LEADERSHIP training

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

LOU RUSSELL
LEADERSHIP training
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LOU RUSSELL
The ATD Workshop Series

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

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

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

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

Each book in the series offers innovative and engaging programs designed by leading experts and grounded in design and delivery best practices and theory. It is like having an expert trainer helping you with each step in the workshop process. The straightforward, practical instructions help you prepare and deliver the workshops quickly and effectively. Flexible timing options allow you to choose from two-hour, one-day, and two-day workshop formats, or to create your own, using the tips and strategies presented for customizing the workshops to fit your unique business environment. Each ATD Workshop book also comes with guidance on leveraging learning technologies to maximize workshop design and delivery efficiency and access to all the training materials you will need, including activities, handouts, tools, assessments, and presentation slides.
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ABOUT ATD 211
In 2002, we launched the ASTD Trainer’s WorkShop Series—a collection of books authored by practitioners that focused on the design and delivery of training on popular soft-skills topics. The creation of this series was a departure for us. These workshops-in-a-book were created to help internal trainers expedite their program delivery by using appropriate and exceptionally designed content that could be adapted and repurposed.

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

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

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

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

Tony Bingham
President & CEO
Association for Talent Development (ATD)
January 2015
Cartoon created by Laurie Compton

I really think they'd be more receptive if you just let them choose three or four!!

Career Skills
- Provide daily sales
- Escape
- Learn to earn
- Group facilitation

Surviving transactions
- Business crisis skills
- Negotiating skills

Effective communication skills
- Mount Sinai Scenic View

Cartoon created by Laurie Compton
Twelve years ago, ASTD asked me to write the original *Leadership Training* book to help trainers jumpstart their leadership programs. Because the time had come to modernize the book and offer a more blended delivery, six months ago Cat Russo, friend, editor, and new publishing leader, invited me to participate in this rewrite and innovative delivery project. To build the first book, I used my book *IT Leadership Alchemy* as the base. Through that competency research and many IT Leadership Academies I became convinced of two things:

- Leadership is the same for all disciplines. It has to do with people, not functional skills.
- Anyone can be a leader by starting with strengths and then influencing others to fill in the holes.

Two years ago, ASTD asked me to update their *Infoline* “Critical Competencies for 21st Century Leaders.” This was right after the recession, and I still believe these two things:

- The pace of work is driving constant change, multitasking, and matrixed reporting.
- Technology is the flame that feeds the urgency, and it’s not going away.

In the *Infoline*, we decided to add these leadership competencies due to world churn:

- Emotional strength
- Empathy to motivate
- Innovation
- Coaching in the moment
- Managing changing roles
- Trust.

The world has many managers, focusing on tasks to meet their goals. These managers are promoted from a functional role because they also have people skills. Under stress, they may fall back on their functional roles and struggle with delegation. However, many unlikely managers rise to the occasion when the situation merits—we all have the ability to do so. This book is written for managers who would like to evolve into leaders.
The world has far fewer leaders. These are people who must look up and out of the organization, focusing on aligning the right people to the right tasks at the right time to support the organizational future strategy. This is complex work. Having a solid leadership succession plan is a critical business advantage. Not one of us has perfect leadership competence at all times, and even high-level leaders must “sharpen the saw.” This book is also written for leaders who continue to grow to support those they lead and the organizations they serve.

As you use this book to cultivate leadership, remember that you cannot teach leadership. Leadership development must take place by facilitating inner work to drive improved leadership performance. It is not about lecturing on leadership. You must facilitate this workshop knowing full well that you are not a subject matter expert on leadership because no one is. Leadership is a journey, not a destination. Think of yourself as a chef, preparing a buffet of skills, knowledge, and leadership challenges. The learners in your sessions, all at different places in their leadership journey, will decide what to take in and how much. They get to choose, not you. Your job is to keep the buffet well stocked.

I struggled with jamming additional competencies into a two-day workshop format, chiding myself for throwing content at my learners. I was doing exactly what I complain about other people doing. The workshop is not about the slides—it’s about helping people move from where they are to where they can go. Leaders never apply one leadership competency at a time. “It’s clearly time for empathy” is an absurd thought. This (obvious) epiphany led me to change the two-day version significantly from the last book. This is my design approach for the new Leadership Training book:

- Two-hour workshop: an interactive overview of leadership competencies with some detail
- One-day workshop: an interactive review of each leadership competency and their subcompetencies
- Two-day workshop: a full simulation that integrates all the leadership competencies into a typical organizational challenge
- Combination of the one- and two-day workshops into a full immersion three-day leadership academy.

I also kept an eye on the possibility that any of these versions could be done through webinars. However, I have to admit that unless you are a very gifted simulator, asynchronous e-learning is not the best way to facilitate leadership. Leadership requires social exchanges and feedback in the moment. Good leaders know that leadership requires leadership to grow.
The leadership programs in this book leverage the excellent assessments of Target Training International (TTI). The assessment portions of the agendas are as self-contained as possible to allow you to insert your own assessments if needed. Leadership development without 360 assessment and strength, acumen, and motivator assessment is a much less valuable and transferrable offering for the learner. If you’re going to cut costs, don’t cut the assessments.

I have been the Queen/CEO of Russell Martin & Associates (www.russellmartin.com) for 26 years. I currently lead the brilliant duo of Brittney Helt and Betsy Ballentine and a group of talented consultants. If you looked closely you’d see they all really teach and lead me. They are the reason I am able to write, to speak, and to facilitate learning. Jeff Feldman, my co-author of IT Leadership Alchemy, and Susan Mosey, the author of Leadership Academies, worked with an advisory panel to develop the leadership competencies in this workshop and the book. They are gifted leadership consultants. We are very fortunate to have their contributions to these materials. Finally, great thanks to the master Thiagi whose exercises in these workshops (and all my workshops) bring leadership to life.

Giant thanks to Abigail Thompson, who is graduating from DePauw University next year. She asked me if she could work with us during the summer to see whether learning and development would be a good career choice for her. I was stunned that anyone knew what it was outside the industry. She has done all the heavy lifting in this book, and I am impressed and indebted to her. The learning and development (not training) industry will benefit from her passion.

The only reason I can improve performance with my customers is because I have Brittney Helt and Betsy Ballentine running the business. Brittney is our customer advocate and starts the discussion about changing performance. Betsy keeps the operations smooth, and in this case, dropped everything to help me make last minute edits for this book. Without the two of them, this project would never have gotten done. Their passion and friendship is imperative to my success.

I dedicate this book to my father, Earl Russell, who passed away a few months ago. My father had his own business and taught me a great deal about leading in a business setting and in a community. He was a constant thinker and challenged us always to learn. I miss him very much.

Finally, thanks to Cat Russo and Jacki Edlund-Braun of Trainers Publishing House—two of the best editors and fun friends. Thanks to Tora Estep for help in editing the manuscript. And, of course, thanks to the Association for Talent Development—ATD rocks!

Lou Russell
Fishers, Indiana
January 2015
Introduction

How to Use This Book

What’s in This Chapter

• Why leadership matters
• What you need to know about training
• The “math” of modifying learning materials
• Estimates of time required
• The use of compliant assessments to grow leadership
• A broad overview of what the book includes

Why Does Leadership Matter?

Imagine two tall mountains. In between them lies a deep valley with a ferocious river. One person stands on each mountaintop. One is named Jo, and the other is Mo.

Jo faces away from the valley and looks down the back side of the mountain, sharing instructions with people below. Jo has managed to get to the top through hard work and creativity and has suffered lots of bumps and bruises from missteps. The rich resources on this mountain-side are exciting, and Jo knows that with help the people below could improve their wealth by harvesting and selling these resources to others. Jo continues to share ideas and experiences to make this economic growth a reality. Jo does not notice Mo.

Mo, however, who is facing the valley and river, sees Jo. Clearly the same valuable resources exist on the back side of Mo’s mountain, and wealth would likely be possible in the short term. But Mo was fascinated with the river. The river could take people away from the mountains, away from the difficult climbing, and perhaps to a more habitable valley. Mo is convinced that the resources on the back of the mountain will be consumed quickly, and this will become a hard
place to live. Mo walks back down to talk to the people about moving away. They could use the resources to build strong boats and bet it all on the future before the winter comes.

As you read this fable, which person did you identify with? Which role seemed more sensible? Which person had the right values and the right focus and would get the best results? What were the best results?

Jo is a **manager**. Jo’s gift is to cope with complexity, driving processes and practices so that large groups of people can grow a better existence. Jo knows that order and consistency are keys to quality and profitability, and the mountain’s resources offer a controllable, low-risk opportunity to grow the wealth of all individuals while working together as a whole. Not many people can do Jo’s job well. Jo is all about *how* and *what*.

Mo sees the opportunity on the mountain but is not drawn to or interested in specifics. Mo wants to do something new. Worried about the changing availability of resources and the difficulty of living in a mountainous area, Mo looks for something bigger and better. Doing what has always been done, even doing it better, is not how Mo views success. Taking a big risk to use the valuable resources to go downriver makes perfect sense to Mo.

Mo is a **leader**. Mo’s gift is to see the future and inspire people to figure out how to get there, steering clear of the messy detail. Mo knows that change is a constant. Only motivation and inspiration can overcome inertia to drive the future plan’s implementation. Mo also knows that sometimes things won’t work out, and another plan will quickly become evident so innovation is also critical. Few people can do Mo’s job either. Mo is all about *why* and *when*.

When you facilitate leadership using the resources in this book, both managers and leaders will attend your sessions. Although rare, you may meet learners who know how to jump between both roles effectively. Both roles, manager and leader, are critical to any organization. Both roles are difficult to staff—and when staffed with good people, magic happens. Managers usually grow up from within, coming up from a functional job to lead others in that functional job. Many of the leadership competencies you will facilitate using this book are as important to a manager as they are to a leader.

But the truth is, managers struggle to leave the day-to-day operations that have created success to jump into the unknown of leadership. While managers look “down” at their people, leaders more often scan “out” toward the future. Managers are tactical; leaders are strategic. Managers are about people; leaders inspire people to be all about the future of the organization. Both are needed for organizations to thrive.
This workshop is designed to help individuals see where they want to be. Do they want to be Jo or Mo? Are they willing to pay the price for the role they’ve chosen? Whether heading to leadership or management, experiencing and practicing the competencies in this book will move your learners on their journey. Your goal is to take them from where they are, to where they can go. Each participant’s journey will be unique.

One small warning: growing management and leadership is not for the faint of heart. No one became a manager or leader by hearing only good news about his or her own behavior. These workshops take a deep dive into individual strengths, but they also explore weaknesses. This isn’t always fun, and, as a facilitator, you have a moral obligation to keep the learners safe as they learn through pain. Help them process without denying the cognitive dissonance (pain) that builds performance growth.

Growing management or leadership is not a project; it’s a process. It never ends. Even the strongest leaders need to “sharpen the saw” and grow their innovation skills to drive performance. Even the most effective managers need new processes and tools to combine with their influencing skills for more efficiency. Facilitating learning for them creates greatness.

What Do I Need to Know About Training?

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

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<th>Question</th>
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<tr>
<td>What is your expertise as a facilitator?</td>
<td>Expert (more than 5 years, always awesome evaluations)</td>
<td>Some experience (1–5 years, sometimes talks too much)</td>
<td>Beginner (less than 1 year, no idea what to do)</td>
</tr>
<tr>
<td>How familiar are you with the topic?</td>
<td>Evolving expert (taken courses, read books, created materials, and it is my passion)</td>
<td>Some experience (taken courses, read books, created materials)</td>
<td>Beginner (had a course in school)</td>
</tr>
<tr>
<td>How committed is your company to investing in training or performance improvement?</td>
<td>Integral part of our corporate culture</td>
<td>Depends on the topic—this one is hot right now</td>
<td>Cheap and fast</td>
</tr>
<tr>
<td><strong>TOTAL:</strong></td>
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If you scored 1-3 (novice at both training and topic): Your best bet is to stick closely to the materials as they are. Spend extra time with the content to learn as much as possible about it. Also, closely read Chapter 8 on training delivery and consider practicing with a colleague before delivering the program.

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

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

For more on facilitation skills, see Chapter 8 in this volume. Chapter 13 includes a comprehensive assessment instrument that will help you manage your professional development and increase the effectiveness of your leadership training sessions (see Assessment 2: Facilitator Competencies).

(Knowledge + Skills) × Motivation = Performance

The more familiar you become with the workshop agendas and facilitation, the easier it will be to modify and adapt the content presented in this book. This mathematical equation is important to keep in mind when you modify learning materials. When approaching a customized offering, ask yourself this question: What will my learners be able to do after they leave this workshop? In creating learning experiences the goal is always to drive improved performance. Three things drive performance:

- **Knowledge**: A learner can describe the performance.
- **Skills**: A learner can do the performance.
- **Motivation**: A learner does the performance.

Notice from the equation that you can have all the knowledge and skills in the world, but if you have no motivation, you have no performance. Similarly, if you are 100 percent motivated but lack the skills or knowledge, performance is impossible. In Chapter 10, you’ll learn ways to support ongoing learning after the workshop is over to grow performance.

Never settle for just knowledge. Even if you only have 30 minutes, add interaction and debrief before you add lecture. Experience is more likely to affect performance because of the
motivational aspect. *Lecture as a last resort* regardless of the time. *Learners learn what they earn* from trying it themselves, not by hearing it from you.

What about compliance training? Isn’t that just about memorizing the rules? Think of this example. If you are building a one-hour workshop to teach people how to extinguish trashcan fires, what is your goal? Do you want them to be able to describe putting out the fire, act out how to put out the fire, or actually put out the fire? No one has time for rote knowledge.

**Knowledge**

Knowledge is often difficult to teach, because learners need a context to help them store the knowledge in their brains. They need the answer to “Why are we learning this?” and “What’s in it for me?” The two-hour workshop, for example, provides knowledge of the 21st Century Leadership Competencies. This version is an overview and establishes context or the “filing cabinets” in the brain to allow more depth in future learning. Participants will learn the hierarchy of leadership competencies:

- **Self-awareness**: internal work
- **Collaboration with others**: external work
- **Business acumen**: strategic work.

They will also review the 11 subcompetencies: self-resiliency, emotional strength, empathy to motivate, trust, team vision, communication skills, coaching in the moment, managing changing roles, project leadership, innovation, and critical thinking. The learners will need a way to self-assess to think about their own strengths and challenges. We will discuss recommendations for assessments later in this chapter.

In this limited time, expecting to change people’s leadership performance is unreasonable. However, even the two-hour workshop is not meant to be pure lecture or an academic exercise. Rather, it is a very interactive workshop, and learners will experience new ideas about leadership by dipping into leadership learning experiences together.

**Skills**

Skills are the easiest to teach, especially skills you can practice in class. In the two-hour workshop, these skills (what can they do) are practiced briefly through exercises:

- Reinforcing to self and others one’s personal purpose
- Improving influencing skills by adapting individual styles to the styles of others
• Heightening emotional awareness and regulation to drive improved decision making
• Practicing basic coaching dos and don’ts
• Practicing basic negotiating strategies.

In the one-day workshop, more learning occurs at a subcompetency level. Additional learning experiences grow these skills in addition to those listed above:

• Driving accountability and clarity in dealing with problems
• Applying multiple facilitation and analysis techniques to grow staff and teams
• Identifying the customer value proposition
• Creating a project charter.

The two-day workshop is completely skill based. Knowledge is acquired by applying skills in a simulation of actual leadership situations and then debriefing. The two-day workshop also includes a 360-degree assessment prior to the workshop and feedback from peers during the workshop.

Motivation

All three of these learning experiences (two-hour, one-day, and two-day) aim to influence motivation. You can’t really teach motivation; you have to sell it. A good facilitator is an evangelist on the topic. This is the most critical way to influence application and ongoing learning. Learners can leave with new skills and new knowledge and never change their leadership performance. The exercises are designed to challenge the learner to set personal goals to bridge the gap between the leaders they are now and the ones they can become with effort. While focusing on a skill, for example “customer focus,” the interaction with others and the debrief by the facilitator, when done well, drives motivation.

If teaching in an online or blended manner, use a discussion board, homework assignments, and “study pairs” to establish community and connection and drive motivation. For more on leveraging technology in your workshop, see Chapter 7.

How Much Time Will Preparation Take?

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

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

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

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

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

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

Section III covers information about post-workshop learning:

- Chapter 10. The Follow-Up Coach
- Chapter 11: Follow-Up Activities.
Section IV includes all the supporting documents and online guidance:

- Chapter 12. Learning Activities
- Chapter 13. Assessments
- Chapter 14. Handouts
- Chapter 15. Online Tools and Downloads.

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

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

- **Learning activities**, which are more detailed than the agendas, cover the objectives of the activity, the time and materials required, the steps involved, variations on the activity in some cases, and wrap-up or debriefing questions or comments.

- **Assessments, handouts, and tools** are the training materials you will provide to learners to support the training program. These can include scorecards for games, instructions, reference materials, samples, self-assessments, and so forth.

- **Presentation media** (PowerPoint slides) are deliberately designed to be simple so that you can customize them for your company and context. They are provided for your convenience. Chapter 7 discusses different forms of technology that you can incorporate into your program, including different types of presentation media.

All the program materials are available for download, customization, and duplication. See Chapter 15 for instructions on how to access the materials.
How Are the Agendas Laid Out?

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

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

<table>
<thead>
<tr>
<th>TIMING</th>
<th>SLIDES</th>
<th>ACTIVITIES/NOTES/CONSIDERATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 a.m. (1 min)</td>
<td>Slide 1</td>
<td><strong>Welcome and Introduction</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Arrive early to set up the room and make sure everything works properly. Adjust the room setup as needed.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Welcome everyone as they arrive. Briefly introduce yourself.</td>
</tr>
<tr>
<td>8:01 a.m. (2 min)</td>
<td>Slide 2</td>
<td><strong>Learning Activity 2: Inspirational Leader</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>To get participants thinking about leadership, ask them to use their cell phones, tablets, or computers to find a picture of a leader who inspires them. If they don't have access to those devices, they can just choose a leader. Ask them each to share who it is and how they are inspired.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Talk a little bit about blind spots of these leaders as well.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Transition into the next activity to help them begin to think about their own leadership strengths and blind spots.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Slide 1 of 2)</td>
</tr>
<tr>
<td>8:03 a.m. (2 min)</td>
<td>Slide 3</td>
<td><strong>Learning Activity 2: Inspirational Leader</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• <strong>Handout 2: Inspirational Leader</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Now ask participants to think about their own leadership. Direct them to fill out Handout 2 by answering questions about what makes them a great leader and what they would like to add to their leadership strengths. Follow instructions in the learning activity.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Note: Assign tables for each functional area (IT, Marketing, HR) to be used later (point them out to learners at this time).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Slide 2 of 2)</td>
</tr>
</tbody>
</table>
TIMING | SLIDES | ACTIVITIES/NOTES/CONSIDERATIONS
--- | --- | ---
8:05 a.m. (30 min) | Slide 4 | **Learning Content/Lecture**

**Leadership Competency Model**

Introduce the competency model briefly. Explain how each competency rolls up into one of three categories: self-awareness, collaboration with others, and business acumen. You may also consider providing them with a copy of the ATD *Infoline* “Critical Competencies for 21st Century Leaders.”

(Slide 1 of 3)

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**How Do I Use This Book?**

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

- If you chose *training expert*, you can get right to work preparing one of the workshops in Section I. Use Section II as a reference. Each of the chapters features a sidebar or other information written by the author who has much experience in the topic under consideration. This advice can help guide your preparation, delivery, and evaluation of training.

- If you chose *topic expert*, read Section II in depth and skim the topic content.

- If you chose *novice at training and the topic*, then spend some serious time familiarizing yourself with both Sections I and II.

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

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**How Can I Use Compliant Assessments to Grow Leaders?**

Self-awareness is a key component of growing leadership competency. Online assessments are useful tools for this goal. It is critical to use compliant and research-based tools when choosing assessments; always ask your vendor to prove its tools are compliant and based on research. We highly recommend the TTI Success Insights tools and the 360 OD Survey. The workshop programs use these two different assessments and include presentation slides to help you debrief them:
1. The TriMetrix EQ assessment, a three-part online profile that measures DISC (behaviors), Workplace Motivators (prioritization), and Emotional Intelligence (awareness and regulation).

2. An online 360 assessment called the 360 OD Survey leveraging the 21st Century Leadership Competencies upon which all three workshop variations are based.

In Chapter 13 you will find information on how to order these tools and train-the-trainer debriefing guides for your own use. A paper alternative to the online 360 OD Survey is also discussed. Your organization may have standard assessments that you are required to use. In Chapter 13, you will also find guide to help you substitute your own compliant assessment profiles into the presentation slides. Map your tools to our recommended tools using this table:

<table>
<thead>
<tr>
<th>ASSESSMENT</th>
<th>PERFORMANCE GOAL</th>
<th>YOUR TOOL</th>
<th>NO TOOL OPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>TriMetrix EQ: Part 1 DISC</td>
<td>Determine behavioral strengths, including natural and adapted behaviors.</td>
<td>Remove slides and ask people to discuss their strengths and blind spots.</td>
<td></td>
</tr>
<tr>
<td>TriMetrix EQ: Part 2 WPM</td>
<td>Define how you prioritize your attention and energy.</td>
<td>Remove slides and ask people to make a list of their top 10 motivators, boil it down to two, and then share.</td>
<td></td>
</tr>
<tr>
<td>TriMetrix EQ: Part 3 EQ</td>
<td>Identify a baseline and tips for growing emotional awareness and regulation.</td>
<td>Remove slides and ask people to think of a stressful time; discuss the triggers and how they regrouped.</td>
<td></td>
</tr>
<tr>
<td>Online 360 assessment</td>
<td>Online tool for self, boss, peers, and team to assess the learner using the 21st Century Leadership Competencies included in these workshops.</td>
<td>Use the paper assessment in this book (Chapter 13 explains).</td>
<td></td>
</tr>
</tbody>
</table>

Most critically, if you choose to use assessments be prepared to support the learners in all their questions and concerns privately. Do not share learners’ results with anyone else unless they have requested it.

**Key Points**

- Growing leadership matters because it mitigates these universal challenges:
  - How to engage, grow, and retain great employees
  - How to meet strategic organizational goals, no matter how challenging
How to translate strategic vision into tactical action
- How to evolve and change organizational culture as needed
- How to maintain organizational growth.

- The workshops in this book are designed to be effective at all levels of trainer expertise.
- Good training requires an investment of time.
- The book contains everything you need to create a workshop, including agendas, learning activities, presentation media, assessments, handouts, and tools.

**What to Do Next**

- Review the agendas presented in Section I and select the best fit for your requirements, time constraints, and budget.
- Decide what assessments you will use for your workshop. If you are using online assessments, consider assigning them as pre-work prior to the workshop. Read Introduction and Chapter 13 carefully to plan which assessment option is the right fit for your workshop.
- Based on your level of expertise, skim or read in-depth the chapters in Section II.
- Consider what kind of follow-up learning activities you will want to include with the workshop by reviewing Section III.

**Additional Resources**


