# Table of Contents

## Managing from the Heart

### Preparation Materials
- Introduction ................................................................. Page 5
- Training Session Checklist ............................................. Page 6
- Trainer’s Instructions for Using the Book *Motivation in the Workplace* Page 7
- Tips for Transferred Learning ........................................ Page 8
- Possible Session Agendas ................................................ Page 9
- Trainer’s Personalized Session Agenda ......................... Page 10
- Invitation Memo to Participants ................................. Page 11
- Trainer’s Instructions for the Pretraining Survey ........ Page 12

### Training Exercises
- Introducing the Session to Participants ....................... Page 14
- Defining Your Management Style ............................... Page 15
- Show Video and Review ............................................... Page 16
- Hear and Understand Me—Active Listening ............... Page 17
- Even If You Disagree, Please Don’t Make Me Wrong .... Page 19
- Create a Friendly Organizational Culture, from the book *Motivation in the Workplace* ........................... Page 20
- Acknowledge the Greatness Within Me ....................... Page 21
- Remember to Look for My Loving Intentions ............... Page 23
- Tell Me the Truth with Compassion .......................... Page 24
- Maintain Open Communication, from the book *Motivation in the Workplace* .......................................... Page 25
- Posttraining Survey ..................................................... Page 26
- Follow-Up Letter .......................................................... Page 27

### Overheads
- Overheads 1–4

### Participant Materials
- Pretraining Survey
- “I” Sentences Worksheet and Trainer’s Key
- Positive Phrasing Worksheet and Trainer’s Key
- Positive Intentions Skills Practice Worksheets (3)
- Tell Me the Truth with Compassion Worksheet
- Posttraining Survey
- Session Evaluation Form
Introduction

Imagine...that the purpose of life is spiritual growth and learning, particularly learning about how to love.

Not your typical beginning to a video on management. But this training course is anything but typical.

Management skills are among the hardest to teach. Why? Because they involve people skills. And all too often we are too hesitant and reluctant to learn how to better interact and communicate with other people.

With this course, we will not only tackle those issues, we will teach the skills necessary to manage other people with care and understanding. It is called managing from the heart. And after this training course, your participants will know how to manage from the heart using five basic principles:

• Hear and understand me.
• Even if you disagree, please don’t make me wrong.
• Acknowledge the greatness within me.
• Remember to look for my loving intentions.
• Tell me the truth with compassion.

Icon Key

Shown below are the icons and descriptions used throughout this training leader's guide.

Read or paraphrase
Overhead
Worksheet
Ask and discuss
Flip chart
Preparation Materials

Training Session Checklist

This checklist should be used to help you gather all necessary materials for the training session.

Meeting Preparation

☐ Determine your training objectives.
☐ Measure the current status of your participants, using the Pretraining Survey.
☐ Choose different ways to train to ensure transfer of information.

Location

☐ Create a relaxed environment.
☐ Make sure all seats have a good view of the visuals.
☐ Make sure there is enough light to take notes when participants view the video Managing from the Heart.
☐ Provide an adequate writing surface for participants.
☐ Assure good acoustics.
☐ Assure that your room is accessible and equipped for participants with disabilities.

Video Equipment

☐ Make sure the VCR is properly connected to the monitor.
☐ Test the VCR, and check monitor for proper picture, color, and volume.
☐ Make sure the tape is rewound and ready to play before beginning your session.
☐ Check all other equipment for proper operation.

Materials

☐ Training Leader’s Guide
☐ Videotape, Managing from the Heart
☐ Overheads
☐ Paper and Pencils
☐ Additional Equipment
☐ Participant Worksheets
Trainer’s Instructions for Using the Book Motivation in the Workplace

Group Training Sessions

Motivation in the Workplace, part of American Media’s How-To Book Series, is an excellent complement to your group training session. Throughout this guide, we have included several exercises from Motivation in the Workplace. To use the book effectively, you may:

• Use the exercises we have developed for this course, incorporate other exercises from the book that you feel better meet the needs of your organization, or use a combination of both.
• Assign reading of an entire chapter of the book that covers an area you wish to emphasize in your session.
• Assign reading of the entire book and completion of assigned exercises.

Self-Study

No time to call everyone together for training? No problem—American Media has made training even easier with its self-study programs. By combining the effectiveness of the video, Managing from the Heart, and American Media’s How-To Training Book, Motivation in the Workplace, your employees can improve their skills through self-guided study.

Written in a user-friendly, easy-to-understand style, the book includes interactive exercises in each chapter to help the reader process the information and put it into action—ensuring that the information makes an impact.

On-the-Job Reference Tool

Providing copies of the book to each training participant allows you to continue instilling the importance of team issues in the workplace after your session is completed. The book is an excellent tool for continued learning and provides an easy, hands-on reference for use on the job.

Order discounted copies for all your session participants today by calling American Media at 1-800-262-2557.
Tips for Transferred Learning

Keep in mind the following tips when conducting any adult training. You may wish to review these tips and incorporate them into your session planning.

1. Adults learn when they feel they need to.
Discuss ways your training will help participants improve job performance by learning how to manage from the heart.

2. Adults learn by doing.
Use the exercises found in this Training Leader’s Guide, or create your own to give participants an opportunity to practice skills they can take back to their jobs.

3. Adults learn by solving realistic problems.
Discuss and analyze actual on-the-job situations. Allow the trainees to solve these real-life problems by using what they have learned.

4. Adults learn in an informal environment.
Design your training room to be as informal as possible. Avoid classroom-style seating. If appropriate, encourage training participants to wear casual clothing. Encourage discussion and interaction to make participants feel more comfortable.

5. Adults learn by different training methods.
Vary your training methods. Combine discussions, role-plays, case studies, self-evaluations, and action planning in your training session. Using a variety of methods reinforces your message and promotes audience involvement.

6. Trainers learn by follow-up methods.
Follow-up methods are crucial when determining the success of transferred training. Feedback from your participants’ managers, follow-up surveys or training sessions, three-, six-, and nine-month skill-testing sessions, etc., can help you evaluate the information being used on the job site.
# Possible Session Agendas

Two session agendas have been provided to help guide you through your Managing from the Heart training session. You can modify these agendas to meet the needs of your participants. A blank agenda sheet is also provided on page 10 if you wish to create your own agenda.

## 2+-Hour Session

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time</th>
<th>Page Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introducing the Session to Participants</td>
<td>10 minutes</td>
<td>Page 14</td>
</tr>
<tr>
<td>Show Video and Review</td>
<td>40 minutes</td>
<td>Page 16</td>
</tr>
<tr>
<td>Hear and Understand Me—Active Listening</td>
<td>20 minutes</td>
<td>Page 17</td>
</tr>
<tr>
<td>Acknowledge the Greatness Within Me</td>
<td>30 minutes</td>
<td>Page 21</td>
</tr>
<tr>
<td>Remember to Look for My Loving Intentions</td>
<td>30 minutes</td>
<td>Page 23</td>
</tr>
<tr>
<td>Session Evaluation</td>
<td>5 minutes</td>
<td></td>
</tr>
</tbody>
</table>

## 4 1/2-Hour Session

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time</th>
<th>Page Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introducing the Session to Participants</td>
<td>10 minutes</td>
<td>Page 14</td>
</tr>
<tr>
<td>Defining Your Management Style</td>
<td>15 minutes</td>
<td>Page 15</td>
</tr>
<tr>
<td>Show Video and Review</td>
<td>40 minutes</td>
<td>Page 16</td>
</tr>
<tr>
<td><strong>15-Minute Break</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hear and Understand Me—Active Listening</td>
<td>20 minutes</td>
<td>Page 17</td>
</tr>
<tr>
<td>Even If You Disagree, Please Don’t Make Me Wrong</td>
<td>20 minutes</td>
<td>Page 19</td>
</tr>
<tr>
<td>Create a Friendly Organizational Culture, from the book</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Motivation in the Workplace</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Acknowledge the Greatness Within Me</td>
<td>30 minutes</td>
<td>Page 21</td>
</tr>
<tr>
<td><strong>15-Minute Break</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remember to Look for My Loving Intentions</td>
<td>30 minutes</td>
<td>Page 23</td>
</tr>
<tr>
<td>Tell Me the Truth with Compassion</td>
<td>20 minutes</td>
<td>Page 24</td>
</tr>
<tr>
<td>Maintain Open Communication, from the book</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Motivation in the Workplace</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Posttraining Survey</td>
<td>15 minutes</td>
<td>Page 25</td>
</tr>
<tr>
<td>Session Evaluation</td>
<td>5 minutes</td>
<td></td>
</tr>
</tbody>
</table>

These suggested times are approximate and may vary depending on the needs of your organization and the number of participants in attendance.
**Preparation Materials**

---

**Trainer’s Personalized Session Agenda**

You may want to plan a session that is different from the agendas provided on page 9. Below is a blank agenda to assist you in outlining your session.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Invitation Memo to Participants

This memo can be sent to your participants approximately one to two weeks prior to your training session. Modify the letter to fit your specific needs.

(Today’s Date)

To: (Participant’s Name)
From: (Trainer’s Name)
Re: Managing from the Heart Training Session

As a manager, you are probably aware of the hundreds of different management theories available for study. But few of those theories take into account the most important factor—the human factor. When you manage people, you affect their feelings and emotions, and by doing so you affect their attitude toward work. To inspire people to enjoy their work and perform at their highest level, you need to manage from the heart.

On (insert date), we will be holding a training session on how to manage from the heart. During the session you will learn the five necessary skills for managing from the heart:

• Hear and understand me.
• Even if you disagree, please don’t make me wrong.
• Acknowledge the greatness within me.
• Remember to look for my loving intentions.
• Tell me the truth with compassion.

To help us get the most out of our training session, please take the time to complete the enclosed Pretraining Survey, and return it to me by (insert date). Your honest response to these questions will help us place emphasis on critical areas.

Please mark your calendar to attend this very important training session.

Thanks!
Trainer’s Instructions for the Pretraining Survey

1. Complete the Invitation Memo to Participants (page 11), and enclose a copy of the Pretraining Survey (included with Participant Materials) to each of the participants. Ask them to complete this survey and return it to you at least five days before the training session.

2. Use the Pretraining Survey to evaluate the needs of your participants. This survey will allow you to design the training session to emphasize areas or topics of importance.

3. A Posttraining Survey is also provided for use at the end of the training session, to determine if your training goals have been met, or if further education and training are necessary.
Training Exercises
Introducing the Session to Participants

Time Required:
• 10 minutes

Materials Needed:
• Overhead 1

Objective:
• To introduce participants to each other and create an environment conducive to training.

1. Ask participants to go around the room and introduce themselves. Ask participants to briefly explain their jobs and what type of management experience they have had.

2. After all participants have finished their introductions, introduce yourself to the group. Then describe the agenda for this training session and outline the training goals.

3. Display Overhead 1. Read or paraphrase the following to the group:

   In this session you will have the opportunity to learn how to:
   • Hear and understand me.
   • Even if you disagree, please don’t make me wrong.
   • Acknowledge the greatness within me.
   • Remember to look for my loving intentions.
   • Tell me the truth with compassion.

4. Ask and discuss the following questions with the group:
   • Has anyone here read or heard of the book Managing from the Heart? If so, what did you think of the book and its ideas?
   • What do you think the term managing from the heart means?
   • Are you open to the idea of being a more caring and compassionate manager?
Defining Your Management Style

Time Required:
- 15 minutes

Materials Needed:
- Paper and Pen

Objective:
- For each participant to outline his or her thoughts/philosophy on management.

1. Read or paraphrase the following:

   In the video we’re about to watch, Harry will learn some new ideas about management—ideas that directly conflict with his current management style. Before we watch the video, I’d like each of you to take five minutes to think of how you view your role as a manager, or how you would describe your management style. Write your thoughts down on paper. They do not have to be formal sentences. Just begin to jot down what comes into your head about what you think management is, and how you currently act as a manager.

2. Allow participants 5 to 7 minutes to put their thoughts on paper. After enough time has passed, read or paraphrase the following:

   These thoughts are for your eyes only. Most of us are appointed or promoted into management without any specific management training or idea of what our role as a manager should be. I hope this essay has given you a chance to start thinking about what your philosophy on management is, how you want to manage your employees, how you want your employees to feel about you, and what results you want to achieve as a manager.

   Now, let’s start the video and see how Harry views his role as manager, and how his views are changed by an other-worldly experience.
Show Video and Review

<table>
<thead>
<tr>
<th>Time Required:</th>
<th>• 40 minutes</th>
</tr>
</thead>
</table>

Materials Needed:
• Video, *Managing from the Heart*
• Pretraining Survey

Objective:
• To apply the knowledge gained from the video.

1. View the video.

2. After viewing the video, distribute copies of the **Pretraining Survey** to participants.

3. Read or paraphrase to the group:
   
   Now that you have viewed the video, let’s discuss the survey you filled out before the training session.

4. Read each statement on the Pretraining Survey (the five basic principles) and ask participants to share their thoughts—pro and con—on the principles demonstrated in the video.
Hear and Understand Me—Active Listening

Time Required:
- 20 minutes

Materials Needed:
- Paper and Pen for notes

Objective:
- To discuss techniques to improve listening skills.

1. Read or paraphrase the following to the group:

   In the video, Selena teaches Harry, “Listening is not passive.” True. Listening isn’t passive, it’s active. Active listening skills are essential to communication. Unfortunately, many learn the hard way that they are actually very poor listeners. Studies have shown that most people listen at 25% efficiency. In this exercise, we’re going to learn and discuss the skills necessary to rise above that 25% level. As we go through them, I encourage you to take notes on these dos and don’ts of communication.

   To Be an Active Listener:

   - **Stop whatever else you are doing and make eye contact with the person speaking.**
     Show in your nonverbal communication—body posture, gestures, facial expressions—that what the person is saying is important.

   - **Concentrate on what the person is saying and ask yourself:**
     - What is the key issue?
     - What results are wanted?

   - **Paraphrase back to the person what he or she has just said to you.**
     This will help you clarify what you have heard and will assure the speaker that you have listened to what he or she has said.

   These points are what you should do to be an active listener. There are also a few things you should not do.
As an Active Listener You Should Never:

- Make mental judgments about what the person is saying.
- Mentally rehearse what the person will say or do next.
- Assume you know all the facts.
- Interrupt or complete sentences.

By remembering and practicing these active listening skills, you and your employees will be working toward 100% effective communication—well above the 25% average. Remember, while using these Active Listening techniques may seem cumbersome at first, the more you practice them, the easier and more effective their use will be.
**Even If You Disagree, Please Don’t Make Me Wrong**

### Time Required:
- 20 minutes

### Materials Needed:
- “I” Sentences Worksheet

### Objective:
- To practice use of “I” sentences.

1. Read or paraphrase the following to the group.

   **Nobody likes to be told he or she is wrong. And trying to correct someone can be difficult. One of the best ways to handle these types of situations is to use an “I” sentence. “I” sentences allow you to take the focus off the other person and instead focus on your own thoughts and feelings. Let’s take a few minutes to practice how these “I” sentences can be used.**

2. Distribute copies of the “I” Sentences Worksheet (found in the Participant Materials). Ask each person to complete the worksheet.

3. When all participants are done, discuss answers as a group. Read through each sentence and ask participants to volunteer answers, or go around the group and ask each participant to give his or her answer. Participants should discuss each others answers, offering comments and constructive criticism. A Trainer’s Key has been provided to assist in this discussion.

4. When you are finished with the worksheet, read or paraphrase to the group:

   **The video tells us, “When people make mistakes, give them a chance to correct the mistake without making the person wrong.” While this may take extra patience on your part, in the long run, it will make your employees feel more self-assured about making independent decisions. Only a person who is comfortable in occasionally making a mistake will truly grow into a learned and contributing employee.**
Create a Friendly Organizational Culture from the Book Motivation in the Workplace

Trainer’s Instructions

1. Ask participants to turn to page 75 of the book Motivation in the Workplace.

2. Beginning with the section titled Create a Friendly Organizational Culture, have participants read pages 75 through 79 and complete the Take a Moment exercise found on page 79.

3. After completing the exercise, ask for volunteers to share their answers. Write down all ideas on a flip chart. When volunteers share an idea they have used in the past, ask them to explain their experience. Some questions to ask and discuss:
   • Did the event accomplish what you had hoped?
   • If yes, why do you think it worked well?
   • If no, why don’t you think it worked?
   • Did employees benefit from the event?
   • Did it improve morale?
   • Would you do it again? recommend it to others?
   • What changes would you make?

4. Read or paraphrase the following to the group:
   
   Hopefully, this has given us all some new ideas to try. I encourage you all to implement at least one of these organizational events into your workplace. Positive employee morale is one of your biggest tools in creating a productive workforce, and social events are a good way to reward employees, keep them happy in their jobs, and create a friendly organizational culture.
**Acknowledge the Greatness Within Me**

**Time Required:**
- 30 minutes

**Materials Needed:**
- Flip Chart
- Positive Phrasing Worksheet

**Objective:**
- To learn how to acknowledge the positive traits in others.

1. Read or paraphrase the following:

   We all have the potential to grow and learn as human beings. Our employees are no different. They not only have the ability to grow and learn in their positions, they will do so faster and to a greater extent if their accomplishments are continually acknowledged and praised.

   You know, as managers, that this can take some practice. Sometimes employees just do not perform at the level you want. Sometimes they are slow. Sometimes they overstep their expertise. Sometimes they make decisions without having full knowledge of a situation. But these things can probably be said about most of us. Let’s take a few minutes to think of some traits that we view as negative, and try to put a positive spin on them. For example, an employee who works slowly can be thought of as a thorough employee. Let’s brainstorm for some similar examples.

2. Using a flip chart, draw a line down the center of a page. Label one side negative characteristics and the other positive characteristics. Ask the group to brainstorm for employee traits that annoy them. After compiling a list of negative traits, ask the group to rethink those traits in a positive light. Some examples include:

   **Negative**
   - Hasty
   - Shoots from the hip
   - Unimaginative
   - Spends too much time socializing
   - Doesn’t see big picture

   **Positive**
   - Quick decision maker
   - Thinks quickly on his/her feet
   - Concentrates on assigned tasks
   - Gets along well with coworkers
   - Detail-oriented
3. After about 5–10 minutes of brainstorming, participants should grasp the idea of how to turn negative traits into positive traits. Distribute a copy of the Positive Phrasing Worksheet to all participants. Give each participant time to complete the worksheet. When done, discuss answers as a group. A Trainer’s Key has been provided to assist in this discussion.

4. Read or paraphrase the following:

This exercise has shown us that many times what we view as negative traits can also be viewed as positive traits. Often it is our perception that needs adjustment, not the action of our employees. And if we need to help our employees make changes in their work habits, they will respond better if we approach them with positive statements, instead of negative ones.
Training Exercises

Remember to Look for My Loving Intentions

<table>
<thead>
<tr>
<th>Time Required:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 30 minutes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Materials Needed:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Positive Intentions Skills Practice Worksheets</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Objective:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• To practice acknowledging the positive traits in others.</td>
</tr>
</tbody>
</table>

1. Read or paraphrase the following:

Remember to look for my loving intentions. This was one of the most difficult skills for Harry to master in the video. And it may be the most difficult for all of us. In a work situation, it may seem out of place to look for someone's loving intentions. But in actuality, it is an extension of what we’ve learned so far—looking for the positive in someone’s actions, knowing that they have the best of intentions for the organization, and recognizing their contributions.

In the exercise we’re about to conduct, we’re going to practice recognizing the positive intentions of people with different opinions than our own.

2. Break participants into groups of three. Each person will play a role in the skills practice, either as a participant or the observer.

3. Distribute copies of the Positive Intentions Skills Practice Worksheets (found in the Participant Materials). Ask each person to assume a role. Give participants a minute to read through the worksheet, and then give them five minutes to complete the skills practice.

4. After all groups are done, have the Observer, who should have been taking notes, report back to the larger group on what he or she observed. Remind participants that this should not be used as criticism but as a learning device. The observer should report on the ideas listed on the worksheet.

5. Read or paraphrase to the group:

Working with people we disagree with, or even dislike, is likely the hardest part of anyone’s job. Yet it is inevitable. Learning the skills you practiced in this exercise, and putting them to use, will help you recognize the positive intention of everyone you interact with. Doing so will help you achieve a result you both desire.
## Tell Me the Truth with Compassion

### Trainer’s Instructions

#### Time Required:
- 20 minutes

#### Materials Needed:
- Tell Me the Truth with Compassion Worksheet

#### Objective:
- To discuss the necessity of truth in a work relationship.

1. Read or paraphrase the following:

   *In the video, Selena tells Harry that “To get the best from people, they need to know the whole truth in a caring way.” We know that this is not always easy. When dealing with people’s feelings, telling the whole truth can be difficult. Yet as we’ve seen, it needs to be done.*

   The worksheet for this video will help us outline a plan for helping employees make improvements in their work performance.

2. Distribute copies of the Tell Me the Truth with Compassion Worksheet. Allow participants 5–10 minutes to complete.

3. Read or paraphrase the following:

   *You’ve learned the skills to be compassionate, caring, and honest with your employees. And now you have an action plan to get you started.*

   *As managers we sometimes have to confront employees about their work behavior. But today we’ve learned that we can do this in a positive manner. And approaching employees with a caring and compassionate attitude can help you increase morale and productivity.*
Maintain Open Communication from the Book Motivation in the Workplace

Time Required:
- 20 minutes

Materials Needed:
- American Media How-To book *Motivation in the Workplace*
- Flip Chart

Objective:
- To learn methods for maintaining open communication in the workplace.

1. Ask participants to turn to page 84 of the book *Motivation in the Workplace*.

2. Ask participants to read Chapter Six, *Maintaining Open Communication*, from pages 84 through 95. When they have finished reading, ask them to complete the *Take a Moment* exercise found on page 93.

3. After completing the exercise, ask for volunteers to share their answers. Write down all ideas on a flip chart with the heading “Methods for Communicating with Employees.” When volunteers share an idea they have used, ask them to explain their experience. Some questions to ask and discuss:
   - Do you think this method of communication has been effective? Explain.
   - Is this the only method of communication you use? If so, do you feel it is adequate?
   - How do you think this method could be updated or enhanced?

4. Read or paraphrase the following to the group:

   Hopefully this has given us all some new ideas to try. Open and honest communication is not only the surest way to keep employees informed, it will also give them a sense of feeling valued. I encourage you all to write down at least two new ideas from this list and implement them into your workplace.
Posttraining Survey

Time Required:
• 15 minutes

Materials Needed:
• Posttraining Survey

Objective:
• To determine if participants have understood the material presented in this session.

1. Read or paraphrase the following:
   This worksheet is designed to evaluate the effectiveness of this training session. It will help us determine what areas we need to improve for future sessions. In no way will it be used to penalize you.

2. Distribute the Posttraining Survey (found in the Participant Materials) and give participants time to complete it. This survey is designed to help the participants reflect on what they have learned and will let you know how effective the training has been, and if it has been received.
Follow-Up Letter

The letter below should be personalized and sent to each participant one to two weeks after your training session. By following up in this manner, your participants will have the opportunity to review and utilize what they learned in their work environment.

(Today’s Date)

To: (Participant’s Name)
From: (Trainer’s Name)
Re: Managing from the Heart Training Session

Earlier this month you attended a training session in which we talked about the importance of managing employees from the heart, and you learned the skills necessary to do so effectively. During the training session you learned the five principles of managing from the heart. They are:

- Hear and understand me.
- Even if you disagree, please don’t make me wrong.
- Acknowledge the greatness within me.
- Remember to look for my loving intentions.
- Tell me the truth with compassion.

If you would like to continue your own self-study to improve your management skills, you are welcome to contact me or (name/department) for use of the Managing from the Heart video, and other materials we have collected on successful management.

Our hope is that you have been able to put the ideas you learned to work within your area. If you have any questions, please contact me at extension (###).
Overheads
Session Objectives

• Hear and understand me.

• Even if you disagree, please don’t make me wrong.

• Acknowledge the greatness within me.

• Remember to look for my loving intentions.

• Tell me the truth with compassion.
Most people listen at 25% efficiency.
To Be an Active Listener:

• Stop whatever else you are doing and make eye contact with the person speaking.

• Concentrate on what the person is saying and ask yourself:
  – What is the key issue?
  – What results are wanted?

• Paraphrase back to the person what he or she has just said to you.
As an Active Listener
You Should Never:

• Make mental judgments about what the person is saying.

• Mentally rehearse what the person will say or do next.

• Assume you know all the facts.

• Interrupt or complete sentences.
Participant Materials
Pretraining Survey

INSTRUCTIONS:
Read each of the statements below and evaluate how much you agree with the statement as a management style. Circle either Agree, Somewhat Agree, or Don’t Agree, depending on your opinion. Briefly explain your answer following each question.

1. I need to hear and understand what my employees are saying and doing.

<table>
<thead>
<tr>
<th>Agree</th>
<th>Somewhat Agree</th>
<th>Don’t Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Explain: ____________________________________________________________________________
____________________________________________________________________________

2. I should not make my employees feel wrong, even if I disagree with them.

<table>
<thead>
<tr>
<th>Agree</th>
<th>Somewhat Agree</th>
<th>Don’t Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Explain: ____________________________________________________________________________
____________________________________________________________________________

3. I need to acknowledge the greatness within my employees and coworkers.

<table>
<thead>
<tr>
<th>Agree</th>
<th>Somewhat Agree</th>
<th>Don’t Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Explain: ____________________________________________________________________________
____________________________________________________________________________

4. I need to remember to look for my employees’ loving intentions.

<table>
<thead>
<tr>
<th>Agree</th>
<th>Somewhat Agree</th>
<th>Don’t Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Explain: ____________________________________________________________________________
____________________________________________________________________________

5. I need to tell my employees the truth with compassion.

<table>
<thead>
<tr>
<th>Agree</th>
<th>Somewhat Agree</th>
<th>Don’t Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Explain: ____________________________________________________________________________
____________________________________________________________________________
“I” Sentences Worksheet

INSTRUCTIONS:
Read through the sentences listed below. Each sentence is phrased as a statement that makes the other person wrong. After each sentence, rewrite the statement and make it an “I” sentence. “I” sentences should take the focus of the other person and put it on yourself. Start each sentence with “I” and finish by describing yourself, your feelings, or your wishes. An example is provided.

Example: You screwed the project up.
“I” sentence: I feel the project is not going as well as it should be.

1. You don’t understand anything.

________________________________________________________________________________

________________________________________________________________________________

2. You always rush to judgment.

________________________________________________________________________________

________________________________________________________________________________

3. That’s a stupid idea.

________________________________________________________________________________

________________________________________________________________________________

4. That idea will never work.

________________________________________________________________________________

________________________________________________________________________________

5. We don’t have time to develop that idea.

________________________________________________________________________________

________________________________________________________________________________

6. Just do it the way we’ve always done it.

________________________________________________________________________________

________________________________________________________________________________

©1998 American Media
Permission is granted for unlimited reproduction of the worksheets contained in this training leader’s guide for use in your organization’s training sessions.
“I” Sentences Worksheet
Trainer’s Key

INSTRUCTIONS:
Following is an answer key for the “I” Sentences Worksheet. These are possible answers. Participants may develop equally workable answers.

Example: You screwed the project up.
“I” sentence: I feel the project is not going as well as it should be.

1. You don’t understand anything.
   I think that perhaps I wasn’t clear about what I wanted accomplished with this project.

2. You always rush to judgment.
   I think we should stop a minute and rethink all of our options.

3. That’s a stupid idea.
   That’s an interesting point, but I don’t think I understand how it applies to our project. Could you explain what your thoughts are?

4. That idea will never work.
   I don’t think that idea would really work in our situation because…. What are your thoughts?

5. We don’t have time to develop that idea.
   Considering our time limitations, I think we should stick to our original plan. Making changes at this point would probably take too much time.

6. Just do it the way we’ve always done it.
   That’s an interesting idea, and perhaps we can develop it for future projects. But for this project I think we should stick to the processes that have worked for us in the past.
Positive Phrasing Worksheet

INSTRUCTIONS:
Read through the sentences listed below and complete them as a constructive criticism. Each sentence provides a positive approach to an employee. The needed result is provided in parentheses with each positive approach. Finish the approach with a constructive criticism that addresses the needed result, remembering to do so in a positive manner. An example is provided.

Example:
Positive Approach: Bill, you’re doing a great job with our accounts receivable. You’re really doing a thorough job.
Constructive Criticism (Work Faster): I see, though, that we’re a little behind schedule for the month. Do you have any ideas how we could complete the accounts receivable in a more timely manner?

1. Positive Approach: Keesha, you’ve really mastered your job duties. We think you’re doing a great job with what we’ve given you.
   Constructive Criticism (Be More Creative)

2. Positive Approach: Ahim, you're in a position where you need to make a lot of decisions quickly. And you do a great job of thinking on your feet.
   Constructive Criticism (Don't make such hasty decisions)

3. Positive Approach: Lin, I wanted to let you know we’re all happy to have you on our team. I can tell you are well-liked and admired by your coworkers.
   Constructive Criticism (Socialize less)
Positive Phrasing Worksheet
Trainer’s Key

INSTRUCTIONS:
Following is an answer key for the Positive Phrasing Worksheet. These are possible answers. Participants may develop equally workable answers.

Example:
Positive Approach: Bill, you’re doing a great job with our accounts receivable. You’re really doing a thorough job.
Constructive Criticism (Work Faster): I see, though, that we’re a little behind schedule for the month. Do you have any ideas how we could complete the accounts receivable in a more timely manner?

1. Positive Approach: Keesha, you’ve really mastered your job duties. We think you’re doing a great job with what we’ve given you.
Constructive Criticism (Be More Creative)
Considering your expertise in the area, do you have any ideas on how we could expand or enhance your job duties so that the organization’s overall efficiency could be improved?

2. Positive Approach: Ahim, you’re in a position where you need to make a lot of decisions quickly. And you do a great job of thinking on your feet.
Constructive Criticism (Don’t make such hasty decisions)
Perhaps we can brainstorm for ways to make your job easier. Do you have any ideas on how to standardize some of the tasks associated with your job, so that you aren’t required to make so many last-minute decisions?

3. Positive Approach: Lin, I wanted to let you know we’re all happy to have you on our team. I can tell you are well-liked and admired by your coworkers.
Constructive Criticism (Socialize less)
I’ve also noticed, though, that you have a lot of time on your hands during the day. I’m worried that we aren’t challenging you enough in your current duties, and I want to make sure we keep you from becoming bored in your job. I wanted to take some time with you and think of ways to expand your job duties if needed, and keep your job challenging. We’d like to keep you happy.
INSTRUCTIONS: Read through the scenario below. Be prepared to assume the role of this person. Use information provided here to act as you think the person would in this situation. Be prepared to embellish or add to the role as you see necessary.

You are an account manager working on a media proposal for Client XYZ. The client is a conservative financial firm that wants to update its look while still retaining its established corporate identity. The demographic for this firm is older, affluent consumers with available money to invest. You have worked hard to establish a relationship with this client and feel like you are the person who best understands their needs.

You must work with the creative director to create a media plan for this client. You have worked with this person before and feel he or she is self-indulgent in his or her work. He or she often creates work that satisfies his or her own artistic taste, while sacrificing the wants and needs of the client. You fear that his or her involvement as creative director on this project jeopardizes the work you have done so far.

The two of you are about to meet to discuss the proposal for this client.
INSTRUCTIONS: Read through the scenario below. Be prepared to assume the role of this person. Use information provided here to act as you think the person would in this situation. Be prepared to embellish or add to the role as you see necessary.

You are a talented creative director who has won numerous awards for your creative talent. Your style tends to be colorful, youthful, and hip. You feel that part of your job as creative director is to show clients something they haven't seen before, and might not have considered. You feel your designs can help modernize a client’s image, introducing them to a newer market.

For one of your current projects, you are working with an account manager whom you have disagreed with in the past. You feel he or she indulges clients’ tendencies to be old-fashioned and outdated, when he or she should be educating them about current media trends that can help them appear current, cutting-edge, and sophisticated.

The two of you are about to meet to discuss the proposal for this client.
INSTRUCTIONS: You will be observing a role-play between two coworkers. Take notes on what you observe. Use the questions below as guidelines for your observations.

**Account Manager (AM) Behavior**
- Is the AM polite and respectful of the Creative Director (CD)?
- Did the AM listen to the CD’s explanation for his or her opinions?
- Did the AM ask questions to clarify and better understand what the CD was saying?
- Did the AM offer explanations for his or her own opinions?
- Did the AM effectively work toward a solution that is agreeable to both parties?

**Creative Director Behavior**
- Is the Creative Director (CD) polite and respectful of the Account Manager (AM)?
- Did the CD listen to the AM’s explanation for his or her opinions?
- Did the CD ask questions to clarify and better understand what the AM was saying?
- Did the CD offer explanations for his or her own opinions?
- Did the CD effectively work toward a solution that is agreeable to both parties?
Tell Me the Truth with Compassion Worksheet

Instructions: Complete the action plan below to outline when and how to approach an employee about job behavior.

Employee name: ______________________________________________________________

Employee’s Positive Traits:

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

Behavior/skills that need improvement:

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

Write an opening positive approach to the employee, including a constructive criticism that addresses the needed change:

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

Date to discuss job performance and possibilities with employee (within 2 days)

__________________________________________________________________________
Posttraining Survey

INSTRUCTIONS:
Read each of the statements below and evaluate how well you think you can adapt the statement into your management style. Circle either Very Well, Well, Fairly Well, Not Well, or Not At All, depending on your opinion. Briefly explain your answer following each question.

1. I need to hear and understand what my employees are saying and doing.

<table>
<thead>
<tr>
<th>Very Well</th>
<th>Well</th>
<th>Fairly Well</th>
<th>Not Well</th>
<th>Not At All</th>
</tr>
</thead>
</table>

Explain: __________________________________________________________

____________________________________________________________________

2. I should not make my employees feel wrong, even if I disagree with them.

<table>
<thead>
<tr>
<th>Very Well</th>
<th>Well</th>
<th>Fairly Well</th>
<th>Not Well</th>
<th>Not At All</th>
</tr>
</thead>
</table>

Explain: __________________________________________________________

____________________________________________________________________

3. I need to acknowledge the greatness within my employees and coworkers.

<table>
<thead>
<tr>
<th>Very Well</th>
<th>Well</th>
<th>Fairly Well</th>
<th>Not Well</th>
<th>Not At All</th>
</tr>
</thead>
</table>

Explain: __________________________________________________________

____________________________________________________________________

4. I need to remember to look for my employees’ loving intentions.

<table>
<thead>
<tr>
<th>Very Well</th>
<th>Well</th>
<th>Fairly Well</th>
<th>Not Well</th>
<th>Not At All</th>
</tr>
</thead>
</table>

Explain: __________________________________________________________

____________________________________________________________________

5. I need to tell my employees the truth with compassion.

<table>
<thead>
<tr>
<th>Very Well</th>
<th>Well</th>
<th>Fairly Well</th>
<th>Not Well</th>
<th>Not At All</th>
</tr>
</thead>
</table>

Explain: __________________________________________________________

____________________________________________________________________

©1998 American Media
Permission is granted for unlimited reproduction of the worksheets contained in this training leader’s guide for use in your organization’s training sessions.
### Session Evaluation Form

**Managing from the Heart**

**INSTRUCTIONS:**
Please circle the number that best describes your evaluation of the training session.

<table>
<thead>
<tr>
<th></th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Uncertain</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>This training program concentrates on the importance of developing a caring management style.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>This training program helped me understand the importance of managing from the heart.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>As a result of this program, I am more confident in my ability to managing my employees in a caring manner.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>The objectives of the program were clearly presented.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Opportunities to ask questions and discuss issues were sufficient.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>The session was well organized.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

The best part of this program was: __________________________________________

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

This program could be improved by: __________________________________________

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

Additional comments _______________________________________________________

_________________________________________________________________________

_________________________________________________________________________

I would recommend this session to others. (Circle one.)  

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

©1998 American Media  
Permission is granted for unlimited reproduction of the worksheets contained in this training leader's guide for use in your organization's training sessions.