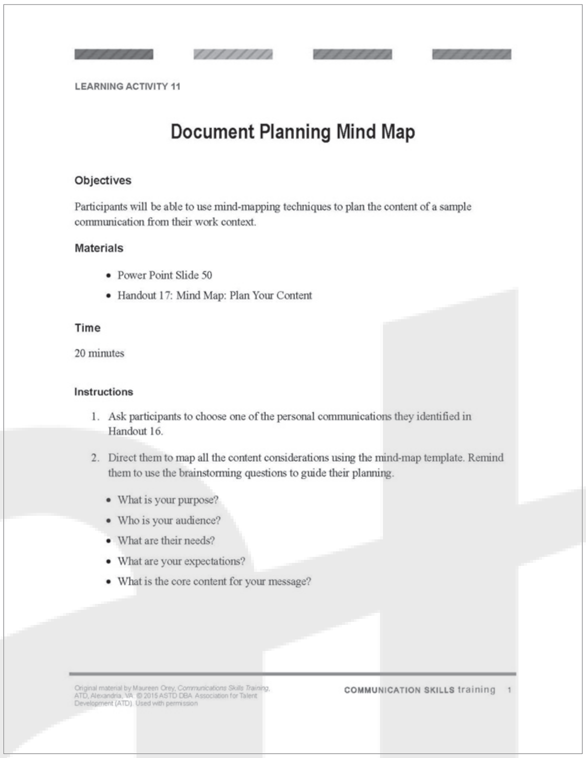
COMMUNICATION SKILLS training

## Learning Activity 11: Document Planning Mind Map



LEARNING ACTIVITY 11

### Document Planning Mind Map

**Objectives**

Participants will be able to use mind-mapping techniques to plan the content of a sample communication from their work context.

**Materials**

- Power Point Slide 50
- Handout 17: Mind Map: Plan Your Content

**Time**

20 minutes

**Instructions**

1. Ask participants to choose one of the personal communications they identified in Handout 16.
2. Direct them to map all the content considerations using the mind-map template. Remind them to use the brainstorming questions to guide their planning.
    - What is your purpose?
    - Who is your audience?
    - What are their needs?
    - What are your expectations?
    - What is the core content for your message?

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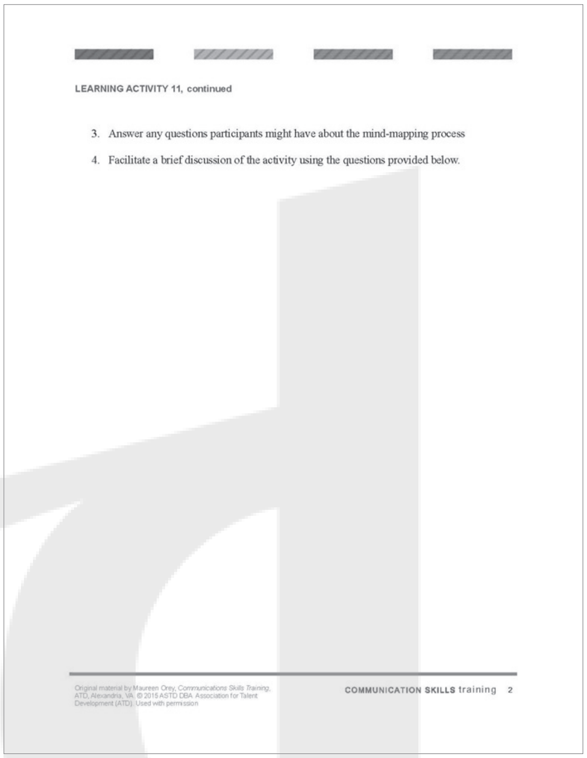
## Learning Activity 11, *continued*



LEARNING ACTIVITY 11, continued

3. Answer any questions participants might have about the mind-mapping process
4. Facilitate a brief discussion of the activity using the questions provided below.

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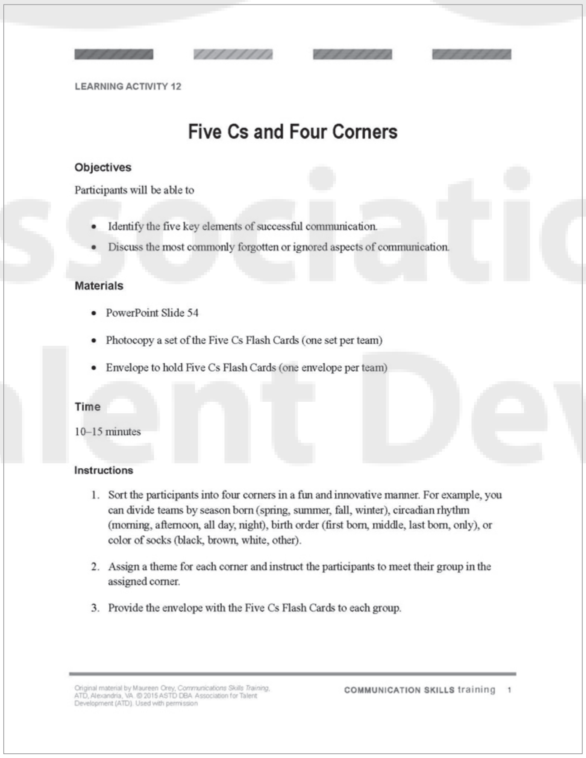
## Learning Activity 12: Five Cs and Four Corners



LEARNING ACTIVITY 12

### Five Cs and Four Corners

**Objectives**

Participants will be able to

- Identify the five key elements of successful communication.
- Discuss the most commonly forgotten or ignored aspects of communication.

**Materials**

- PowerPoint Slide 54
- Photocopy a set of the Five Cs Flash Cards (one set per team)
- Envelope to hold Five Cs Flash Cards (one envelope per team)

**Time**

10–15 minutes

**Instructions**

1. Sort the participants into four corners in a fun and innovative manner. For example, you can divide teams by season born (spring, summer, fall, winter), circadian rhythm (morning, afternoon, all day, night), birth order (first born, middle, last born, only), or color of socks (black, brown, white, other).
2. Assign a theme for each corner and instruct the participants to meet their group in the assigned corner.
3. Provide the envelope with the Five Cs Flash Cards to each group.

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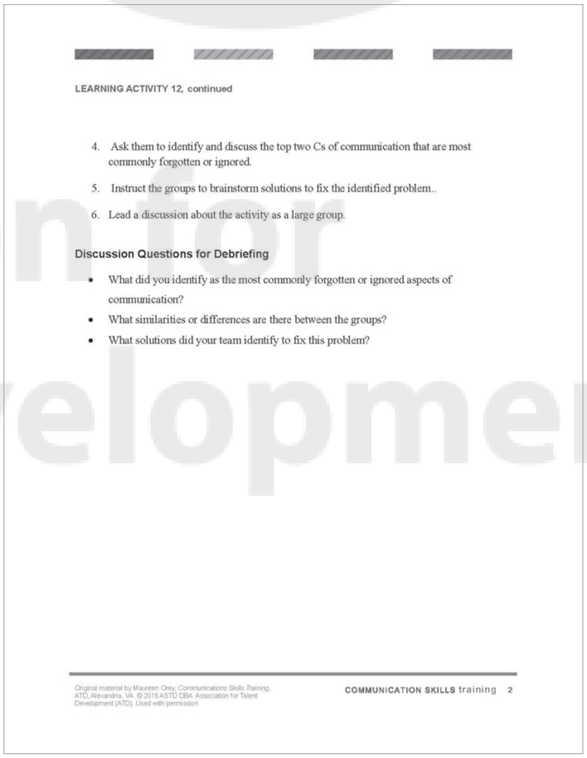
## Learning Activity 12, *continued*



LEARNING ACTIVITY 12, continued

4. Ask them to identify and discuss the top two Cs of communication that are most commonly forgotten or ignored.
5. Instruct the groups to brainstorm solutions to fix the identified problem..
6. Lead a discussion about the activity as a large group.

**Discussion Questions for Debriefing**

- What did you identify as the most commonly forgotten or ignored aspects of communication?
- What similarities or differences are there between the groups?
- What solutions did your team identify to fix this problem?

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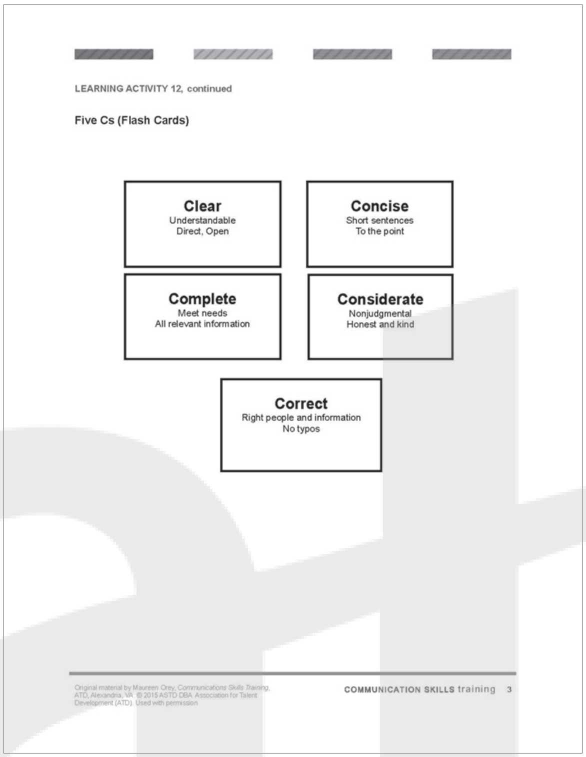
## Learning Activity 12, *continued*



LEARNING ACTIVITY 12, continued

**Five Cs (Flash Cards)**

**Clear**
Understandable
Direct, Open

**Concise**
Short sentences
To the point

**Complete**
Meet needs
All relevant information

**Considerate**
Nonjudgmental
Honest and kind

**Correct**
Right people and information
No typos

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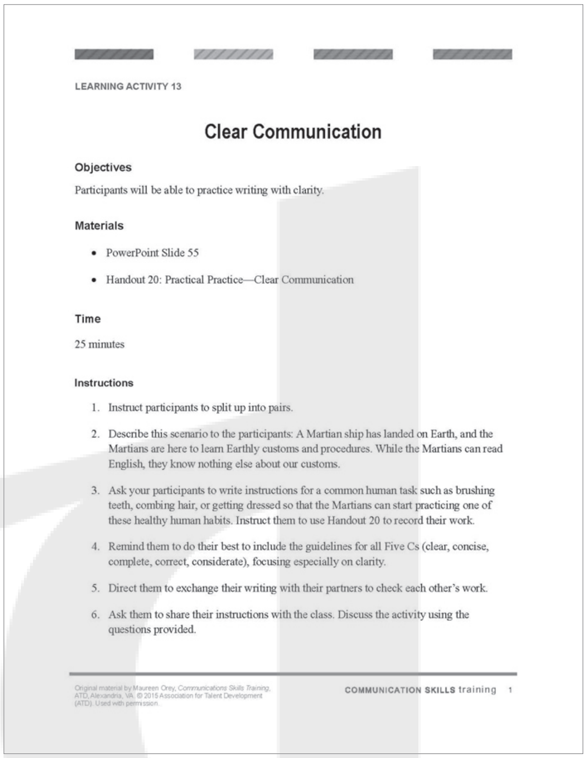
**COMMUNICATION SKILLS** training 3

## Learning Activity 13: Clear Communication



LEARNING ACTIVITY 13

### Clear Communication

**Objectives**

Participants will be able to practice writing with clarity.

**Materials**

- PowerPoint Slide 55
- Handout 20: Practical Practice—Clear Communication

**Time**

25 minutes

**Instructions**

1. Instruct participants to split up into pairs.
2. Describe this scenario to the participants: A Martian ship has landed on Earth, and the Martians are here to learn Earthly customs and procedures. While the Martians can read English, they know nothing else about our customs.
3. Ask your participants to write instructions for a common human task such as brushing teeth, combing hair, or getting dressed so that the Martians can start practicing one of these healthy human habits. Instruct them to use Handout 20 to record their work.
4. Remind them to do their best to include the guidelines for all Five Cs (clear, concise, complete, correct, considerate), focusing especially on clarity.
5. Direct them to exchange their writing with their partners to check each other's work.
6. Ask them to share their instructions with the class. Discuss the activity using the questions provided.

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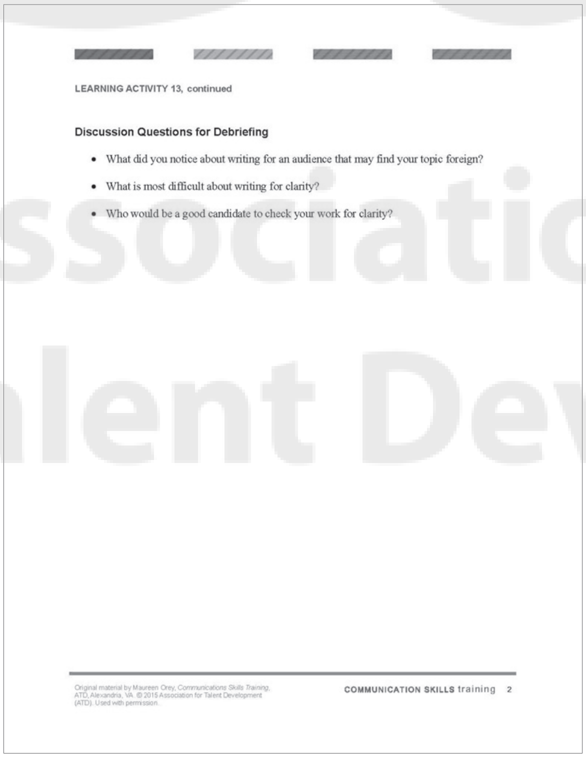
## Learning Activity 13, *continued*



LEARNING ACTIVITY 13, continued

**Discussion Questions for Debriefing**

- What did you notice about writing for an audience that may find your topic foreign?
- What is most difficult about writing for clarity?
- Who would be a good candidate to check your work for clarity?

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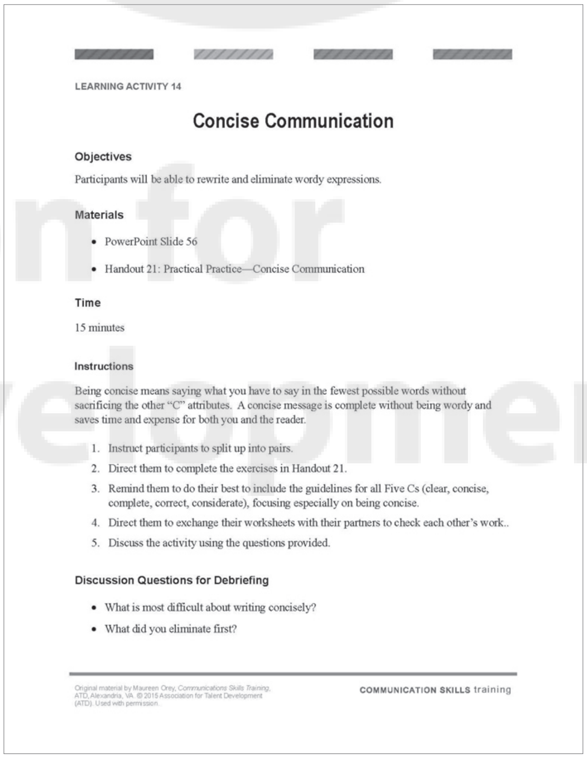
## Learning Activity 14: Concise Communication



LEARNING ACTIVITY 14

### Concise Communication

**Objectives**

Participants will be able to rewrite and eliminate wordy expressions.

**Materials**

- PowerPoint Slide 56
- Handout 21: Practical Practice—Concise Communication

**Time**

15 minutes

**Instructions**

Being concise means saying what you have to say in the fewest possible words without sacrificing the other "C" attributes. A concise message is complete without being wordy and saves time and expense for both you and the reader.

1. Instruct participants to split up into pairs.
2. Direct them to complete the exercises in Handout 21.
3. Remind them to do their best to include the guidelines for all Five Cs (clear, concise, complete, correct, considerate), focusing especially on being concise.
4. Direct them to exchange their worksheets with their partners to check each other's work..
5. Discuss the activity using the questions provided.

**Discussion Questions for Debriefing**

- What is most difficult about writing concisely?
- What did you eliminate first?

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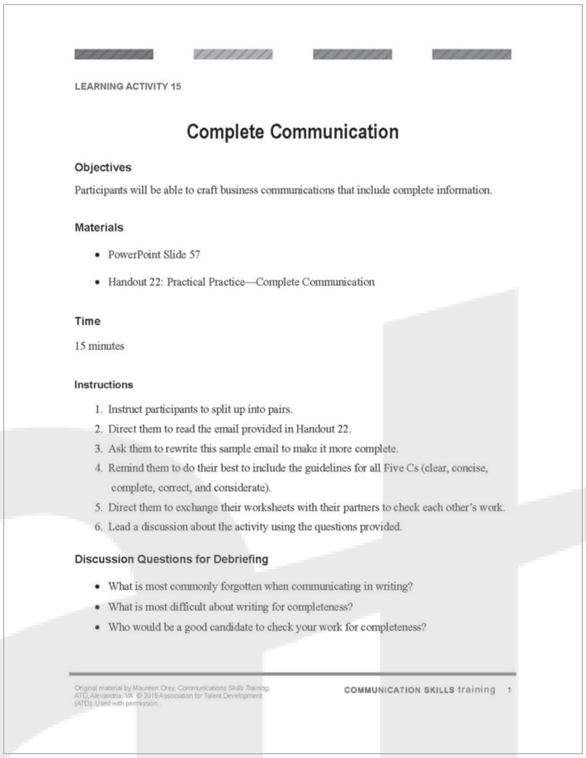
## Learning Activity 15: Complete Communication



LEARNING ACTIVITY 15

### Complete Communication

**Objectives**

Participants will be able to craft business communications that include complete information.

**Materials**

- PowerPoint Slide 57
- Handout 22: Practical Practice—Complete Communication

**Time**

15 minutes

**Instructions**

1. Instruct participants to split up into pairs.
2. Direct them to read the email provided in Handout 22.
3. Ask them to rewrite this sample email to make it more complete.
4. Remind them to do their best to include the guidelines for all Five Cs (clear, concise, complete, correct, and considerate).
5. Direct them to exchange their worksheets with their partners to check each other's work.
6. Lead a discussion about the activity using the questions provided.

**Discussion Questions for Debriefing**

- What is most commonly forgotten when communicating in writing?
- What is most difficult about writing for completeness?
- Who would be a good candidate to check your work for completeness?

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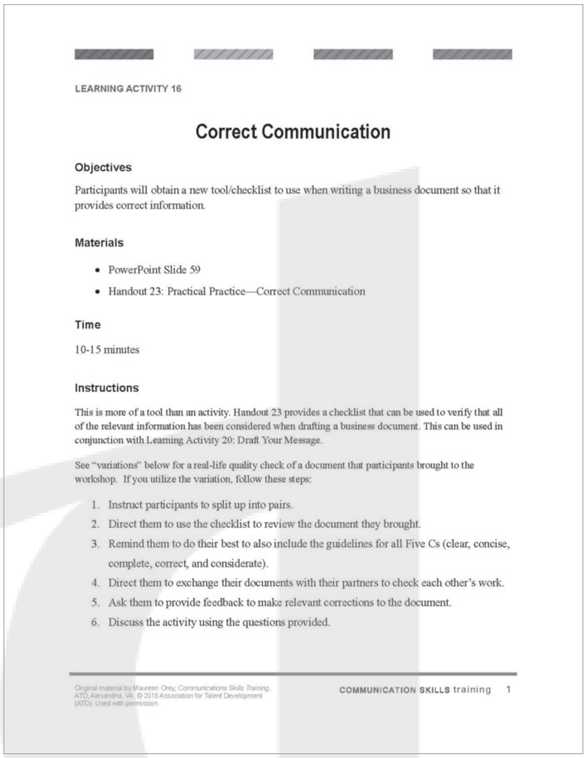
## Learning Activity 16: Correct Communication



LEARNING ACTIVITY 16

### Correct Communication

**Objectives**

Participants will obtain a new tool/checklist to use when writing a business document so that it provides correct information.

**Materials**

- PowerPoint Slide 59
- Handout 23: Practical Practice—Correct Communication

**Time**

10-15 minutes

**Instructions**

This is more of a tool than an activity. Handout 23 provides a checklist that can be used to verify that all of the relevant information has been considered when drafting a business document. This can be used in conjunction with Learning Activity 20: Draft Your Message.

See "variations" below for a real-life quality check of a document that participants brought to the workshop. If you utilize the variation, follow these steps:

1. Instruct participants to split up into pairs.
2. Direct them to use the checklist to review the document they brought.
3. Remind them to do their best to also include the guidelines for all Five Cs (clear, concise, complete, correct, and considerate).
4. Direct them to exchange their documents with their partners to check each other's work.
5. Ask them to provide feedback to make relevant corrections to the document.
6. Discuss the activity using the questions provided.

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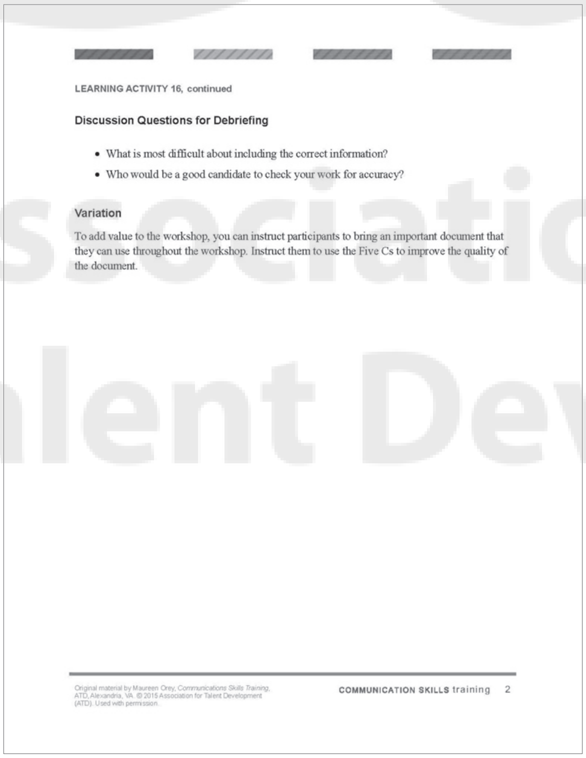
## Learning Activity 16, *continued*



LEARNING ACTIVITY 16, continued

**Discussion Questions for Debriefing**

- What is most difficult about including the correct information?
- Who would be a good candidate to check your work for accuracy?

**Variation**

To add value to the workshop, you can instruct participants to bring an important document that they can use throughout the workshop. Instruct them to use the Five Cs to improve the quality of the document.

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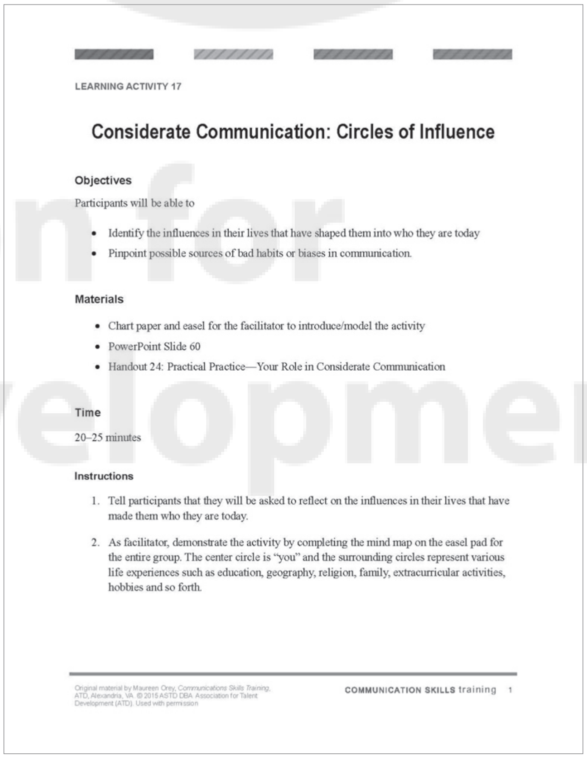
## Learning Activity 17: Considerate Communication: Circles of Influence



LEARNING ACTIVITY 17

### Considerate Communication: Circles of Influence

**Objectives**

Participants will be able to

- Identify the influences in their lives that have shaped them into who they are today
- Pinpoint possible sources of bad habits or biases in communication.

**Materials**

- Chart paper and easel for the facilitator to introduce/model the activity
- PowerPoint Slide 60
- Handout 24: Practical Practice—Your Role in Considerate Communication

**Time**

20–25 minutes

**Instructions**

1. Tell participants that they will be asked to reflect on the influences in their lives that have made them who they are today.
2. As facilitator, demonstrate the activity by completing the mind map on the easel pad for the entire group. The center circle is "you" and the surrounding circles represent various life experiences such as education, geography, religion, family, extracurricular activities, hobbies and so forth.

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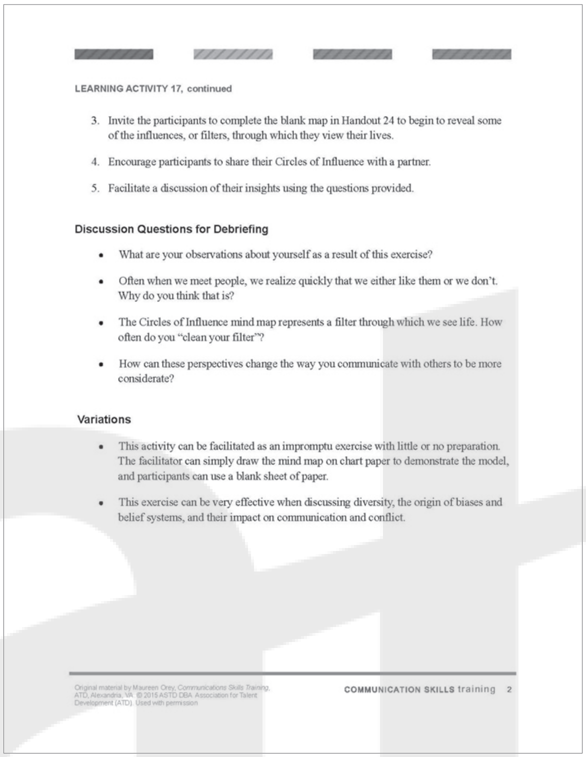
## Learning Activity 17, *continued*



LEARNING ACTIVITY 17, continued

3. Invite the participants to complete the blank map in Handout 24 to begin to reveal some of the influences, or filters, through which they view their lives.
4. Encourage participants to share their Circles of Influence with a partner.
5. Facilitate a discussion of their insights using the questions provided.

**Discussion Questions for Debriefing**

- What are your observations about yourself as a result of this exercise?
- Often when we meet people, we realize quickly that we either like them or we don't. Why do you think that is?
- The Circles of Influence mind map represents a filter through which we see life. How often do you "clean your filter"?
- How can these perspectives change the way you communicate with others to be more considerate?

**Variations**

- This activity can be facilitated as an impromptu exercise with little or no preparation. The facilitator can simply draw the mind map on chart paper to demonstrate the model, and participants can use a blank sheet of paper.
- This exercise can be very effective when discussing diversity, the origin of biases and belief systems, and their impact on communication and conflict.

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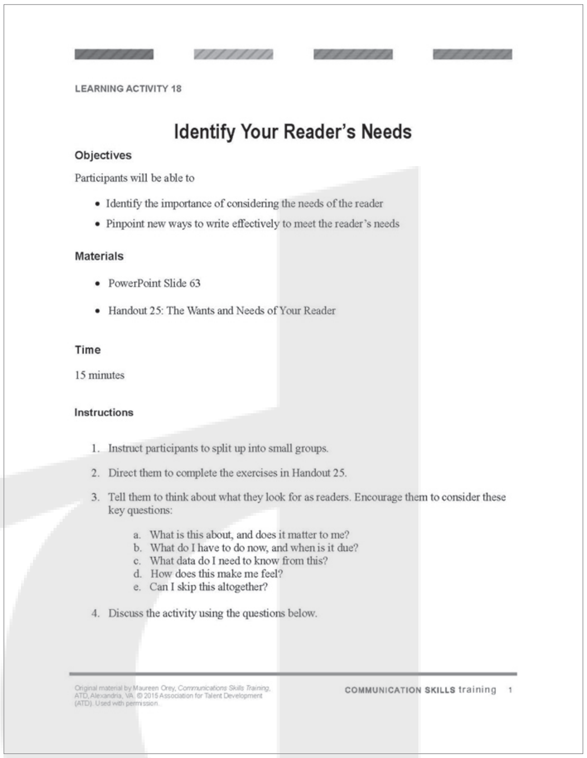
## Learning Activity 18: Identify Your Reader's Needs



LEARNING ACTIVITY 18

**Identify Your Reader's Needs**

**Objectives**

Participants will be able to

- Identify the importance of considering the needs of the reader
- Pinpoint new ways to write effectively to meet the reader's needs

**Materials**

- PowerPoint Slide 63
- Handout 25: The Wants and Needs of Your Reader

**Time**

15 minutes

**Instructions**

1. Instruct participants to split up into small groups.
2. Direct them to complete the exercises in Handout 25.
3. Tell them to think about what they look for as readers. Encourage them to consider these key questions:
    a. What is this about, and does it matter to me?
    b. What do I have to do now, and when is it due?
    c. What data do I need to know from this?
    d. How does this make me feel?
    e. Can I skip this altogether?
4. Discuss the activity using the questions below.

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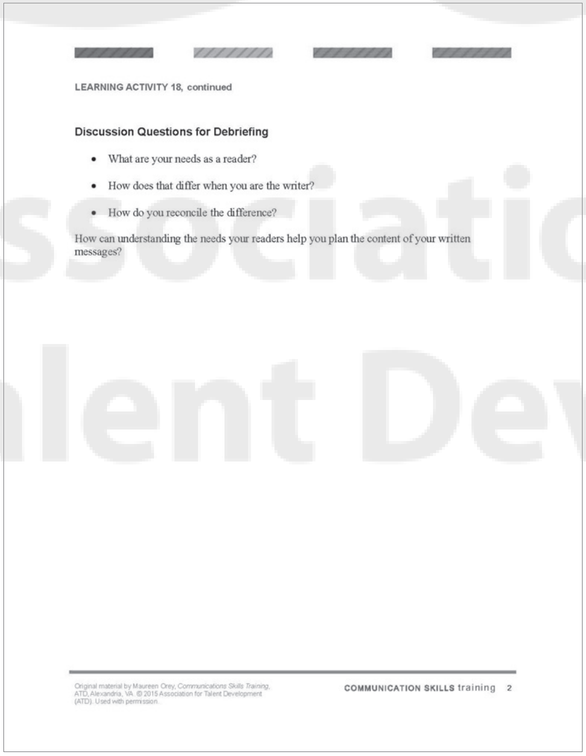
## Learning Activity 18, *continued*



LEARNING ACTIVITY 18, continued

**Discussion Questions for Debriefing**

- What are your needs as a reader?
- How does that differ when you are the writer?
- How do you reconcile the difference?

How can understanding the needs your readers help you plan the content of your written messages?

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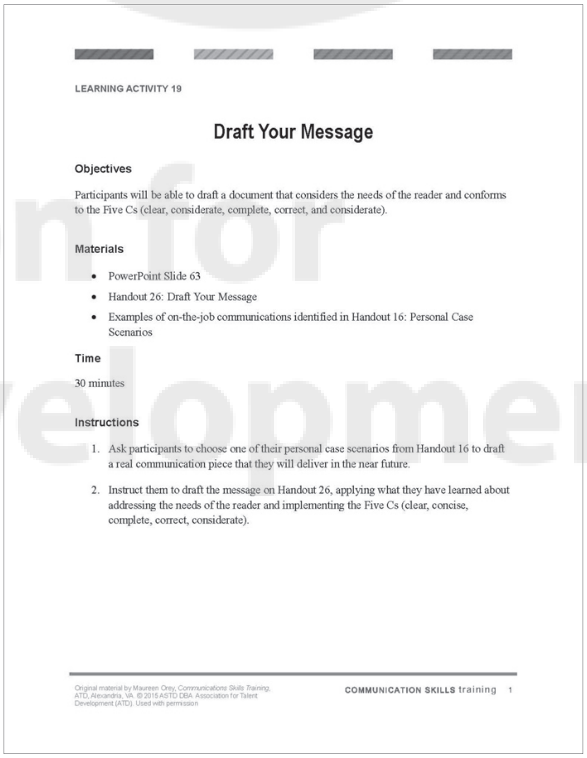
## Learning Activity 19: Draft Your Message



LEARNING ACTIVITY 19

**Draft Your Message**

**Objectives**

Participants will be able to draft a document that considers the needs of the reader and conforms to the Five Cs (clear, considerate, complete, correct, and considerate).

**Materials**

- PowerPoint Slide 63
- Handout 26: Draft Your Message
- Examples of on-the-job communications identified in Handout 16: Personal Case Scenarios

**Time**

30 minutes

**Instructions**

1. Ask participants to choose one of their personal case scenarios from Handout 16 to draft a real communication piece that they will deliver in the near future.
2. Instruct them to draft the message on Handout 26, applying what they have learned about addressing the needs of the reader and implementing the Five Cs (clear, concise, complete, correct, considerate).

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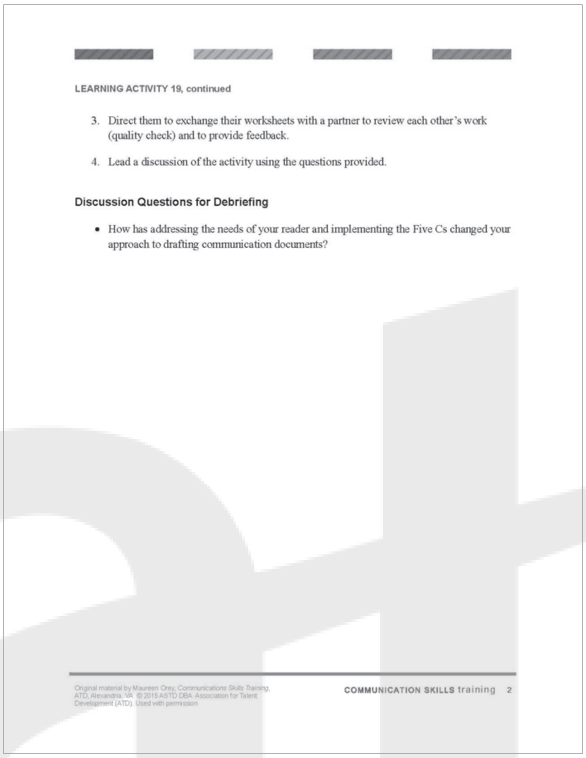
## Learning Activity 19, *continued*



LEARNING ACTIVITY 19, continued

3. Direct them to exchange their worksheets with a partner to review each other's work (quality check) and to provide feedback.
4. Lead a discussion of the activity using the questions provided.

**Discussion Questions for Debriefing**

- How has addressing the needs of your reader and implementing the Five Cs changed your approach to drafting communication documents?

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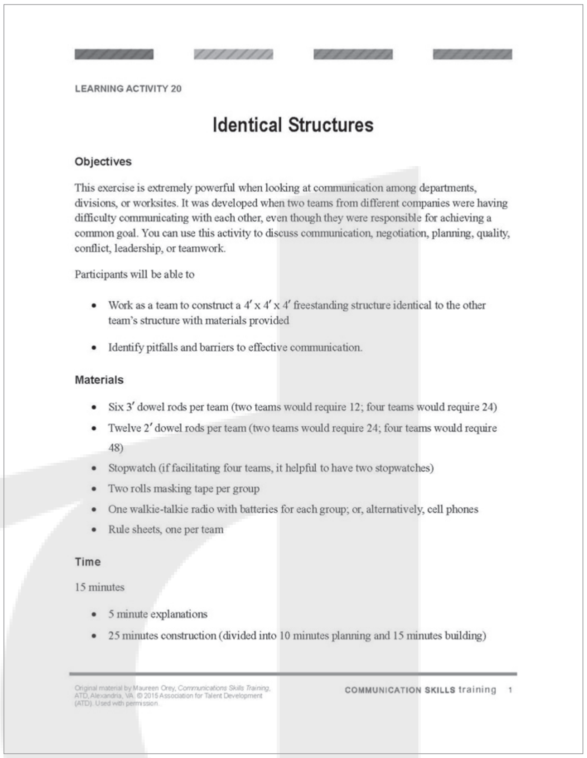
## Learning Activity 20: Identical Structures



LEARNING ACTIVITY 20

### Identical Structures

**Objectives**

This exercise is extremely powerful when looking at communication among departments, divisions, or worksites. It was developed when two teams from different companies were having difficulty communicating with each other, even though they were responsible for achieving a common goal. You can use this activity to discuss communication, negotiation, planning, quality, conflict, leadership, or teamwork.

Participants will be able to

- Work as a team to construct a 4′ x 4′ x 4′ freestanding structure identical to the other team's structure with materials provided
- Identify pitfalls and barriers to effective communication.

**Materials**

- Six 3′ dowel rods per team (two teams would require 12; four teams would require 24)
- Twelve 2′ dowel rods per team (two teams would require 24; four teams would require 48)
- Stopwatch (if facilitating four teams, it helpful to have two stopwatches)
- Two rolls masking tape per group
- One walkie-talkie radio with batteries for each group; or, alternatively, cell phones
- Rule sheets, one per team

**Time**

15 minutes

- 5 minute explanations
- 25 minutes construction (divided into 10 minutes planning and 15 minutes building)

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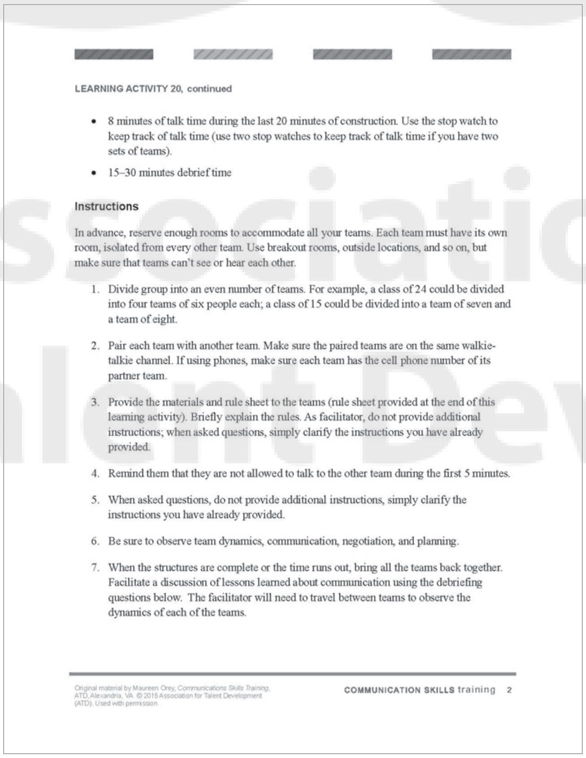
## Learning Activity 20, *continued*



LEARNING ACTIVITY 20, continued

- 8 minutes of talk time during the last 20 minutes of construction. Use the stop watch to keep track of talk time (use two stop watches to keep track of talk time if you have two sets of teams).
- 15–30 minutes debrief time

**Instructions**

In advance, reserve enough rooms to accommodate all your teams. Each team must have its own room, isolated from every other team. Use breakout rooms, outside locations, and so on, but make sure that teams can't see or hear each other.

1. Divide group into an even number of teams. For example, a class of 24 could be divided into four teams of six people each; a class of 15 could be divided into a team of seven and a team of eight.
2. Pair each team with another team. Make sure the paired teams are on the same walkie-talkie channel. If using phones, make sure each team has the cell phone number of its partner team.
3. Provide the materials and rule sheet to the teams (rule sheet provided at the end of this learning activity). Briefly explain the rules. As facilitator, do not provide additional instructions; when asked questions, simply clarify the instructions you have already provided.
4. Remind them that they are not allowed to talk to the other team during the first 5 minutes.
5. When asked questions, do not provide additional instructions, simply clarify the instructions you have already provided.
6. Be sure to observe team dynamics, communication, negotiation, and planning.
7. When the structures are complete or the time runs out, bring all the teams back together. Facilitate a discussion of lessons learned about communication using the debriefing questions below. The facilitator will need to travel between teams to observe the dynamics of each of the teams.

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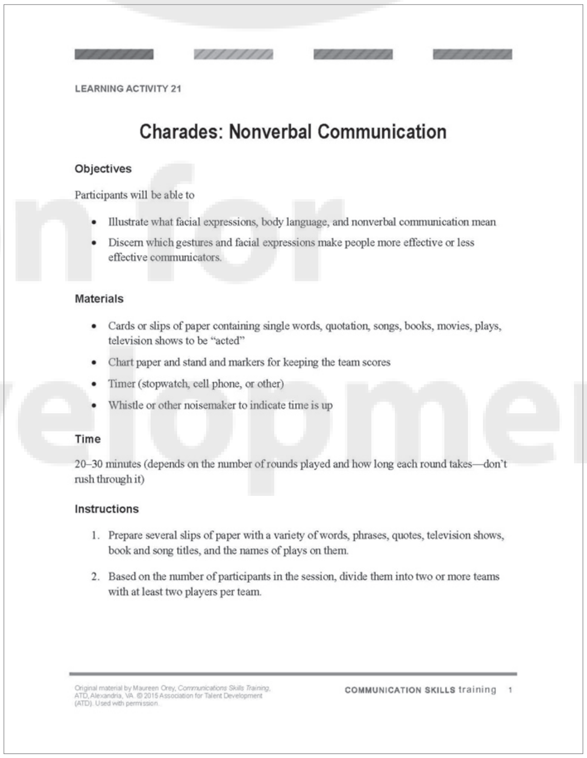
COMMUNICATION SKILLS training 2

## Learning Activity 21: Charades: Nonverbal Communication



LEARNING ACTIVITY 21

### Charades: Nonverbal Communication

**Objectives**

Participants will be able to

- Illustrate what facial expressions, body language, and nonverbal communication mean
- Discern which gestures and facial expressions make people more effective or less effective communicators.

**Materials**

- Cards or slips of paper containing single words, quotation, songs, books, movies, plays, television shows to be "acted"
- Chart paper and stand and markers for keeping the team scores
- Timer (stopwatch, cell phone, or other)
- Whistle or other noisemaker to indicate time is up

**Time**

20–30 minutes (depends on the number of rounds played and how long each round takes—don't rush through it)

**Instructions**

1. Prepare several slips of paper with a variety of words, phrases, quotes, television shows, book and song titles, and the names of plays on them.
2. Based on the number of participants in the session, divide them into two or more teams with at least two players per team.

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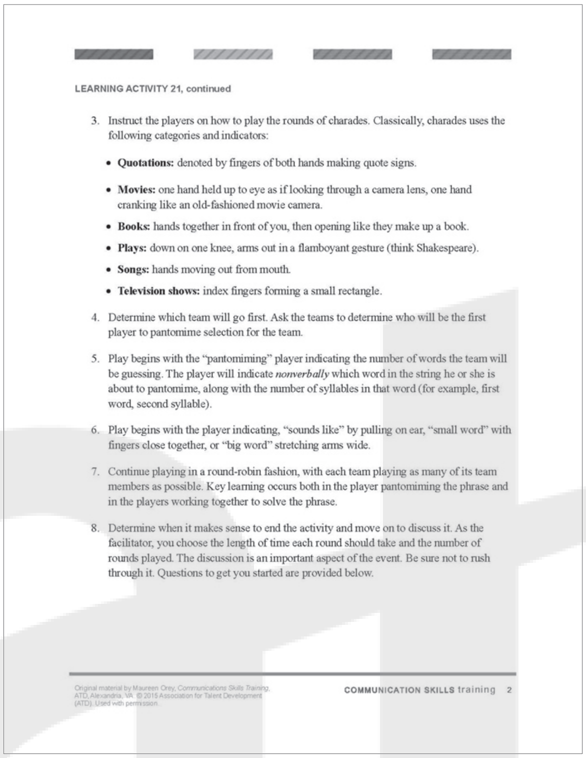
## Learning Activity 21, *continued*



LEARNING ACTIVITY 21, continued

3. Instruct the players on how to play the rounds of charades. Classically, charades uses the following categories and indicators:
   - **Quotations:** denoted by fingers of both hands making quote signs.
   - **Movies:** one hand held up to eye as if looking through a camera lens, one hand cranking like an old-fashioned movie camera.
   - **Books:** hands together in front of you, then opening like they make up a book.
   - **Plays:** down on one knee, arms out in a flamboyant gesture (think Shakespeare).
   - **Songs:** hands moving out from mouth.
   - **Television shows:** index fingers forming a small rectangle.
4. Determine which team will go first. Ask the teams to determine who will be the first player to pantomime selection for the team.
5. Play begins with the "pantomiming" player indicating the number of words the team will be guessing. The player will indicate *nonverbally* which word in the string he or she is about to pantomime, along with the number of syllables in that word (for example, first word, second syllable).
6. Play begins with the player indicating, "sounds like" by pulling on ear, "small word" with fingers close together, or "big word" stretching arms wide.
7. Continue playing in a round-robin fashion, with each team playing as many of its team members as possible. Key learning occurs both in the player pantomiming the phrase and in the players working together to solve the phrase.
8. Determine when it makes sense to end the activity and move on to discuss it. As the facilitator, you choose the length of time each round should take and the number of rounds played. The discussion is an important aspect of the event. Be sure not to rush through it. Questions to get you started are provided below.

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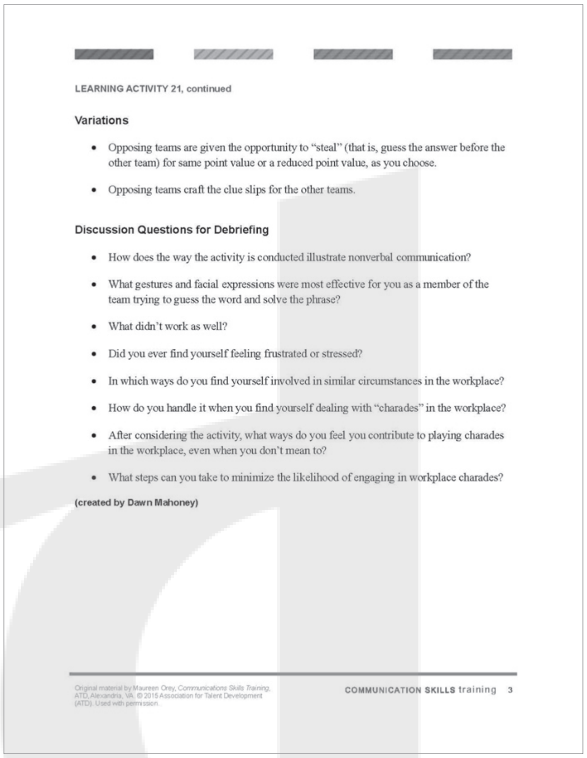
**COMMUNICATION SKILLS** training 2

## Learning Activity 21, *continued*



LEARNING ACTIVITY 21, continued

**Variations**

- Opposing teams are given the opportunity to "steal" (that is, guess the answer before the other team) for same point value or a reduced point value, as you choose.
- Opposing teams craft the clue slips for the other teams.

**Discussion Questions for Debriefing**

- How does the way the activity is conducted illustrate nonverbal communication?
- What gestures and facial expressions were most effective for you as a member of the team trying to guess the word and solve the phrase?
- What didn't work as well?
- Did you ever find yourself feeling frustrated or stressed?
- In which ways do you find yourself involved in similar circumstances in the workplace?
- How do you handle it when you find yourself dealing with "charades" in the workplace?
- After considering the activity, what ways do you feel you contribute to playing charades in the workplace, even when you don't mean to?
- What steps can you take to minimize the likelihood of engaging in workplace charades?

**(created by Dawn Mahoney)**

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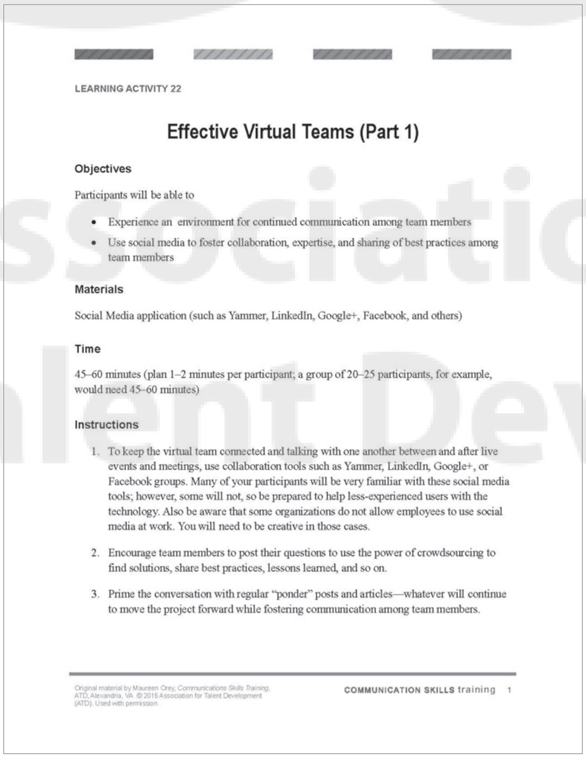
**COMMUNICATION SKILLS** training 3

## Learning Activity 22: Effective Virtual Teams (Part 1)



LEARNING ACTIVITY 22

**Effective Virtual Teams (Part 1)**

**Objectives**

Participants will be able to

- Experience an  environment for continued communication among team members
- Use social media to foster collaboration, expertise, and sharing of best practices among team members

**Materials**

Social Media application (such as Yammer, LinkedIn, Google+, Facebook, and others)

**Time**

45–60 minutes (plan 1–2 minutes per participant; a group of 20–25 participants, for example, would need 45–60 minutes)

**Instructions**

1. To keep the virtual team connected and talking with one another between and after live events and meetings, use collaboration tools such as Yammer, LinkedIn, Google+, or Facebook groups. Many of your participants will be very familiar with these social media tools; however, some will not, so be prepared to help less-experienced users with the technology. Also be aware that some organizations do not allow employees to use social media at work. You will need to be creative in those cases.
2. Encourage team members to post their questions to use the power of crowdsourcing to find solutions, share best practices, lessons learned, and so on.
3. Prime the conversation with regular "ponder" posts and articles—whatever will continue to move the project forward while fostering communication among team members.

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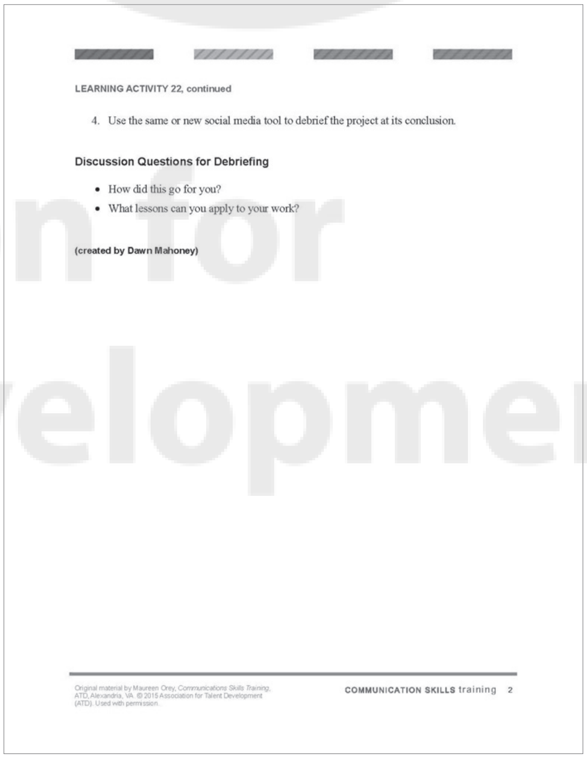
**COMMUNICATION SKILLS** training 1

## Learning Activity 22, *continued*



LEARNING ACTIVITY 22, continued

4. Use the same or new social media tool to debrief the project at its conclusion.

**Discussion Questions for Debriefing**

- How did this go for you?
- What lessons can you apply to your work?

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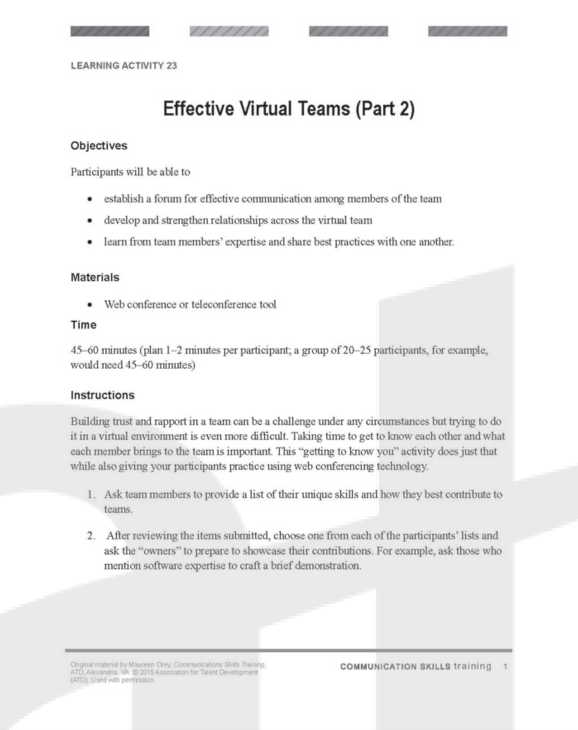
**COMMUNICATION SKILLS** training 2

## Learning Activity 23: Effective Virtual Teams (Part 2)



LEARNING ACTIVITY 23

### Effective Virtual Teams (Part 2)

**Objectives**

Participants will be able to

- establish a forum for effective communication among members of the team
- develop and strengthen relationships across the virtual team
- learn from team members' expertise and share best practices with one another.

**Materials**

- Web conference or teleconference tool

**Time**

45–60 minutes (plan 1–2 minutes per participant; a group of 20–25 participants, for example, would need 45–60 minutes)

**Instructions**

Building trust and rapport in a team can be a challenge under any circumstances but trying to do it in a virtual environment is even more difficult. Taking time to get to know each other and what each member brings to the team is important. This "getting to know you" activity does just that while also giving your participants practice using web conferencing technology.

1. Ask team members to provide a list of their unique skills and how they best contribute to teams.
2. After reviewing the items submitted, choose one from each of the participants' lists and ask the "owners" to prepare to showcase their contributions. For example, ask those who mention software expertise to craft a brief demonstration.

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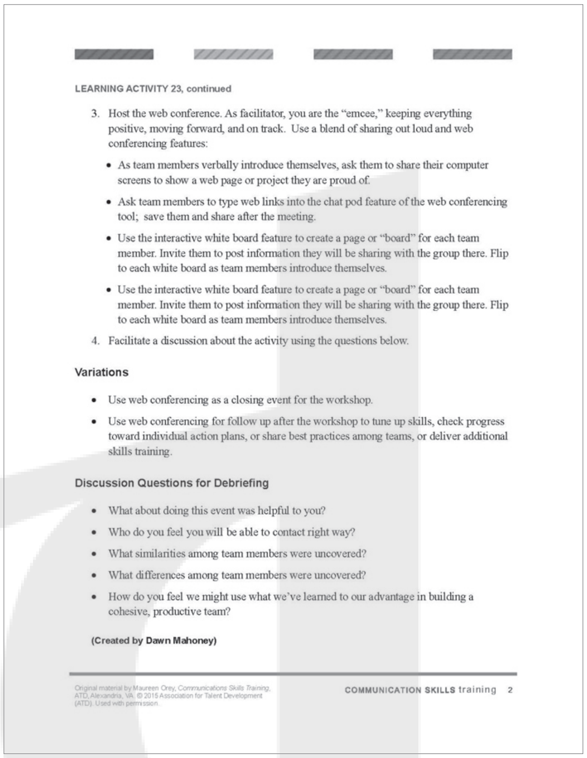
**COMMUNICATION SKILLS** training 1

## Learning Activity 23, *continued*



LEARNING ACTIVITY 23, continued

3. Host the web conference. As facilitator, you are the "emcee," keeping everything positive, moving forward, and on track. Use a blend of sharing out loud and web conferencing features:
   - As team members verbally introduce themselves, ask them to share their computer screens to show a web page or project they are proud of.
   - Ask team members to type web links into the chat pod feature of the web conferencing tool; save them and share after the meeting.
   - Use the interactive white board feature to create a page or "board" for each team member. Invite them to post information they will be sharing with the group there. Flip to each white board as team members introduce themselves.
   - Use the interactive white board feature to create a page or "board" for each team member. Invite them to post information they will be sharing with the group there. Flip to each white board as team members introduce themselves.
4. Facilitate a discussion about the activity using the questions below.

**Variations**

- Use web conferencing as a closing event for the workshop.
- Use web conferencing for follow up after the workshop to tune up skills, check progress toward individual action plans, or share best practices among teams, or deliver additional skills training.

**Discussion Questions for Debriefing**

- What about doing this event was helpful to you?
- Who do you feel you will be able to contact right way?
- What similarities among team members were uncovered?
- What differences among team members were uncovered?
- How do you feel we might use what we've learned to our advantage in building a cohesive, productive team?

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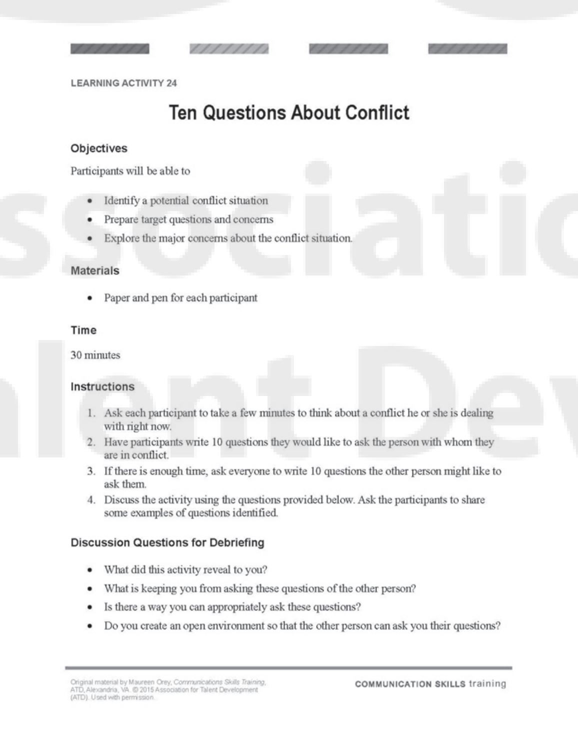
**COMMUNICATION SKILLS** training 2

## Learning Activity 24: Ten Questions About Conflict



LEARNING ACTIVITY 24

### Ten Questions About Conflict

**Objectives**

Participants will be able to

- Identify a potential conflict situation
- Prepare target questions and concerns
- Explore the major concerns about the conflict situation.

**Materials**

- Paper and pen for each participant

**Time**

30 minutes

**Instructions**

1. Ask each participant to take a few minutes to think about a conflict he or she is dealing with right now.
2. Have participants write 10 questions they would like to ask the person with whom they are in conflict.
3. If there is enough time, ask everyone to write 10 questions the other person might like to ask them.
4. Discuss the activity using the questions provided below. Ask the participants to share some examples of questions identified.

**Discussion Questions for Debriefing**

- What did this activity reveal to you?
- What is keeping you from asking these questions of the other person?
- Is there a way you can appropriately ask these questions?
- Do you create an open environment so that the other person can ask you their questions?

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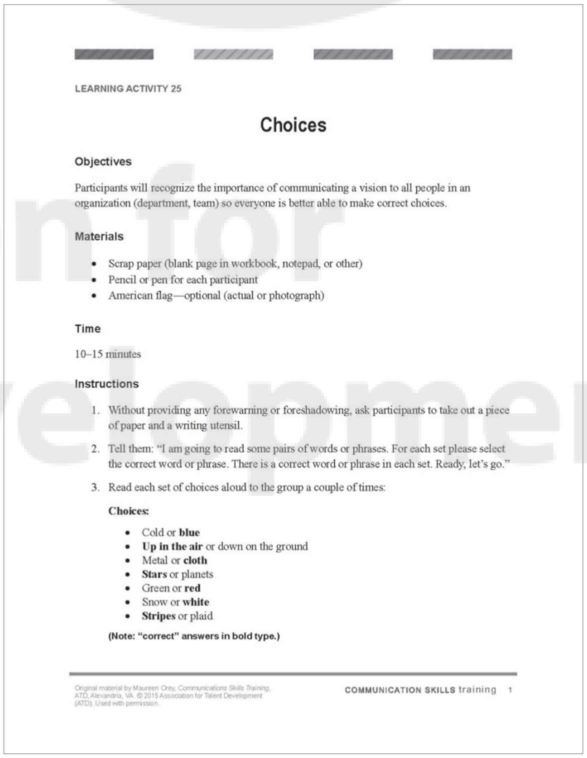
**COMMUNICATION SKILLS** training

## Learning Activity 25: Choices



LEARNING ACTIVITY 25

### Choices

**Objectives**

Participants will recognize the importance of communicating a vision to all people in an organization (department, team) so everyone is better able to make correct choices.

**Materials**

- Scrap paper (blank page in workbook, notepad, or other)
- Pencil or pen for each participant
- American flag—optional (actual or photograph)

**Time**

10–15 minutes

**Instructions**

1. Without providing any forewarning or foreshadowing, ask participants to take out a piece of paper and a writing utensil.
2. Tell them: "I am going to read some pairs of words or phrases. For each set please select the correct word or phrase. There is a correct word or phrase in each set. Ready, let's go."
3. Read each set of choices aloud to the group a couple of times:

**Choices:**

- Cold or **blue**
- **Up in the air** or down on the ground
- Metal or **cloth**
- **Stars** or planets
- Green or **red**
- Snow or **white**
- **Stripes** or plaid

**(Note: "correct" answers in bold type.)**

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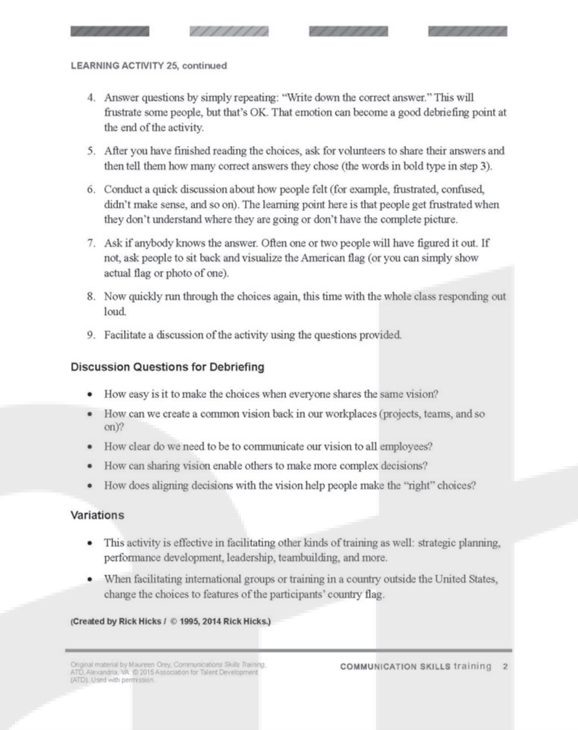
**COMMUNICATION SKILLS** training 1

## Learning Activity 25, *continued*



LEARNING ACTIVITY 25, continued

4. Answer questions by simply repeating: "Write down the correct answer." This will frustrate some people, but that's OK. That emotion can become a good debriefing point at the end of the activity.
5. After you have finished reading the choices, ask for volunteers to share their answers and then tell them how many correct answers they chose (the words in bold type in step 3).
6. Conduct a quick discussion about how people felt (for example, frustrated, confused, didn't make sense, and so on). The learning point here is that people get frustrated when they don't understand where they are going or don't have the complete picture.
7. Ask if anybody knows the answer. Often one or two people will have figured it out. If not, ask people to sit back and visualize the American flag (or you can simply show actual flag or photo of one).
8. Now quickly run through the choices again, this time with the whole class responding out loud.
9. Facilitate a discussion of the activity using the questions provided.

**Discussion Questions for Debriefing**

- How easy is it to make the choices when everyone shares the same vision?
- How can we create a common vision back in our workplaces (projects, teams, and so on)?
- How clear do we need to be to communicate our vision to all employees?
- How can sharing vision enable others to make more complex decisions?
- How does aligning decisions with the vision help people make the "right" choices?

**Variations**

- This activity is effective in facilitating other kinds of training as well: strategic planning, performance development, leadership, teambuilding, and more.
- When facilitating international groups or training in a country outside the United States, change the choices to features of the participants' country flag.

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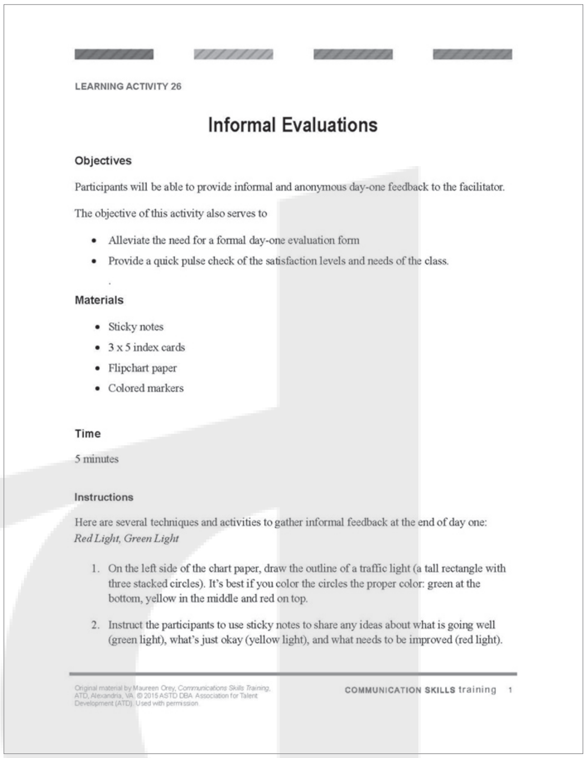
## Learning Activity 26: Informal Evaluations



LEARNING ACTIVITY 26

### Informal Evaluations

**Objectives**

Participants will be able to provide informal and anonymous day-one feedback to the facilitator.

The objective of this activity also serves to

- Alleviate the need for a formal day-one evaluation form
- Provide a quick pulse check of the satisfaction levels and needs of the class.

.

**Materials**

- Sticky notes
- 3 x 5 index cards
- Flipchart paper
- Colored markers

**Time**

5 minutes

**Instructions**

Here are several techniques and activities to gather informal feedback at the end of day one:
*Red Light, Green Light*

1. On the left side of the chart paper, draw the outline of a traffic light (a tall rectangle with three stacked circles). It's best if you color the circles the proper color: green at the bottom, yellow in the middle and red on top.
2. Instruct the participants to use sticky notes to share any ideas about what is going well (green light), what's just okay (yellow light), and what needs to be improved (red light).

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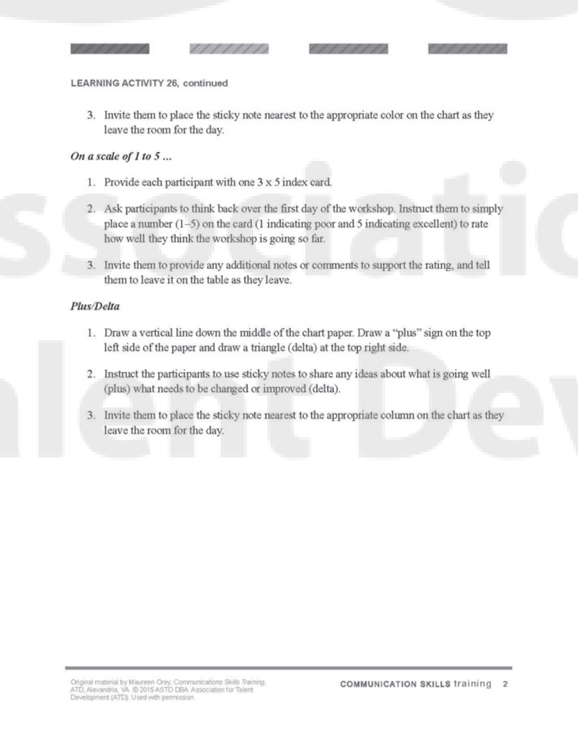
## Learning Activity 26, *continued*



LEARNING ACTIVITY 26, continued

3. Invite them to place the sticky note nearest to the appropriate color on the chart as they leave the room for the day.

***On a scale of 1 to 5 …***

1. Provide each participant with one 3 x 5 index card.
2. Ask participants to think back over the first day of the workshop. Instruct them to simply place a number (1–5) on the card (1 indicating poor and 5 indicating excellent) to rate how well they think the workshop is going so far.
3. Invite them to provide any additional notes or comments to support the rating, and tell them to leave it on the table as they leave.

***Plus/Delta***

1. Draw a vertical line down the middle of the chart paper. Draw a "plus" sign on the top left side of the paper and draw a triangle (delta) at the top right side.
2. Instruct the participants to use sticky notes to share any ideas about what is going well (plus) what needs to be changed or improved (delta).
3. Invite them to place the sticky note nearest to the appropriate column on the chart as they leave the room for the day.

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## Chapter 12

# Assessments

**What's in This Chapter**

- Ten assessments to use in your workshops in thumbnail format for reference
- To pre-work or not to pre-work, that is the question
- Refer to Chapter 14 for instructions to download full-size assessments

---

Assessments and evaluations are critical to a workshop—before it begins, as it goes on, and when it concludes. To prepare an effective workshop for participants, you have to assess their needs and those of their organization. Although a formal needs analysis is outside the scope of this book, the needs analysis assessments in this chapter can help you identify important information about the expectations for the workshop—both of the organization and of the participants—and about what participants' current knowledge or skill level of the topic may be. This information can help you make course adjustments to fit the needs of the learners and their organization.

Using assessments during the workshop helps participants identify areas of strength and weakness, enabling them to capitalize on their strengths and improve their weaknesses to be able to perform better in the workplace. Assessments can also be used during the workshop to check in on participants' learning so that you can make any needed adjustments as you go.

Finally, evaluation assessments of the workshop and the facilitator are vital both for the organization and for you as the facilitator. To learn if you met the goals and expectations, you want direct responses from participants. Although negative comments can be tough to read, ultimately they allow you to continually learn and improve your skills as a learning facilitator.

The instruments in this chapter provide instructions on how to complete each assessment and when to use it in the course of the workshop, as well as an explanation of the assessment's purpose. See Chapter 14 for complete instructions on how to download the workshop assessment instruments.

## To Pre-Work or Not to Pre-Work . . .

One of the most common uses of assessments is as pre-work before a workshop event. And yet there seems to be a never-ending discussion about whether or not pre-work is beneficial. On one hand, pre-work can build interest among participants, increase personal investment in the training, and connect participants with the facilitator and others in the workshop. On the other hand, the pressures of the workplace make it a certainty that at least some of your participants won't complete it. Then what do you do?

Many of the assessments offered here are designed to be short enough to complete during the workshop, and you can incorporate them easily into the flow of your workshop agenda. There is one exception to this: Assessment 2: Communication Style Inventory (CSI), courtesy of Ken Phillips of Phillips Associates, which is longer and more robust than may be easily conducted during the workshop. With a long assessment such as the CSI, it may be better to ask the participants to complete it prior to coming to class. It would also work well as a homework assignment between sessions or as a post-workshop activity. When you do assign pre-work, help your participants understand that the assessment adds value to the workshop experience. You will want to create a sense of urgency and an expectation for completion. Sometimes it is even helpful to incentivize your participants.

## Assessments Included in *Communication Skills Training*

Assessment 1. Listening Behavior Assessment

Assessment 2. Communication Style Inventory

Assessment 3. Course Evaluation

Assessment 4. Facilitator Competencies

Assessment 5. Interpersonal Skills

Assessment 6. Learning Needs Assessment Sheet

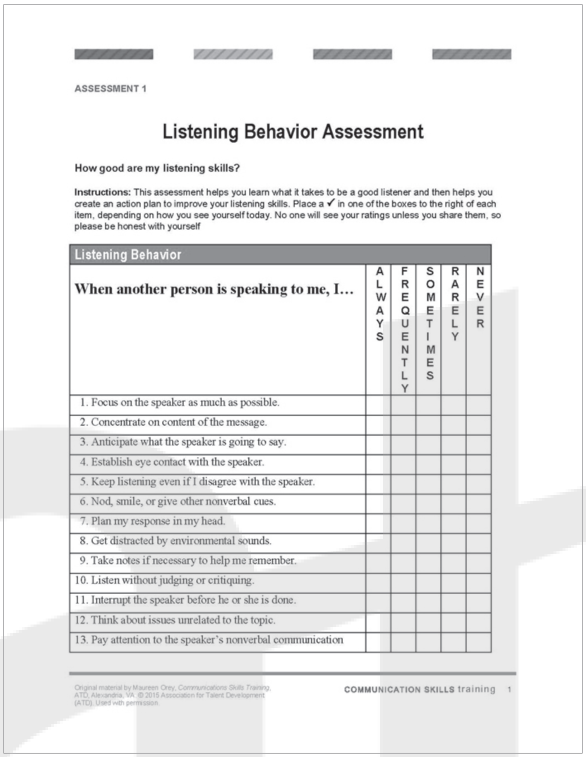
Assessment 7. Needs Analysis Discussion Form

Assessment 8. Nonverbal Communication Self-Assessment

Assessment 9. Skills Application Reflection

Assessment 10. Skills Mastery Assessment

## Assessment 1: Listening Behavior Assessment



ASSESSMENT 1

### Listening Behavior Assessment

**How good are my listening skills?**

**Instructions:** This assessment helps you learn what it takes to be a good listener and then helps you create an action plan to improve your listening skills. Place a ✓ in one of the boxes to the right of each item, depending on how you see yourself today. No one will see your ratings unless you share them, so please be honest with yourself

| **Listening Behavior** | | | | | |
|---|---|---|---|---|---|
| **When another person is speaking to me, I…** | ALWAYS | FREQUENTLY | SOMETIMES | RARELY | NEVER |
| 1. Focus on the speaker as much as possible. | | | | | |
| 2. Concentrate on content of the message. | | | | | |
| 3. Anticipate what the speaker is going to say. | | | | | |
| 4. Establish eye contact with the speaker. | | | | | |
| 5. Keep listening even if I disagree with the speaker. | | | | | |
| 6. Nod, smile, or give other nonverbal cues. | | | | | |
| 7. Plan my response in my head. | | | | | |
| 8. Get distracted by environmental sounds. | | | | | |
| 9. Take notes if necessary to help me remember. | | | | | |
| 10. Listen without judging or critiquing. | | | | | |
| 11. Interrupt the speaker before he or she is done. | | | | | |
| 12. Think about issues unrelated to the topic. | | | | | |
| 13. Pay attention to the speaker's nonverbal communication | | | | | |

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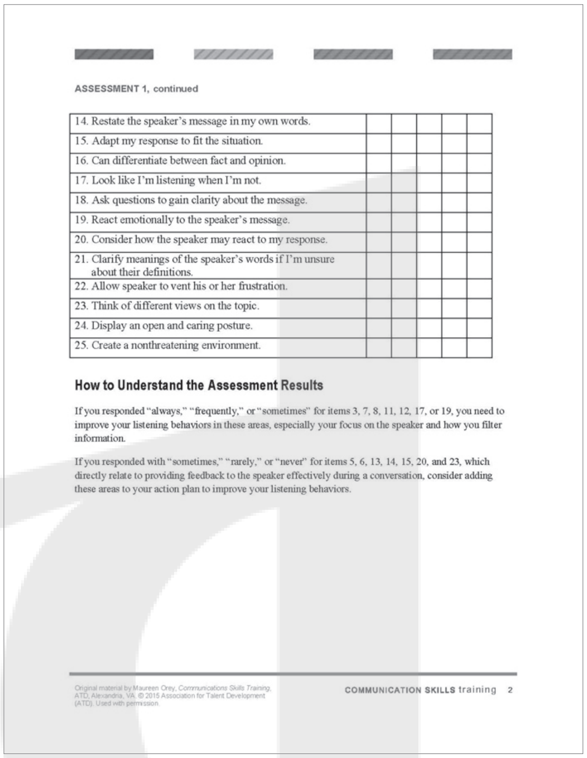
COMMUNICATION SKILLS training 1

## Assessment 1, *continued*



ASSESSMENT 1, continued

| | | | | | |
|---|---|---|---|---|---|
| 14. Restate the speaker's message in my own words. | | | | | |
| 15. Adapt my response to fit the situation. | | | | | |
| 16. Can differentiate between fact and opinion. | | | | | |
| 17. Look like I'm listening when I'm not. | | | | | |
| 18. Ask questions to gain clarity about the message. | | | | | |
| 19. React emotionally to the speaker's message. | | | | | |
| 20. Consider how the speaker may react to my response. | | | | | |
| 21. Clarify meanings of the speaker's words if I'm unsure about their definitions. | | | | | |
| 22. Allow speaker to vent his or her frustration. | | | | | |
| 23. Think of different views on the topic. | | | | | |
| 24. Display an open and caring posture. | | | | | |
| 25. Create a nonthreatening environment. | | | | | |

#### How to Understand the Assessment Results

If you responded "always," "frequently," or "sometimes" for items 3, 7, 8, 11, 12, 17, or 19, you need to improve your listening behaviors in these areas, especially your focus on the speaker and how you filter information.

If you responded with "sometimes," "rarely," or "never" for items 5, 6, 13, 14, 15, 20, and 23, which directly relate to providing feedback to the speaker effectively during a conversation, consider adding these areas to your action plan to improve your listening behaviors.

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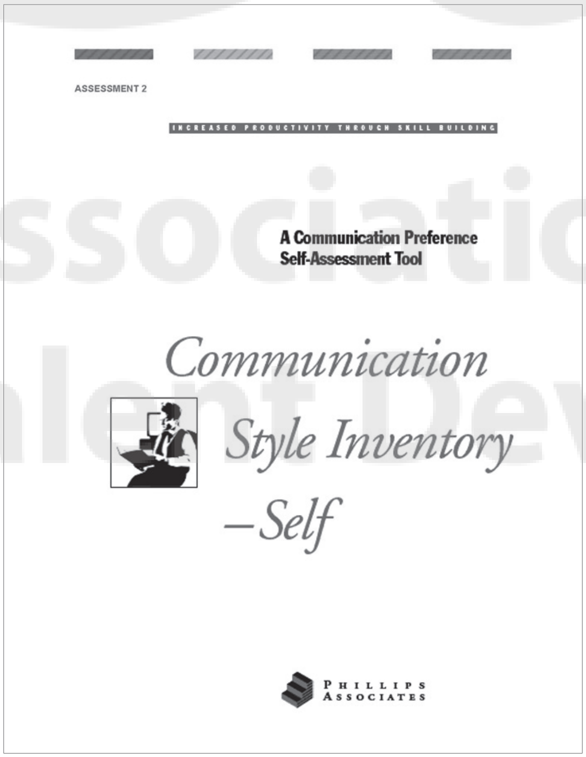
COMMUNICATION SKILLS training 2

## Assessment 2: Communication Style Inventory (22 pages)



ASSESSMENT 2

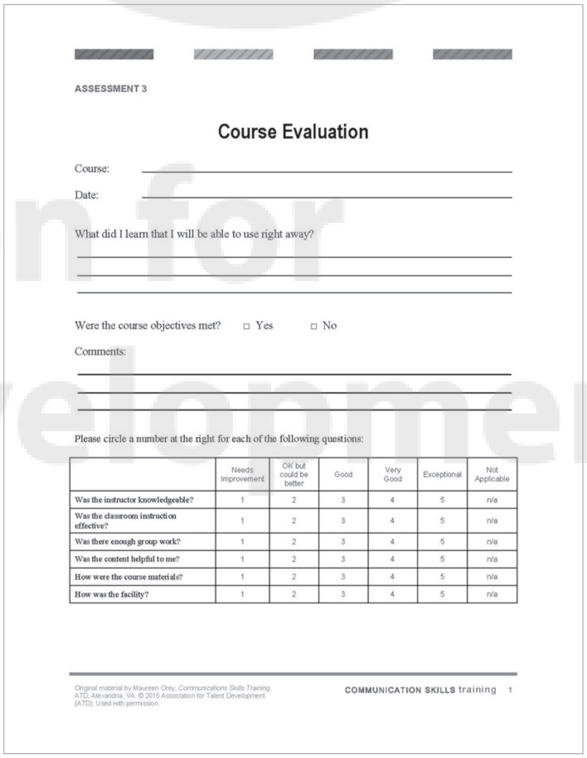
INCREASED PRODUCTIVITY THROUGH SKILL BUILDING

**A Communication Preference Self-Assessment Tool**

*Communication*
*Style Inventory*
*—Self*

PHILLIPS ASSOCIATES

## Assessment 3: Course Evaluation



ASSESSMENT 3

### Course Evaluation

Course: ____________________

Date: ____________________

What did I learn that I will be able to use right away?

____________________

____________________

____________________

Were the course objectives met? ☐ Yes ☐ No

Comments:

____________________

____________________

____________________

Please circle a number at the right for each of the following questions:

| | Needs Improvement | OK but could be better | Good | Very Good | Exceptional | Not Applicable |
|---|---|---|---|---|---|---|
| Was the instructor knowledgeable? | 1 | 2 | 3 | 4 | 5 | n/a |
| Was the classroom instruction effective? | 1 | 2 | 3 | 4 | 5 | n/a |
| Was there enough group work? | 1 | 2 | 3 | 4 | 5 | n/a |
| Was the content helpful to me? | 1 | 2 | 3 | 4 | 5 | n/a |
| How were the course materials? | 1 | 2 | 3 | 4 | 5 | n/a |
| How was the facility? | 1 | 2 | 3 | 4 | 5 | n/a |

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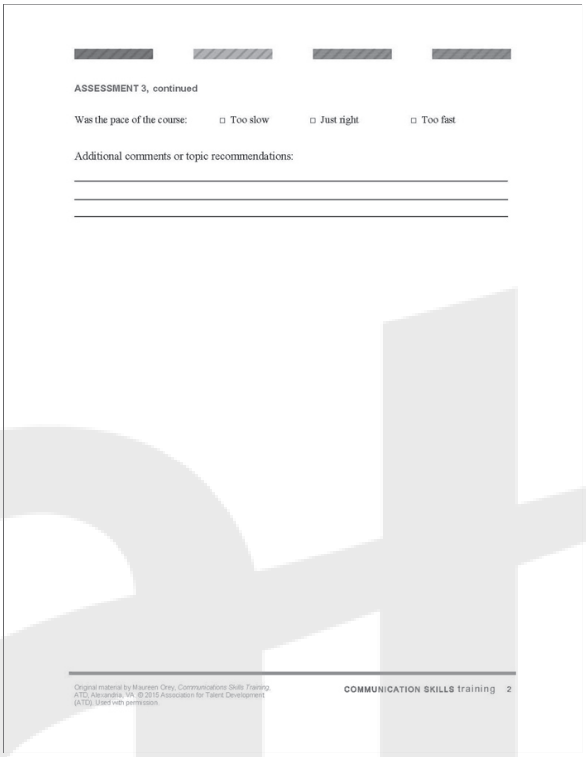
COMMUNICATION SKILLS training 1

## Assessment 3, *continued*



ASSESSMENT 3, continued

Was the pace of the course: ☐ Too slow ☐ Just right ☐ Too fast

Additional comments or topic recommendations:

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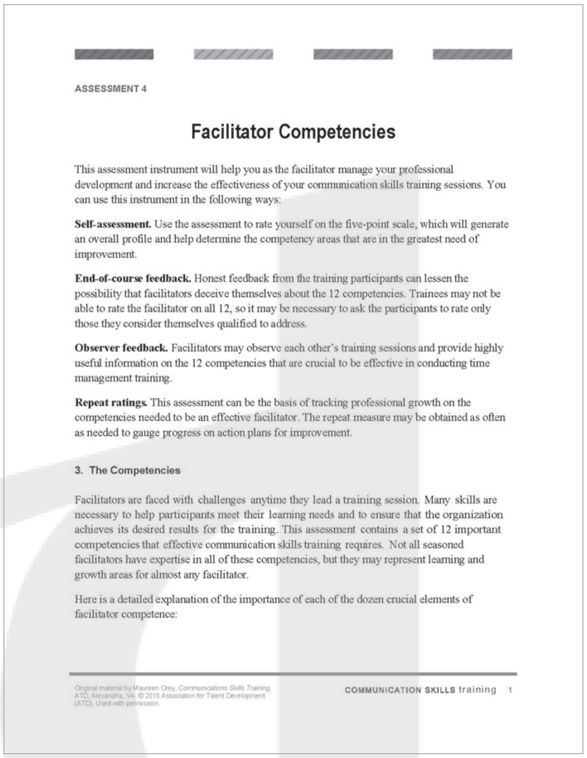
## Assessment 4: Facilitator Competencies



ASSESSMENT 4

### Facilitator Competencies

This assessment instrument will help you as the facilitator manage your professional development and increase the effectiveness of your communication skills training sessions. You can use this instrument in the following ways:

**Self-assessment.** Use the assessment to rate yourself on the five-point scale, which will generate an overall profile and help determine the competency areas that are in the greatest need of improvement.

**End-of-course feedback.** Honest feedback from the training participants can lessen the possibility that facilitators deceive themselves about the 12 competencies. Trainees may not be able to rate the facilitator on all 12, so it may be necessary to ask the participants to rate only those they consider themselves qualified to address.

**Observer feedback.** Facilitators may observe each other's training sessions and provide highly useful information on the 12 competencies that are crucial to be effective in conducting time management training.

**Repeat ratings.** This assessment can be the basis of tracking professional growth on the competencies needed to be an effective facilitator. The repeat measure may be obtained as often as needed to gauge progress on action plans for improvement.

### 3. The Competencies

Facilitators are faced with challenges anytime they lead a training session. Many skills are necessary to help participants meet their learning needs and to ensure that the organization achieves its desired results for the training. This assessment contains a set of 12 important competencies that effective communication skills training requires. Not all seasoned facilitators have expertise in all of these competencies, but they may represent learning and growth areas for almost any facilitator.

Here is a detailed explanation of the importance of each of the dozen crucial elements of facilitator competence:

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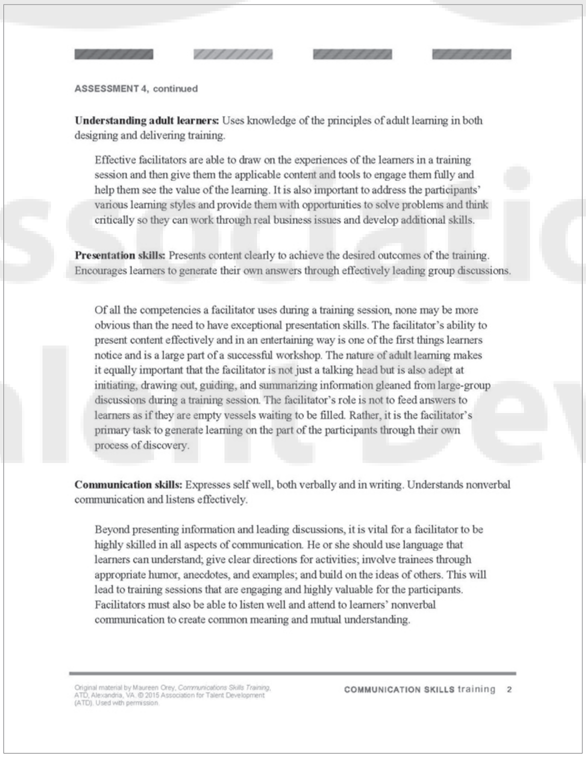
## Assessment 4, *continued*



ASSESSMENT 4, continued

**Understanding adult learners:** Uses knowledge of the principles of adult learning in both designing and delivering training.

> Effective facilitators are able to draw on the experiences of the learners in a training session and then give them the applicable content and tools to engage them fully and help them see the value of the learning. It is also important to address the participants' various learning styles and provide them with opportunities to solve problems and think critically so they can work through real business issues and develop additional skills.

**Presentation skills:** Presents content clearly to achieve the desired outcomes of the training. Encourages learners to generate their own answers through effectively leading group discussions.

> Of all the competencies a facilitator uses during a training session, none may be more obvious than the need to have exceptional presentation skills. The facilitator's ability to present content effectively and in an entertaining way is one of the first things learners notice and is a large part of a successful workshop. The nature of adult learning makes it equally important that the facilitator is not just a talking head but is also adept at initiating, drawing out, guiding, and summarizing information gleaned from large-group discussions during a training session. The facilitator's role is not to feed answers to learners as if they are empty vessels waiting to be filled. Rather, it is the facilitator's primary task to generate learning on the part of the participants through their own process of discovery.

**Communication skills:** Expresses self well, both verbally and in writing. Understands nonverbal communication and listens effectively.

> Beyond presenting information and leading discussions, it is vital for a facilitator to be highly skilled in all aspects of communication. He or she should use language that learners can understand; give clear directions for activities; involve trainees through appropriate humor, anecdotes, and examples; and build on the ideas of others. This will lead to training sessions that are engaging and highly valuable for the participants. Facilitators must also be able to listen well and attend to learners' nonverbal communication to create common meaning and mutual understanding.

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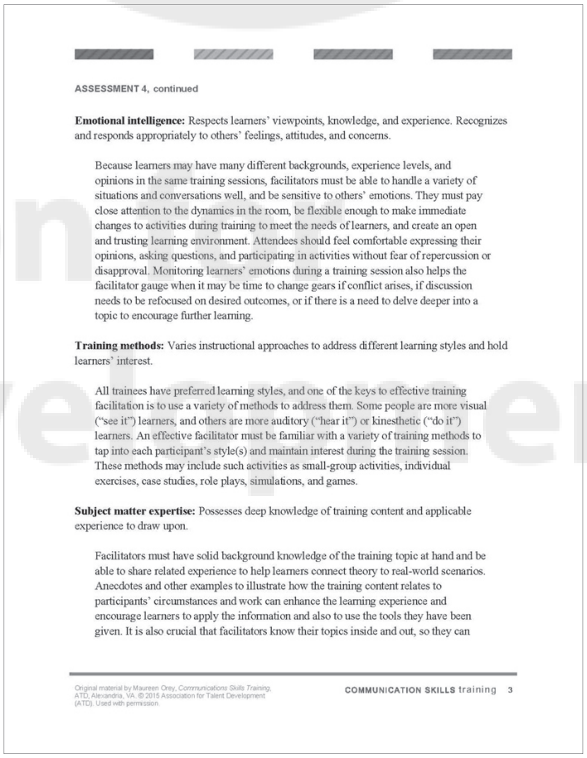
## Assessment 4, *continued*



ASSESSMENT 4, continued

**Emotional intelligence:** Respects learners' viewpoints, knowledge, and experience. Recognizes and responds appropriately to others' feelings, attitudes, and concerns.

> Because learners may have many different backgrounds, experience levels, and opinions in the same training sessions, facilitators must be able to handle a variety of situations and conversations well, and be sensitive to others' emotions. They must pay close attention to the dynamics in the room, be flexible enough to make immediate changes to activities during training to meet the needs of learners, and create an open and trusting learning environment. Attendees should feel comfortable expressing their opinions, asking questions, and participating in activities without fear of repercussion or disapproval. Monitoring learners' emotions during a training session also helps the facilitator gauge when it may be time to change gears if conflict arises, if discussion needs to be refocused on desired outcomes, or if there is a need to delve deeper into a topic to encourage further learning.

**Training methods:** Varies instructional approaches to address different learning styles and hold learners' interest.

> All trainees have preferred learning styles, and one of the keys to effective training facilitation is to use a variety of methods to address them. Some people are more visual ("see it") learners, and others are more auditory ("hear it") or kinesthetic ("do it") learners. An effective facilitator must be familiar with a variety of training methods to tap into each participant's style(s) and maintain interest during the training session. These methods may include such activities as small-group activities, individual exercises, case studies, role plays, simulations, and games.

**Subject matter expertise:** Possesses deep knowledge of training content and applicable experience to draw upon.

> Facilitators must have solid background knowledge of the training topic at hand and be able to share related experience to help learners connect theory to real-world scenarios. Anecdotes and other examples to illustrate how the training content relates to participants' circumstances and work can enhance the learning experience and encourage learners to apply the information and also to use the tools they have been given. It is also crucial that facilitators know their topics inside and out, so they can

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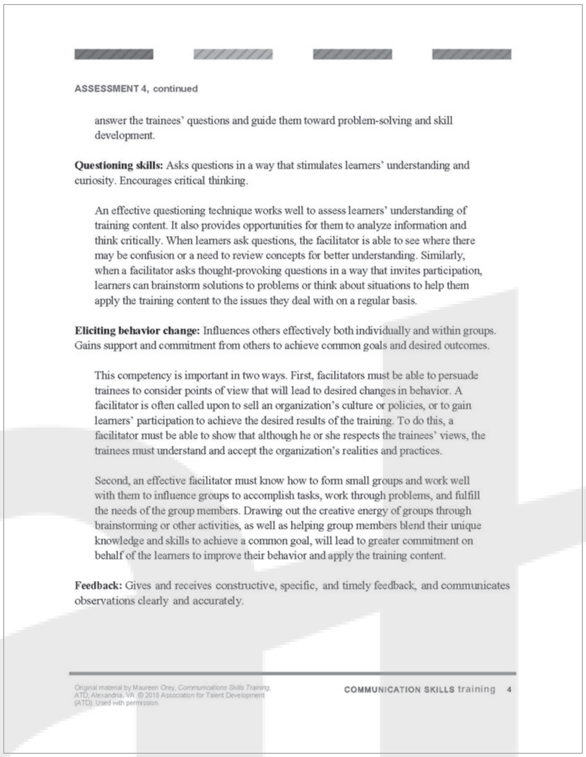
## Assessment 4, *continued*



answer the trainees' questions and guide them toward problem-solving and skill development.

**Questioning skills:** Asks questions in a way that stimulates learners' understanding and curiosity. Encourages critical thinking.

An effective questioning technique works well to assess learners' understanding of training content. It also provides opportunities for them to analyze information and think critically. When learners ask questions, the facilitator is able to see where there may be confusion or a need to review concepts for better understanding. Similarly, when a facilitator asks thought-provoking questions in a way that invites participation, learners can brainstorm solutions to problems or think about situations to help them apply the training content to the issues they deal with on a regular basis.

**Eliciting behavior change:** Influences others effectively both individually and within groups. Gains support and commitment from others to achieve common goals and desired outcomes.

This competency is important in two ways. First, facilitators must be able to persuade trainees to consider points of view that will lead to desired changes in behavior. A facilitator is often called upon to sell an organization's culture or policies, or to gain learners' participation to achieve the desired results of the training. To do this, a facilitator must be able to show that although he or she respects the trainees' views, the trainees must understand and accept the organization's realities and practices.

Second, an effective facilitator must know how to form small groups and work well with them to influence groups to accomplish tasks, work through problems, and fulfill the needs of the group members. Drawing out the creative energy of groups through brainstorming or other activities, as well as helping group members blend their unique knowledge and skills to achieve a common goal, will lead to greater commitment on behalf of the learners to improve their behavior and apply the training content.

**Feedback:** Gives and receives constructive, specific, and timely feedback, and communicates observations clearly and accurately.

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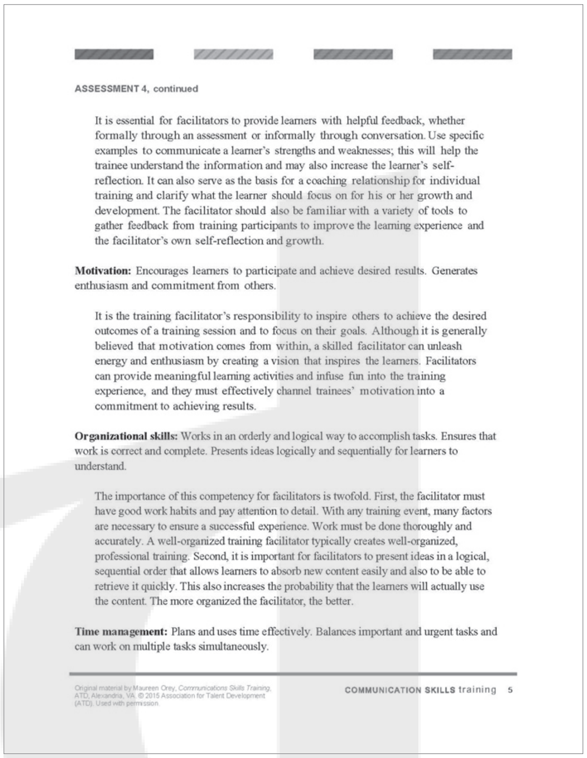
## Assessment 4, *continued*



It is essential for facilitators to provide learners with helpful feedback, whether formally through an assessment or informally through conversation. Use specific examples to communicate a learner's strengths and weaknesses; this will help the trainee understand the information and may also increase the learner's self-reflection. It can also serve as the basis for a coaching relationship for individual training and clarify what the learner should focus on for his or her growth and development. The facilitator should also be familiar with a variety of tools to gather feedback from training participants to improve the learning experience and the facilitator's own self-reflection and growth.

**Motivation:** Encourages learners to participate and achieve desired results. Generates enthusiasm and commitment from others.

It is the training facilitator's responsibility to inspire others to achieve the desired outcomes of a training session and to focus on their goals. Although it is generally believed that motivation comes from within, a skilled facilitator can unleash energy and enthusiasm by creating a vision that inspires the learners. Facilitators can provide meaningful learning activities and infuse fun into the training experience, and they must effectively channel trainees' motivation into a commitment to achieving results.

**Organizational skills:** Works in an orderly and logical way to accomplish tasks. Ensures that work is correct and complete. Presents ideas logically and sequentially for learners to understand.

The importance of this competency for facilitators is twofold. First, the facilitator must have good work habits and pay attention to detail. With any training event, many factors are necessary to ensure a successful experience. Work must be done thoroughly and accurately. A well-organized training facilitator typically creates well-organized, professional training. Second, it is important for facilitators to present ideas in a logical, sequential order that allows learners to absorb new content easily and also to be able to retrieve it quickly. This also increases the probability that the learners will actually use the content. The more organized the facilitator, the better.

**Time management:** Plans and uses time effectively. Balances important and urgent tasks and can work on multiple tasks simultaneously.

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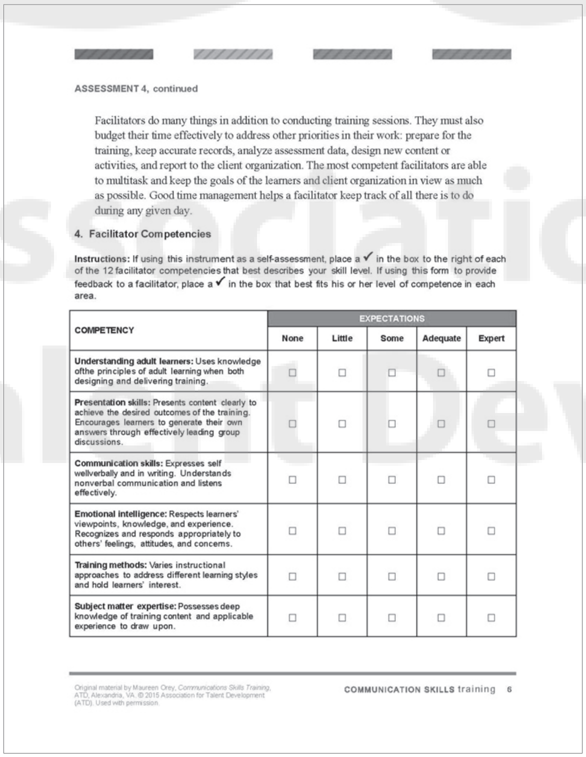
## Assessment 4, *continued*



Facilitators do many things in addition to conducting training sessions. They must also budget their time effectively to address other priorities in their work: prepare for the training, keep accurate records, analyze assessment data, design new content or activities, and report to the client organization. The most competent facilitators are able to multitask and keep the goals of the learners and client organization in view as much as possible. Good time management helps a facilitator keep track of all there is to do during any given day.

### 4. Facilitator Competencies

**Instructions:** If using this instrument as a self-assessment, place a ✓ in the box to the right of each of the 12 facilitator competencies that best describes your skill level. If using this form to provide feedback to a facilitator, place a ✓ in the box that best fits his or her level of competence in each area.

| COMPETENCY | EXPECTATIONS | | | | |
|---|---|---|---|---|---|
| | None | Little | Some | Adequate | Expert |
| **Understanding adult learners:** Uses knowledge ofthe principles of adult learning when both designing and delivering training. | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Presentation skills:** Presents content clearly to achieve the desired outcomes of the training. Encourages learners to generate their own answers through effectively leading group discussions. | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Communication skills:** Expresses self wellverbally and in writing. Understands nonverbal communication and listens effectively. | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Emotional intelligence:** Respects learners' viewpoints, knowledge, and experience. Recognizes and responds appropriately to others' feelings, attitudes, and concerns. | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Training methods:** Varies instructional approaches to address different learning styles and hold learners' interest. | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Subject matter expertise:** Possesses deep knowledge of training content and applicable experience to draw upon. | ☐ | ☐ | ☐ | ☐ | ☐ |

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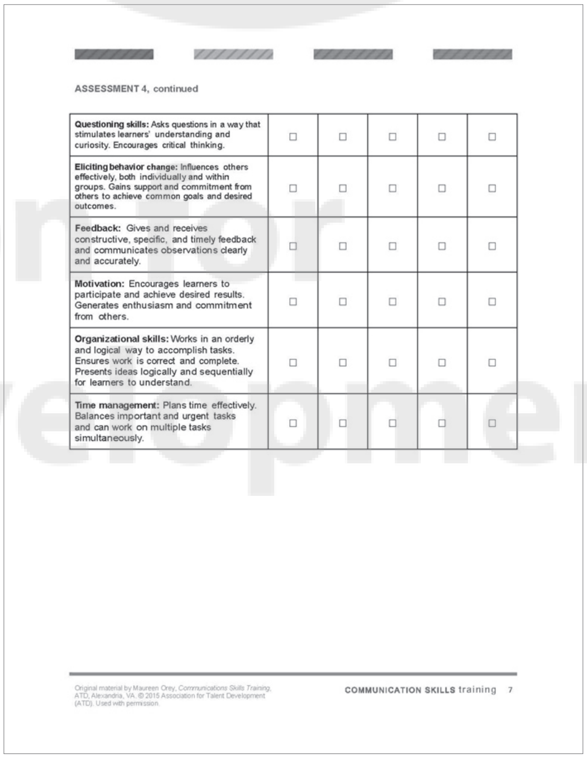
## Assessment 4, *continued*



| | | | | | |
|---|---|---|---|---|---|
| **Questioning skills:** Asks questions in a way that stimulates learners' understanding and curiosity. Encourages critical thinking. | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Eliciting behavior change:** Influences others effectively, both individually and within groups. Gains support and commitment from others to achieve common goals and desired outcomes. | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Feedback:** Gives and receives constructive, specific, and timely feedback and communicates observations clearly and accurately. | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Motivation:** Encourages learners to participate and achieve desired results. Generates enthusiasm and commitment from others. | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Organizational skills:** Works in an orderly and logical way to accomplish tasks. Ensures work is correct and complete. Presents ideas logically and sequentially for learners to understand. | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Time management:** Plans time effectively. Balances important and urgent tasks and can work on multiple tasks simultaneously. | ☐ | ☐ | ☐ | ☐ | ☐ |

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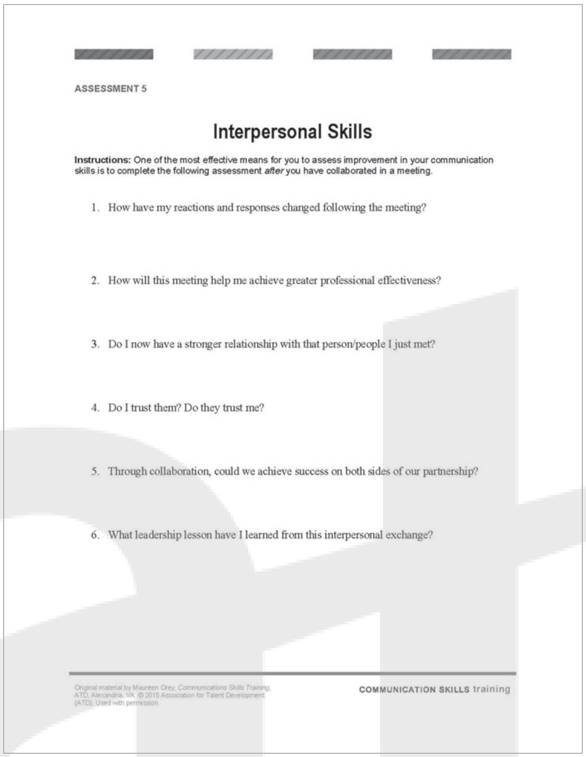
## Assessment 5: Interpersonal Skills



ASSESSMENT 5

### Interpersonal Skills

**Instructions:** One of the most effective means for you to assess improvement in your communication skills is to complete the following assessment *after* you have collaborated in a meeting.

1. How have my reactions and responses changed following the meeting?
2. How will this meeting help me achieve greater professional effectiveness?
3. Do I now have a stronger relationship with that person/people I just met?
4. Do I trust them? Do they trust me?
5. Through collaboration, could we achieve success on both sides of our partnership?
6. What leadership lesson have I learned from this interpersonal exchange?

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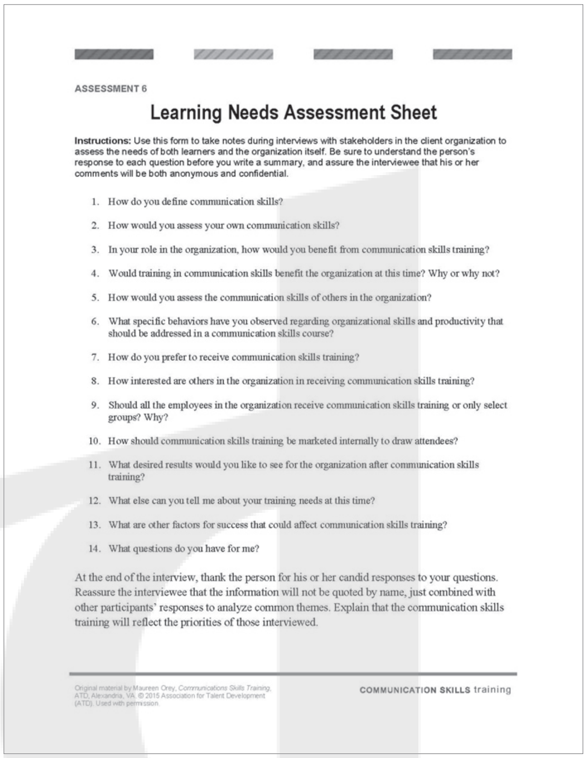
**COMMUNICATION SKILLS** training

## Assessment 6: Learning Needs Assessment Sheet



ASSESSMENT 6

### Learning Needs Assessment Sheet

**Instructions:** Use this form to take notes during interviews with stakeholders in the client organization to assess the needs of both learners and the organization itself. Be sure to understand the person's response to each question before you write a summary, and assure the interviewee that his or her comments will be both anonymous and confidential.

1. How do you define communication skills?
2. How would you assess your own communication skills?
3. In your role in the organization, how would you benefit from communication skills training?
4. Would training in communication skills benefit the organization at this time? Why or why not?
5. How would you assess the communication skills of others in the organization?
6. What specific behaviors have you observed regarding organizational skills and productivity that should be addressed in a communication skills course?
7. How do you prefer to receive communication skills training?
8. How interested are others in the organization in receiving communication skills training?
9. Should all the employees in the organization receive communication skills training or only select groups? Why?
10. How should communication skills training be marketed internally to draw attendees?
11. What desired results would you like to see for the organization after communication skills training?
12. What else can you tell me about your training needs at this time?
13. What are other factors for success that could affect communication skills training?
14. What questions do you have for me?

At the end of the interview, thank the person for his or her candid responses to your questions. Reassure the interviewee that the information will not be quoted by name, just combined with other participants' responses to analyze common themes. Explain that the communication skills training will reflect the priorities of those interviewed.

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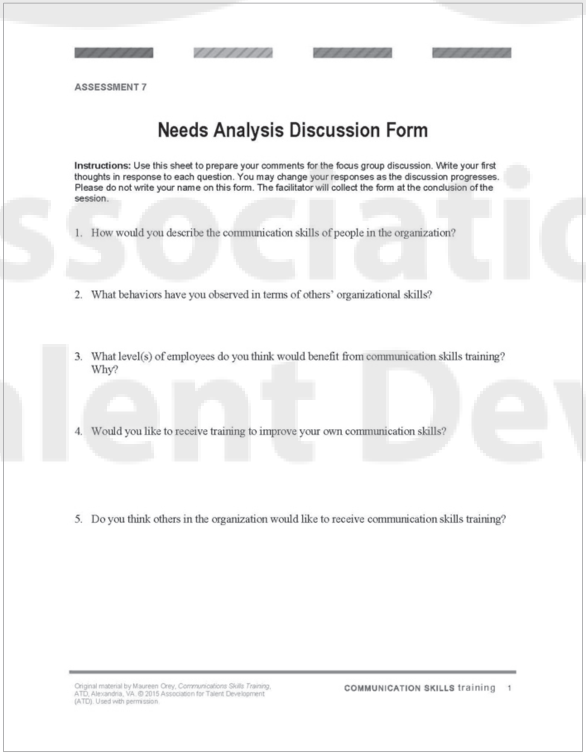
## Assessment 7: Needs Analysis Discussion Form



ASSESSMENT 7

### Needs Analysis Discussion Form

**Instructions:** Use this sheet to prepare your comments for the focus group discussion. Write your first thoughts in response to each question. You may change your responses as the discussion progresses. Please do not write your name on this form. The facilitator will collect the form at the conclusion of the session.

1. How would you describe the communication skills of people in the organization?
2. What behaviors have you observed in terms of others' organizational skills?
3. What level(s) of employees do you think would benefit from communication skills training? Why?
4. Would you like to receive training to improve your own communication skills?
5. Do you think others in the organization would like to receive communication skills training?

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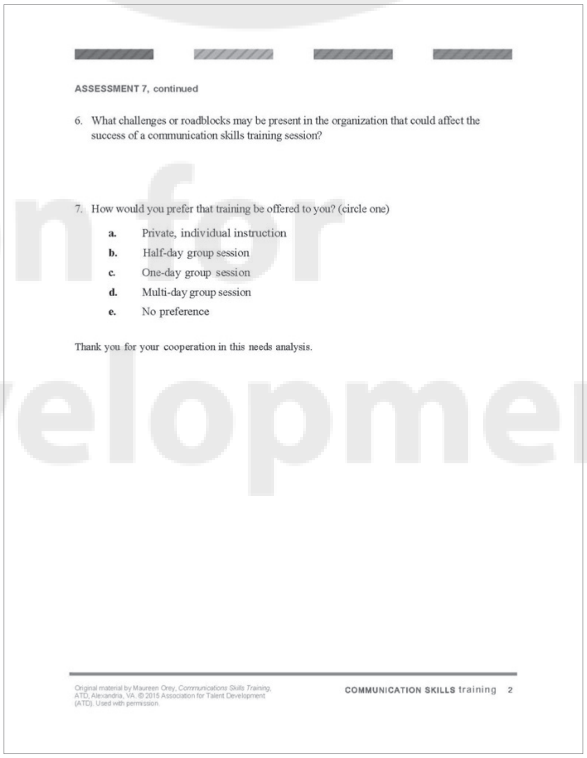
**COMMUNICATION SKILLS** training 1

## Assessment 7, *continued*



ASSESSMENT 7, continued

6. What challenges or roadblocks may be present in the organization that could affect the success of a communication skills training session?
7. How would you prefer that training be offered to you? (circle one)
   - **a.** Private, individual instruction
   - **b.** Half-day group session
   - **c.** One-day group session
   - **d.** Multi-day group session
   - **e.** No preference

Thank you for your cooperation in this needs analysis.

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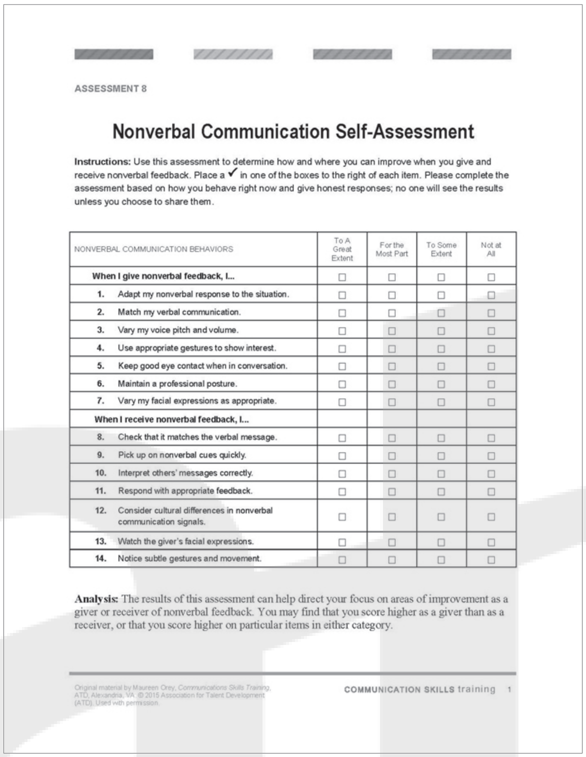
**COMMUNICATION SKILLS** training 2

## Assessment 8: Nonverbal Communication Self-Assessment



ASSESSMENT 8

### Nonverbal Communication Self-Assessment

**Instructions:** Use this assessment to determine how and where you can improve when you give and receive nonverbal feedback. Place a ✓ in one of the boxes to the right of each item. Please complete the assessment based on how you behave right now and give honest responses; no one will see the results unless you choose to share them.

| NONVERBAL COMMUNICATION BEHAVIORS | To A Great Extent | For the Most Part | To Some Extent | Not at All |
|---|---|---|---|---|
| **When I give nonverbal feedback, I...** | ☐ | ☐ | ☐ | ☐ |
| **1.** Adapt my nonverbal response to the situation. | ☐ | ☐ | ☐ | ☐ |
| **2.** Match my verbal communication. | ☐ | ☐ | ☐ | ☐ |
| **3.** Vary my voice pitch and volume. | ☐ | ☐ | ☐ | ☐ |
| **4.** Use appropriate gestures to show interest. | ☐ | ☐ | ☐ | ☐ |
| **5.** Keep good eye contact when in conversation. | ☐ | ☐ | ☐ | ☐ |
| **6.** Maintain a professional posture. | ☐ | ☐ | ☐ | ☐ |
| **7.** Vary my facial expressions as appropriate. | ☐ | ☐ | ☐ | ☐ |
| **When I receive nonverbal feedback, I...** | | | | |
| **8.** Check that it matches the verbal message. | ☐ | ☐ | ☐ | ☐ |
| **9.** Pick up on nonverbal cues quickly. | ☐ | ☐ | ☐ | ☐ |
| **10.** Interpret others' messages correctly. | ☐ | ☐ | ☐ | ☐ |
| **11.** Respond with appropriate feedback. | ☐ | ☐ | ☐ | ☐ |
| **12.** Consider cultural differences in nonverbal communication signals. | ☐ | ☐ | ☐ | ☐ |
| **13.** Watch the giver's facial expressions. | ☐ | ☐ | ☐ | ☐ |
| **14.** Notice subtle gestures and movement. | ☐ | ☐ | ☐ | ☐ |

**Analysis:** The results of this assessment can help direct your focus on areas of improvement as a giver or receiver of nonverbal feedback. You may find that you score higher as a giver than as a receiver, or that you score higher on particular items in either category.

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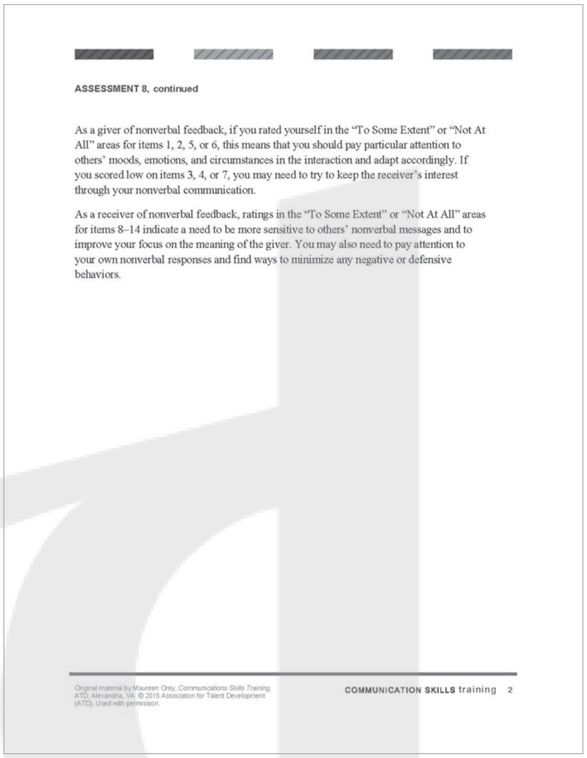
**COMMUNICATION SKILLS** training 1

## Assessment 8, *continued*



ASSESSMENT 8, continued

As a giver of nonverbal feedback, if you rated yourself in the "To Some Extent" or "Not At All" areas for items 1, 2, 5, or 6, this means that you should pay particular attention to others' moods, emotions, and circumstances in the interaction and adapt accordingly. If you scored low on items 3, 4, or 7, you may need to try to keep the receiver's interest through your nonverbal communication.

As a receiver of nonverbal feedback, ratings in the "To Some Extent" or "Not At All" areas for items 8–14 indicate a need to be more sensitive to others' nonverbal messages and to improve your focus on the meaning of the giver. You may also need to pay attention to your own nonverbal responses and find ways to minimize any negative or defensive behaviors.

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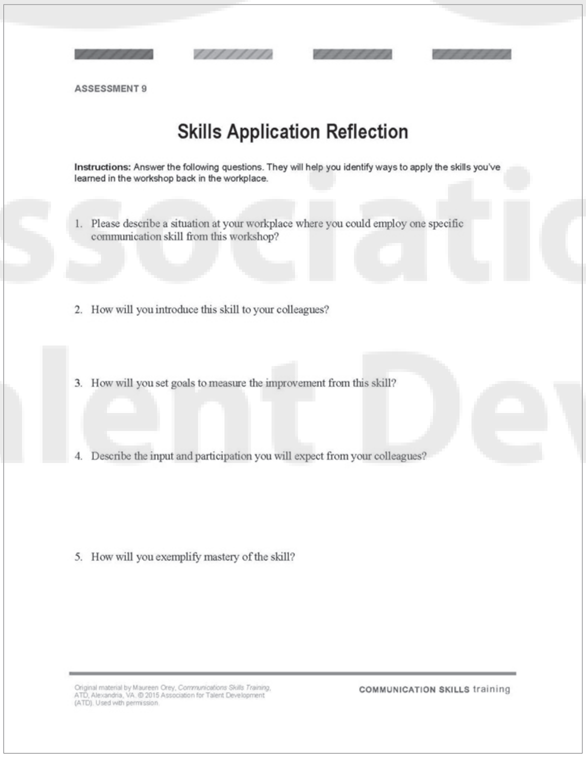
**COMMUNICATION SKILLS** training 2

## Assessment 9: Skills Application Reflection



ASSESSMENT 9

### Skills Application Reflection

**Instructions:** Answer the following questions. They will help you identify ways to apply the skills you've learned in the workshop back in the workplace.

1. Please describe a situation at your workplace where you could employ one specific communication skill from this workshop?
2. How will you introduce this skill to your colleagues?
3. How will you set goals to measure the improvement from this skill?
4. Describe the input and participation you will expect from your colleagues?
5. How will you exemplify mastery of the skill?

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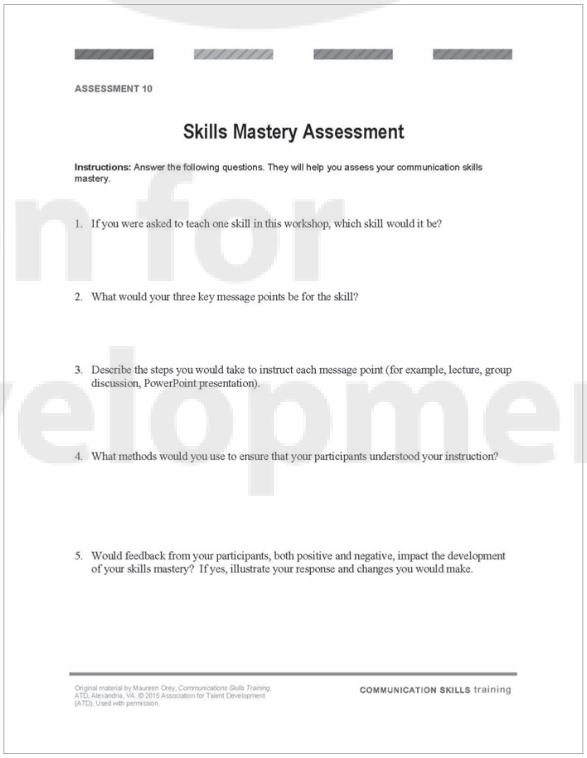
**COMMUNICATION SKILLS** training

## Assessment 10: Skills Mastery Assessment



ASSESSMENT 10

### Skills Mastery Assessment

**Instructions:** Answer the following questions. They will help you assess your communication skills mastery.

1. If you were asked to teach one skill in this workshop, which skill would it be?
2. What would your three key message points be for the skill?
3. Describe the steps you would take to instruct each message point (for example, lecture, group discussion, PowerPoint presentation).
4. What methods would you use to ensure that your participants understood your instruction?
5. Would feedback from your participants, both positive and negative, impact the development of your skills mastery? If yes, illustrate your response and changes you would make.

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## Chapter 13

# Handouts

**What's in This Chapter**

- Twenty-nine handouts in thumbnail format for reference
- Refer to Chapter 14 for instructions to download full-size handouts

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Handouts comprise the various materials you will provide to the learners throughout the course of the workshop. In some cases, the handouts will simply provide instructions for worksheets to complete, places to take notes, and so forth. In other cases, they will provide important and practical materials for use in and out of the training room, such as reference materials, tip sheets, samples of completed forms, flowcharts, and so forth.

The workshop agendas in Chapters 1–3 and the learning activities in Chapter 11 will provide instructions for how and when to use the handouts within the context of the workshop. See Chapter 14 for complete instructions on how to download the workshop support materials.

## Handouts Included in *Communication Skills Training*

Handout 1a: Objective Decision (Two-Day Workshop)

Handout 1b: Objective Decision (One-Day Workshop)

Handout 1c: Objective Decision (Half-Day Workshop)

Handout 2: The Most Difficult Person in the World

Handout 3: Causes of Miscommunication

Handout 4: The Importance of Body Language

Handout 5: Impression Improv

Handout 6: The Impact of Congruent Communication

Handout 7: Role of Emotion in Communication

Handout 8: Emotions and the Brain

Handout 9: Surgical Analysis of Your Story

Handout 10: Mistakes in Listening

Handout 11: Active Listening

Handout 12: Barriers to Effective Listening

Handout 13: Action Plan and Reflection

Handout 14: Alpha Beta Exercise

Handout 15: Model for Effective Business Writing

Handout 16: Personal Case Scenario Worksheet

Handout 17: Mind Map: Plan Your Content

Handout 18: Brainstorm Other Brainstorming Methods

Handout 19: The Five Cs of Effective Communication

Handout 20: Practical Practice—Clear Communication

Handout 21: Practical Practice—Concise Communication

Handout 22: Practical Practice—Complete Communication

Handout 23: Practical Practice—Checklist for Correct Communication

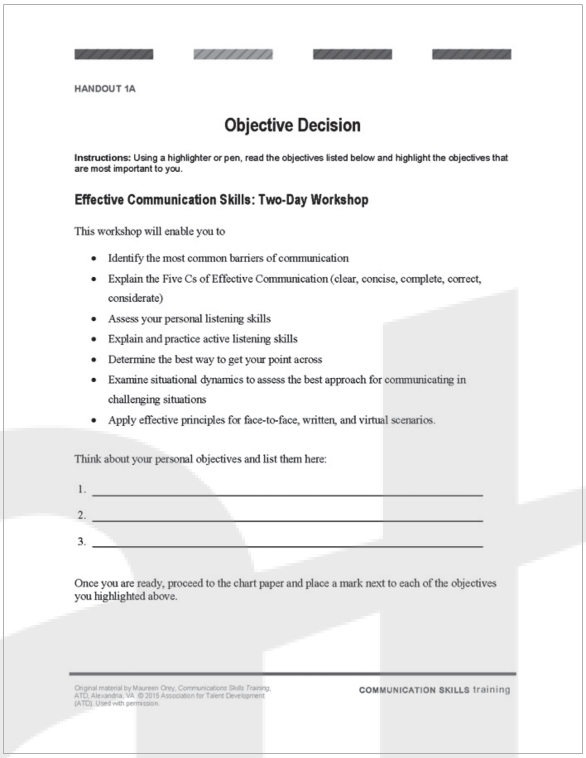
Handout 24: Practical Practice—Your Role in Considerate Communication

Handout 25: The Wants and Needs of Your Reader

Handout 26: Draft Your Message

Handout 27: Reflection and Action Plan

## Handout 1a: Objective Decision (Two-Day Workshop)



HANDOUT 1A

### Objective Decision

**Instructions:** Using a highlighter or pen, read the objectives listed below and highlight the objectives that are most important to you.

**Effective Communication Skills: Two-Day Workshop**

This workshop will enable you to

- Identify the most common barriers of communication
- Explain the Five Cs of Effective Communication (clear, concise, complete, correct, considerate)
- Assess your personal listening skills
- Explain and practice active listening skills
- Determine the best way to get your point across
- Examine situational dynamics to assess the best approach for communicating in challenging situations
- Apply effective principles for face-to-face, written, and virtual scenarios.

Think about your personal objectives and list them here:

1. ________________________________
2. ________________________________
3. ________________________________

Once you are ready, proceed to the chart paper and place a mark next to each of the objectives you highlighted above.

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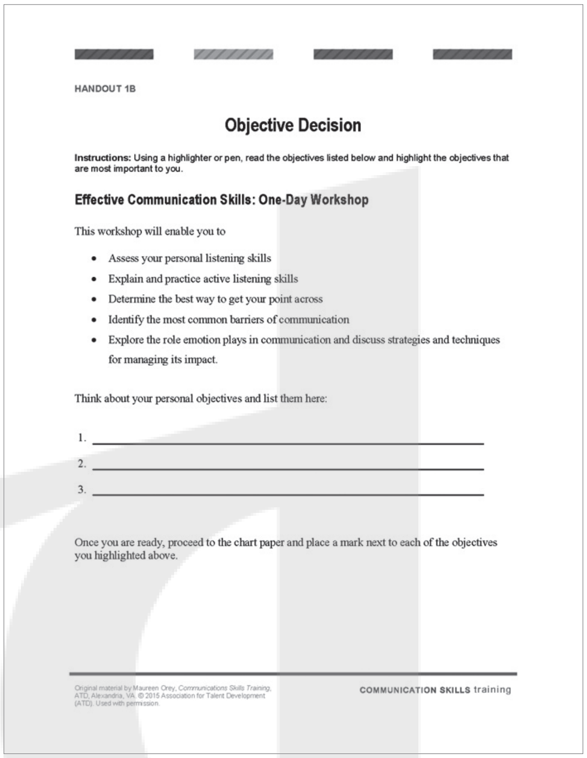
COMMUNICATION SKILLS training

## Handout 1b: Objective Decision (One-Day Workshop)



HANDOUT 1B

### Objective Decision

**Instructions:** Using a highlighter or pen, read the objectives listed below and highlight the objectives that are most important to you.

**Effective Communication Skills: One-Day Workshop**

This workshop will enable you to

- Assess your personal listening skills
- Explain and practice active listening skills
- Determine the best way to get your point across
- Identify the most common barriers of communication
- Explore the role emotion plays in communication and discuss strategies and techniques for managing its impact.

Think about your personal objectives and list them here:

1. ________________________________
2. ________________________________
3. ________________________________

Once you are ready, proceed to the chart paper and place a mark next to each of the objectives you highlighted above.

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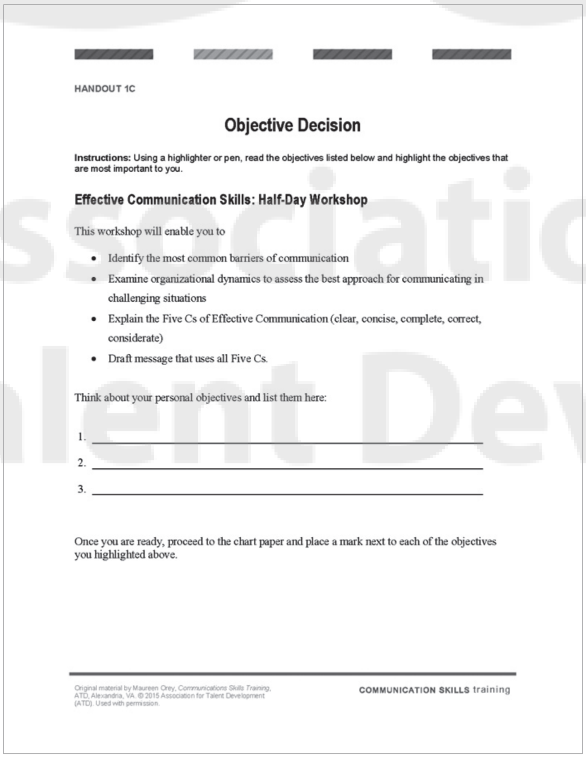
## Handout 1c: Objective Decision (Half-Day Workshop)



HANDOUT 1C

### Objective Decision

**Instructions:** Using a highlighter or pen, read the objectives listed below and highlight the objectives that are most important to you.

**Effective Communication Skills: Half-Day Workshop**

This workshop will enable you to

- Identify the most common barriers of communication
- Examine organizational dynamics to assess the best approach for communicating in challenging situations
- Explain the Five Cs of Effective Communication (clear, concise, complete, correct, considerate)
- Draft message that uses all Five Cs.

Think about your personal objectives and list them here:

1. ________________________________
2. ________________________________
3. ________________________________

Once you are ready, proceed to the chart paper and place a mark next to each of the objectives you highlighted above.

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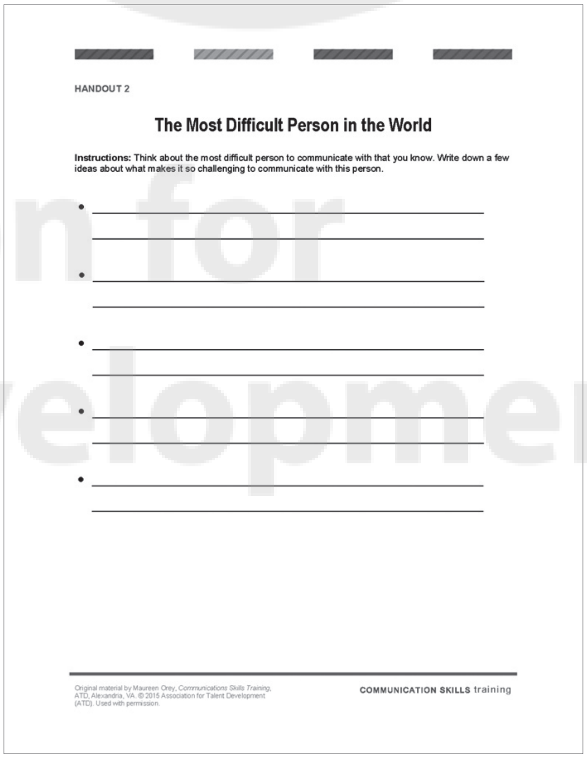
COMMUNICATION SKILLS training

## Handout 2: The Most Difficult Person in the World



HANDOUT 2

### The Most Difficult Person in the World

**Instructions:** Think about the most difficult person to communicate with that you know. Write down a few ideas about what makes it so challenging to communicate with this person.

- ________________________________
- ________________________________
- ________________________________
- ________________________________
- ________________________________

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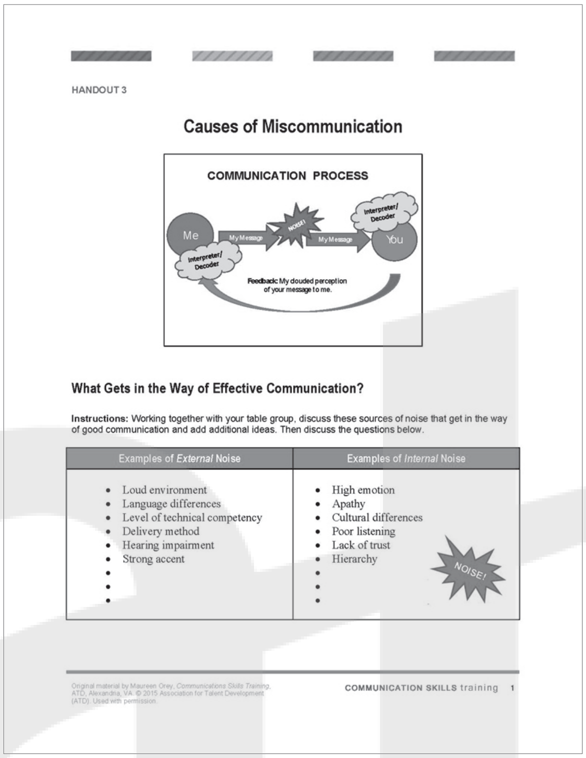
COMMUNICATION SKILLS training

## Handout 3: Causes of Miscommunication



HANDOUT 3

### Causes of Miscommunication

#### What Gets in the Way of Effective Communication?

**Instructions:** Working together with your table group, discuss these sources of noise that get in the way of good communication and add additional ideas. Then discuss the questions below.

| Examples of *External* Noise | Examples of *Internal* Noise |
|---|---|
| • Loud environment<br>• Language differences<br>• Level of technical competency<br>• Delivery method<br>• Hearing impairment<br>• Strong accent<br>•<br>•<br>• | • High emotion<br>• Apathy<br>• Cultural differences<br>• Poor listening<br>• Lack of trust<br>• Hierarchy<br>•<br>•<br>• |

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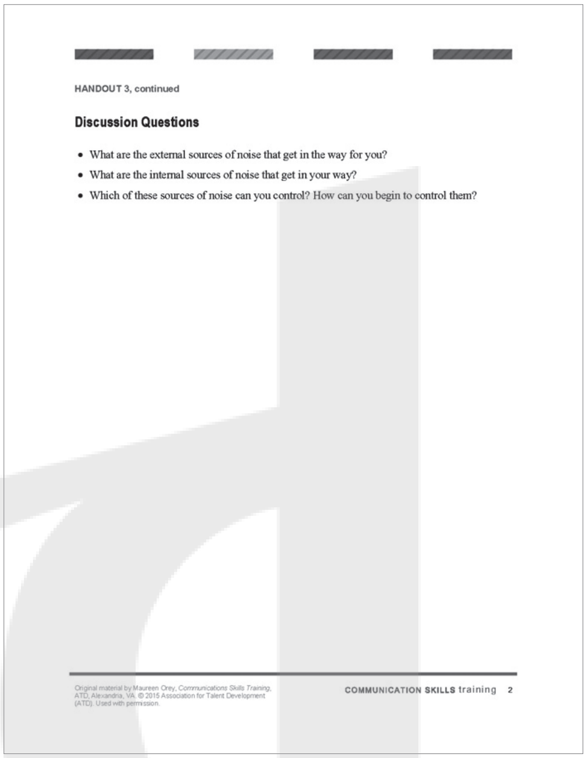
## Handout 3, *continued*



HANDOUT 3, continued

#### Discussion Questions

- What are the external sources of noise that get in the way for you?
- What are the internal sources of noise that get in your way?
- Which of these sources of noise can you control? How can you begin to control them?

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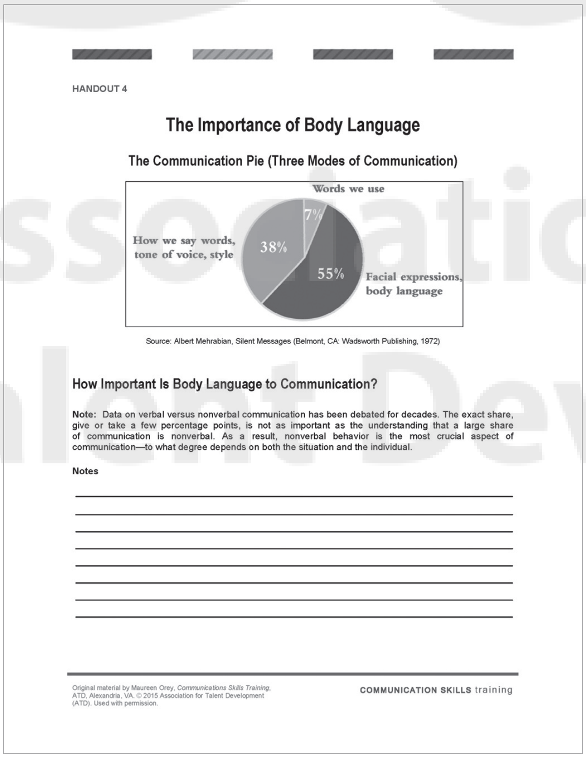
## Handout 4: The Importance of Body Language


Words we use
7%
How we say words, tone of voice, style
38%
55%
Facial expressions, body language

HANDOUT 4

### The Importance of Body Language

#### The Communication Pie (Three Modes of Communication)

Source: Albert Mehrabian, Silent Messages (Belmont, CA: Wadsworth Publishing, 1972)

#### How Important Is Body Language to Communication?

**Note:** Data on verbal versus nonverbal communication has been debated for decades. The exact share, give or take a few percentage points, is not as important as the understanding that a large share of communication is nonverbal. As a result, nonverbal behavior is the most crucial aspect of communication—to what degree depends on both the situation and the individual.

**Notes**

________________________________________

________________________________________

________________________________________

________________________________________

________________________________________

________________________________________

________________________________________

________________________________________

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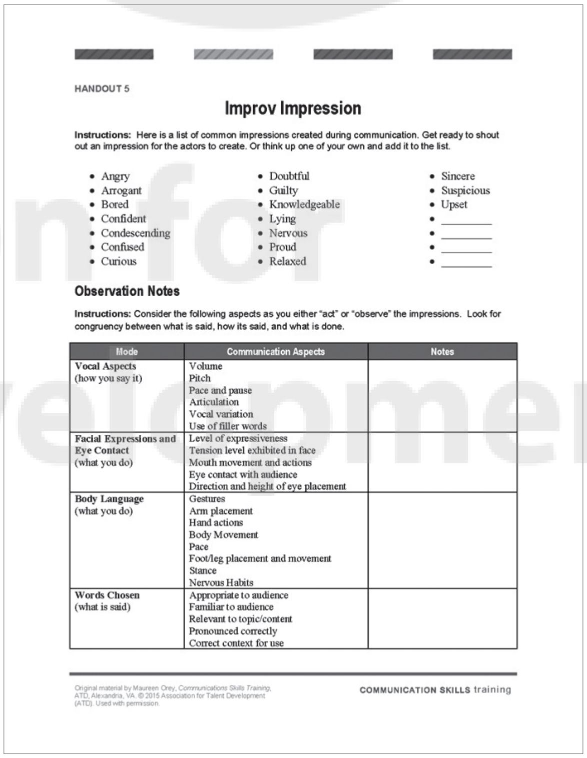
## Handout 5: Impression Improv



HANDOUT 5

### Improv Impression

**Instructions:** Here is a list of common impressions created during communication. Get ready to shout out an impression for the actors to create. Or think up one of your own and add it to the list.

- Angry
- Arrogant
- Bored
- Confident
- Condescending
- Confused
- Curious
- Doubtful
- Guilty
- Knowledgeable
- Lying
- Nervous
- Proud
- Relaxed
- Sincere
- Suspicious
- Upset
- ________
- ________
- ________
- ________

#### Observation Notes

**Instructions:** Consider the following aspects as you either "act" or "observe" the impressions. Look for congruency between what is said, how its said, and what is done.

| Mode | Communication Aspects | Notes |
|---|---|---|
| **Vocal Aspects**<br>(how you say it) | Volume<br>Pitch<br>Pace and pause<br>Articulation<br>Vocal variation<br>Use of filler words | |
| **Facial Expressions and Eye Contact**<br>(what you do) | Level of expressiveness<br>Tension level exhibited in face<br>Mouth movement and actions<br>Eye contact with audience<br>Direction and height of eye placement | |
| **Body Language**<br>(what you do) | Gestures<br>Arm placement<br>Hand actions<br>Body Movement<br>Pace<br>Foot/leg placement and movement<br>Stance<br>Nervous Habits | |
| **Words Chosen**<br>(what is said) | Appropriate to audience<br>Familiar to audience<br>Relevant to topic/content<br>Pronounced correctly<br>Correct context for use | |

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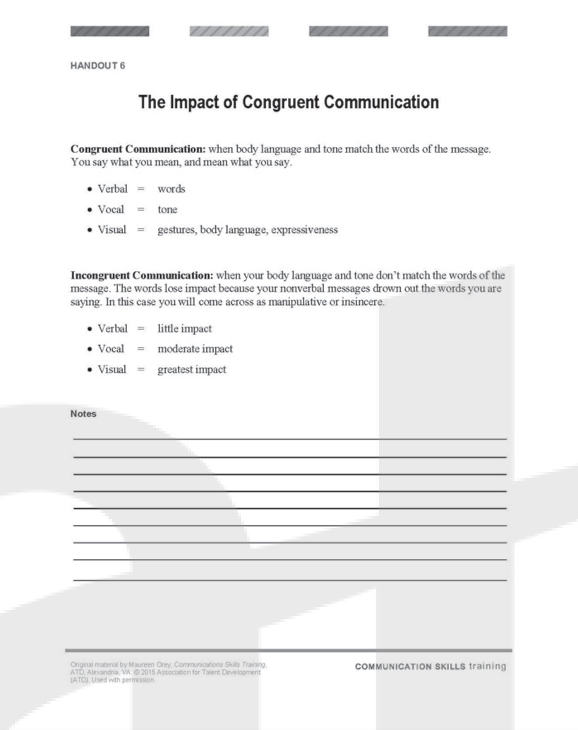
## Handout 6: The Impact of Congruent Communication



HANDOUT 6

### The Impact of Congruent Communication

**Congruent Communication:** when body language and tone match the words of the message. You say what you mean, and mean what you say.

- Verbal = words
- Vocal = tone
- Visual = gestures, body language, expressiveness

**Incongruent Communication:** when your body language and tone don't match the words of the message. The words lose impact because your nonverbal messages drown out the words you are saying. In this case you will come across as manipulative or insincere.

- Verbal = little impact
- Vocal = moderate impact
- Visual = greatest impact

**Notes**

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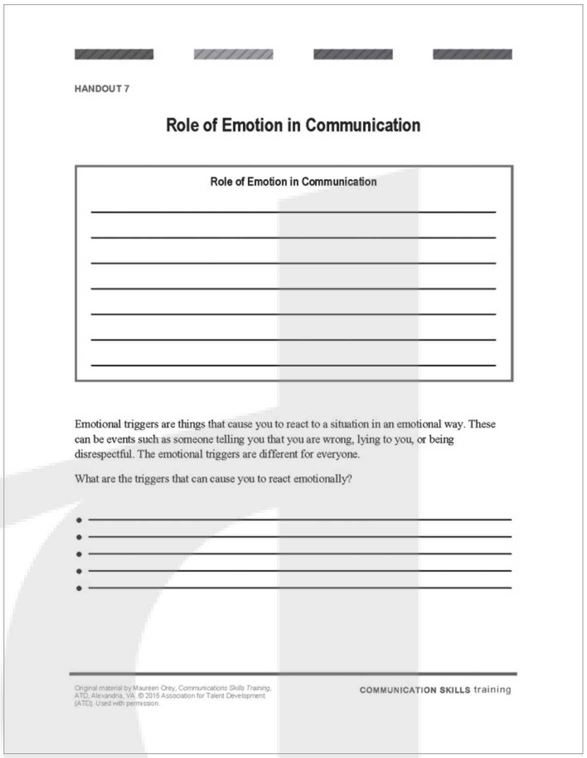
## Handout 7: Role of Emotion in Communication



HANDOUT 7

### Role of Emotion in Communication

**Role of Emotion in Communication**

Emotional triggers are things that cause you to react to a situation in an emotional way. These can be events such as someone telling you that you are wrong, lying to you, or being disrespectful. The emotional triggers are different for everyone.

What are the triggers that can cause you to react emotionally?

- 
- 
- 
- 
-

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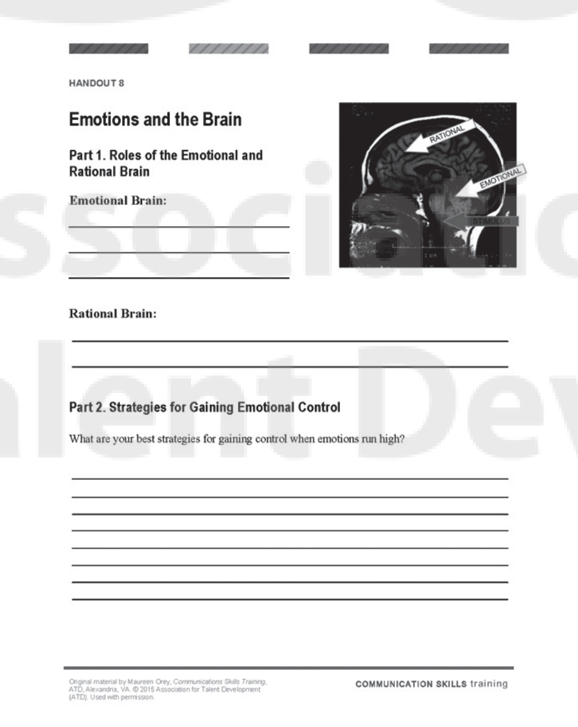
## Handout 8: Emotions and the Brain



HANDOUT 8

### Emotions and the Brain

**Part 1. Roles of the Emotional and Rational Brain**

**Emotional Brain:**

**Rational Brain:**

**Part 2. Strategies for Gaining Emotional Control**

What are your best strategies for gaining control when emotions run high?

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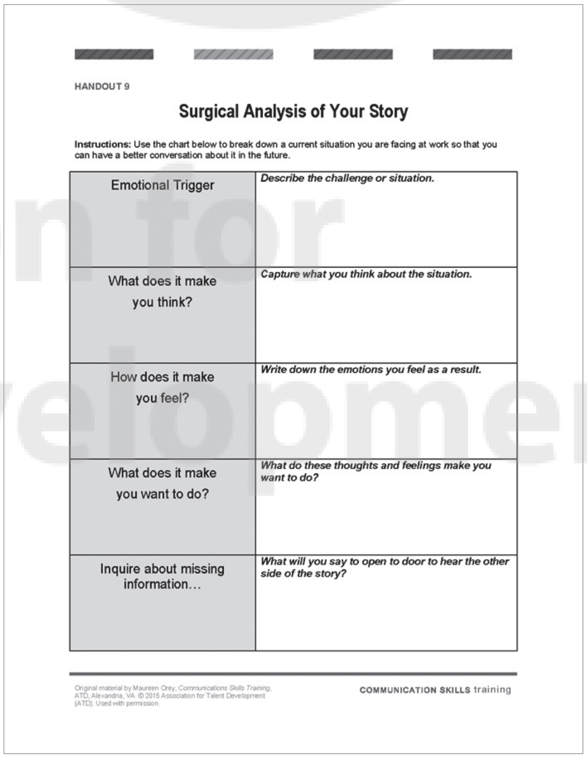
## Handout 9: Surgical Analysis of Your Story



HANDOUT 9

### Surgical Analysis of Your Story

**Instructions:** Use the chart below to break down a current situation you are facing at work so that you can have a better conversation about it in the future.

| | |
|---|---|
| Emotional Trigger | *Describe the challenge or situation.* |
| What does it make you think? | *Capture what you think about the situation.* |
| How does it make you feel? | *Write down the emotions you feel as a result.* |
| What does it make you want to do? | *What do these thoughts and feelings make you want to do?* |
| Inquire about missing information… | *What will you say to open to door to hear the other side of the story?* |

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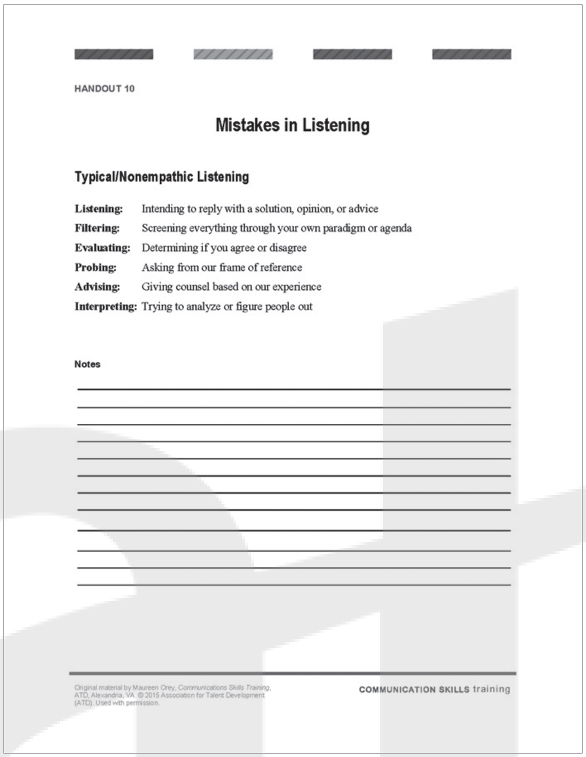
## Handout 10: Mistakes in Listening



HANDOUT 10

### Mistakes in Listening

#### Typical/Nonempathic Listening

| | |
|---|---|
| **Listening:** | Intending to reply with a solution, opinion, or advice |
| **Filtering:** | Screening everything through your own paradigm or agenda |
| **Evaluating:** | Determining if you agree or disagree |
| **Probing:** | Asking from our frame of reference |
| **Advising:** | Giving counsel based on our experience |
| **Interpreting:** | Trying to analyze or figure people out |

Notes

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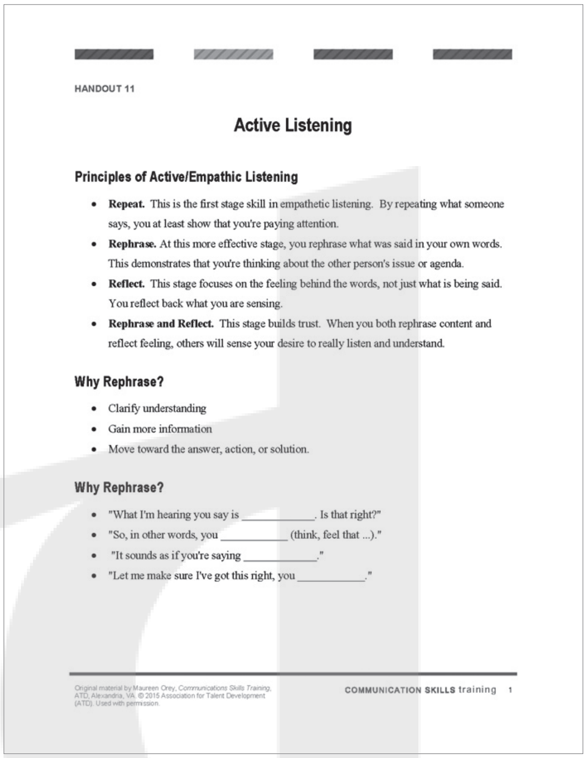
## Handout 11: Active Listening



HANDOUT 11

### Active Listening

#### Principles of Active/Empathic Listening

- **Repeat.** This is the first stage skill in empathetic listening. By repeating what someone says, you at least show that you're paying attention.
- **Rephrase.** At this more effective stage, you rephrase what was said in your own words. This demonstrates that you're thinking about the other person's issue or agenda.
- **Reflect.** This stage focuses on the feeling behind the words, not just what is being said. You reflect back what you are sensing.
- **Rephrase and Reflect.** This stage builds trust. When you both rephrase content and reflect feeling, others will sense your desire to really listen and understand.

#### Why Rephrase?

- Clarify understanding
- Gain more information
- Move toward the answer, action, or solution.

#### Why Rephrase?

- "What I'm hearing you say is ____________. Is that right?"
- "So, in other words, you ___________ (think, feel that ...)."
- "It sounds as if you're saying ____________."
- "Let me make sure I've got this right, you ___________."

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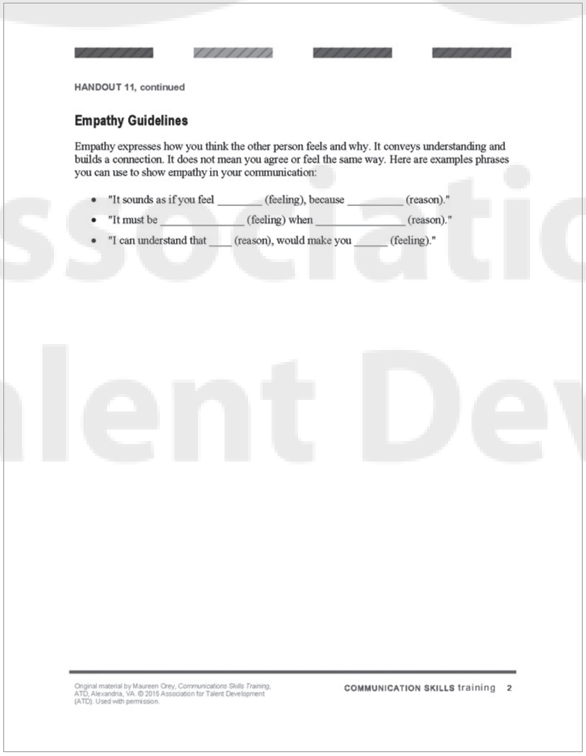
## Handout 11, *continued*



HANDOUT 11, continued

#### Empathy Guidelines

Empathy expresses how you think the other person feels and why. It conveys understanding and builds a connection. It does not mean you agree or feel the same way. Here are examples phrases you can use to show empathy in your communication:

- "It sounds as if you feel ________ (feeling), because __________ (reason)."
- "It must be _____________ (feeling) when ______________ (reason)."
- "I can understand that ____ (reason), would make you ______ (feeling)."

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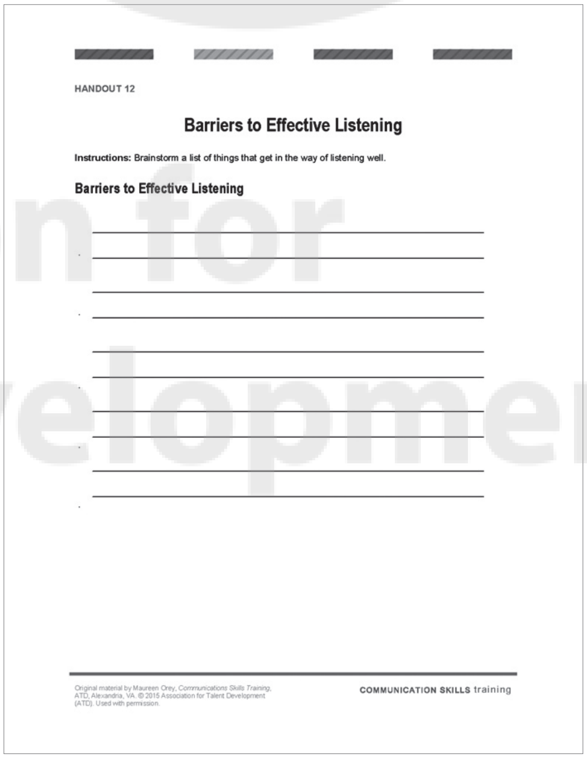
## Handout 12: Barriers to Effective Listening



HANDOUT 12

### Barriers to Effective Listening

**Instructions:** Brainstorm a list of things that get in the way of listening well.

#### Barriers to Effective Listening

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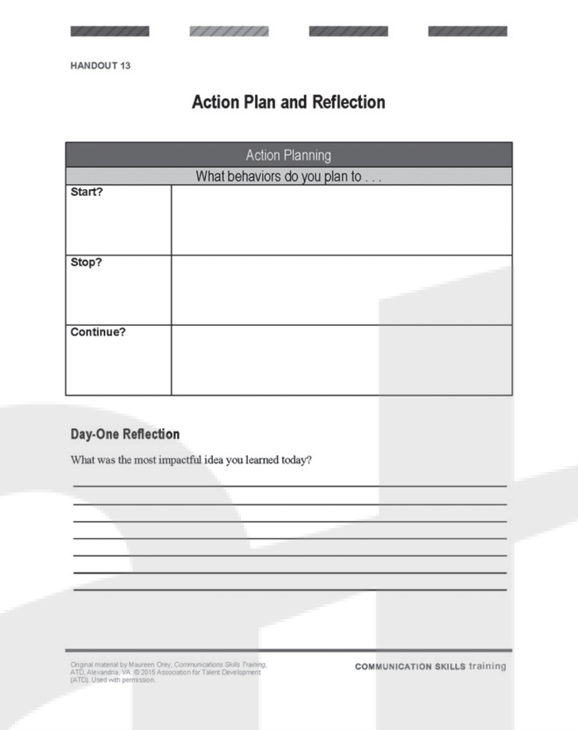
## Handout 13: Action Plan and Reflection



HANDOUT 13

### Action Plan and Reflection

| Action Planning | |
|---|---|
| What behaviors do you plan to . . . | |
| **Start?** | |
| **Stop?** | |
| **Continue?** | |

**Day-One Reflection**

What was the most impactful idea you learned today?

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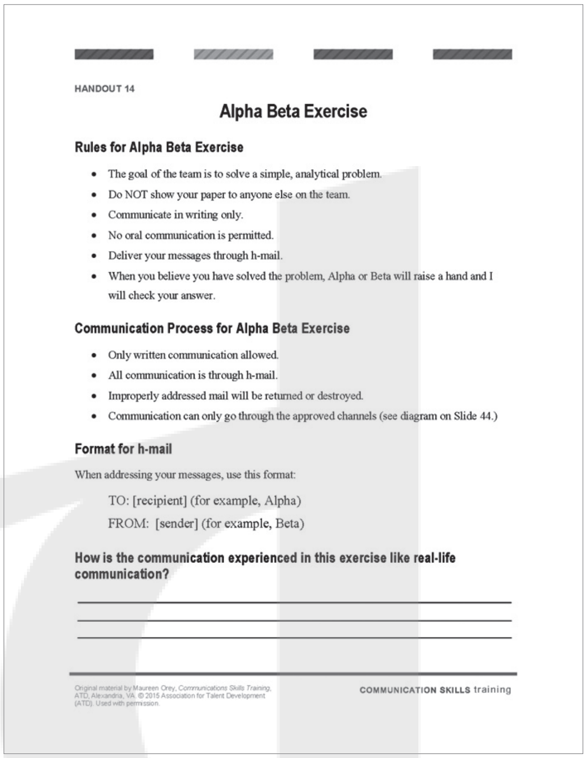
## Handout 14: Alpha Beta Exercise



HANDOUT 14

### Alpha Beta Exercise

**Rules for Alpha Beta Exercise**

- The goal of the team is to solve a simple, analytical problem.
- Do NOT show your paper to anyone else on the team.
- Communicate in writing only.
- No oral communication is permitted.
- Deliver your messages through h-mail.
- When you believe you have solved the problem, Alpha or Beta will raise a hand and I will check your answer.

**Communication Process for Alpha Beta Exercise**

- Only written communication allowed.
- All communication is through h-mail.
- Improperly addressed mail will be returned or destroyed.
- Communication can only go through the approved channels (see diagram on Slide 44.)

**Format for h-mail**

When addressing your messages, use this format:

TO: [recipient] (for example, Alpha)
FROM: [sender] (for example, Beta)

**How is the communication experienced in this exercise like real-life communication?**

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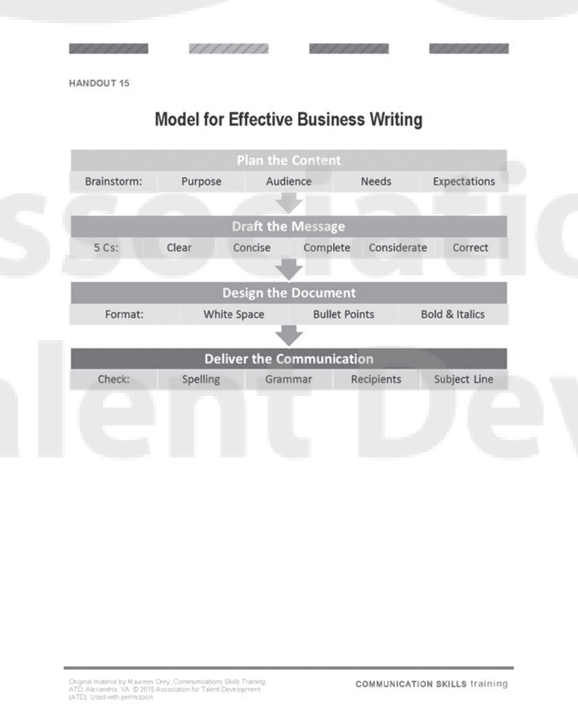
## Handout 15: Model for Effective Business Writing



HANDOUT 15

### Model for Effective Business Writing

**Plan the Content**
Brainstorm: Purpose | Audience | Needs | Expectations

**Draft the Message**
5 Cs: Clear | Concise | Complete | Considerate | Correct

**Design the Document**
Format: White Space | Bullet Points | Bold & Italics

**Deliver the Communication**
Check: Spelling | Grammar | Recipients | Subject Line

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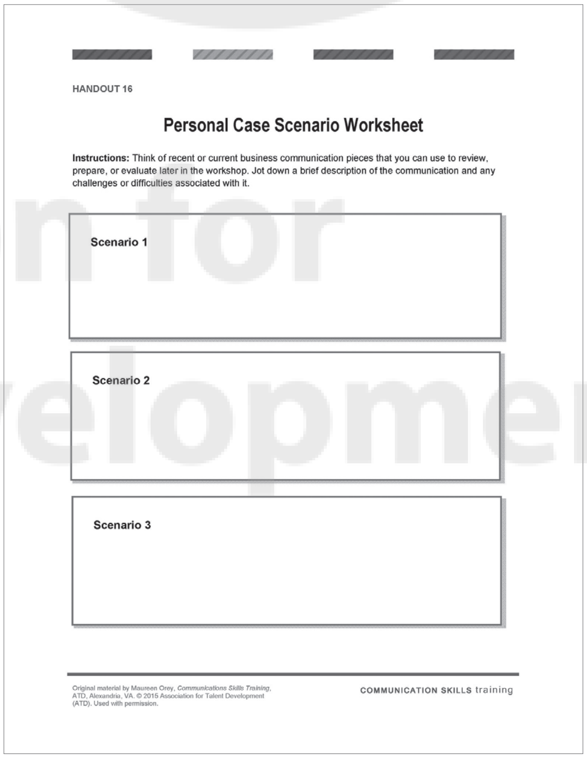
## Handout 16: Personal Case Scenario Worksheet



HANDOUT 16

### Personal Case Scenario Worksheet

**Instructions:** Think of recent or current business communication pieces that you can use to review, prepare, or evaluate later in the workshop. Jot down a brief description of the communication and any challenges or difficulties associated with it.

**Scenario 1**

**Scenario 2**

**Scenario 3**

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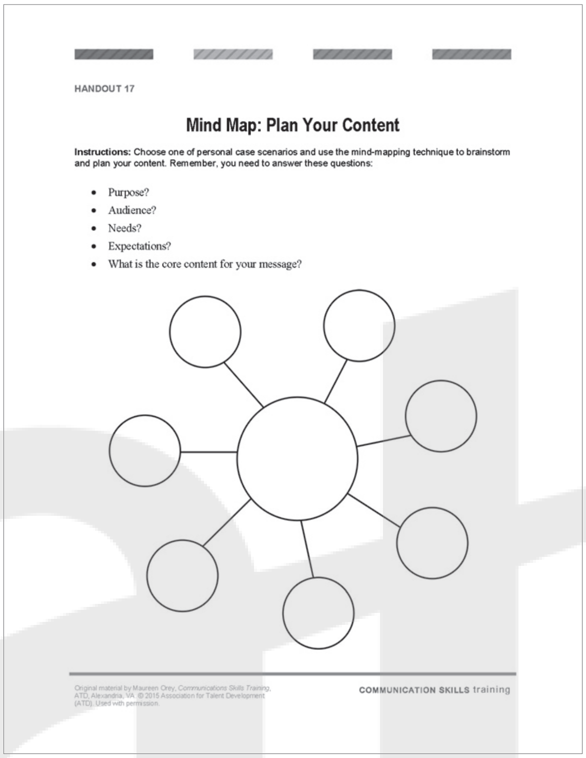
## Handout 17: Mind Map: Plan Your Content



HANDOUT 17

### Mind Map: Plan Your Content

**Instructions:** Choose one of personal case scenarios and use the mind-mapping technique to brainstorm and plan your content. Remember, you need to answer these questions:

- Purpose?
- Audience?
- Needs?
- Expectations?
- What is the core content for your message?

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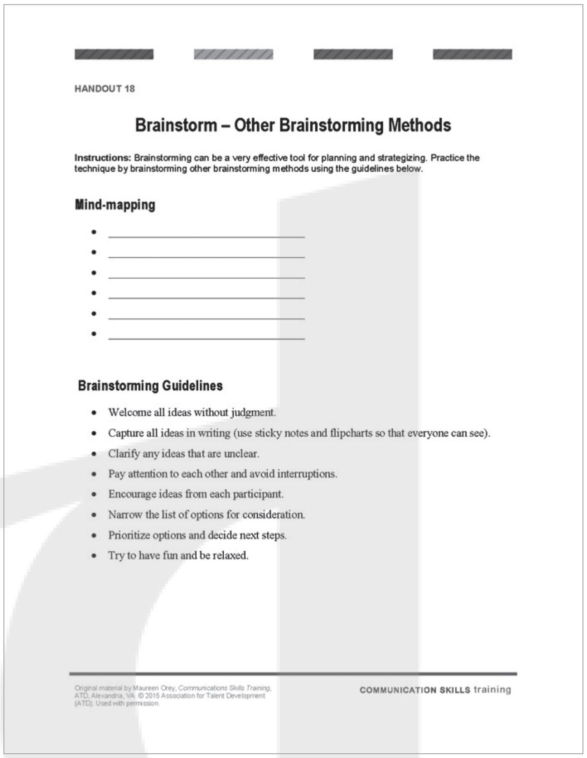
## Handout 18: Brainstorm Other Brainstorming Methods



HANDOUT 18

### Brainstorm – Other Brainstorming Methods

**Instructions:** Brainstorming can be a very effective tool for planning and strategizing. Practice the technique by brainstorming other brainstorming methods using the guidelines below.

**Mind-mapping**

- ____________________________
- ____________________________
- ____________________________
- ____________________________
- ____________________________
- ____________________________

**Brainstorming Guidelines**

- Welcome all ideas without judgment.
- Capture all ideas in writing (use sticky notes and flipcharts so that everyone can see).
- Clarify any ideas that are unclear.
- Pay attention to each other and avoid interruptions.
- Encourage ideas from each participant.
- Narrow the list of options for consideration.
- Prioritize options and decide next steps.
- Try to have fun and be relaxed.

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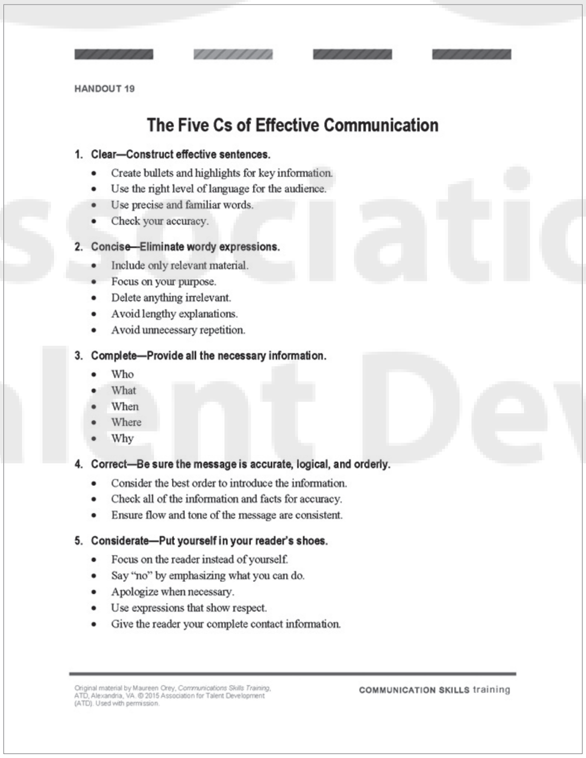
## Handout 19: The Five Cs of Effective Communication



HANDOUT 19

### The Five Cs of Effective Communication

1. **Clear—Construct effective sentences.**
   - Create bullets and highlights for key information.
   - Use the right level of language for the audience.
   - Use precise and familiar words.
   - Check your accuracy.
2. **Concise—Eliminate wordy expressions.**
   - Include only relevant material.
   - Focus on your purpose.
   - Delete anything irrelevant.
   - Avoid lengthy explanations.
   - Avoid unnecessary repetition.
3. **Complete—Provide all the necessary information.**
   - Who
   - What
   - When
   - Where
   - Why
4. **Correct—Be sure the message is accurate, logical, and orderly.**
   - Consider the best order to introduce the information.
   - Check all of the information and facts for accuracy.
   - Ensure flow and tone of the message are consistent.
5. **Considerate—Put yourself in your reader's shoes.**
   - Focus on the reader instead of yourself.
   - Say "no" by emphasizing what you can do.
   - Apologize when necessary.
   - Use expressions that show respect.
   - Give the reader your complete contact information.

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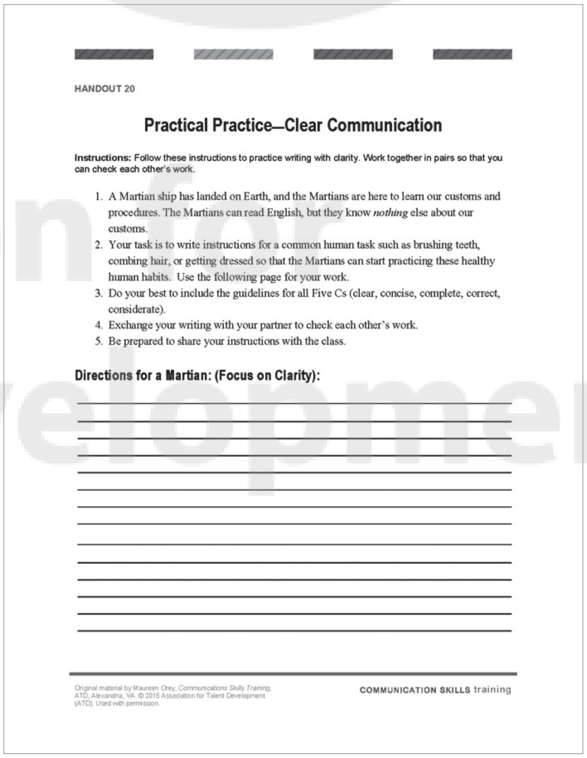
## Handout 20: Practical Practice—Clear Communication



HANDOUT 20

### Practical Practice—Clear Communication

**Instructions:** Follow these instructions to practice writing with clarity. Work together in pairs so that you can check each other's work.

1. A Martian ship has landed on Earth, and the Martians are here to learn our customs and procedures. The Martians can read English, but they know ***nothing*** else about our customs.
2. Your task is to write instructions for a common human task such as brushing teeth, combing hair, or getting dressed so that the Martians can start practicing these healthy human habits. Use the following page for your work.
3. Do your best to include the guidelines for all Five Cs (clear, concise, complete, correct, considerate).
4. Exchange your writing with your partner to check each other's work.
5. Be prepared to share your instructions with the class.

**Directions for a Martian: (Focus on Clarity):**

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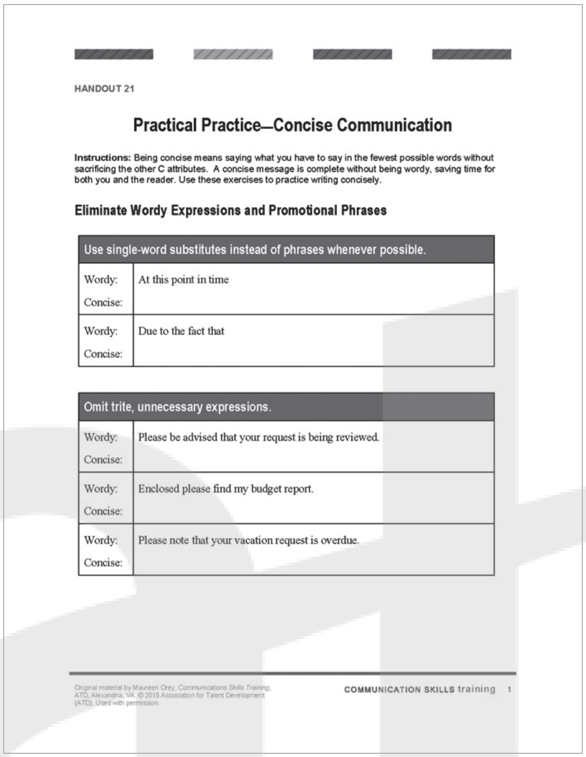
## Handout 21: Practical Practice—Concise Communication



HANDOUT 21

### Practical Practice—Concise Communication

**Instructions:** Being concise means saying what you have to say in the fewest possible words without sacrificing the other C attributes. A concise message is complete without being wordy, saving time for both you and the reader. Use these exercises to practice writing concisely.

#### Eliminate Wordy Expressions and Promotional Phrases

| Use single-word substitutes instead of phrases whenever possible. | |
|---|---|
| Wordy: | At this point in time |
| Concise: | |
| Wordy: | Due to the fact that |
| Concise: | |

| Omit trite, unnecessary expressions. | |
|---|---|
| Wordy: | Please be advised that your request is being reviewed. |
| Concise: | |
| Wordy: | Enclosed please find my budget report. |
| Concise: | |
| Wordy: | Please note that your vacation request is overdue. |
| Concise: | |

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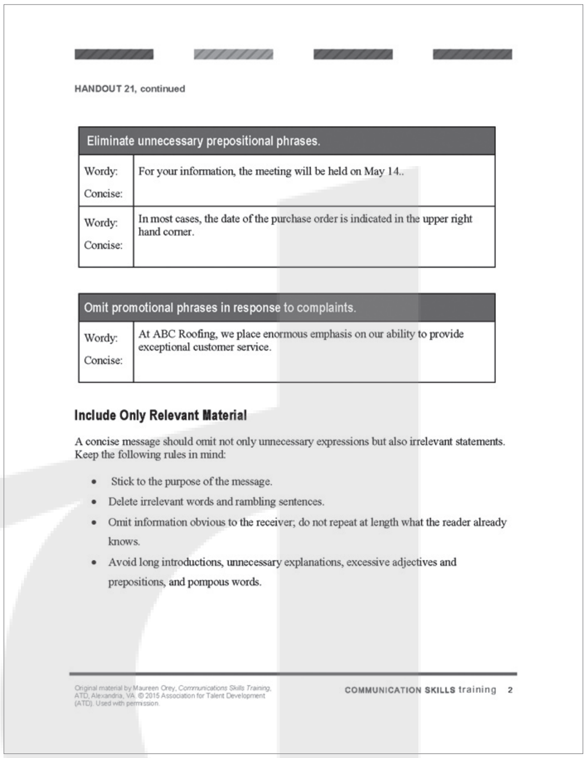
## Handout 21, *continued*



HANDOUT 21, continued

| Eliminate unnecessary prepositional phrases. | |
|---|---|
| Wordy: | For your information, the meeting will be held on May 14.. |
| Concise: | |
| Wordy: | In most cases, the date of the purchase order is indicated in the upper right hand corner. |
| Concise: | |

| Omit promotional phrases in response to complaints. | |
|---|---|
| Wordy: | At ABC Roofing, we place enormous emphasis on our ability to provide exceptional customer service. |
| Concise: | |

#### Include Only Relevant Material

A concise message should omit not only unnecessary expressions but also irrelevant statements. Keep the following rules in mind:

- Stick to the purpose of the message.
- Delete irrelevant words and rambling sentences.
- Omit information obvious to the receiver; do not repeat at length what the reader already knows.
- Avoid long introductions, unnecessary explanations, excessive adjectives and prepositions, and pompous words.

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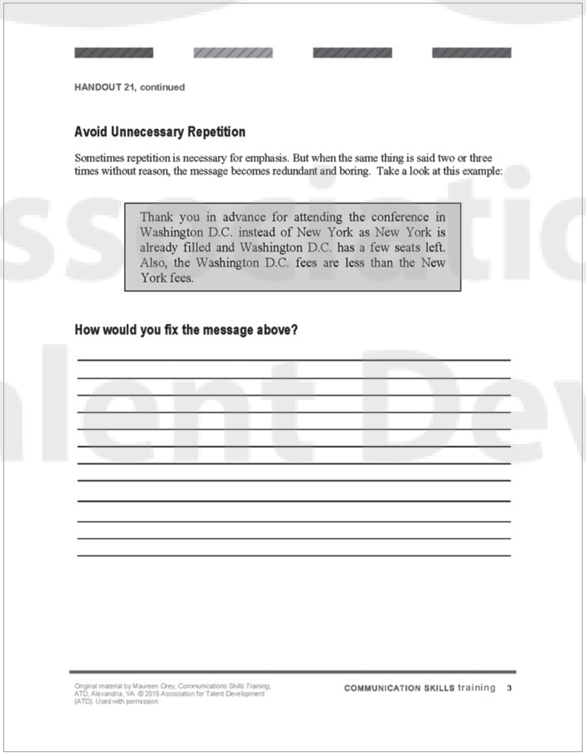
## Handout 21, *continued*



HANDOUT 21, continued

#### Avoid Unnecessary Repetition

Sometimes repetition is necessary for emphasis. But when the same thing is said two or three times without reason, the message becomes redundant and boring. Take a look at this example:

> Thank you in advance for attending the conference in Washington D.C. instead of New York as New York is already filled and Washington D.C. has a few seats left. Also, the Washington D.C. fees are less than the New York fees.

**How would you fix the message above?**

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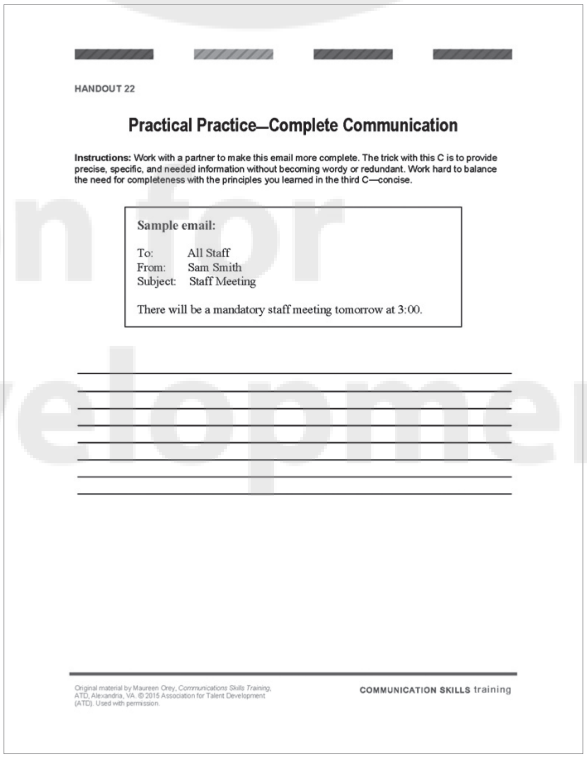
## Handout 22: Practical Practice—Complete Communication



HANDOUT 22

### Practical Practice—Complete Communication

**Instructions:** Work with a partner to make this email more complete. The trick with this C is to provide precise, specific, and needed information without becoming wordy or redundant. Work hard to balance the need for completeness with the principles you learned in the third C—concise.

> **Sample email:**
>
> To: All Staff
> From: Sam Smith
> Subject: Staff Meeting
>
> There will be a mandatory staff meeting tomorrow at 3:00.

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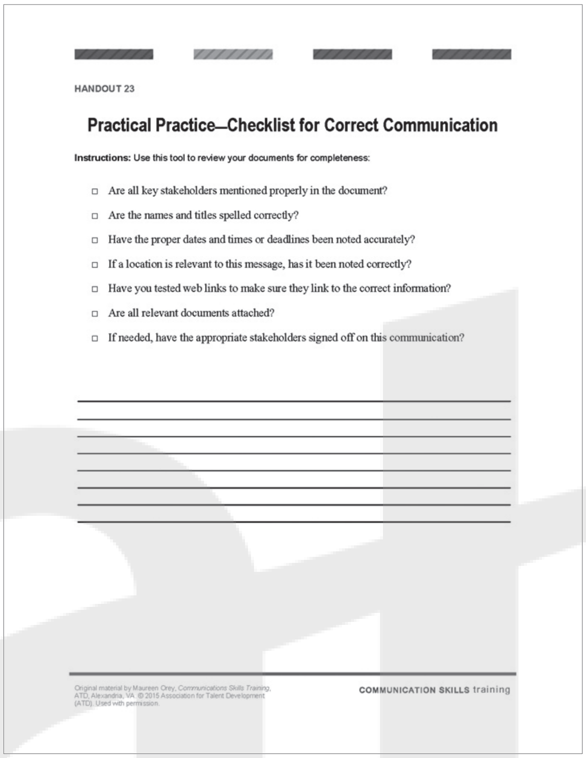
## Handout 23: Practical Practice—Checklist for Correct Communication



HANDOUT 23

### Practical Practice—Checklist for Correct Communication

**Instructions:** Use this tool to review your documents for completeness:

- ☐ Are all key stakeholders mentioned properly in the document?
- ☐ Are the names and titles spelled correctly?
- ☐ Have the proper dates and times or deadlines been noted accurately?
- ☐ If a location is relevant to this message, has it been noted correctly?
- ☐ Have you tested web links to make sure they link to the correct information?
- ☐ Are all relevant documents attached?
- ☐ If needed, have the appropriate stakeholders signed off on this communication?

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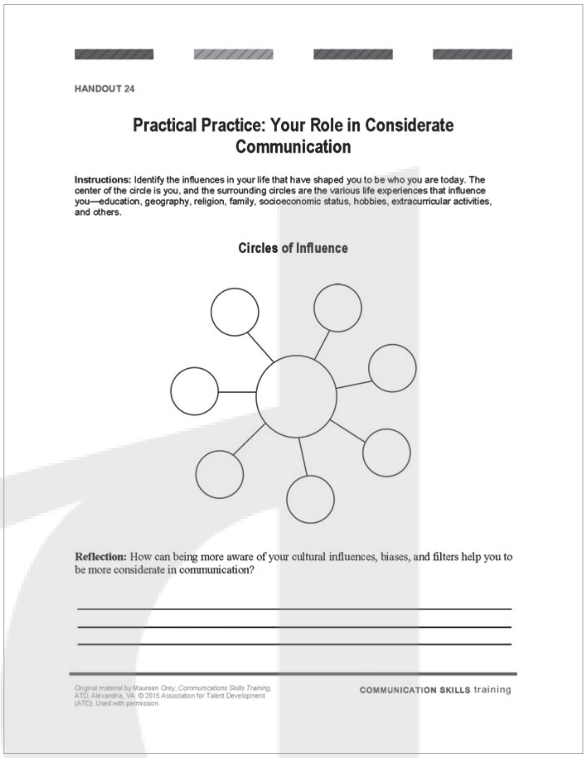
## Handout 24: Practical Practice—Your Role in Considerate Communication



HANDOUT 24

### Practical Practice: Your Role in Considerate Communication

**Instructions:** Identify the influences in your life that have shaped you to be who you are today. The center of the circle is you, and the surrounding circles are the various life experiences that influence you—education, geography, religion, family, socioeconomic status, hobbies, extracurricular activities, and others.

**Circles of Influence**

**Reflection:** How can being more aware of your cultural influences, biases, and filters help you to be more considerate in communication?

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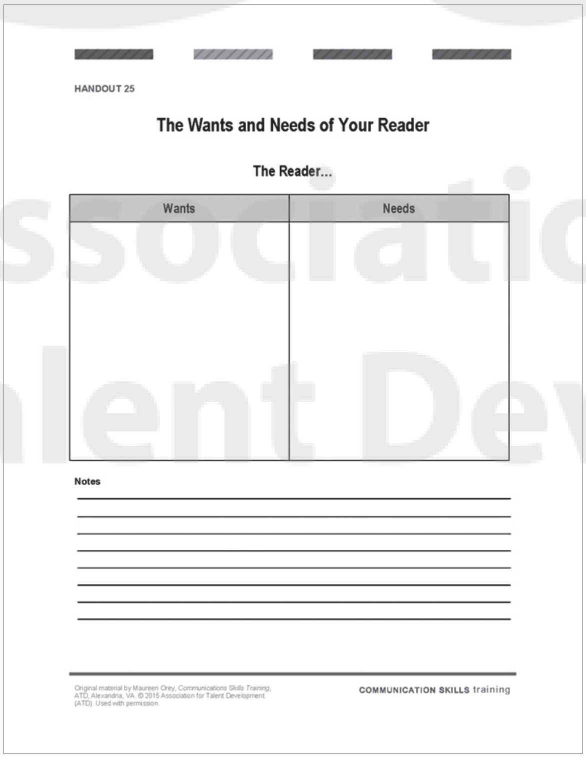
## Handout 25: The Wants and Needs of Your Reader



HANDOUT 25

### The Wants and Needs of Your Reader

**The Reader…**

| Wants | Needs |
|---|---|
| | |

**Notes**

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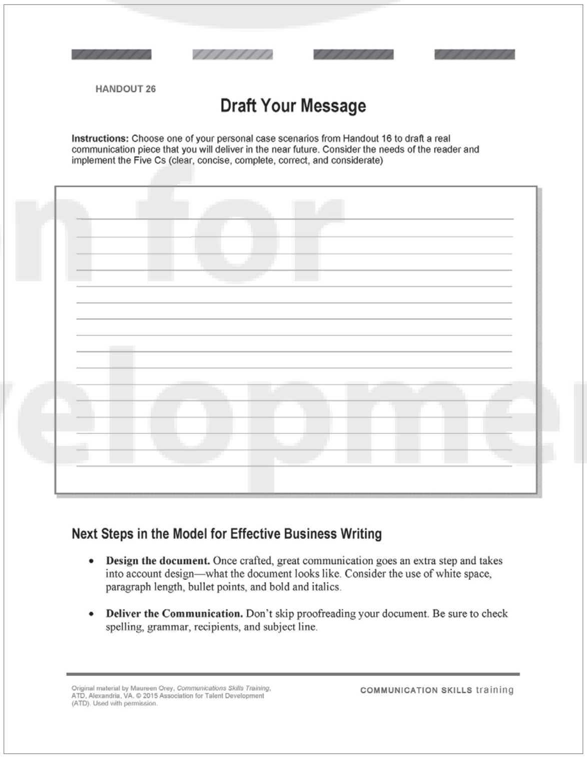
## Handout 26: Draft Your Message



HANDOUT 26

### Draft Your Message

**Instructions:** Choose one of your personal case scenarios from Handout 16 to draft a real communication piece that you will deliver in the near future. Consider the needs of the reader and implement the Five Cs (clear, concise, complete, correct, and considerate)

**Next Steps in the Model for Effective Business Writing**

- **Design the document.** Once crafted, great communication goes an extra step and takes into account design—what the document looks like. Consider the use of white space, paragraph length, bullet points, and bold and italics.
- **Deliver the Communication.** Don't skip proofreading your document. Be sure to check spelling, grammar, recipients, and subject line.

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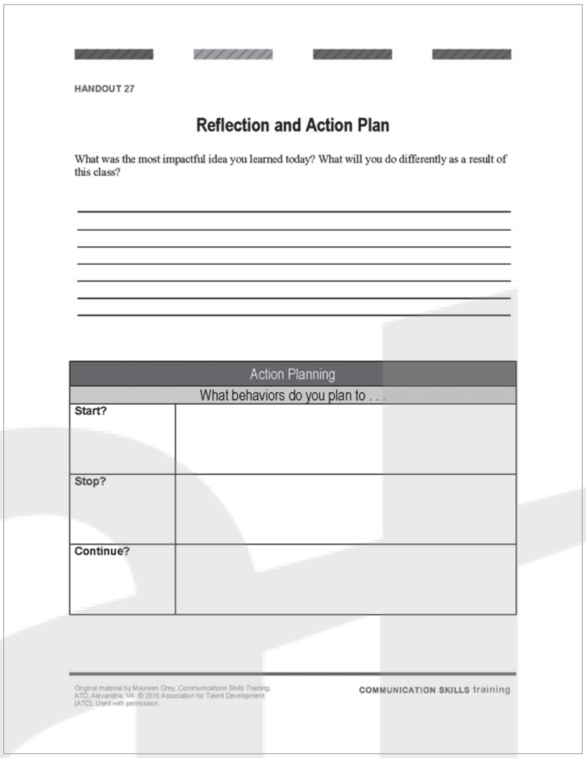
# Handout 27: Reflection and Action Plan



HANDOUT 27

## Reflection and Action Plan

What was the most impactful idea you learned today? What will you do differently as a result of this class?

| Action Planning | |
|---|---|
| What behaviors do you plan to . . . | |
| **Start?** | |
| **Stop?** | |
| **Continue?** | |

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## Chapter 14

# Online Tools and Downloads

**What's in This Chapter**

- Instructions to access supporting materials
- Options for using tools and downloads
- Licensing and copyright information for workshop programs
- Tips for working with the downloaded files

---

The ATD Workshop Series is designed to give you flexible options for many levels of training facilitation and topic expertise. As you prepare your program, you will want to incorporate many of the handouts, assessments, presentation slides, and other training tools provided as supplementary materials with this volume. We wish you the best of luck in delivering your Communication Skills Training workshops. As mentioned in the preface, it is exciting work that ultimately can change lives.

## Accessing Support Materials

To get started,

- **Visit the ATD Workshop Series page: td.org/workshopbooks.** This page includes links for downloading the tools as well as up-to-date information about new additions to the series and new program offerings. Six ATD Workshop Series books are planned for publication in 2014-2015.

- **Click on “Tools & Downloads.”** This links you to the list of current titles in the ATD Workshop Series. Choose “Communication Skills Training,” which will immediately take you to the Tools & Downloads section for this book. Please note that you will be required to register your name and email address on your first visit to the page.

All the training materials you need to deliver engaging and effective training on communication skills are available to download and use immediately. To give you the maximum amount of flexibility with the materials, ATD offers three options for use.

## Option One: Access to Ready-to-Use Resources

The first option offers learning activities, handouts, assessments, and presentation slide files in PDF format, which are included in the purchase price of this book. Use these files to deliver your workshop program and as a resource to help you prepare your own materials. Click on “Free Downloads” and then “Communication Skills Training,” the page that houses all the supplementary documents, including learning activities, assessments, handouts, and presentation slides. Each of the files may be downloaded and employed as part of your training delivery for the workshops, provided no alterations are made to the original materials.

You may choose to modify or recreate these documents on your own, provided they will be used within your organization or for your personal use only. Please note that all materials included in the book are copyrighted and you are using them with permission of ATD. If you choose to modify the materials, per copyright usage requirements, you must provide attribution to the original source of the content and display a copyright notice as follows:

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## Option Two: Access to Customizable Resources

The second option allows you to fully customize the supplemental content for an additional nominal fee. This option gives you access to a downloadable zip file with the entire collection of training materials in Microsoft Word and Microsoft PowerPoint file formats. Once purchased, you will have indefinite and unlimited access to these materials in your “MY DOWNLOADS” section on the ATD online store. Provided you are able to use Microsoft Word and PowerPoint files, you can completely customize and personalize all the documents and presentations to best suit your program requirements. You can add your own content, change the order or format, include your company logo, and any number of other customizations.

Please note that all the original documents contain attribution to ATD and this volume as the original source for the material. As you modify and tailor the documents, remember to keep these attributions intact (see copyright notice above). By following this procedure, you are practicing professional courtesy by respecting the intellectual property rights of another trainer (the author) and you are modeling respect for copyright and intellectual property laws for your program participants.

*Communication Skills Training* and other books in the ATD Workshop Series were developed primarily for use by an individual or a department needing to deliver comprehensive training solutions for in-house needs. Consider this example:

> Trainer Joe is a salaried staff member in a small- to mid-sized manufacturing company of 750 employees. Joe has been tasked with developing the interpersonal communication skills of 15 department managers and 35 line supervisors within the departments. Joe is a training specialist but has never conducted communication workshop programs; he's looking for a reasonable and authoritative resource to help him accomplish this project. Joe purchases *Communication Skills Training* as well as the customizable collection of documents (option two).
>
> He determines that the two-day program works best for the department managers but thinks that the half-day program is a better fit for the supervisors because they can't be off the line for more than a few hours. Based on the agenda programs in this book, Joe prepares the two different workshops for delivery, customizing the supporting materials for each group, and adding content pertinent to the manufacturing environment in which the attendees work. Joe delivers the workshop programs as part of his training role at the manufacturing company, and the managers and supervisors attend the training workshops as part of their required professional development with the company.

Having purchased the "individual use" set of materials, Joe can freely customize and distribute the assessments, handouts, PowerPoints, and other tools for use within his company and at the training workshops, no matter how often the programs are delivered. *In this case, no further license is required.*

## Option Three: Licensing Program Materials

You *will* need to purchase a license, however, if you or your company wants to "sell" training workshops based on the materials presented in *Communication Skills Training*. This includes any derivative materials you have customized based on materials presented here. The easiest way to think about it is this: If you or your company plans to develop "client solutions" by offering a training workshop for which you or your company are being paid a fee or if you are charging for "seat" attendance, you will need to purchase a license to use the workshops and related materials.

On the "Tools & Downloads" page, you have the option to purchase a license to use, customize, and develop workshops based on the content provided in this book and in the collected set of supporting documents. Two licensing purchase options are available:

- License to deliver Workshop Training Content up to ten (10) different client companies
- License to deliver Workshop Training Content up to twenty-five (25) different client companies.

Note that if you or your company would like to purchase a license to deliver this material to more than 25 companies, you will need a special licensing agreement. Send an email to Licensing@td.org. Include the words "ATD WORKSHOP LICENSE" in the subject line, and a representative from the ATD Sales Department will work with you to prepare a larger-audience delivery license.

As of this printing, licenses for multiple workshop book titles within a single license are not available. Please check back with the "Tools & Downloads" page for updates on new products and offers.

## Working with the Files

### PDF Documents

To read or print the PDF files you download, you must have PDF reader software such as Adobe Acrobat Reader installed on your system. The program can be downloaded free of cost from the Adobe website: www.adobe.com. To print documents, simply open the downloaded files using a PDF reader and print as many copies as you need. The materials are provided in color, but you can choose to print them in grayscale if color duplication is not available to you.

## PowerPoint Slides

To use or adapt the contents of the PowerPoint presentation files (available in options two and three), you must have Microsoft PowerPoint software installed on your system. If you simply want to view the PowerPoint documents, you need an appropriate viewer on your system. Microsoft provides various viewers for free download at www.microsoft.com.

Once downloaded to your computer system, you can print the presentation slides using Microsoft PowerPoint. Open the files and print as many copies as you need. You can also make handouts of the presentations by printing them three "slides" per page. The slides will be in color, with design elements embedded. PowerPoint permits you to print these in grayscale (black-and-white) as well.

You can modify or otherwise customize the slides by opening and editing them in the appropriate application. However, you must retain the credit line denoting the original source of the material as noted earlier in this chapter. It is illegal to present this content as your own work. The files will open as "Read-Only," so before you adapt them you will need to save them onto your hard drive under a different name.

The PowerPoint slides included in this volume support the three workshop agendas:

- Two-Day Workshop
- One-Day Workshop
- Half-Day Workshop

For PowerPoint slides to successfully support and augment learning, it is essential that you practice making presentations with the slides *before* using them in live training situations. You should be confident that you can cogently expand on the points featured in the presentations and discuss the methods for working through them. If you want to engage your participants fully (rather than worrying about showing the next slide), become familiar with the simple technology before you need to use it. The sidebar on page 176 offers a quick cheat sheet to help you navigate through the presentation. A good practice is to insert notes into the "Speaker's Notes" feature of the program, print them out, and have them in front of you when you present the slides. The workshop agendas in this book show thumbnails of each slide to help you keep your place as you deliver the workshop.

## NAVIGATING THROUGH A POWERPOINT PRESENTATION

| **Key** | **PowerPoint "Show" Action** |
|---|---|
| Space bar or Enter or Mouse click | Advance through custom animations embedded in the presentation |
| Backspace | Back up to the last projected element of the presentation |
| Escape | Abort the presentation |
| B or b | Blank the screen to black |
| B or b (repeat) | Resume the presentation |
| W or w | Blank the screen to white |
| W or w (repeat) | Resume the presentation |

# Acknowledgments

I can't help but think of the old saying that it takes a village to raise a child; in many ways this book was not written by me alone. Without the support of my friends, family, and colleagues this book would have taken an eternity to complete. Many thanks to my intern, Debby Tang, from the University of California, San Diego: your keen eye for detail and friendly disposition never failed, and your willingness and patience to deal with my crazy travel schedule was truly a lifesaver! Thanks also to the fabulous learning leaders and contributing authors: Rick Hicks, Dawn Mahoney, and Sharon Wingron. The ideas and activities you provided have added to the quality and strength of this book. Special thanks particularly to Ken Phillips who not only shared a great learning activity but also the Communication Style Inventory—one of the most spectacular new resources in the book! Of course I would be remiss not to mention the TPH team: Cat Russo who championed the re-envisioning of the workshop series, editor Jacki Edlund-Braun who kept nudging me gently as deadlines loomed, and Tora Estep who, along with my fellow ATD Workshop Series authors, helped craft Section II. Thank you for your gracious patience with me!

As always, without fail, my friends and family always had nothing but love and support for me as I wrote. I appreciate my doctoral study group, Sharon and Carolyn, who met me at Co-Merge Workplace to write, even though I was not always working on my dissertation! Thank you Vey for keeping me fed, loved, and sane during the long days; and Shane, Danielle, and Rachel for your understanding when my response to the question "What are we doing today?" was always . . . "Writing" . . . Perhaps we can go out soon!

*I am blessed beyond belief to have this village of support—my deepest thanks to all.*

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# About the Author

**Maureen C. Orey** is an award-winning international speaker, expert facilitator, and executive coach with more than 25 years of experience in the fields of communication, management, leadership, training, career development, and diversity. She has worked in many industries, including technology, healthcare, construction, hospitality, and education. Her client list includes Boeing, Sony Corp, Scripps Health, SHARP Healthcare, San Diego State University, the Scaffold Industry Association, the Association for Talent Development (ATD), the City of San Diego, the U.S. Marine Corps, and the U.S. Navy, among others. As President of Workplace Learning & Performance Group, Orey is dedicated to working with inspired individuals and organizations to help them improve their performance so they can achieve their desired results.

Orey is co-author of the best-selling *Communication Skills Training* (ASTD Press, 2004) and author of *Successful Staffing in a Diverse Workplace* (Richard Chang Associates). She is a Certified Professional in Learning and Performance (CPLP), holds a master's degree in education from the University of San Diego, and a bachelor's degree in psychology from San Diego State University. In addition to her work in the private sector, she currently serves as adjunct professor at University of California, San Diego and Brandman University. Orey recently embraced the role of student again and is currently a doctoral candidate in organizational leadership at Brandman University in San Diego, CA.

Among her many professional recognitions, Orey was honored as the 2008 Outstanding Instructor of the Year for San Diego State University's College of Extended Studies. Her company, Workplace Learning & Performance Group, is proud to be the 2014 Winner of the San Diego Regional Chamber of Commerce's Small Business Awards.

She is passionate about work–life balance, health, fitness, and embracing the differences that make us strong. When she has time, she stays fit with regular circuit training, martial arts, and body building. Originally from San Diego, she is a proud mother of three children and has served as President of the Helix Charter High School PTSA and Chapter President of the

San Diego Chapter of ASTD. She resides in Spring Valley, CA, with her family, four cats, and two dogs.

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The Association for Talent Development (ATD), formerly ASTD, is the world's largest association dedicated to those who develop talent in organizations. These professionals help others achieve their full potential by improving their knowledge, skills, and abilities.

ATD's members come from more than 120 countries and work in public and private organizations in every industry sector.

ATD supports the work of professionals locally in more than 125 chapters, international strategic partners, and global member networks.

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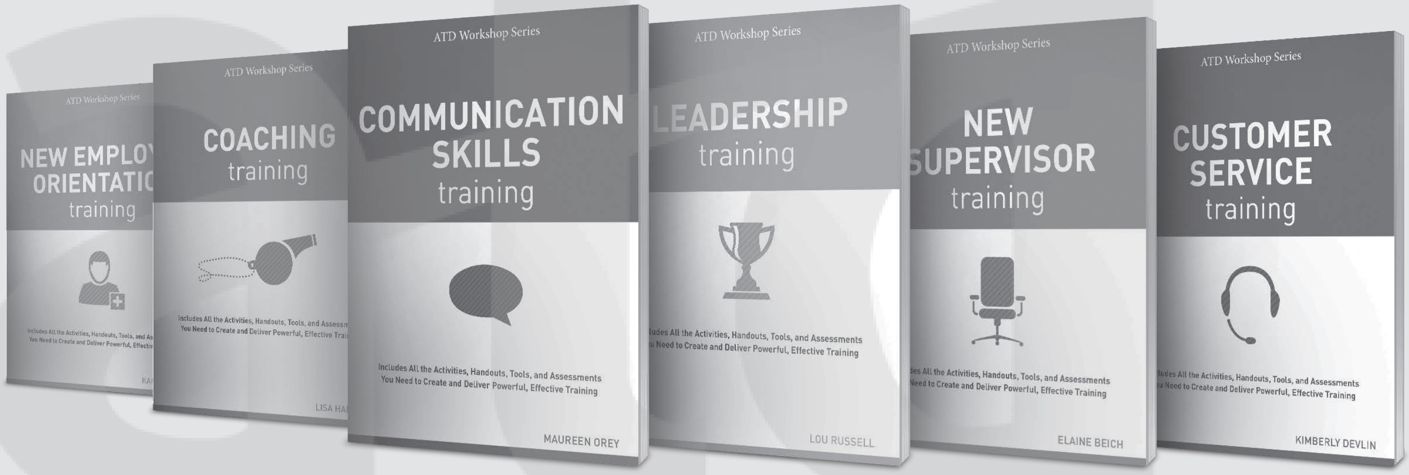
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