**Training Transfer Process Diagrams and Templates**

**Learner Characteristics**

* Cognitive ability
* Self-Efficacy
* Pre-Training Motivation
* Absence of Negative Emotional State
* Openness to Experience
* Extroverted
* Perceived Usefulness
* Career Planning
* Commitment to the Organization

**Before**

Organizational Environment & Support

* Strategic Link
* Supervisory Support
* Accountability
* Peer Support

**Training Design**

* Learning Goals
* Content Relevance
* Practice & Feedback
* Behavior Modeling
* Error-Based Examples
* Self-Management Strategies

**Organizational Environmental & Support**

* Opportunity to Perform
* Strategic Link
* Transfer Climate
* Supervisory Support
* Accountability
* Peer Support

Learning

**Job Performance & Skill Maintenance**

**Most Powerful Time/Role Combinations (pg. 6)**

**BEFORE DURING AFTER**

|  |  |  |
| --- | --- | --- |
| **1** | **8** | **3** |
| **2** | **4** | **9** |
| **7** | **5** | **6** |

**MANAGER**

**TRAINER**

**TRAINEE**

Key: 1 = high; 9 = low frequency/potency

**Most Frequently Used time/Role Combinations (pg. 6)**

**BEFORE DURING AFTER**

|  |  |  |
| --- | --- | --- |
| **5** | **6** | **9** |
| **2** | **1** | **7** |
| **8** | **3** | **4** |

**MANAGER**

**TRAINER**

**TRAINEE**

Key: 1 = high; 9 = low frequency/potency

**Most Frequently Used time/Role Combinations (pg. 7)**

**BEFORE DURING AFTER**

|  |  |  |
| --- | --- | --- |
| **5/1** | **6/8** | **9/3** |
| **2/2** | **1/4** | **7/9** |
| **8/7** | **3/5** | **4/6** |

**MANAGER**

**TRAINER**

**TRAINEE**

Key: 1 = high; 9 = low frequency/potency

**Kudos Congratulations (pg. 26)**

To: PaulParticipant@anyhwere.com

Subject: Shaking Your Hand

Hi Paul,

I ran into Terri today and she mentioned what a good job you’re doing with the system implementation. Looks like all your hard work in the training is paying off! Keep up the good work and as always, let me know if you have any questions.

Barbara Carnes

To: TomTrainee@anywhere.com

Subject: High Five!

Nice job chairing the meeting today! I saw that you used lots of the ideas from the workshop.

Barbara Carnes

**Three Penny Challenge (pg. 29)**

To: PatriceParticipant@anywhere.com

Subject: 3 Penny Challenge

Now that you and your coworkers have completed the training course Project Management for Professionals. I challenge you to “catch a coworker doing it right” – that is, using our practicing one or more of the skills learned in class and to acknowledge them. To help you remember, take 3 pennies out of your pocket or purse and place them on your desk or computer top. Each time you acknowledge a coworker for practicing or using one of the skills from class, move one of the pennies to another position or move it from one pocket to another pocket.

Be sure to acknowledge your coworker immediately or as soon afterward as possible and be sure your praise is sincere. Every person really wats to be told when they are doing something right, and it’s only by practicing and doing – and reinforcing – that new skills can be truly learned

I challenge you!

Barbara Carnes

[www.maketrainingstick.com](http://www.maketrainingstick.com)

***Use of Training Certificate***

**Transfer Certificate (page 31)**

This to certify that \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Participant)

has successfully applied \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Skills)

which he/she learned in \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Training Program)

On \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

(Date)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Supervisor) (Trainee)

**Goal Card or Buddy Card (page 37)**

My after-training goal is

(something I would like to try out): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

My buddy/support person: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email and Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

My buddy’s after-training goal: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

My buddy can help & support me by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I can support and help my buddy by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Our first after-training contact will be: \_(When)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

­ \_­­­­(How)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Simple Action Plan (pg. 38)**

|  |  |  |
| --- | --- | --- |
| **Goal:** Improve general communication and influencing skills to better gather requirements to ensure projects meet the stakeholders’ needs and expectations | | |
| **Improvement Strategies:**   1. Attend other requirements gathering sessions to “watch and learn” 2. Mock requirements gathering session | | |
| **Tasks/Action Steps** | **Support/Resources Needed** | **Timeline (Complete By)** |
| 1. Attend two other requirements gathering sessions as an observer | **1a.** Manager’s help to ensure time to observe other requirements gathering sessions  **1b.** Manager’s support in “paving the way” with other teams to sit in and observe the requirements gathering sessions  **1c.** Attendance as an observer at two other requirements gathering sessions  **1d.** Schedule time to meet with the lead business analysts from the sessions observed to debrief – discuss the process, how issues/problems were handled, etc.  **1e.** Lessons learned report to share with manager  **1f.** Develop a plan for utilizing what was learned and how those skills, along with skills learned in workshop, will be applied in the mock session | **1a.** Done  **1b.** July 6  **1c.** July 17  **1d.** July 22  **1e.** July 24  **1f.** July 26 |
| 2. Schedule a mock requirements gathering sessions | 2a. Manager’s help ensure time to prepare for and conduct a mock session  **2b.** Manager’s help to gather resources for the mock session to play various roles (e.g., an individual who won’t show up for the meetings, another individual who wants something different from the rest of the group, etc.)  **2c.** Others in the organization to evaluate and provide feedback on performance at the end of the mock session  **2d.** Creation of a sample project to use in the mock session – need assistance form the Process Improvement Office in developing a sample project  **2e.** Preparation time for mock session. (Use job aids from workshop)  **2f.** Conduct mock session  **2g.** Follow-up to debrief – get feedback and suggestions/recommendations from observes  **2h.** Develop plan, with manager’s support, on how skills learned will be applied going forward in one role | **2a**.Done  **2b.** July 27  **2c.** July 27  **2d.** Aug 6  **2e.** Aug 14  **2f.** Aug 25  **2g.** Aug 28  **2h.** Sept 4 |

**Post-Training Participant Contact (pg. 40-41)**

To: darrellparticipant@anywhere.com

Subject: Your Project Management Training

Dear Darrell,

It’s been two weeks since you completed Professional Project Management. In the class we focused on these objectives.

1. Identify all stakeholders and agree on final and intermediate deadline
2. Develop project budget, with input from all stakeholders
3. Use the project calendar system to track due dates, deadline, and stakeholder communication

How have you been using what we learned? Please let me hear from you – call or email me with what’s working, what isn’t working, and what you would like input on.

If you haven’t had an opportunity to use it yet, please remember that what you don’t use, you lose! Make it a point to use or practice what you learned within the next week even if you don’t have a real project to work on. You’ll be glad you did.

Terri Trainer

**Post-Training Participant Contact (pg. 40-41)**

To: darrellparticipant@anywhere.com

Subject: Your Project Management Training

Dear Darrell,

Now that you have completed the e-learning course Professional Project Management, how are you using what you learned? The class focused on these objectives.

1. Identify all stakeholders and agree on final and intermediate deadline
2. Develop project budget, with input from all stakeholders
3. Use the project calendar system to track due dates, deadline, and stakeholder communication

If you haven’t had an opportunity to use it yet, please remember that what you don’t use, you lose! Make it a point to use or practice what you learned within the next week even if you don’t have a real project to work on. You’ll be glad you did.

Terri Trainer

**Post-Training Participant Contact (pg. 40-41)**

To: darrellparticipant@anywhere.com

Subject: Your Project Management Training

Dear Darrell,

It’s been two weeks since you completed Professional Project Management. In the class we focused on these objectives.

1. Identify all stakeholders and agree on final and intermediate deadline
2. Develop project budget, with input from all stakeholders
3. Use the project calendar system to track due dates, deadline, and stakeholder communication

How have you been using what we learned? Please let me hear from you – call or email me with what’s working, what isn’t working, and what you would like input on.

If you haven’t had an opportunity to use it yet, please remember that what you don’t use, you lose! Make it a point to use or practice what you learned within the next week even if you don’t have a real project to work on. You’ll be glad you did.

Terri Trainer

**Target Your Own Objectives (pg. 43)**

To: *Jackie Sweet*

From: *Dora Johnson*

Subject: *Managing Multiple Priorities Training Class*

Before you attend \_\_*the above*\_\_ training, please take a minute and think about what you would like to get out of the training: what you would like to learn and do differently.

The objectives of the training are:

1. *To increase your ability to discriminate among low, medium, and high priority activities.*
2. *To sharpen and review your department and job mission and purpose*
3. *To assign priorities to tasks based on mission purpose*
4. *To reduce stress caused from too many things to do*
5. What are your personal objectives? What do you want to know? What do you want to be able to do better? What specific situations or issues (or people) do you want insight/new skills to do with? Be as specific as possible.
6. *I need to be able to decide which tings I should do every day, because I can’t get them all done, most days*
7. *I need to learn how to tell people (especially my boss) when I can’t get everything done*

It is a good idea to discuss this with your supervisor before you come to training on \_\_*January 15*\_\_ *(date).*

Please fax this to me at (*xxx-xxx)* no later than \_\_*Jan 13*\_\_ , so I can be responsive to your needs. I’m looking forward to working with you

Signed,

*Dora Johnson*

**Target Individual Objectives/Outcomes (pg. 44)**

To: *Joe Supervisor*

From: *Terry Trainer*

Subject: *Upcoming Training: Project Management*

**STEP 1:**  Start with understanding the stated objectives/outcomes for the training program. Attached are the objectives/outcomes from the training program. Please read them if you have any questions you might contact the training department \_\_*xxx-xxx*\_\_ .

**Then Focus on Your Own Objectives/Outcomes**

**STEP 2:** With the set objectives/outcomes in mind:

1. What additional objectives/outcomes do you want your employee to achieve during training program?
2. What extended objectives/outcomes do you want from this training?

|  |  |
| --- | --- |
| **OUTCOMES** | **PLAN** |
| 1. Be able to lay out a project schedule a year ahead of time 2. Be able to plan time for at least 3 other people on the project 3. Track progress | I’ll have one ready for him to work on within a week after the class |

**STEP 3:** What happened? Your role in making training stick back to the work site is essential. We ask that you talk with your employee regarding the outcomes/objectives you specified. Periodically check the above outcomes and determine which ones have been achieve

**Report Card (pg. 47)**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Report Card**  **Participant: ­­­­\_\_\_\_\_\_\_\_\_\_\_\_ Class: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Subject: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Supervisor: \_\_\_\_\_\_\_\_\_\_\_** | | | | | | | | |
| **Training Outcomes** | Two Week | | Four Week | | Twelve Week | | | |
| Identify Objectives | A | A | A | A | A | A | A | A |
| Prepare Form | - | A | - | A | A | A | A | A |
| Conduct Discussions | - | - | - | B | - | B | B | B |
| **A** – A Best Work **D** – Distinguished  **B** – Better than Before **F** – Free from many errors  **C** – Creative besides  Specific Skills Comments | | | | | | | | |
| Analyze Performance | S | S | S | S | *Good!* | | | |
| Listen to Employee | S | E | S | E | *Sounds like you did it well!* | | | |
| Negotiate Rating | S | S | U | S | *You blew it with Janiel!* | | | |
|  |  |  |  |  |  | | | |
|  |  |  |  |  |  | | | |
| **E** – Superior **U** - Unsatisfactory  **S** – Satisfactory **?** – Well Done  **Supervisor:** ­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | | | | | |

**Report Card Cont’d (pg. 47)**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Report Card**  **Participant: \_­­­­\_\_\_\_\_\_\_\_\_\_\_\_**  **Session: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Subject: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Trainer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | | | | | | | | |
| **Training Outcomes** | Two Week | | Four Week | | Twelve Week | | | |
| Identify Objectives |  | B |  | B+ |  |  |  | A |
| Prepare Form |  | A |  | A |  |  |  | A |
| Conduct Discussions |  | - |  | B |  |  |  | B+ |
| **A** – A Best Work **D** – Distinguished  **B** – Better than Before **F** – Free from many errors  **C** – Creative Besides  Specific Skills Comments | | | | | | | | |
| Analyze Performance | S | S | S | S | *Good analysis -* | | | |
| Listen to Employee | S | E | S | E |  | | | |
| Negotiate Rating | S | S | U | S | *Hold your ground!* | | | |
|  |  |  |  |  |  | | | |
|  |  |  |  |  |  | | | |
| **E** – Superior **U** - Unsatisfactory  **S** – Satisfactory **?** – Well Done  **Trainer:** ­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | | | | | |

**Report Card Cont’d (pg. 48)**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **A** | **B** | **C** | **D** | **E** | **F** | **G** | **H** |
| Training Scorecard for Instruction  **Participant:** Darron Done | | Instructions: | Rate each skill performance according to the following scale:  A = Superior **–** Close to perfect, better than 90% of others who took this class  B = Excellent – In top 20% of others who took this class  C = Average – Adequate skills – On par with 70% of others who took this class  D = Below Average skills  F = Did not attempt to learn, did not participate | | | | |
|  |  |  |  |  |  |  |  |
|  |  |  | **Participant:** | **Trainer:** | **Supervisor:** |  |  |
| **Skills & Outcomes Learned In Class:** | |  |  |  |  |  |  |
| Develop Project Management Plan | |  | B+ | A |  |  |  |
| Identify and Classify Stakeholders | |  | B+ | B |  |  |  |
| Identify Key Checkpoints | |  | B | B |  |  |  |
|  |  |  |  |  |  |  |  |
| **Skills & Outcomes Practiced on the Job:** | |  | A | A |  |  |  |
| Develop project management plan | |  | B | B |  |  |  |
| Identify and classify stakeholders | |  | B | B+ |  |  |  |
| Identify key checkpoints | |  |  |  |  |  |  |

**Affirmation Card (pg. 53)**

My Affirmation for: ­\_\_\_\_*Better Listening*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Is: \_\_ *I listen carefully and repeat back to be sure I heard it right\_\_*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

My Affirmation for: ­\_\_\_\_*Positive Attitude about Chang*e\_\_\_\_\_\_\_\_

Is: \_\_ *I focus on the positive aspects of a change and communicate this to my employees\_*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Affirmation Card (pg. 54)**

Affirmations have been used for thousands of years to help people achieve what they desire. Whether your desired end result is personal, like losing weight, or professional, like applying and using the skills learned in this training, an affirmation will help you get the desired results.

Repeat your affirmation statement at least five times daily. Better yet, write it down and put it someplace where you will see it often. You might also record your affirmation statement over and over and play the tape daily. The more often you expose yourself to your affirmation, the better result.

* Based on what you have been learning in training, what do you want to do differently or more?

*Get my employees to set measurable objectives*

* Now write as if it were already true (that is, use present tense)?

*Set measurable performance objectives with my employees*

* Add personal pronouns such as I and me to your statement and re-write it below.

*I help my employees set measurable performance objectives*

**Check.** Your affirmation should be

* Positive
* In the present tense
* Describing your desired outcomes, as if it were already true

**Coaching Contract (pg. 62)**

**Coaching Pre-Contract Worksheet**

Training: *Central Office Repair*

Participant(s): If more than one participant is being coached, list all participants

* *Jack Jones*
* *Bill Baxter*
* *Jackie Sweet*

1. What skills, abilities, and knowledge do I have that will most benefit this/these participant(s)? \_\_\_\_*20 years in Central office repair*\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Over what time period am I willing/able to meet with and coach them?

*\_\_\_\_\_6 months to a year*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. What do I need from \_\_*Jack, Bill, & Jack\_\_*  *(name(s)* of participants) so I can help them use these skills, abilities, and knowledge? \_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. What should \_\_*Jack, Bill, & Jackie*\_\_, (name(s) of participants) commit to doing, so I can help them use these skills, abilities, and knowledge?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. How will we know if the coaching is working? \_\_\_If we think it is.\_\_\_

**Coaching Contract Cont’d (pg. 63)**

**Participant’s Pre-Contract Coaching Worksheet**

Training: \_\_\_*Project Management\_\_\_*

Participant: \_\_\_\_\_*Jack Jones\_\_\_\_\_*

Coach: \_\_\_\_\_\_*Joe Supervisor*\_\_\_\_\_

1. What skills, abilities, and knowledge from this training do I want and need to use?  *How to plan another people’s time and budget the project.*\_\_\_\_\_\_

*How to budget a project with at least a 1-year timeline \_\_\_\_\_\_*

1. How will I benefit from using these skills, abilities, and knowledge in my job? \_\_\_\_*Better planning will help the customers and suppliers*

*understand when things will be ready. Because we can track things from the plan, we’ll know if we’re on budget or not, and we’ll also know far\_\_ ahead of time what resources are going to be needed.*

1. How will my work group, department, and/or organization benefit from my using these skills, abilities, and knowledge in my job? \_\_*Everyone will*

*have a better idea of what is going on; if we need to make any cost cuts, we’ll be able to do it early on, we should be able to avoid brush fires.\_\_*

1. What do I need from \_\_*Supervisor Joe\_\_*  *(coach*) to help them use these skills, abilities, and knowledge? \_\_\_*Review my plan, make suggestions*

*and MAKE ME DO IT even if I put it off.\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_*

1. What am I willing and able to commit to doing so that I will use these skills, abilities, and knowledge in my job? \_\_\_*Yes, got to make them work*

\_\_\_\_*\_\_\_\_\_\_\_\_\_\_\_*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. How will we know if the coaching is working? \_*I guess if I do what he tells me to (just kidding). If my plans are better than they used to be.\_\_\_\_\_\_*

**Coaching Contract Cont’d (pg. 64)**

**Coaching Contract**

Coach: \_\_\_\_\_\_*Joe Supervisor*\_\_\_\_\_

Participant: *\_\_\_\_\_Jack Jones\_\_\_\_\_*

We agree that it is desirable for \_\_*Jack Jones\_\_ (participant)* to use the following key skills:

* Define the scope of a project
* Plan project timelines at least 1 year out
* Plan project roles for at least 3 other people

The use of these key skills will result in these on-the-job benefits:

* Better planning and tracking
* Better understanding of who is supposed to do what.
* Better knowledge of whether or not the project is on schedule and budget

We therefore commit to communicate \_\_*bi-weekly\_\_ (how often)* via face-to-face meetings, or when these are not possible, via e-mail/voicemail.

We agree to do this for the time period beginning \_\_*Jan. 31\_\_* and ending \_\_*Aug. 1\_\_.* We further agree that should either party not meet regularly as agreed upon, that the other party shall remind her/him and request either re-commitment or termination of this contract.

Signed this \_\_\_\_15th\_\_\_\_day of \_\_\_\_*January*\_\_\_\_,

*Coach \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

*Participant \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

**Learning Contract (pg. 80)**

TO: keishatrainee@anywhere.com

CC: Keisasboss@anywhere.com

Subject: Six Sigma Green Belt Training

Dear Keisha,

This confirms your registration for s Six Sigma Green Belt Training. Attached is the Learning Contract for this course, which outlines the objectives and expected outcomes. Prior to beginning this course, no later than mm/dd/yyyy please.

1. Ask your supervisor (copied on this note) to review, sign, and return to you
2. Review and sign your portion
3. Send back to me

I’ll return a copy of the fully signed contract to you and your supervisor for after-class review

If you have any questions, please don’t hesitate to contact me.

*Terri Trainer*

599-999-9999

**Learning Contract (pg. 80)**

TO: keishatrainee@anywhere.com

CC: Keisasboss@anywhere.com

Subject: So You Want To Be a Supervisor

Dear Keisha,

This confirms your registration for, So You Want to Be a Supervisor. Attached is the Learning Contract for this course, which provides opportunity for you to target what you learn in the class. Before you start the class, please take a few moments to consider what key things you would like to take away from the class, and then complete the appropriate portions of the contract. When you have completed it, please send a copy to me.

If you have any questions, please don’t hesitate to contact me, and good luck in the class!

*Terri Trainer*

599-999-9999

**Learning Contract (pg. 81)**

**Learning Contract**

Dora Johnson intends to participate in the training, So You Want To Be A Supervisor.

The objectives of this training are:

* *Identify key performance indicators (KPIs) involved with being a supervisor*
* *Describe 3-5 key differences between being an individual contributor and being a supervisor*
* *Arrive at a decision about whether or not to pursue becoming a supervisor*

Dora agrees to demonstrate these objectives by doing the following:

1. *Have a post-training discussion with LaToya Johnson, her supervisor in which she provides response to objectives 1, 2, 3, above.*

To support the training, Barbara Carnes, the trainer, agrees to conduct the training so that these objectives can be met, via lecture, discussion, demonstration, and other appropriate means, and to respond to questions and concerns of all participants.

To support this training LaToya Johnson agrees to support Dora’s learning by having a post-training with her (see above)

Signed:

/ss/ Barbara Carnes \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Barbara Carnes, Trainer

/ss/ Dora Johnson \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dora Johnson, Participant

/ss/ LaToya Johnson \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

LaToya Johnson, Supervisor

**Learning Contract Cont’d (pg. 82)**

**Learning Contract**

*\_\_Keisha Johnson\_\_* intends to participate in \_*Introduction to Project Management\_* training. The objectives are

* Learn how to define project scopes
* Be able to identify key stakeholders
* Learn how to develop project timelines and milestones

*\_\_Keisha Johnson\_\_* *(participants)* agrees to learn the following key skills associated with these project objectives

* *Identify project scopes for large and small projects*
* *Identify possible stakeholders for any project and get feedback about who are key stakeholders*
* *Use a Gantt chart to develop project timelines and milestones*

And use them back on the job in the following ways:

For the upcoming system conversion –

* *Identify the scope of the conversion implementation in xyz dept.*
* *Get input from John, Sherika, and Daron about timelines and deadlines*
* *Develop a timeline and milestones with for the implementation in xyz dept*
* *Track timeline and milestones and investigate any variances*

To support this learning \_\_*Terry Trainer\_\_ (trainer)* agrees to conduct the training and be responsive to questions so that \_*Keisha\_* learns and uses the training (see above).

To support this learning, \_\_*Jackson\_\_ (supervisor)* agrees to support the learning in the following ways

* *Help her make time in her schedule for this project management.*
* *Go over stakeholders with her and revise as necessary*
* *Review her timeline and milestones, making suggestions and giving feedback*

Signed: /ss/ Keisha Jones \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signed: /ss/ Terry Trainer \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signed: /ss/ Jackson Paulson \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Contracts (pg. 84)**

TO: javiergolzalez@anywhere.com

CC: hisSupervisor@anywhere.com

Subject: Your Productive Maintenance Training Class

Javier,

This confirms your registration for Productive Maintenance. An important part of this class is setting your learning objectives up front. Below are objectives for this class. Please review them and then think about what you feel you need to learn in this class.

Then reply to this email, and label each objective 1, 2, 3, etc. according to how important you feel it is for you. Put NA by anything that you don’t think is important at all. Add anything that you believe is important but is not listed.

Objectives – Upon completion of the course you should be able to:

* Describe the requirements for setting up a total productive maintenance program
* Explain the difference between different types of maintenance
* Calculate OEE  
  Set up and lead autonomous maintenance inspections

Please be sure to send your reply back before you plan to begin the class. You will not be able to enter the class until you do.

If you have any questions of concerns, please contact me at the number below

Thanks!

*Barbara Carnes*

**Contracts (pg. 85)**

TO: BillBoss@anywhere.com

CC: JavierGonzalez@anywhere.com

Subject: Your Productive Maintenance Training Class

Bill,

This confirms Javier Gonzalez’s registration for Productive Maintenance. An important part of this class is setting the learning objectives up front. Below are objectives for this class. Please review them and talk with Javier about what he should learn in this class.

Then reply to this email, and label each objective 1, 2, 3, etc. according to how important you feel it is. Put NA by anything that is no important at all. Add anything that is not listed.

Objectives – Upon completion of the course Javier should be able to:

* Describe the requirements for setting up a total productive maintenance program
* Explain the difference between different types of maintenance
* Calculate OEE  
  Set up and lead autonomous maintenance inspections

Please be sure to send your reply back before Javier plans to begin the class. He will not be able to enter the class until this is received.

If you have any questions of concerns, please contact me at the number below

Thanks!

*Barbara Carnes*

**Contract Based On Program Outcomes and Their Priority**

*\_\_Estella Sanchez\_\_* *(name of participant)* is enrolling in the training \_*Supervisory Skills\_* *(title of session),* scheduled for \_\_*March 3 - 11\_*\_ *(dates).*

The following are out unit’s priorities for his/her participation

Directions: (include directions for prioritizing strategy desired – see first page for options)

Priority: \_\_*Supervisory Skills*\_\_ Training Program Outcomes

\_\_*4*\_\_ 1. Able to conduct performance appraisals, including discussion with

the employee, efficiently and comfortably (as reported by self)

\_\_*1*\_\_ 2. Able to reduce conflict within the department by applying 5 Steps

for resolving/reducing conflict (as reported by self of subordinates)

\_\_*5*\_\_ 3. Able to delegate more tasks efficiently (as reported by self or

subordinates)

\_\_*3*\_\_ 4. Able to assert self and department needs without turning people

off (reported by self or subordinate

\_\_*2*\_\_ 5.

It is *\_\_Estella’s\_\_* *(participant)* responsibility to focus on these priorities during the training. Following the training, with the participant, I \_\_*Jenyce Johnson\_\_* *(supervisor)* will develop an action plan by \_\_*March 15\_\_ (date)* which addresses the needs of this department within the priorities outlined above

We agree to forward a copy of the plan to the training department to encourage follow through. The Training Department agrees to review training plan progress at one, three, and six months following training.

\_\_\_\_\_\_\_*Naoima Jones*\_\_\_\_\_\_\_ \_\_*February 23\_\_*

Participant’s Supervisor Date

*\_\_\_\_\_\_\_\_\_Cilia Pope\_\_\_\_\_\_\_\_* \_\_\_\_\_\_\_\_\_\_\_\_\_

Participant Date

\_\_\_\_\_\_*Maria Rathousky*\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_

Training Department Date

**Contracts Cont’d (pg. 86)**

**Critical Incidents (pg. 89)**

TO: TomChang@anywhere.com

Subject: Transformation Leadership Training Follow-Up

Hi Tom,

It’s been about a month since you completed the Transformational Leadership Training, so please think back to situations and interactions you’ve had with your staff and others where you have used what you learned in the class. To refresh your memory, the key objectives of the class were:

* Identify and examine your own and others’ thinking patterns that can interfere with productive problem-solving
* Create and share new lenses for solving problems and capitalizing on opportunities
* Develop and foster experiments that will lead to problem-solving breakthroughs.

So – think back to an incident where you used, or wish you had used, some of the skills you learned.

How did it go?

What do you wish you’d done differently (if anything)?

Is there anything else – information, support, resources – that you would like now, to help you in the future.

Please send me a reply by next Monday – I’ll look forward to hearing back from you.

*Barbara Carnes*

**Incident Report Form**

**Training Class:** Transformational Leadership

**Trainee:** Tom Chang

**Describe an incident in which you used, or wish you had used, one of the skills or ideas from this training.**

My team was not very happy about having to re-do a lot of the work on the xyz project because of the incompatibility with the new system. I called an all hands conference call and asked them to talk about their assumptions. They came back with comments like “just more bs from IT that doesn’t really change anything…” and all the comments really boiled down to “none of the changes around here work.”

I suggested that instead of thinking about what hasn’t work, that we talk about how we’d be doing thigs if we still had the technology, we had 5 years ago. They got it. So, then I led a discussion about how we can approach re-loading the data so it’s more of an experiment and problem-solving instead of re-doing work

**How did it go? What do you think about the way it went?**

We’ll see … but I think it went pretty well and the team will have a more productive attitude about this.

**What will you do the next time a situation like this comes up?**

One thing I’d do differently – I’d talk to a few of the individually before the conference call. That way I can address their concerns – the ones who are the most negative – and avoid bringing them up in the meeting.

**What questions do you have? What support would you like to get?**

I’d like to get some more questions like we practiced in class to get people talking and questioning their assumptions. Could you send me more?

**Critical Incidents Cont’d (pg. 90)**

**Critical Incidents Cont’d (pg. 92)**

TO: TomChang@anywhere.com

Subject: Performance Management Training

Dear Tom,

Now that you’ve completed the Performance Management Training and hopefully you’ve had a chance to get some experience working with your employees, setting some expectations.

Please read the attached scenario and make a choice on how you would respond to the situation.

*Barbara Carnes*

**Critical Incidents Cont’d (pg. 3)**

TO: TomChang@anywhere.com

Subject: What Would You Do?

Hi Tom,

It’s been a few weeks since you finished the Performance Management training, and I wanted to get back with you to see what you think about this scenario. Please shot me an email with your answers by next Monday. I’ll compile everybody’s answers and share them with the class.

**Creating Expectations**

Jim has five employees that all perform the same duties. Three have over 10 years of experience, while the other two just started last year. Jim decided to meet individually with each of them and ask them what they think reasonable expectations are for the coming performance cycle. Then he took the best suggestions from each of them and put this set of expectations into each of their performance management worksheets.

What do you think about Jim’s approach?

What would you do differently? Why?

*Barbara Carnes*

**Training Topic: Delegating Work**

During the recent Time Management Training, we discussed delegation, including determining which tasks you need to keep and ones you could delegate. One of our training outcomes is that you will be able to determine which skill can be delegated to others, and that you will be able to successfully delegate these skills. Included in the delegation section were several related skills.

* Determining which tasks to delegate
* Assigning and getting agreement from the other person
* Creating a training plan for the task if necessary
* Identifying and communicating authority and responsibility
* Creating and following check-in points

Please identify a situation which has occurred since our training, in which you used one or more of these skills. Check the skills above the list which apply. When and where did this situation occur?

Is there any background need to understand the current situation?

Yes \_\_*We’ve had trouble communicating before… he either checks back with me every 5 minutes or goes ahead and does the whole thing and doesn’t check in with me at all\_\_*

Which of the skills listed above did you attempt to apply?

\_\_*\_*\_\_ Determining which tasks to delegate

\_\_X\_\_ Assigning and getting agreement from the other person

\_\_*\_*\_\_ Creating a training plan for the task, if necessary

\_\_X\_\_ Identifying and communicating authority and responsibility

\_\_X\_\_ Creating and following check-in points

How successful were you?

Very Successful \_\_\_ Somewhat Successful \_X\_ Need to try again \_\_\_

What will you do now or next time?

More of \_\_*We’ll see how he does; he seemed relieved that I was more*

*specific than I have been\_\_*

Less of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

About the same of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_

Participant Date

\_\_\_\_\_\_*Maria Rathousky*\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_

Training Department Date

**Critical Incidents Cont’d (pg. 94)**

**Critical Incidents Cont’d (pg. 96)**

TO: SamSupervisor@anywhere.com

CC: JimSmith@anywhere.com

Subject: Service Excellence Training Follow - Up

Dear Sam,

Jim Jones completed the training class Service Excellence a few weeks ago. Now it is time to follow up with his learning and how he’s applying it. Please take a few minutes to discuss the following questions with him so you and he can maximize the investment in his development.

* + - Describe a recent service situation you were involved in – what happened? Who was involved? Where did it happen? What was the result?
    - Thinking back to before you took the Service Excellence class, did you do anything differently this time than you would have before you took the class? If so, what?
    - If you could replay this situation, is there anything you would do differently? If so, what? Why?
    - What additional tools or support would you like to have to help you use what you learned in this class?

Please send Jim’s responses to me no later than next Monday.

Thanks,

*Barbara Carnes*

**Exercises Cont’d (pg. 100)**

TO: TimTrainee@anywhere.com

CC: SamSupervisor@anywhere.com

Subject: Service Excellence 3 Minute Follow - Up

Hi Tim,

You completed the Service Excellence class last week. Now that you’re back on the job, here’s a quick follow up. Think of an email or phone call you might have had – or actually did – with an unhappy customer involving a shipping error or other issue where we didn’t do what we should have.

Now think about the Service Excellence training points – what form the training could you use or have used?

Close your eyes (no, don’t go to sleep – just tune out distraction)

Now visualize the situation – and “see” yourself handling this situation the way you learned in class

Please send a quick note describing what you “saw.” I’ll send you a FREE LUNCH coupon when I get your responses. Any questions? Any support or resources I can give you? Please don’t hesitate to let me know!

*Barbara Carnes*

**Exercises Cont’d (pg. 100)**

TO: JoeWantanabe@anywhere.com

CC: MaryManager@anywhere.com

Subject: Lock Out Tag Out Training – Good Job

Hi Joe,

Great job answering the follow up questions. There’s a logo cup at Kerry’s desk in the Training Department with your name on it. Please pick it up at your convenience.

The training records now show you have completed this class. Congratulations!

*Barbara Carnes*

**Exercises Cont’d (pg. 101)**

**Three – Minute Self Help Drill**

Sample Instructions:

**Step 1:** Allow yourself three minutes to work on this exercise. Set a timer if necessary.

**Step 2:** Make yourself comfortable and avoid interruptions by forwarding your phone, etc.

**Step 3:** Think of the situation involving \_\_\_\_\_ *(topic from the training session).* Visualize the physical environment (walls, surroundings, sounds, sights, etc.) Who is there? What is he/she saying? Doing? How do they look? DON’T form any conclusions, judgements, or decisions right now. When you have the situation well in mind move on to Step 4.

**Step 4:** Stop! Take a couple of deep breaths and mentally set the situation you have just visualized aside. You will come back to it shortly.

**Step 5:** Recall the training you just completed. What are some points applicable to this situation? Are there any worksheets/exercises which fit?

**Step 6:** Plan how to apply those points in this situation. Don’t implement the plan right now. Just plan.

**Step 7:** Now return or previsualized the situation you visualized in Step 3, only this time apply your plan. Visualize your revised situation unfolding, from beginning to completion. If at any time the plan doesn’t seem to be working, STOP. Repeat steps 4 through 6. Then restart the situation from its beginning. Strat and stop as many times as you need.

**Step 8:** Acknowledge success and your ability to apply the training principles.

**Exercises Cont’d (pg. 102)**

TO: TimTrainee@anywhere.com

CC: SamSupervisor@anywhere.com

Subject: Service Excellence 3 Minute Follow - Up

Hi Tim,

You completed the Service Excellence class last week. Now that you’re back on the job, here’s a quick follow up. Think of an email or phone call you might have had – or actually did – with an unhappy customer involving a shipping error or other issue where we didn’t do what we should have.

Now think about the Service Excellence training points – what form the training could you use or have used?

Close your eyes (no, don’t go to sleep – just tune out distraction)

Now visualize the situation – and “see” yourself handling this situation the way you learned in class

Please send a quick note describing what you “saw.” I’ll send you a FREE LUNCH coupon when I get your responses. Any questions? Any support or resources I can give you? Please don’t hesitate to let me know!

*Barbara Carnes*

**Exercises Cont’d (pg. 104)**

**Follow Through Activities**

What we do in training isn’t enough. You need to try out the skills and learnings between sessions to see how they can be applied. Please choose at least three items from the list below. We will spend the first part of our next session discussing your experience. As an added bonus, those who complete their follow-through activities will receive a “special prize!”

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

**Letter to Self (pg. 100)**

TO: PatriciaParticipant@anywhere.com

CC: SamSupervisor@anywhere.com

Subject: Your Upcoming Six Sigma Black Belt Certification

Dear Patricia

I am very glad to see that you are going to become certified as a Six Sigma Black Belt. Maintaining high quality standards and continuously improving is very important at our company. Once you have completed the training, please work with your supervisor, Sam Supervisor, to practice your newly learned skills in some real-world situations.

With the skills and abilities of skilled people such as yourself, we will be able to meet and exceed our strategic growth initiative.

Best Regards,

*Bill BigBoss*

Six Sigma is a way of life at our company. As you begin this important step in the “quality journey,” I want you to know how important you are. Without skilled individuals like you, we would not be able to outperform our competition and stay competitive in the marketplaces of today.

So please review these materials carefully and think about how you can use them in your job. When you have an opportunity, talk to your supervisor about what you’re learning and how you see yourself using it in your job.

**Letter to Self Cont’d (pg. 108)**

TO: SamSupervisor@anywhere.com

CC: TerriTrainee@anywhere.com

Subject: Terri Trainee

This confirms that Terri Trainee has registered for Dealing with a Diverse Workforce and should complete it within the next few days. As you know, your role as her supervisor is an important one. In the next few days please schedule a meeting with your employee and discuss the training objectives and how to put them to use on the job.

Click on this link for ideas and suggestion https://companyintranet.php

To all supervisors and managers:

Diversity is an important topic in today’s work world and our organization is no exception. That is why we are requiring every employee in the company to participate in our Valuing Diversity training sometime during the coming year. As you will learn in the training, a diverse workforce can help us be more responsive to our customers, increase our competitive position in the market, and maintain the most positive relationships with our vendors.

In addition to participating in the training. I am requesting that all supervisors and managers discuss with your direct reports how the class training applies to your jobs and work units. This discussion should take place no later than one week after the employee completes the training. In the discussion, please address:

* *What types of diversity we have in our company and in your work unit?*
* *The value that diversity can bring to supporting your unit’s strategic business objectives*
* *How each employee can recognize, appreciate, and support diversity*

I look forward to future feedback bout how this training is helping our company achieve the benefits of diversity

*Bill*

**Questionnaires Cont’d (pg. 100)**

FROM: BCarnes@maketrainingstick.com

TO: MikeManager@anywhere.com

Subject: Following up on Perry’s Project Management Training

Mike,

Perry completed the Project Management training several weeks ago, so please take a quick moment to respond to these 3 questions.

1. Which parts of the training has he been using? Highlight or bold the course outcomes listed below you’ve observed him using
   * + - Develop project management plan
       - Identify and classify stakeholders
       - Identify key checkpoints
2. Are there any of the skills taught in the training that he seems to be struggling with? If so, please list them in your reply.
3. Are there any aspects of the training that you think he could use support for? If so, please mention them in your reply

Thanks – I’ll look forward to hearing back form you.

Terry Trainer

**Questionnaires Cont’d (pg. 114)**

**Skills Pre-Assessment**

Training Program: \_\_\_*Group Facilitation\_\_\_*

Skills Pre-Assessment for \_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(name*)

Skills used by successful group facilitators:

Please rate yourself by circling the numbers

that most closely corresponds with your

current level of skill at each of the following.

|  |  |  |  |
| --- | --- | --- | --- |
| 1. Processes ice breaker/get acquainted to relieve strangers’ reactions among participants and connect to content. | 1 | 2 | 3 |
| 1. Introduce and implement brainstorming when appropriate. | 1 | 2 | 3 |
| 1. Integrate experiential cycle and process each phase successfully. | 1 | 2 | 3 |
| 1. Am aware of my group interaction style and how this impacts my roles as facilitator. | 1 | 2 | 3 |
| 1. Identify stages of group development and facilitates group’s progress through them. | 1 | 2 | 3 |
| 1. Acknowledge and support both task and process roles of participants. | 1 | 2 | 3 |
| 1. Successfully chairs formal group and committee meetings. | 1 | 2 | 3 |
| 1. Has a variety of strategies for: | 1 | 2 | 3 |
| 1. Structuring ice breaker/get-acquainted activities | 1 | 2 | 3 |
| 1. Developing ground rules/expectations | 1 | 2 | 3 |
| 1. Assessing and addressing participant needs and agendas | 1 | 2 | 3 |
| 1. Giving instructions | 1 | 2 | 3 |
| 1. Grouping participants | 1 | 2 | 3 |
| 1. Choosing leaders | 1 | 2 | 3 |
| 1. Reviewing and summarizing | 1 | 2 | 3 |
| 1. Closing | 1 | 2 | 3 |
| 1. Initiates strategies successfully | 1 | 2 | 3 |
| 1. Supports participants during activities | 1 | 2 | 3 |
| 1. Debriefs so as to connect to learning outcomes | 1 | 2 | 3 |

|  |  |  |
| --- | --- | --- |
| No or Little Skill | Some Skills but Needs to Get Better | Highly Skilled |

**The Zeigarnik Effect (pg. 127)**

**Essential Question Worksheet**

**Current Participant Objectives/Outcomes**

* *Apply strategies to existing training to increase transfer*
* *Increase management support for transferring training*
* *Design transfer into new training*

**Developing the Essential Questions**

What are the essential, substance, and critical answer in each of the above? (You may need to group some.)

* *Which strategies and techniques are most suited to our training participants?*
* *Which sills and/or training that we offer are best bets to incorporate training techniques*
* *Who are the managers who currently support training application?*
* *Who are managers that are most likely to start supporting training transfer with some encouragement?*
* *Which manager transfer strategies are best suited for our managers and our culture?*
* *What new training is currently being designed or is planned?*

How will you go about getting answers to these questions?

* *Review possible strategies from books, newsletters, and blogs and select the best possibilities*
* *Review training calendar/website and star the best ones to work on*
* *Talk with the other trainers in our department and make a list of Training Champions and possible Champions – talk with them, spread the word about what they do and help them think through what else they can do*
* *Talk with our manager* about planned designing.