

# FIVE STEPS TO CREATE A CLIMATE FOR DIVERSITY

Tyrone Holmes

1. *Create opportunities for culturally different individuals to interact with each other continuously:* Recognize that you cannot simply cluster people with significant cultural differences and expect them to connect on their own naturally. Of course, some will, but even more will not. You can proactively facilitate cross-cultural interaction through structured icebreakers and social events, team-building activities, group projects and assignments, and cross-training interventions. The key is to make sure that people have an opportunity to interact on an ongoing basis, not just now and then.
2. *Help employees develop the skills they need to effectively communicate, resolve conflicts, and solve problems in culturally diverse settings:* Such skills include the abilities to communicate across cultural differences, to resolve diversity-based conflicts, to provide coaching and mentoring for a diverse range of employees, and to contribute to the creation of culturally empowered environments. Keep in mind that organizational members do not develop these skills overnight. However, with ongoing developmental opportunities and the chance to apply newly developed skills on the job, increased competency levels become evident, and they will have a positive impact on both individual and organizational performance.
3. *Develop, implement, and enforce antiharassment and antidiscrimination policies:* This includes providing skills-based training that teaches managers and supervisors to effectively challenge inappropriate comments and behavior. It includes a systematic process for communicating the policies to employees and letting them know what they should do if they feel they are the victims of harassing or discriminatory behavior. Most important, you have a specific process to handle complaints in a timely and comprehensive fashion.
4. *Actively work to recruit a high-quality, culturally diverse workforce:* This can create a significant competitive advantage for your organization. Many companies have improved their performance and their ability to serve a diverse customer base by proactively focusing on the creation of high-quality, culturally diverse candidate pools for their positions. By “enlarging the net” to recruit top candidates and by improving the climate for diversity, you can significantly improve business performance.
5. *Ensure that organizational policies and practices support a diverse workforce:* For example, many top diversity practitioners reward managers for effective diversity leadership in the form of bonuses and merit increases. They recognize the holidays and celebrations of various cultural groups, and ensure that the physical environment (such as artwork, posters, and other visual displays) reflects an appreciation for diversity. They also implement flexible work practices and develop compensation systems that fit the needs of diverse organizational members.

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

# 10 TIPS FOR SUCCESSFUL ON-THE-JOB TRAINING

Geri Lopker

Structured on-the-job training (SOJT) is training that occurs in the workplace rather than off the job. Employees learn from experienced co-workers or supervisors while they work. This learning occurs through observation and doing the job, through feedback about performance, and through the use of job aids and other job reference materials. It is structured, not random. It follows a predetermined set of skill-building work opportunities that provide a safe environment for the new performer to demonstrate performance mastery under the watchful guidance of an SOJT coach.

1. *Decide if SOJT is the right approach for transferring knowledge and skills:* Most organizations use a blended approach to orientation and training. Rarely should a new employee receive SOJT as the only form of instruction. Decide if the knowledge and skills are best transferred by combining instructor-led or Web-based training with SOJT. Every training approach has pros and cons; SOJT provides the opportunity for the new learner to practice their new skills in a supportive learning environment under the watchful support of an SOJT coach.
2. *Provide appropriate learning sessions before SOJT for the new performer to gain the concepts, knowledge, and rudimentary skills:* New performers need to acquire the knowledge and skills and then apply them in a realistic work environment. The new performer generally should first participate in knowledge and skill acquisition sessions (classroom training, Web training, self-discovery learning, etc.).
3. *Locate appropriate SOJT coaches and provide training for them so that they understand how adults learn, how to deliver feedback, and how to make sure the new performer has ample opportunities to demonstrate mastery:* The wrong SOJT coach can hinder the new performer's confidence and competence. Once the new knowledge and rudimentary skills are acquired in other training or learning sessions, the new performer is ready for SOJT and an SOJT coach. The coach needs to understand not only the benefits of SOJT, but also the roles, expectations, and principles of delivering good feedback. The coach needs to allow new performers to connect their new knowledge to the new skill in the workplace.
4. *Clearly identify what the new learner needs to do back on the job. Match the SOJT environment to the everyday work environment:* Make sure that the skills to be practiced and acquired are linked with job-based criterion standards so that the new learner can practice and receive feedback from the coach. Unless it is a simulation environment for safety or regulatory reasons, the SOJT should be conducted in an environment as close to the real world as possible.

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

# 10 TIPS FOR SUCCESSFUL ON-THE-JOB TRAINING (CONT.)

5. *Follow an SOJT model:* The coach helps the new performer establish goals for the SOJT period, verifies that the new performer understands the tasks or groupings of tasks, and answers any questions. The coach demonstrates the task and answers any additional questions. The new performer then completes the task under the supportive watch of the coach. The coach provides encouraging and/or developmental feedback that helps the new performer pinpoint areas for improvement. Practice makes permanent; so repeat as often as needed until the new performer is proficient.
6. *Understand the benefits to the learner, and promote the benefits throughout the department before, during, and after the training:* New hires receive high-quality training delivered by a coach who is capable and committed to making sure they acquire the skills and knowledge to do the new job, plus learn how to initiate and ask effective questions. Confidence grows more quickly in completing critical tasks, and job tasks are accomplished more efficiently and effectively. In the long run, the manager spends less time correcting or giving critiquing feedback, which enhances the relationship between employee and manager.
7. *Understand the benefits to the SOJT coach and the organization, and promote the benefits throughout the department before, during, and after the training:* The SOJT coach and the organization also benefit from the SOJT approach. Coaches develop interpersonal skills, communicate at a more effective level, and are usually more organized. We also tend to find that the SOJT coach learns and applies problem-solving skills that can benefit them throughout their work lives.
8. *Follow the instructional approaches that promote learning on the job:* Start with an overview of the big picture, then review the requirements of the job. Understand and take learners from where they are and present the instruction in the form of a problem to be solved. Make sure to demonstrate the desired outcome and then provide feedback and suggestions for improvement. If needed, provide a job aid to help them back on the job and finish with regular follow-up.
9. *Remember that adults learn best when the training follows adult learning approaches:* Adults really are self-directed learners; they like to link the new learning to prior experiences. They want their learning to have practical application and to be able to use their new learning in real time. Adults are internally motivated, and they learn when there is a connection to their personal success.

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

10. *Practice makes permanent!* Help the learner have a minimum of 50 percent practice, increasing over the SOJT period. The quantity of practice, more than the quality of the practice, is instrumental in the learning process.

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

# SEVEN TIPS FOR MAINTAINING PROFESSIONALISM

Lenn Millbower

## Tip One: **Play for the Audience**

*Performers perform because the audience exists.* The one primary reason to put on a performance is to please an audience. Rehearsal is not a substitute. Blank walls do not applaud. Only an audience ignites the performance.

Performers who have tired of their role tune the mechanics of the role out and tune the audience in. For those watching, the experience is new and, by focusing on them, the performer becomes one with the audience. The audience's reactions, not the delivery, make the show a success. Through the audience, the bored performer sees the performance as new.

In training, the material, not the trainer, is the show. Great trainers do not overshadow their learning points. Those points, and the success of the connections those points make with the trainees, determine the success of the learning event. Trainers who have tired of the material can take a tip from performers: Focus on the reaction of the audience to that material and, as a result, see the learning anew.

## Tip Two: **Explore the Alternatives**

*Performers never stop enhancing the performance.* Actors are told when to enter, how to stand, where to look, what to say, and which emotion to portray while saying what they have been told to say. These are confining parameters. Yet great actors, through subtle variations in the inflection, movement, or look, vary their performance greatly.

Trainers are more fortunate than actors. They are not as closely directed. There is no set character to portray, no word-for-word script to follow, and no one directing the trainer to stand on an X. Trainers who become bored with their material should embrace this freedom and deliver the material in different ways. Stand in a different spot. Use a different vocal inflection. Add humor. Run an activity with a different twist. If an actor, with all the specific direction, can stave off boredom, a trainer can too.

## Tip Three: **Refine Your Delivery**

*Performers constantly hone their craft.* Comedians rarely settle for what worked the night before. They insistently try to wring every possible laugh out of a line. Once that line works to its maximum potential, they search for a second line to augment the first. Once that line works, they search for a third, and then a fourth. The process of refinement never stops.

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

# SEVEN TIPS FOR MAINTAINING PROFESSIONALISM (CONT.)

So it should be with training. The same-old same-old becomes tedious, tiring, and boring. To the trainees, the resulting robotic delivery demonstrates a lack of enthusiasm for the material itself. Trainer skills need not be cast in stone. Trainers, like comedians, should continually seek ways to refine their delivery. Look for another place to stand, a more flowing hand gesture, a different grouping of words, and a clearer way to conduct the discussion. Through this continued search for refinement, boredom can be conquered.

## **Tip Four: Focus on Emotion**

*Performers focus on emotion.* Classical musicians play the same notes, exactly, flawlessly, in performance after performance. It appears they have no room for creative maneuver, but they actually have a wide latitude. Instead of focusing on the mechanics of the notes, the classical musician focuses on the emotion within the notes. The notes have long since been absorbed into the brain's procedural memory, allowing the performer to feel rather than think and thus ward off boredom.

Trainers present the same material so often that their mouths find the content without conscious awareness (much as our cars find their way to work). This procedural memory skill seems to create boredom. It is actually a source of liberation. Once the procedural memory has taken over, the trainer can concentrate on the emotional message behind the words. The trainer can make the training sing!

## **Tip Five: Own the Material**

*Performers believe in their material.* You can spot a bored actor in a second. The performer goes through the motions required by the script but clearly does not own the words he or she speaks. The critics call it "walking the part," and the audience senses that the performer is not believable in the role. Great actors, in contrast, tunnel inside the character so thoroughly that the actor becomes secondary to the character. At that moment, the actor is not on stage, the character is.

Trainers, regurgitating management and instructional designer talking points over and over and over, also become bored with their role. When trainers are required to deliver messages they do not agree with or support, it becomes even more difficult.

Trainees can spot the trainer who is "walking the part." Sometimes they spot a subtle, vacant look. On more egregious occasions, they hear a public disavowal of the material. We owe our audience more. As learning professionals, we have an obligation to become one with the material, to believe it, and to deliver it in a spontaneous, fresh, and original manner each and every time.

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

## **Tip Six: Reconnect Your Purpose**

*Performers work for the art, not for the pay.* Being a performer is not a job; it is a calling. Performers do it because they believe their talent is the reason for their existence.

Very few trainers could make the claim that they train for the pay. There are certainly more lucrative ways to succeed in the business world. Each of us becomes a trainer because of a purpose: perhaps helping people, sharing information, personal growth. Whatever the case, some reason existed at one point in time. During my tenure at the Disney University (writing training programs for Walt Disney World), I occasionally found myself bogged down in the details of an instructional design. Fortunately, the office was right behind the Magic Kingdom. When I found myself disconnected, I sat on the patio. Within a few minutes, the sound of the steam train's whistle called to me. It was my reconnector. It reminded me of the guests a few short feet away having the time of their life. My purpose was to deliver magical instructional designs to the people who delivered the Disney magic.

Trainers who have become disconnected should seek out the reason they wanted to train in the first place. That reason is the fuel to an enthusiastic delivery.

## **Tip Seven: Make a Move**

*Performers who cannot reconnect quit.* A key difference between performers and the rest of the world is the performers' attitude toward long-term employment. Most of the world views a job as a multiyear commitment. Performers think in terms of "gigs" that come and go. They have little expectation of a long-term gig. Most would, in fact, refuse one if it were offered. It is not that performers object to being employed. Professional artists fear something worse: losing their creative edge. And when they can no longer connect with their purpose in any one job, they make a move.

Likewise, trainers who are bored with training should make a move. Try training a different subject. Learn a new skill. Change careers. Bored trainers serve both themselves and their trainees poorly.

So celebrate the good times and P-E-R-F-O-R-M. You owe it to your trainees. You owe it to yourself. Follow these seven tips, and your good times will last throughout the year.

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

# MOVING YOUR CAREER FORWARD

Annabelle Reitman

1. *Evaluate your present work satisfaction level:* Answer the following questions to assess whether you should be staying or thinking about moving on. Do you feel:

- “The burning passion” for your work is starting to cool down?
- “You have been there, done that”—that there is no more challenge left in your work?
- You are settling for less and you are lucky to have the job?
- You have fewer opportunities for learning?
- What you do is valuable and meaningful?
- You are constricted at work?
- Your skills, knowledge, and abilities are being used to their full capacity?
- Your supervisor and the organization acknowledge and appreciate your contributions and efforts?
- You have advancement opportunities and, if so, you are interested in the positions available to you?
- Your salary and benefits are good compensation for your level of work and responsibility?
- Your job and its responsibilities allow you adequate time for your family and/or personal life?
- Your professional interests and focus are changing direction, and you are not sure your present employer can accommodate these shifts?

*Conclusion:* How do your responses weigh in on the balance scale? More positive? More negative? What do you think will be your next steps?

2. *Keep a professional/personal lifestyle balance:*

- To be able to develop, expand, and enhance your career, you need harmony and integration of all your life roles. If you are happy and at ease with (a) the amount of time you devote to each of your life roles, (b) the priority or importance of each role in your life, and (c) the emotional or psychological investment you have in each role, then you have a good balance of your professional and personal lifestyles.
- If you are investing too much energy, time, and resources into one or two of your roles, your life as a whole is unbalanced. The extent of stress and tension resulting from this imbalance leaves you with little time and strength to concentrate on moving your career forward. You can manage how much time, energy, and

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

## MOVING YOUR CAREER FORWARD (CONT.)

quality you give to each one and how, when, and where they will interact mutually.

- A life in equilibrium gives you the time and space to do long-range planning and goal setting. Of all your life roles, your professional/career role is most impacted by societal, technological, and economic changes and advances, and thus the need to take a long-range view of this role is essential for success. To continue to experience success in the workplace, an assessment of where you are and where you would like to be should be a regular activity marked on your calendar. If you are able to block out the full amount of time and truly give your full attention to the task at hand, you are comfortable and satisfied about your professional/personal lifestyle balance.
  - How can you move your career forward and retain the balance you desire in your professional/personal lifestyles? Be sure that the people who play important roles in your life are part of the decision-making process for your next career step and therefore stakeholders in your work future.
3. *Survive within your present work environment:*
- Although everything at work is great at the moment, you never know when things can change: a new boss, a restructuring, a new CEO, and so forth. Therefore, keep making yourself indispensable to your office and the organization by letting people know of your accomplishments.
  - Avoid being pigeonholed. Presenting yourself through your skills and capabilities, not specific responsibilities or job titles, allows managers and HR staff to view you from a broader perspective and fit you into a bigger picture. Of course, you should be known for a particular expertise, but not just as a Web designer or salesperson. In fact, having this broader perspective of your strengths helps you alter your image of your professional self. You will begin to look for and find a wider range of position opportunities.
  - Look for new possibilities and ideas in your present job. Is a need not being met? Does a problem require resolution? Coming up with a solution can lead to a promotion, job growth, or the beginning of your own business.
  - Be willing to accept new challenges within your organization. Do not be afraid to initiate or propose new tasks for yourself, especially if they take the organization down a new road, lead to adopting a new work model, or take advantage of demonstrating

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

the efficiency of new technology, and so forth. In other words, be willing to take a risk and be open to possibilities.

- Ideally, you want your supervisor to think of you as essential to your office as well as to the overall organization. Be as productive and as visible as possible. Keep asking yourself, will my boss be excited by this result? What value have I added to this team, to my department, to the organization? Does my “signature” or “brand” stand out? This can particularly work to your advantage in times of reorganization, restructuring, and downsizing.
- Be aware of office politics—learn how the specifics of how your organization, division, and department operates. What are the informal chains of command and power? Who knows the what, where, and when of your work environment?

4. *Be alert to future opportunities:*

- Although you may be satisfied with your present job and employer, you should still be open to future possibilities. Your ideal work situation can be just over the horizon. Know what kind of opportunities you are looking for—new job with higher-level responsibilities, a chance to make a professional shift or a career change, a partner for a business opportunity, expansion of your skill/expertise base, becoming known as a speaker or writer, and so forth. Recognize the window when it opens for you. Be sure to keep your resume updated and at hand.
- Remember, opportunities are all around you, 24/7. Do not be rigid in your thinking and mind-set about where and when you will find an opportunity. Possibilities exist in print publications, online Websites, and list servs, leisure and hobby pursuits, and recreational activities, and so forth. Be relaxed and open-minded to viewing all directions. Maximize what you see around you in both your professional and personal lives, and take control of the situation.
- Keep a running list of the opportunities (present and future ones) that you have created, noticed, and have acted on or plan to act on in the near future. Set dates for initiation or follow-up. Record final outcomes. Think about the results: Would you do anything different if a similar opportunity appeared again?

5. *Networking is ongoing:*

- Taking care of and keeping up-to-date with your network is one of the most important things you can do to continually move your career forward. Let people know of your latest accomplishments, new responsibilities, a promotion, and the like. Whenever you revise your resume, be sure that your network members receive a copy.

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

## MOVING YOUR CAREER FORWARD (CONT.)

- Expand your network by joining professional organizations (both national and local chapters), special interest groups, your local alumni chapter (if one exists), professional women's networking groups, and so forth. Build and establish new relationships by volunteering in these groups. Another way to grow your network is to take advantage of Internet technology, such as chat rooms, specialty online mailing lists and newsgroups, and so forth. Use networking as a resource to learn about other industries and to meet people from organizations in which you are interested.
  - There are network opportunities within your own organization in the form of team projects, the people you work with in other departments and offices on a day-to-day basis, and/or managers and other staff employees whom you meet at company functions and activities.
  - Keep your Rolodex contact information current. Once a year, send out an email requesting everyone to review his or her contact information and revise it as necessary.
  - Establish a networking log in which you can record the particulars of your phone calls, emails, and meetings. Include such items as contact information and how the contact originated—through a referral; by meeting at a function/activity; or located through a resource, such as a newsletter article, radio show. Make notes of contact results, such as new names, training classes, jobs, professional groups; specifics of how you will follow up; and results of follow-up actions.
6. *Establish a professional design plan (PDP):*
- A PDP is a blueprint for how, when, and where you build your path for accomplishing the necessary tasks for ultimate career success. It is a strategic plan in progress—adaptable, flexible, and reflective of your situation at any moment as you experience your professional and personal lives.
  - Creating a PDP enables you to establish a long-term perspective on your career. This document commits you to action by (a) providing the means to manage your career destination and achieve your professional goals, (b) allowing you to develop a workable, comprehensive, practical action plan, (c) pinpointing a set of related tasks and activities that can be arranged in logical order, and (d) serving as measurement tool for monitoring progress and needed revisions toward the overall career objective.
  - One essential element of a PDP is to establish long- and short-range goals. Goals are functional declarations of your potential career dreams and hopes. They are specific, realistic, outcome-

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

oriented, and measurable intentions. Long-term goals represent the overall picture of what you are working toward, and they keep you on the path toward your final destination—usually three to five years. Short-term goals give you a more manageable timetable and keep you focused and clear about the immediate tasks and activities—usually 12 to 18 months.

- The action plan is the heart of the PDP—how do I get there? Most of your time and energy is spent carrying out the steps and activities outlined in this plan. Each short-range goal is in reality a project that needs to be coordinated and completed. It is in the action plan that procedures and tasks are spelled out, and limitations, resources, and deadlines are listed and described.
- Interim measurable milestones of success are the established regular checkpoints for monitoring progress toward your goal. Milestones are important as means to review whether your plan of action is on track and on time. They allow for the determination of which strategies and activities are satisfactory and which are not working to meet your needs.
- Adjustments and revisions help you stay on target, committed, and motivated. This is the time to think about what can be done to improve your rate of success before the next scheduled success milestone checkpoint date. Were there any missed activities and how can they be rescheduled? Are any modifications or changes required to improve the efficiency and effectiveness of the PDP?

Moving your career forward—whether it is from one work situation to another, accepting a new job, receiving a promotion, shifting to a different professional role or function, or going independent—requires modifying your perception of the changing shape of your career and the image you have of your professional self.

A final suggestion: Consider hiring a coach to (a) help you successfully assess and navigate professional shifts and/or career transitions, (b) provide support and guidance to move you up in your organization or begin a job search, and/or (c) assist you in changing your mind-set about who you are professionally and to successfully adapt to a new work role.

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

# PRIORITIZING TRAINING REQUESTS

Renee Stoll

## Is There a Training Need?

Before you can even consider whether you have the resources to work on a requested project, determine whether training is needed. We have all been victim to the well-intentioned manager who requests “team building” or “communication training” when the real issue is clear expectations and accountability. The following questions can help you determine if training will indeed address the request.

<i>Question</i>	<i>Rationale</i>
1. Are the expectations and standards for performance clear?	If not, we cannot be sure whether they know how to complete the task or simply do not understand the task.
2. Is anything in the environment preventing folks from doing the job (i.e., lack of tools, time, resources)?	If so, start there before training can be effective.
3. Have employees received feedback on their performance?	If not, it may not be a training skill issue, but rather a lack of understanding of what is expected.

If your answers to the previous questions are yes or not applicable, you are most likely looking at an appropriate training need.

## Should You or Your Team Address the Need?

Training could help the situation, but that does not mean this training request is the best use of your time. The following questions help you further determine whether you or your team should accept this request *right now*.

<i>Question</i>	<i>Rationale</i>
1. Does it affect a large population?	Many training teams, when forced to prioritize, invest their efforts in the largest need or population.
2. Can the project be linked to the company vision, strategy, mission, or goals?	If not, this project is probably not the best use of your time.
3. Does the project have strong support from a business unit and an identified sponsor?	If not, invest additional time to get the project moving, supported, and staffed.
4. Do we, the training team, have the skills to accomplish the task?	If not, consider outsourcing (whether to another internal group or to an external vendor).
5. Do we have budget money to accomplish the task?	If not, invest additional time to get the key stakeholders to fund the initiative.

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

Your company culture, style, and resources determine whether you should work on a training initiative or not, but the previous questions can help you make an informed decision.

### **What Is the Priority?**

Suppose you are looking at five projects that meet all your criteria and that are appropriate uses of your time or your team's. But you have time to focus on only three of the five right now. How do you decide? The following strategies provide some ideas for addressing the question of priority.

<i>Strategy</i>	<i>Rationale</i>
Use a decision matrix tool that aligns with the company mission/strategy.	This can help you choose the projects that most closely align with the company's top goals.
Use a decision matrix tool that aligns with revenue or costs.	This depends on the company and industry, but many times you can use the bottom line to prioritize your projects.
Get help from key stakeholders.	Having your customers help with prioritization can ensure buy-in and go a long way toward building strong relationships with them. You will also learn a lot about how they prioritize work.

### **Assign the Project (for Large Training Teams)**

If you have a large team, determine who is the best resource or resources to work on the project. The following questions help you determine the best team member for the job.

<i>Question</i>	<i>Rationale</i>
1. Is a team or individual needed to complete the project?	This helps you consider how many resources you need up front to accomplish the goals of the project.
2. Who has the skills necessary for this project?	Someone who has done a project like this in the past can either lead this one or be a mentor for someone developing the skill set.
3. Who has expressed an interest in working on this type of project?	Someone already interested in this type of work will be more motivated and usually will do a better job.
4. What are the criticality and time frame of the project?	This helps you determine whether this can be a developmental assignment for someone or you need to complete it quickly.
5. Who has room to take on the project?	Sometimes you need to shift projects around to get the right ones on each person's plate.

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

# PRIORITIZING TRAINING REQUESTS (CONT.)

## Communicate Your Decision

At this point, you have either decided to take on this training request or determined that the request is not the best use of your time. In either case, circle back to the requestor and bring him or her up to speed on your decision.

*If you are going to take on the request:*

<i>Communicate ...</i>	<i>Rationale</i>
1. The criteria you used to come to this decision.	Your customers/partners learn how you make decisions and bring the information the next time.
2. The scope of the project as you see it.	This ensures you and your customer/partner have the same understanding about the project and its deliverables.
3. Who has been assigned to the project.	The customer/partner understands whom to work with going forward.

*If you are not going to take on the request:*

<i>Communicate ...</i>	<i>Rationale</i>
1. The criteria you used to come to this decision.	The customer/partner understands how you arrived at the decision. He or she might also be able to provide additional information about the project, which in some cases can take you back to the prioritization drawing board.
2. A bit about the projects you currently have going.	This helps the customer/partner understand that you truly are working based on your criteria. It also shows that you are at full capacity.
3. Other alternatives for meeting the need.	In many cases, you can offer alternatives if the customer/partner is adamant that the need must be addressed. This might include getting another team involved, outsourcing the request, or meeting the needs through options other than training. Your willingness to creatively problem solve shows the customer/partner that you truly care about the request and the success of the unit.

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

# 26 EMPLOYEE LEARNING OPPORTUNITIES THAT INCREASE PERFORMANCE AND MOTIVATION

Jeanne Baer

1. *Begin each day with 15 minutes of training:* In a retail store, for instance, you could focus each session on one new product—what it is, why use it, how to use it, and so forth. Once the store opens, urge employees to share what they have learned with customers, as a way of promoting the product and cementing their knowledge.
2. *Or conduct 10-minute “pregame huddles” for all employees just before the store opens:* Focus this just-in-time training on key operations—everything from selling techniques, news about a product, customer service tips, to ideas about displaying merchandise, and so forth.
3. *Begin and end the day with goal setting and learning:* Schedule five- to 10-minute meetings at the beginning of the day so that employees can share their key goals for the day. End the day with a quick recap of accomplishments made and/or things learned.
4. *Start a company library, put it in a handy spot, and build an expectation of daily reading:* Stock the library with interesting, real-world material—books, trade journals, business newspapers, audiotapes, CDs, videotapes, DVDs, and anything connected with your business. (Be sure you ask employees for their suggestions about what to buy.) Employees can add to their knowledge by visiting the library over their lunch hour or by taking things home or on vacation.
5. *Challenge yourself and your employees to learn five new business concepts a month:* Read books or trade magazines, watch or listen to tapes, attend seminars, interview people in the know. Do whatever you can to learn more about production, marketing, finances, law, and other aspects of your work.
6. *Or assign employees to a rotating schedule of scanning articles, reports, and news stories about your industry:* They can check the Internet or the closest library and report their findings at weekly briefings. In this way, employees sharpen their researching, reading, analysis, and presentation skills.
7. *Offer “What I learned this month” brown-bag lunches:* Go around the room and have everyone share at least two things he or she learned about company operations, key customers, industry trends, service, or product improvements ... even a mistake he or she learned from!
8. *Or ask employees to take turns giving a 20- to 30-minute report at brown-bag lunches:* The topic? Something relating to your business, which the employee learned recently. (In addition to leveraging learning, this also helps build presentation skills.) Because only one employee will report at each lunch and must make some preparations to do so, be sure you recognize his or her efforts in some way.

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

## 26 EMPLOYEE LEARNING OPPORTUNITIES THAT INCREASE PERFORMANCE AND MOTIVATION (CONT.)

9. *Spread the wealth:* Whenever people attend a conference or seminar, have them report at a company or department meeting on, say, the three to five most important things they learned.
10. *Offer incentives:* If your employees are working toward a GED, for instance, you might give them one compensation hour for every 10 hours they attend classes. Employees could use their accumulated time for holiday shopping, a three-day weekend, or taking a day off for hobbies.
11. *Or tie customer service to employee bonuses:* Employees could volunteer to call customers to learn what they think of their products and the company. An added benefit of this program is the learning that occurs when employees return customer calls with answers to questions they have researched.
12. *Help people see the big picture:* If you have a large company, pick a different employee every week to enjoy a complete tour of your offices (and remote sites, if appropriate). Employees will get a better sense of what others do, and it helps everyone establish links with office and administrative employees.
13. *Or invite managers from other departments:* Have them visit your staff meetings and tell your employees what they do and how it fits into the company's mission.
14. *Better yet, invite all the employees from another department to visit yours:* Tell your guests about your department's function and how it relates to them, the overall company goals, and your customers. Then it is *their* turn. (At a bank in Missouri, *all* departments got involved; each one delivered an hour-long presentation about its functions for the rest of the company. After all the presentations, everyone played a version of the "Jeopardy" TV game show to test their knowledge.)
15. *Circulate an "I really wish I knew ..." email message:* Ask employees to list those areas in which they need to improve, learn more about, or just keep up with. Use their responses to plan coaching sessions, cross-training opportunities, and individual learning plans.
16. *Training doesn't have to take long:* Every two weeks, offer a 15- to 30-minute program on topics of employee need. You could call the series TIPS, for Tips for Improving Performance Sessions. Just be sure your topics are narrow enough to cover in a short period.
17. *Continually cascade learning:* You might, for instance, gather your top senior managers to decide on the one company area in most urgent need of immediate improvement. Then give the staff 90 days to do two things: (1) learn all they can about how to improve that area, and (2) train their direct reports in that area. Give the newly

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

trained middle managers, in turn, 90 days to learn all *they* can and to train *their* direct reports. Thus the learning cascades, throughout their worldwide operations. When the first 90-day cycle is complete and all next-level managers have been trained, those at the top start the training cycle all over again.

18. *Build training and coaching into your appraisal system:* If you want your employees to welcome, orient, coach, and train their employees or peers, find ways to measure it, put it in their job descriptions, and discuss and reward it at appraisal time.
19. *Make it a game:* To help employees see how costs add up, consider staging a monthly game of “The Price is Right” with various departments. Employees guess the price of “disposable” items such as pens, copy paper, bandages (in a hospital), shampoo (in a hotel), and so forth. Winners get prizes and everyone gets a new appreciation for using resources wisely.
20. *Make it a badge of honor for an employee to teach and train others:* For them to do the best possible training, do not expect them to train when they “have a moment”—help them *make* time by eliminating another task. If possible, give them incentives such as extra pay or recognition while they are training others.
21. *Create a simple “learning contract” to help measure the impact of your training:* For instance, you could help an employee learn a new software program by providing him or her with a coach, and making sure the coach spends three hours a week helping the employee. When the training has been completed, the coach documents how skilled the learner is with the program. When the employee has fully mastered it, the learning contract obligates the employee to help at least two *other* people become equally proficient within the following year.
22. *Repetition reaps rewards:* To help people learn a few key quarterly goals, for instance, you could print them on t-shirts and give them to all employees at a manufacturing plant. Every day, at least some people be wearing their t-shirts, creating plenty of opportunities to “review” the goals! At a future meeting, you can bet the whole plant will pass a quiz on them.
23. *Hold monthly “movie dates”:* You and employees watch a training or industry video. (You can rent these videos, which are usually about a half-hour long, from business-video vendors, or you can borrow them from the library.) Provide popcorn and sodas, along with an assignment: “Watch carefully!” Afterward discuss the video’s applicability in your own organization: Which tips are the most useful? How can you implement the best ideas? What organization-wide changes have merit?

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

## 26 EMPLOYEE LEARNING OPPORTUNITIES THAT INCREASE PERFORMANCE AND MOTIVATION (CONT.)

24. *Set up a shadowing program:* An employee spends time with someone from a different department. The “shadows” learn more about how the company functions and more about a department in which they may eventually want to work! (Better to have employees transfer *within* your company than lose them to your competition!)
25. *Increase your employees’ value and versatility:* Sponsor courses of various types and encourage employees to learn as many different jobs at the company as possible; security guards can learn how to be paramedics and accounting clerks, for example. Pay employees \$20–\$25 for each half-day session that they attend on their own time, and increase their pay as they complete more courses.
26. *Shop the competition—combine intelligence gathering with a perk!* Some companies actually *pay* for their employees to do business with a competitor! For instance, a restaurant springs for an employee’s dinner at a competing restaurant, or a plumbing company has an employee call its competitor to make a home service call. What is the catch? The benefiting employee must write a report about various aspects of the “mystery shopper” experience and make a presentation to all employees. The employee sees the customer side of the service equation, and the company finds out what is going on down the street.

As you can see, you are limited only by your own creativity in helping your employees learn and master new information and skills. Meanwhile, can you see how putting these ideas to work increases competence *and* motivation? Doing so also builds a real learning *culture* in your organization, a culture in which people *expect* to learn new things and make a contribution to the shared knowledge, every working day.

*And now, one more suggestion: **Make sure all these learning experiences are available to everyone.** That way, you confirm your belief in the potential of all employees, not just a few. And you ensure a continuing “crop” of increasingly skilled employees!*

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

# TIPS FOR DEVELOPING A GLOBAL LEARNING FOCUS

Catherine Mercer Bing

## 1. *Design stage checklist:*

- Charter a team with members.
- Form a team across the organization and identify internal cultural experts who can advise you.
- Collect information about what learning opportunities the company has; include internal training programs, external approved seminars and programs, educational opportunities, mentoring, on-the-job development activities (such as action learning). Include the collection of information on anything that is relatively formalized in your company.
- Conduct interviews with senior or key executives to identify:
  - Whether the development needs are currently being met with what the company has to offer and, if not, what is needed.
  - How the strategic direction of the company might indicate a new or different development need.
- Collect data from performance management systems to help you project what managers think their employees will need to develop in the next year.
- Conduct an employee survey asking what programs are needed to:
  - Help them in their current job.
  - Help prepare employees for their next position.
- Perform a gap analysis of what the company has or will need.
- Identify all learning audiences (executive, management, and employee). This could include special classes of employees such as sales force, engineers, and so forth. or special classes of managers, such as regional or global managers.
- Align the audiences with the succession management and performance management systems. Divide up who needs what, when.
- Create a learning (delivery) strategy frame: how much (what percentage) should be classroom and instructor-led training (ILT), how much should be university-based (executive development programs), how much should be hands-on (action learning or mentoring), how much should be self-directed (such as Web-based [WBT] or computer-based training [CBT]).
- If more of the delivery systems will be through technology, conduct a technology audit (which technology the company is capable of supporting now and in the future). It would be a shame to spend thousands of dollars on a CBT or even a PowerPoint presentation that included some voice or streaming video if the bandwidth

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

# TIPS FOR DEVELOPING A GLOBAL LEARNING FOCUS (CONT.)

did not support delivery of the technology or if those outside headquarters did not have the sound cards to hear the vocals embedded in the presentation.

## 2. Planning stage:

- Create learning maps to identify who needs to learn what and when. Maps can be prepared for each job family category of learning and for the levels at which the learning is needed or expected. See Table 1.
- Communicate the maps to employees and managers to help set performance expectations.
- Identify how much learning and development is skill based and how much is knowledge based (“know” versus “do”).
- Define the best technologies for the transfer of knowledge and the transfer of skill. If *x* is something employees need to know, perhaps the most effective way to get the information to them is by email or the Web (use a PowerPoint presentation or newsletter format to encourage it being read). Or simply include an evaluation form with qualitative answers to be returned upon completion of the reading or viewing.

**Table 1:** Partial Sample for Administrators

	<i>Computer and Equipment Skills</i>	<i>Interpersonal Skills</i>	<i>Financial Skills</i>	<i>Administrative Skills</i>
Foundation stage	<ul style="list-style-type: none"> <li>• Telephone vendor training</li> <li>• Microsoft Office (Word and PPT)</li> </ul>	<ul style="list-style-type: none"> <li>• Telephone techniques training Level 1</li> </ul>	<ul style="list-style-type: none"> <li>• Processing of invoices—Accounting Level 1</li> </ul>	
Intermediate stage	<ul style="list-style-type: none"> <li>• Excel Level 1</li> </ul>			<ul style="list-style-type: none"> <li>• Global conference management 1</li> </ul>
Expert	<ul style="list-style-type: none"> <li>• Excel Level 2</li> <li>• Access Level 1</li> <li>• SPSS</li> </ul>		<ul style="list-style-type: none"> <li>• Processing accounts payable—Accounting Level 2</li> </ul>	

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

- Make a decision about how much of the “training” or “knowledge management” needs to be invested in:
  - Tracking attendance.
  - Measuring outcomes (testing).
  - Management or peer assessment of what has been learned (outcomes might be better measured in the performance system, assuming people are being held accountable for using what they are learning).
- Prior to budget time every year, have a global meeting of professional development providers and stakeholders, and discuss what they “want” to offer or “recommend” to be offered through the company for the upcoming fiscal year.
- Align these ideas with the strategic plan for the company.
- Present your plan of what is recommended, aligned with the corporate goals and strategies, when you are asked to put together a budget.

### *3. Implementing the plan:*

- Work with partners outside your department to ensure that all stakeholders have a say in the development and implementation of your plan. What good is a major change in call center training if you plan to roll this out during peak season?
- Figure out what will fill the gaps for what is needed.
- Create long-term plans to fill the need for future gaps (rather than just being reactive). Remember to consider nontraditional learning (action learning teams and mentoring), as well as technology solutions.
- Plan and communicate about the transition to alternative methodologies and delivery mechanisms.
- Revitalize existing training by adding blended components (CBT/WBT, action learning, development opportunities, mentoring/mentee relationships, etc.).
- Align learning and development needs to competency models to ensure what is needed to be successful is getting the financial investment needed.
- Make sure you communicate up, down, and sideways throughout all this, especially to introduce the rollout.
- When rolling out across cultures, make sure you consider language differences. Consider communicating in the local language to ensure more attention and value to the implementation.

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

# SEVEN WAYS TO GET THE MOST FROM THE NEXT TRAINING YOU ATTEND

Kevin Eikenberry

You can apply the following seven strategies to convert your time and energy spent in training into real, useful learning.

1. *Have a goal:* Now that you are signed up for the learning opportunity, set a learning goal. If you are already knowledgeable about the topic and have specific things you want to improve, setting your goal or goals should be easy. If you are less excited about attending or are unclear about its content, you can still set a goal, such as to learn one new thing to apply at work or meet one person to add to your network. Having a written goal focuses your mind and helps you gain real practical value from any learning situation.
2. *Take personal responsibility:* Take responsibility for your own learning experience. Make that your focus. Perhaps the trainer is not exactly going to cover a topic of interest to you. OK—use their expertise. Ask the instructor at a break, probe for other resources. Stay focused on your goal. Your learning is under your control. Take responsibility for getting what you want and need from the experience.
3. *Ask questions:* Is there something you do not understand? Ask for clarification. Want a little more information? Ask for it. A big part of being responsible for your learning is asking questions to get what you need. This applies to more than just during the session itself. If you have questions before the training begins, write them down. They will help you focus and you may be able to ask them before the session starts. This is the best way to improve the likelihood that you get what you need from the session.
4. *Ask the golden question:* The most important question is the one you will not likely ask out loud: How can I use what I am learning? This is the golden question because it helps us translate the learning to real life. Ask this question of yourself throughout the training experience. I keep a separate place to keep notes on the application ideas I get from asking myself this question when I am in training. Ask the golden question when you start to get distracted, and ask it of yourself at breaks. Soon it will become a natural response and an amazingly valuable habit.
5. *Learn from everyone:* There are more people to learn from than just the speaker or the trainer. The other people in the room can be a great way to learn. Tap into their experience and knowledge. Talk to the people at your table or around you. Think of them as peer coaches. These people can help you learn during the session and

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

might become great people in your network after you leave. Be involved, participate, and allow yourself to learn from everyone, not just from the person in the front of the room.

6. *Build an action plan:* At the end of the training event, build an action plan. Review your goal(s) and build a plan to implement what you have learned. Reflect on your answers to the golden question and resolve that you will apply those ideas too. If the training has been really valuable, you might have several ideas. This is great, but be realistic about how much you can apply at a time. Build your plan, recognizing that you might be able to implement some things tomorrow, but that other things might need to be spread out over the next week or more.
7. *Teach someone else:* If you want to really lock in what you have learned, share what you have learned with someone else. Talk to a colleague back in the office. Share the concepts with a friend. Not only have you helped the other person, but you have increased your mastery and clarity of the ideas in your own mind.

*Bonus tip # 8—Review your notes:* If you want to really retain what you have learned for the long term, set up a process to review your notes. Review them the evening after the event. Review them the next day, and again the next day. Then put a note in your to-do list to review them one week later and one month later. Each review needs to be only five minutes long. You are simply trying to build the concepts in your mind through repetition and give your mind a chance to spark new connections and new ideas.

As you can see, these strategies do not require any additional monetary investment, just an investment of your focus and approach. Applying just one of these strategies can have a major impact on your results. Applying them collectively puts you among the learning elite.

Put these strategies somewhere so that you can review them before you attend any training event. Over time, the reminders turn the strategies into your own habits—habits that help you move toward your goals and potential.

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

# TIPS FOR COMMUNICATING WITH NEXTERS: GIV IT 2 ME STR8, FST, & ALWAYS

Dianne Gayeski

Most of us have impressions of what these Nexters (those born after 1980) are like, and many of those stereotypes are pretty negative. Indeed, these kids can seem like pampered slackers without social skills. But we need to understand what has shaped their lives and, most important for us, how to communicate with them. Can you understand the last part of the title of this handout? If you can, you are one step ahead.

“Give it to me straight, fast, and always.” Think of this as the motto of our newest workforce generation. Consider where they are coming from. The 18- to 25-year-olds coming into our workforce:

- Are the first generation who cannot recall life without computers. Most of them could type well before they could form cursive letters.
- Did not have the benefit of family life as many of us knew it. Many are children of divorce who grew up in blended families or were raised by single parents, and they had to get used to quickly making and breaking important ties. Most had a parent or parents who worked outside the home, so they needed to grow up quickly and learn to be independent and entertain themselves.
- Had ample material possessions and discretionary spending ability. Some researchers call them “trophy children,” whose parents worked hard to provide a bountiful life and in some ways might have exchanged their presence for presents.
- Are used to having their activities and accomplishments completely planned for them. This is the generation whose lives were planned from conception through graduate school. They were enrolled in kindergartens before they were born, and every “free hour” was filled with music lessons, soccer teams, camps, play dates, and so on.
- See themselves very much as individuals and are accustomed to having information and teaching tailored to their needs. Something like 15 percent of the smartest college graduates today are people with diagnosed learning disabilities. Remember, these are the kids who have been mainstreamed into the educational system, regardless of handicaps.

So what does this mean? What drives them? How do we reach them?

## GIVE IT TO THEM STRAIGHT

Nexters have zero tolerance for euphemisms and corporate-speak. They have not been spared from tough issues in their own lives or in the news.

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

They want to know not only what is happening, but also what drives the thinking and feeling of their corporate leaders. These kids have seen the older generation get moved around, downsized, and misled by their employers, and they start out with a skeptical attitude. Among themselves, they communicate with remarkable intimacy. Most high school and college students have their own blogs, and you would probably be shocked to see what they write. It is like the diaries that teenage girls used to keep, except they are written by guys as well and, of course, they are not locked up and hidden under the bed. They are online for the whole world to read. Why? I think they are looking to be “heard” and “understood.” And they *really* want to know what their cohorts are about, what they are experiencing in their lives and emotions, and how they think and react.

If you want them to buy into your corporate messages, you need to install a b\*llsh\*t filter into your word processor. More important, your corporate executives need to be much more emotionally and intellectually “accessible” to them. Nexters do not expect everybody to be perfect or to know everything, but they do expect them to be genuine. When the most qualified of these young folks look for jobs, they look for organizations whose values match theirs. They want to be told what is going on. They can deal with a mess; just tell it to them straight and they will be right on board.

## **GIVE IT TO THEM FAST**

The younger generation lives in a multitasking world. They commonly write a paper, compose an email, instant-message with kids on a 50-person buddy list, and talk on their cell phones with the TV on in the background and a CD playing on the computer. You might think they are not paying attention to any of it—but they are. We all know that typically we are using only a fraction of our brainpower; these kids have learned to use more of it.

The Nexters are accustomed to instant news, and they want it to be delivered anytime, anywhere. This means learning how to package information for display on cell phone and PDA screens. The content might be short text messages, brief video clips, or short sound bites of news and information that they can play on their iPods. Many organizations are already adapting their intranet content for delivery on mobile devices and using these as performance and training aids, in addition to communication channels. Instead of sending people away to training classes, organizations are designing *workflow learning*—opportunities to seek new knowledge and theory or develop mentoring relationships as they grapple with authentic work projects. Communicators need to learn to embed opportunities to provide news, business updates, and motivational messages into the stream of work rather than making them external and separate events and messages.

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

# TIPS FOR COMMUNICATING WITH NEXTERS: GIV IT 2 ME STR8, FST, & ALWAYS (CONT.)

## GIVE IT TO THEM ALWAYS AND ALL WAYS

We are moving into a ubiquitous communication environment in which we are always accessible by cell phones and wireless networking. Free wireless Internet access blankets many cities next year. Nexters seem to feel anxious if they do not have at least some sign of “presence” from their buddy list of colleagues and families. Most sign on to an instant messaging program as soon as they are awake, and many have it on 24/7, posting “away” messages so that people know where they are if they step away from their computers or are asleep. This is the new form of community and tribe. Although many organizations forbid instant messaging, others have embraced it and have found that it adds to a feeling of teamwork and cohesiveness in addition to speeding up performance.

The younger generation also expects you to cater to their needs and styles, abilities and disabilities. We have a much more diverse employee base entering the workforce. Because of mainstreaming, even students with severe handicaps have had the advantage of intensive interventions, and many are prepared to be our most loyal and able workers. Kids from other nations and cultures have had the advantage of teaching and materials in other languages, and their environments have been careful to respect their religious, cultural, and lifestyle choices. Students who in my generation were considered to be just a bit “slow” have had their learning disabilities diagnosed and their entire education adjusted for them. They expect the same thing at work.

Creating information in one medium or style of presentation is not enough. Some people are auditory learners; some process information better when it is presented visually. Websites and intranet pages need to be designed for accessibility standards. Information might need to be translated into different languages. And when holding meetings, be careful of your choice of dates, food, location, and even icebreaker jokes lest you offend someone or make part of the experience inaccessible to important segments of the workforce.

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

# NINE EDUCATOR APPROACHES

**Stephen Hobbs**

**Directions:** *Each of the nine educator approaches starts with a definition, followed by an explanation. Also, a typical statement made by a learner helps frame which approach might work best.*

**Trainer** ... to train is to impart a skill with some knowledge for practice in the present

- The trainer transmits to participants what they need to know about how to do a skill, ensures the skill is learned to a predetermined level, and has a vested interest in participants' meeting specified criteria for immediate use.

**I do not know how to do it.**

**Instructor** ... to instruct is to provide a description and explanation of the knowledge and skill at a deeper level

- The instructor supports participants in learning the knowledge and associated skills of a discipline/domain, ensures the knowledge (with skill) is learned to a predetermined level, has a vested interest in participants' learning about the discipline/domain within specified criteria for use in the future.

**I need to know that by understanding why.**

**Consultant** ... to consult is to provide information and/or to exchange ideas

- The consultant provides support to participants in the solving of a problem identified by the participants; shares knowledge in content, process, or construct; and has a vested interest in achieving the correct result as determined through the consultant's dialogue with participants.

**I do not know what I know. You do—help me!**

**Facilitator** ... to facilitate is to help a process go well, to “blue sky” ideas

- The facilitator draws responses from participants in a setting conducive to their need for learning, oversees the process for participants to learn what they need to do, has participants dependent on him or her to get them to a place of decision making for action, and has a vested interest in achieving an outcome identified through participants' dialogue.

**I do not know that I do not know.**

**Coach** ... to coach is to drive and/or urge participation through the task

- The coach encourages the most from participants without actually doing whatever needs to be done, helps participants do it (because they are the ones charged with doing it), and has a vested interest in achieving the result identified by participants as doing their best.

**I know what I know. I am not sure I can do it alone.**

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

## NINE EDUCATOR APPROACHES (CONT.)

**Mentor** ... to mentor is to provide trusted advice during the adventure

- The mentor speaks the truth of experience when participants are most likely ready to listen, shares experiences in a casual and causal way, and has a vested interest in participants' gaining insight about themselves by sharing the lived experience of the mentor.

**I know I am stuck. With your experience, you can advise me to see my knowing.**

**Counselor** ... to counsel is to talk things over and to give advice

- The counselor empathetically assists participants to reach a plane of reflection, wants participants to reach a place of self-acceptance, and has a vested interest in unblocking what participants identify as the issue.

**I know something is holding me back. Help me understand the situation.**

**Shifter** ... to shift is to suggest career development options

- The shifter supports participants in realizing their life map by appealing to participants' hierarchy of values and vocation decisions, assists in the identification of the challenges placed in front of participants in order for them to achieve, and has a vested interest in connecting career decisions with life purpose.

**I am unsure of what I need to know to meet my career decisions.**

**Minstrel** ... to minstrel is to reconcile the other eight educator types through storytelling and fostering the natural rhythms of learning and educating

- The minstrel shares a path of learning with participants that seeks balance for knowing infinitely; identifies *news* of the day and shares it willingly and mindfully; and has a vested interest in sharing paths to knowing that promote, embrace, and integrate what is learned with what is known.

**I know I have something to share while in service to others.**

*A worksheet listing five examples follows for your personal review. The worksheet also may be used with others to educate them on deciding on an educator approach for various situations.*

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

# WORKSHEET: DECIDING ON AN EDUCATOR APPROACH: THE APPROACH COMPLEMENTS THE SITUATION

**Directions:** *Whether working as a workplace educator or managing and leading others, it is important to know which educator approach works best for the situation. Consider the five examples listed below and identify which of the nine educator approaches would work best for each situation.*

<b>Trainer</b>	to train is to impart a skill with some knowledge for practice in the present
<b>Instructor</b>	to instruct is to provide a description and explanation of the knowledge and skill at a deeper level
<b>Consultant</b>	to consult is to provide information and/or to exchange ideas
<b>Facilitator</b>	to facilitate is to help a process go well, to “blue sky” ideas
<b>Coach</b>	to coach is to drive and/or urge participation through the task
<b>Mentor</b>	to mentor is to provide trusted advice during the adventure
<b>Counselor</b>	to counsel is to talk things over and to give advice
<b>Shifter</b>	to shift is to suggest career development options
<b>Minstrel</b>	to minstrel is to reconcile the other eight educator types through storytelling and fostering the natural rhythms of learning and educating

1. Call center staff have been given a new software program to use.
2. Twenty-one high-caliber candidates, identified through performance reviews, are asked to learn about leadership to shape and guide the organization over the next 10 years.
3. Three managers with 10 years’ experience have transferred to a different country to take up their job assignments to expand business operations.
4. Four front-line employees have been coming to work late and as their supervisor you decide to work with them on a time management program.
5. Five long-term employees are retiring in six months, and they agreed to share their knowing with you.

## Possible Answers

1. Call center staff have been given a new software program to use.  
⇒ training and consulting with coaching
2. Twenty-one high-caliber candidates, identified through performance reviews, are asked to learn about leadership to shape and guide the organization over the next 10 years.  
⇒ instructing, facilitating with coaching, and mentoring afterward

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.

# **WORKSHEET: DECIDING ON AN EDUCATOR APPROACH: THE APPROACH COMPLEMENTS THE SITUATION (CONT.)**

3. Three managers with 10 years' experience have transferred to a different country to take up their job assignments to expand business operations.  
    ⇒ facilitating with instructing
4. Four front-line employees have been coming to work late and as their supervisor you decide to work with them on a time management program.  
    ⇒ instructing, counseling, and possible shifting to follow
5. Five long-term employees are retiring in six months, and they agreed to share their knowing with you.  
    ⇒ minstrel with shifting

---

You can download this handout to your hard drive from the accompanying CD-ROM. The document can then be opened and printed.