

# THE LEADERSHIP JOURNEY

## FACILITATOR'S GUIDE

### **Giving Crystal-Clear Instructions That Result in Action Without Any Misunderstanding**

**Have you ever given an employee what you thought was a crystal-clear instruction only to discover later on that they didn't quite get it? In this course you will learn:**

- **A simple five-step method for giving clear directions.**
- **How to ensure your employees take action – the first time you ask.**
- **Why two-way dialog is critical in achieving a successful outcome.**
- **One powerful way to confirm understanding, even with your most challenging employees.**



## The Featured Expert



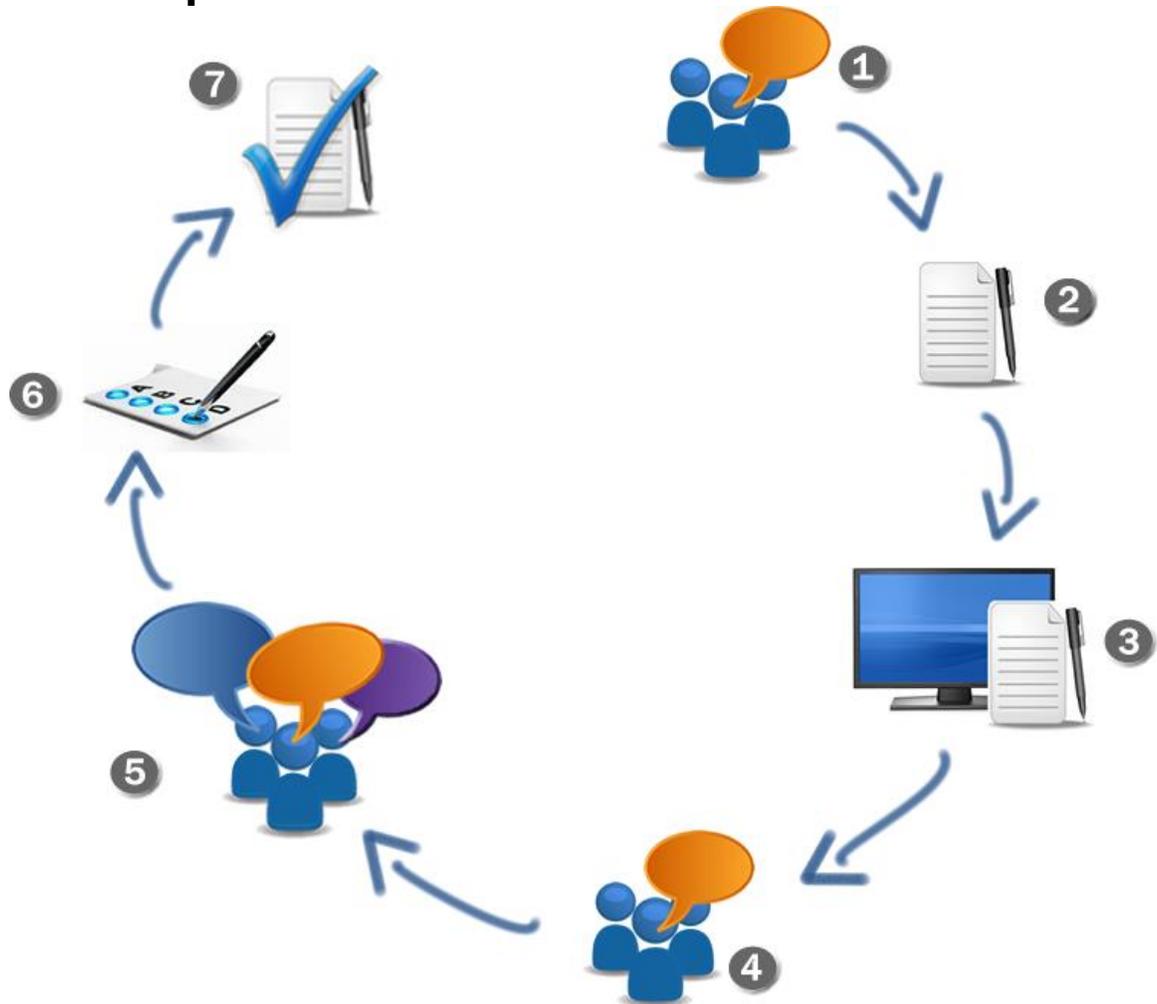
Merge Gupta-Sunderji is a Certified Speaking Professional (CSP) who turns managers into leaders. An international speaker, author, radio commentator, and consultant since 1988, she gives people specific and practical tools to achieve leadership and communication success. She is an award-winning book author, has published over 50 articles in numerous magazines and trade publications, and is the well-known voice behind the national CBC radio column *The Softer Side of Business*. She offers a unique blend of realism and humor that consistently engages and entertains new managers and seasoned veterans alike.

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## Course Components



**This course consists of seven interactive components:**

1. Pre-discussion questions
2. Note-taking guide (Use with video)
3. Video presentation
4. Post-discussion questions
5. Group exercise
6. Quiz
7. Personal action plan

## You Will Need

- As the facilitator, you will need to print a copy of this Facilitator's Guide to use during the course.
- A copy of the Participant Guide for each participant.
- A pen or pencil for each participant.
- A room with audio-visual equipment.
- The course video.
- Time before class to setup and test the video presentation for clear viewing and adequate volume.

## Course Length

The recommended course length is one hour. The course video is 11 minutes long. The time listed for each section is simply a suggestion; you may spend more or less time depending on the size of your group and length of discussion. We suggest you check with your organization before facilitating this course to identify the most important sections and which, should time run short, you may skip.

## Icons in this Facilitator's Guide

Icon	Meaning
	<ul style="list-style-type: none"> <li>• Total number of pages in a section of the course</li> <li>• Page numbers in the Facilitator's and Participant Guides</li> </ul>
	<ul style="list-style-type: none"> <li>• Information, instructions, and tips for the facilitator</li> </ul>
	<ul style="list-style-type: none"> <li>• Facilitator should announce the information provided</li> </ul>
	<ul style="list-style-type: none"> <li>• Class discussion or question-and-answer session. (one person speaks at a time, while others listen)</li> </ul>
	<ul style="list-style-type: none"> <li>• Small groups interactive exercise (several discussions take place at the same time)</li> </ul>
	<ul style="list-style-type: none"> <li>• Personal action plans for applying new knowledge and skills in the workplace</li> </ul>

## Your Role as Facilitator

As the facilitator your job is to encourage discussion among all of the class participants. The idea is to encourage everyone to freely express ideas and opinions. Participants will learn from their classmates as well as from the course material.

It is your responsibility to keep the discussion on track and to watch the clock so the class finishes on time.

## Facilitating Group Discussion

Throughout this course you will call on participants and ask them to share their answers. Some participants may need extra time to think. Others may require encouragement to participate. If the participant you are calling on does not have an answer, open up the question to the group. You don't want to make anyone feel uncomfortable.

After the first student has shared their answer, ask if anyone else has a different answer or something more to add. Encourage everyone to participate.

Sample responses are provided in the facilitator's guide to help get discussions started. If the class is stuck on a question, provide an answer to help get the discussion started. The participant guides do not have sample answers.

When leading group participation, start calling on the person to your left. Always go in the same direction so students can anticipate their turn. After you finish a section, note who will be next when you begin another activity.

## Getting Started



This section contains:

- 1 page in this facilitator's guide. (page 7)



Remind participants:

- The Participant Guides are theirs. No one else will see them.
- Use the guides for writing answers and taking notes.
- Don't worry about grammar or punctuation.
- If they don't know the answer, leave it blank.
- If someone makes a good point, write it down in your notes.
- The guide should be saved as a reference for later use.



Distribute Participant Guides to each participant.

**(The course begins on the next page.)**

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## Pre-Discussion Questions

(5 minutes)

**Objective:** Pre-discussion questions help prepare the participants for learning and get them to focus on the course topic.



This section contains:

- 2 pages in this facilitator's guide. (pages 8-9)
- 1 page in the participant guide. (page 4)



Before beginning:

- Ask everyone to turn off and put away electronic devices.
- Announce the title of the course.
- Remind participants to write their answers in the space provided.
- Provide pens or pencils to those who need them.



Before viewing the video presentation, there is a brief discussion. Begin the course by asking participants to answer the four pre-discussion questions.

Start by having the person to your left read and answer question #1. Always go in the same direction so participants can anticipate their turn.

After an answer is given, ask if others have additional ideas to share. Continue this way through all four questions.

There are no "right" or "wrong" answers for this section of the course. Refer to the sample answers to help get the discussion started. Your group may have different answers.

**(The pre-discussion questions begin on the next page.)**



1. Have you ever given an employee what you *thought* was a crystal-clear instruction and discovered later that they didn't quite get it? How did things turn out?
  - Usually, the result of this situation is that things don't get done.
  - A deadline was missed.
  - Everyone was frustrated.
  - A lot of time was wasted.
  
2. What circumstances come up in your department where giving instruction is so important that a lack of action could be disastrous?
  - When changes are made to a job that we are working on.
  - When a particular report has to be done accurately and on-time, it could have a negative effect on our earnings report.
  - When equipment operator(s) are failing to follow safety rules like eye protection.
  
3. What do you believe is necessary to achieve crystal-clear communication?
  - Clear articulation of the situation or issue.
  - Willingness by both parties to listen and understand.
  - Get confirmation that the other person has understood.
  - A good working relationship.
  
4. What do you think gets in the way of clear communication?
  - Convolved instructions – not being clear with your language.
  - Assuming the other person understood what you said.
  - Rambling or giving too much information.
  - Getting interrupted or forgetting what was said.
  - Talking too fast or not loud enough.
  - Not taking enough time to fully explain things.

## Video Presentation and Note-Taking Guide (20 minutes)

**Objective:** The note taking guide improves retention of essential ideas by having participants write-down keywords. Watching the video and recording keywords engages participants and allows them to take an active role in the video presentation.



This section contains:

- 2 pages in this facilitator's guide. (pages 10-11)
- 2 pages in the participant guide. (pages 5-6)



Before starting the video, ask participants to:

- Turn to the note-taking section in their guidebooks.
- Fill in the keywords as they watch the video.
- The keywords are underlined in the video.
- Be ready to share their answers.



Play the video ensuring the volume is loud enough for everyone to hear.

After the video is finished, call on the participant whose turn is next. Have them read the full sentence, not just the answer. Reading both will help reinforce key concepts.

A completed note-taking guide is included below. The keyword answers are underlined for you - participants must fill in the blanks.

In the note-taking guide, you will see a text box like this one that contain one or more notable excerpts from the video.

**(The note-taking guide begins on the next page.)**



## THE IMPORTANCE OF A TWO-WAY DIALOG

1. Sometimes \_\_\_\_\_%
2. Often \_\_\_\_\_%
3. Always \_\_\_\_\_%
4. Never \_\_\_\_\_%

It is the sender's responsibility to confirm understanding from the receiver.

## GIVE CRYSTAL-CLEAR INSTRUCTIONS

The five-step method to giving directions so that others will understand and act

1. Ask, don't command
2. Stress what to do, not what to avoid
3. Say why it's important
4. Leave freedom of action
5. Remember - it's a dialog

## CONFIRM UNDERSTANDING

Confirm understanding to ensure that the message received is the same as the message sent.

The easiest way to confirm understanding is the direct way.

*“John, do me a favor. Sometimes, I don’t communicate as well as I should. Can you play back to me what you heard me say in terms of what I’m expecting you to do?”*

## Post-Discussion Questions

(5 minutes)

**Objective:** Post-discussion questions help participants transfer new knowledge and skills to the workplace, applying what they learned to their specific jobs. Having a discussion will allow participants to learn from their classmates' experiences as well as from the course material.



This section contains:

- 3 pages in this facilitator's guide. (pages 12-14)
- 1 page in the participant guide. (page 7)



Remind participants to write down answers in the space provided.



Continue calling on the participants where you left off. Have them read the questions and their answers.

After the initial participant answers, ask the class if anyone has anything to add. Often a discussion will take place with multiple people offering their ideas and experiences.

Allow discussion about each question. Participants will learn from their classmates as well as from the course material

There are no "right" or "wrong" answers for this section of the course. Sample answers are provided to help you get the discussion going. Your group may have different answers.

**(The post-discussion questions begin on the next page.)**



1. Reflecting on the “Sometimes, Often, Always, Never” exercise, explain why it is so easy for communication to break down.
  - It is not as easy to be precise in your communication as you might expect.
  - Even if the sender thinks the message is very precise, often the message received is not the same.
  - The distortion between sending and receiving occurs because of varying interpretations and different filters that exist in both the sender and receiver.
2. What can you do to ensure a successful outcome in a situation in which you are trying to assign or request action by another person on your team?
  - A two-way dialog is critical to the successful outcome of any conversation.
  - Recognize that it is the sender’s responsibility to confirm understanding from the receiver.
  - In order to loop back to confirm understanding, you must ask for feedback from the other person.
3. Consider the five-step method for giving directions explained in this course. Which step do you think would be most important for your team or organization?
  - Say why it is important. My team really needs to know they why to do the best they can.
  - Leave freedom of action. My followers like to feel empowered rather than micro-managed.
  - All of the steps are equally important.

**(The post-discussion questions continue on the next page.)**



4. The Featured Expert explained a method for confirming the message received was the same as the message sent. What challenges might your department have in consistently doing this?
- Not enough time – we are under too many deadline pressures.
  - Assuming that the other person understood.
  - When an employee is generally good at following instructions we often get complacent.
  - Instructions are not always verbal to allow for confirmation.

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## Group Exercise (10 minutes)

**Objective:** The group exercise provides a safe environment for participants to practice new skills, and gives them an opportunity to work together on applying new concepts to the workplace.



This section contains:

- 2 pages in this facilitator's guide. (pages 15-16)
- 1 page in the participant guide. (page 8)



The class will break into small groups. Each group should work independently.

The directions for this exercise do not have to be read out loud to the entire class. Each small group can proceed at their own pace.

You may adjust the number of people per group, depending on your class size.

Keep track of the time. Remind the participants when they are half way through the time allowed.

**(The group exercise begins on the next page.)**



In this exercise you will practice writing and delivering instructions using the five-step method presented in this course.

1. Form small groups of two people.
2. The group member with the longest first name should use the first scenario. The other group member should use the second scenario.

You have been asked to provide a short description of your department to someone who is putting together a company orientation newsletter. The description needs to include names of people in the department plus the new projects you are working on. You are planning on assigning this work to Eric, one of your most experienced employees.

There is a new piece of equipment arriving at your workplace and your staff is unfamiliar with it. You need someone to read the instructions and become familiar with its operations. That person then needs to train the rest of your staff on the new equipment. You are planning on assigning this work to Eric, one of your most experienced employees.

3. Each group member should use the five-step method to create a script for how you will ask Eric to do this work.
4. Role-play the dialogue in your small group. Have one member play the role of Eric and another play the role of direction-giver. Then switch roles and repeat, so that each group member gets to practice using their script to give instructions.
5. Return to the large group. As a class, discuss the following: How did it feel to give the instructions? What clues did you get from Eric about whether or not he got the message as you intended? When playing the role of Eric, how clear did the instructions seem? Was there any confusion? Did the script lead to a crystal-clear understanding? If not, what was missing?

## Quiz

(10 minutes)

**Objective:** With the quiz, participants can check their comprehension of the course material.



This section contains:

- 3 pages in this facilitator's guide. (pages 17-19)
- 2 pages in the participant guide. (pages 9-10)



Before the participants start the quiz, remind them that they:

- Will be called on to share their answers.
- Will have four minutes to complete the quiz.
- May skip a question when they don't know the answer.



Give the participants four minutes to complete the quiz. Watch the class to see when everyone is finished. Or, after four minutes, start calling on the participants where you left off in the previous section. Ask each student to read the question and the correct answer.

If you are running short on time, you may simply read the question yourself and ask participants for the correct answer.

The correct answers have an asterisk (\*) after them.

**(The quiz begins on the next page.)**



1. In verbal communication the most effective way to ensure that the message received is the same as the message sent is to \_\_\_\_\_.
  - a. repeat your message
  - b. confirm understanding \*
  - c. put it in writing
  - d. none of the above
  
2. In a two-way communication, it is the \_\_\_\_\_ responsibility to ensure that the receiver has understood the message clearly.
  - a. receiver's
  - b. senders and receiver's
  - c. sender's \*
  - d. none of the above
  
3. The words "Always" and "Never" are very precise words whose meanings are clearly understood by anyone who understands English.
  - a. True
  - b. False \*
  
4. A two-way dialog is \_\_\_\_\_ to the successful outcome of any conversation.
  - a. critical \*
  - b. desirable
  - c. unnecessary
  - d. none of the above
  
5. Which of the following is NOT a step in the five-step method for giving directions so others will understand and act?
  - a. leave freedom of action
  - b. stress what to do
  - c. remember that it's a dialog
  - d. put it in writing \*

**(The quiz is continued on the next page.)**



6. When seeking to make your instructions crystal-clear, it is essential that you let them know *why* it is important.
  - a. True \*
  - b. False
  
7. The most effective way to confirm understanding is to \_\_\_\_\_.
  - a. ask the other person to repeat back what he or she heard \*
  - b. give the person written instructions
  - c. provide a checklist
  - d. all of the above
  
8. Which of the following is a key step in the five-step method to giving directions so that others will understand and act?
  - a. Identify roadblocks
  - b. Speak clearly and confidently
  - c. Ask, don't command \*
  - d. None of the above
  
9. The easiest way to confirm understanding is the direct way.
  - a. True \*
  - b. False
  
10. Giving crystal-clear instructions that result in action without any misunderstanding requires that you:
  - a. Always use the established five-step method.
  - b. Always confirm the person's understanding.
  - c. both of the above \*
  - d. none of the above

## Personal Action Plan

(10 minutes)

**Objective:** The personal action plan allows participants to share their most important concepts from this course and is an effective way of reviewing learning objectives. With their written action plan in place, participants are better prepared to apply their new skills to the specific challenges, objectives, and opportunities they are facing.



This section contains:

- 2 pages in this facilitator's guide. (pages 20-21)
- 1 page in the participant guide. (page 11)



Before the participants start, remind them that they:

- Should complete the personal action plans individually.
- Will share their answer to the first question, before completing the other questions.
- May refer to their notes and materials from this course to answer the questions.
- Will follow-up by sharing their personal action plans with someone like their manager, a colleague, a training partner, or they may be chosen in the next class to share the results of their action steps. (This optional follow-up process should be pre-determined by your organization.)



Give the participants a few minutes to answer the first question. Then, go around the room and have each participant share their answer, allowing time for them to explain or elaborate.

After everyone has had the opportunity to share, focus each participant's attention back to completing the remainder of their personal action plan.

**(The personal action plan begins on the next page.)**



Participants should individually write their answers in the space provided.

1. What is the most important idea that you learned from this course?
2. Think of a situation where you will soon need to give instructions to one of your followers or coworkers. Using the five-step method, write out a script of what you will say to this person as you ask them to do the work.
3. Practice saying the script out loud until it feels comfortable and natural.
4. When you deliver the instructions remember to review your script.

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## Additional Notes

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## About Business Training Experts

We believe learning is not a one-time event, it happens over time.

Business Training Experts publishes corporate training programs that deliver lasting behavior change and business results. Our turnkey training programs are customizable to any organization's needs.

We'll transform your people with our proprietary burst learning model that takes a systematic approach to learning. Instead of relying on a one-time training event, our short courses can be spaced out over time. Students learn practical skills, then apply them on the job to real workplace challenges - before they learn the next set of skills. Supervisors learn and internalize through discussion, practice and application. Our follow-up tools hold students accountable for applying new skills in the workplace.

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