Peer Today,
Boss Tomorrow
Navigating Your Changing Role

Facilitator Guide
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This program is designed to...

Peer Today, Boss Tomorrow is designed to help your participants make a successful transition from “coworker” to “manager” or “supervisor.”

Making the leap from peer to boss is never easy. New managers frequently struggle to balance their old coworker relationships with their new management responsibilities.

Peer Today, Boss Tomorrow presents four proven strategies that will help new supervisors navigate those changing relationships and prepare for the most difficult situations they are likely to encounter as they assume their new role.

The four key learning strategies are:
1. Accept your new role
2. Establish clear boundaries
3. Communicate
4. Take action

Participants will learn how to address these common situations:
- Overcoming the fear of lost friendships and lost rapport
- Disciplining a former peer
- Managing coworkers who are older
- Enforcing a policy the individual may have personally broken prior to becoming a manager
- Avoiding the appearance of favoritism
- Keeping confidential information confidential
- Admitting mistakes in a way that builds trust and credibility with former peers (and all direct reports)

By the way, we know that your organization has its unique personality, culture, needs, and issues. Peer Today, Boss Tomorrow was designed with that in mind. We have provided three different agendas and supplemental material in the Facilitator Resource Section that will make it easy for you to customize the training to your organization’s needs. The program is flexible enough to be used as the foundation for a new supervisory orientation; or you can easily adapt it and integrate it into your existing management training initiatives.
The rock-bottom benefits are...

Here are the benefits of this course for employees and for the organization:

For employees:
- Reduces stress and frustration—employees will have the competence and confidence to make a successful transition to their new role
- Increases efficiency and effectiveness—employees will be armed with knowledge and skills that will help them do the right thing, in the right way, at the right time
- Builds respect and recognition within the organization—employees will be able to maximize their opportunities for career advancement
- Promotes job satisfaction and personal satisfaction

For the organization:
- Become an employer of choice—employees actively seek out and stay with an organization that has a reputation for employing competent, caring managers
- Attract and retain loyal customers—skilled managers translate into motivated employees, and motivated employees translate into satisfied, loyal customers
- Improve productivity while minimizing the potential for lawsuits—competent managers have the ability to develop and maintain a workplace based on respect and trust; and they have the skills needed to address situations before they escalate into disruptive violations of law and policy
Facilitator Guide

Participants will know how to...

When they have completed this course, participants will be able to:

- Explain the role of supervisor
- State how the role of supervisor is different from that of a non-manager employee
- Navigate their changing role by applying four strategies to help their transition from peer to boss
- Develop an action plan to put the four strategies into action back on the job
Participants will experience...

*Peer Today, Boss Tomorrow* uses...

- Four strategies to help navigate the transition from peer to boss effectively
- A video to focus attention on the actions necessary to execute each strategy
- A variety of focused discussions, exercises, case studies, and skill practices that build understanding of the four strategies and actions to execute each strategy
- Worksheets to support discussions, exercises, case studies, and practices
- Action plans to use the skills back on the job
The complete package includes...

- *Peer Today, Boss Tomorrow* videotape or DVD*
- Facilitator Guide
- Reproducible Participant Materials
- Reproducible Self-Study Materials
- PowerPoint® slides/overheads
- Access to industry-specific alternatives for certain case studies

*While we use the term “video” throughout this facilitator guide, if you are using the DVD, the process is basically the same. So, where we say “video” or “videotape,” just think “DVD.”*
What can be reproduced and what cannot...

We would really appreciate it if you followed the instructions below for reproducing or otherwise using the materials in this course.

All materials included with this program are copyright protected.

Please do not rent, sell, loan, or make copies of:

- The videotape or DVD
- The Facilitator Guide

Please do feel free to make copies to your heart’s content of:

- The Participant Materials
- The Self-Study Materials
- The handouts, overheads, and flipcharts

Thank you for your help.
Set your agenda...

To be honest, we have seen people go on for hours about just one of the scenarios in a course. Okay, so it was us; but that is beside the point.

The point is that time is the most valuable resource we have; and like anyone else in this warp-speed world, you want to spend it wisely and productively. So to help you do that, we have provided you with three workable agendas for presenting this program plus some supplemental material for reinforcement.

We recommend the one-day agenda so that participants benefit from a comprehensive introduction to learning how to be successful in their new role as supervisor. The one-day session affords participants a number of opportunities to apply and practice new skills they are learning.

We recognize, however, that time constraints in your organization may not permit a one-day session. If that is the case, we provide a four-hour alternative and two options for a one-hour overview. Guidelines for facilitating the four-hour course and the one-hour overview options are in the Facilitator Resource Section of this guide.

A Self-Study guide is also provided in case you would like your new managers to go through the material on their own time or if you have only a few new managers who need the training and do not have enough people for a full class.

We hope you find these options useful!
## Agenda for the One-Day (One Day, Eight-Hour) Workshop

<table>
<thead>
<tr>
<th>Step</th>
<th>Item</th>
<th>Time</th>
<th>Page</th>
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<tbody>
<tr>
<td></td>
<td>15-minute breaks in a.m. and p.m. and 45-minute lunch</td>
<td>75 minutes</td>
<td>N/A</td>
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<tr>
<td>#1</td>
<td>Arrival of Participants</td>
<td>N/A</td>
<td>24</td>
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<tr>
<td>#2</td>
<td>Break the Ice</td>
<td>20 minutes</td>
<td>27</td>
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<tr>
<td>#3</td>
<td>Get People Focused</td>
<td>15 minutes</td>
<td>32</td>
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<tr>
<td>#4</td>
<td>Video</td>
<td>60 minutes</td>
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<td>#5</td>
<td>The Four Strategies</td>
<td>20 minutes</td>
<td>39</td>
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<tr>
<td>#6</td>
<td>Strategy #1: Accept Your New Role</td>
<td>45 minutes</td>
<td>41</td>
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<tr>
<td>#7</td>
<td>Strategy #2: Set Clear Boundaries</td>
<td>75 minutes</td>
<td>47</td>
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<tr>
<td>#8</td>
<td>Strategy #3: Communicate</td>
<td>90 minutes</td>
<td>53</td>
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<tr>
<td>#9</td>
<td>Strategy #4: Take Action</td>
<td>60 minutes</td>
<td>64</td>
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<tr>
<td>#10</td>
<td>Focus on the Future</td>
<td>20 minutes</td>
<td>69</td>
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<tr>
<td>#11</td>
<td>Wrap-Up</td>
<td>10 minutes</td>
<td>71</td>
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Supplemental exercises are found in the Facilitator Resource Section of this guide.

Alternative agendas are also found in the Facilitator Resource Section of this guide. Included are guidelines for facilitating a four-hour course and two options for conducting a one-hour overview.
**Step 3: Get People Focused**

**Time it takes:** 15 minutes

**What it’s about:** Provide a more detailed orientation to the program and prepare participants for the video.

**What you’ll need:**
- Flipcharts #2 and #3
- Participant Materials

**How to do it:**

1. (Referring to Flipchart #2, which is posted) Introduce the topic of how participants feel about their new roles by saying:

   You mentioned that you face many challenging situations as a new supervisor. How do these challenges make you feel? Turn to page 6 in your materials and put a checkmark next to all the feelings that apply. Also, write down on the blank lines any feelings you may have about your role that aren’t on the list.

2. Ask participants to tell you what they checkmarked and check the same items off on Flipchart #3.

3. Ask participants what they added to the list and write it on Flipchart #3.
4. Acknowledge these feelings by asking:

Let’s see a show of hands. How many of you marked at least five different feelings?

What do you notice about the feelings that you checkmarked on your lists? Are they all positive? All negative? Or mixed?

What do you conclude by the variety of feelings that all of you checkmarked?

_possible response: Having a lot of emotions or mixed emotions is normal._

5. Continue by saying:

It’s not unusual to have these feelings as a new supervisor. In fact, it’s perfectly normal to have mixed feelings about this new role. The feelings you mentioned are actually not unexpected when you go through a change of role or responsibilities. In fact, these may actually reflect a need for strategies to help you cope with your new role. Let’s discuss what has changed.

6. Discuss what this new role entails by asking participants:

How is this new role of “boss” different from your role when you were a non-manager employee?

_possible responses: As an individual contributor, I was mostly just responsible for my own performance and took direction; I didn’t initiate action; it was more of a passive role._
**Step 4: Video**

**Time it takes:** 60 minutes

*Trainer’s Note: Plan for 10-15 minutes of discussion prior to showing the video, 25 minutes to show the video, and 20-25 minutes to debrief.*

**What it’s about:** An introduction to the four strategies for making the transition from peer to boss

**What you’ll need:**
- Overhead/PowerPoint® slide A-5
- Video/DVD: *Peer Today, Boss Tomorrow*
- Participant Materials

**How to do it:**

1. Prepare participants to watch the video by saying:

   We’re going to get started by watching a video about a newly promoted supervisor, Terrence, and the insights he gains from his friends about how to navigate his changing role. His friends suggest several ideas that fall into four strategies that help make the transition from peer to boss a little easier.

   Before we play the video, let’s take a quick look at the four strategies. (show slide A-5) **Accepting and acknowledging your new role is the first step to**
being successful. Let’s take a minute and discuss how others might know that you’ve accepted and are comfortable with your new role.

Possible responses: body language is confident, might show up earlier, communicates direction and guidelines, take ownership for problems

How about setting boundaries? What exactly is a boundary?

Possible responses: invisible line helping to clarify acceptable and non-acceptable behavior, redefining friendships, sharing or not sharing information depending on what is or isn’t confidential

Good communication is sometimes harder than you’d think. Being a new supervisor requires a new way to communicate. What does it now mean to effectively communicate?

Possible responses: body language that shows interest, providing the “right” information to the “right” people at the “right” time, clearly considering a variety of viewpoints, setting expectations, giving feedback

Good supervisors get the “right” things done and help others take action too. When you’re the boss, what do you think it means to take action?

Possible responses: assessing impact before taking action, making a decision quickly, gathering data, fixing problems swiftly and amicably

Okay. Let’s watch the video and look for ways the four strategies can help you navigate your changing role.
2. Play the videotape/DVD through to its conclusion.

3. At the conclusion of the video, ask:

   **Could any of you relate to some of the things that Terrence is going through or see yourselves in the video? In what ways?**

4. Continue by asking:

   **What was some of the advice that Terrence received from his friends?**

   Possible answers: treat people with respect; accept the changes; just be up front; don’t expect your relationships not to change; just be yourself; don’t let your feelings get hurt; admit mistakes; don’t pull any punches; stand your ground; help others to be more valuable; use clear communication; don’t play favorites; don’t wait for things to happen; do what you say you’re going to do

5. Continue by asking:

   **In what ways would that advice be helpful to a new supervisor?**

   Possible answers: It would help you establish yourself as “the boss”; it would help you gain the trust and confidence of your former peers/new employees”; it would help you get off on the right foot”; it would send a message that you’re there to support your employees; it would help you set new team norms; it would help you get things done, which would help your manager feel like he/she made a good choice in promoting you!
6. Review the four strategies in the video by saying:
   
   **Terrence's friends gave him a lot of advice, which can be summarized into four key strategies. Let's review these.**

7. Reinforce the four strategies by displaying Overhead/PowerPoint® slide A-5.

8. Test participants' high-level understanding of the strategies by asking them to tell you what each one means and why it's important. Encourage them to take notes on page 7 of the participant materials.

   *Trainer's Note: You could make this into a small-group exercise by combining it with Step #5.*

   *Trainer's Note: Optional Approach: If due to time limitations you will not be re-showing the vignettes in steps 6 – 9, you may want to stop the tape after each situation and ask the group to discuss the questions listed in how-to pointers 3 – 5 above. If you choose to stop the tape, look for the road signs with the four strategies listed to know when to stop the tape. Road signs include: fuel sign, guest check, blue directional sign, and green mileage sign.*


**Step 6**

**Strategy #1: Accept Your New Role**

**Time it takes:** 45 minutes

*Trainer’s Note: If you have extra time or need an energizer that supports this step, consider the R.O.L.E. Supplemental Exercise found in the Facilitator Resource Section of this guide.*

**What it’s about:** Specific ways that participants’ roles have changed and why:
- A viewing of the video vignette showing Shelby accepting her new role
- Identification of actions that supervisors can take to implement this strategy

**What you’ll need:**
- Flipchart #2
- Overhead/PowerPoint® slide A-6
- Participant Materials
- Video/DVD

**How to do it:**

1. Introduce the concept of new roles for supervisors by saying:

   The first thing you need to do as a new supervisor is come to grips with the fact that your accountabilities and your work relationships have changed because of your promotion. You’re no longer one of the guys/gals–you’re one of “them”: you’re “management.”
2. Refer to the flipchart and point out those challenges listed that are related to this strategy—those "come with the territory"—or ask for others that are specifically related to this strategy.

Possible additional challenges might include: supervising people who are older than I am; supervising people who have more experience than I do; having to deal with resistance to my direction; getting the cold shoulder from former friends; etc.

3. Continue introduction by saying:

In the past, companies thought it was important for supervisors to know every aspect of the work that he/she managed. That was usually the reason that an employee was promoted to supervisor in the first place—he/she had excellent technical or functional knowledge.

Today, that has changed. A supervisor now must provide more than excellent technical knowledge; he/she must provide daily management oversight and also provide leadership that goes beyond job knowledge. As we’ve said, a supervisor’s role is to help others be successful. That’s what you’re getting paid to do. And you’re in a unique position to do that because you’re closest to the frontline people who are involved with delivering a product or service to the client. So it’s imperative for you to accept your role and take actions to affect what is delivered to the client.

4. Show Overhead/PowerPoint® slide A-6.
5. Ask participants to consider the impact of their role on the organization by asking:

**When you help others be successful, what is the impact on the organization?**

Possible answers: *We create value for the organization; we can meet or exceed customer expectations; we help meet company goals; it reduces turnover/increases retention; employee morale is better; there are fewer mistakes; less work has to be redone; quality is improved; etc.*

6. Ask participants to consider specific changes in their role and responsibilities and how they can learn what they need to do to manage them specifically by saying:

**Let's take a closer look at what's different in your jobs now and how you can learn what you need to do to manage everything successfully.**

7. Divide participants into three small groups and refer to page 9 in the Participant Materials. Assign one of three categories of changes (New Duties, New Relationships, or New Accountabilities) to each group. (Mention that “New Duties” refers to new or additional tasks that supervisors must take on and that “New Accountabilities” refers to new responsibilities or new ways in which supervisors are “answerable.”) Ask them to identify what is new or different on the job in their assigned category and ways they can learn what is expected of them/what they are supposed to do in the new role. Instruct them to write their answers on page 9 in the Participant Materials and to assign a reporter who will explain the group’s work. Allow ten minutes.
8. Ask each group to share their discussions with the entire group.

Possible answers for New Duties:
- **Duties:** hiring; firing; disciplining; coaching; performance reviews
- **To learn:** one-on-ones with my manager; talk to other supervisors; find a mentor; read policy manuals

Possible answers for New Relationships:
- **Relationships:** managing direct reports; working with peer supervisors on the team; coordinating with supervisors/team leads in other departments
- **To learn:** ask my manager; take people to lunch; learn the organizational chart; find out how decisions are made

Possible answers for New Accountabilities:
- **Accountabilities:** budget concerns; managing overtime; managing the performance/results of an entire group; safety; facilities; compliance issues; legal issues; confidentiality of competitive information
- **To learn:** ask my manager; meet with safety and facilities managers; meet with the HR representative; meet with people in Finance; read compliance and ethics policies; know codes of conduct

9. Introduce the video vignette for this strategy by saying:

Let’s now turn our attention to ways that you can demonstrate to the people you supervise that you’ve really stepped up to the changes in your new role. We’re going to watch the part of the video again in which Shelby as new teller manager is having a meeting with her staff. Pay
attention to what she says or does that indicates she’s accepted her new role and jot down a few notes on page 10 in your materials.

10. Show the video vignette (Shelby). Stop the video when you see the fuel sign graphic.

   Trainer’s Note: If time permits, instead ask participants to discuss with a partner or in a small group their observations of Shelby’s actions and why they were important to this strategy.

11. Ask participants to share their observations, and ask them why the actions are important to success with this strategy.

   Possible answers: Treat people with respect (because it shows you value your employees); admit what you don’t know (because it shows your integrity and character); provide ideas, resources, assistance, and encouragement (because it shows you’re there to help employees succeed); thank people (because it shows you recognize and appreciate their efforts and care about them); acknowledge good performance (because it helps reinforce good/positive behavior); provide direction (because it gives employees a roadmap and helps establish expectations for their performance).

12. Ask participants if there is anything else a new supervisor could do to accept his/her new role.

   Possible answers: don’t act “superior”; just continue to be yourself.

   Trainer’s Note: Depending on participants’ responses, make the point or reinforce their point that the supervisor’s employees really want the supervisor to manage, so don’t back down from your new duties, no matter what challenges you may face from others.

13. (If time permits) Briefly review the other strategies by asking:
What did Shelby do to set clear boundaries?

Possible answers: She didn’t side with employees; she supported company policy.

What did Shelby do to communicate?

Possible answers: She held a meeting to inform everyone; she explained the situation and expectations clearly.

What did Shelby do to take action?

Possible answers: She provided resources and a procedure to make the task easier; she promised follow-up.

Trainer’s Note: Skip any or all of these questions if they came up earlier in the conversation. Reminder: If you have extra time or need an energizer that supports this step, consider the R.O.L.E. Supplemental Exercise found in the Facilitator Resource Section of this guide.

Strategy #3: Communicate

Time it takes: 90 minutes

*Trainer’s Note: Plan for 20-25 minutes of discussion prior to showing the video vignette, 10-15 minutes to show and discuss the video, and 45-60 minutes for the remaining activities.*

What it’s about: Different ways in which supervisors must communicate:
- A viewing of the video vignette showing Monte communicating with an employee
- Identification of actions that supervisors can take to implement this strategy

What you’ll need:
- Participant Materials
- Overheads/PowerPoint® slides A-8 through A-11
- Video/DVD
- Handout situations (page 86 in Facilitator Resource Section)

How to do it:

1. Introduce the concept of communication by asking:

   Communication is a vital aspect of your role as supervisor. When do you need to communicate in your new role?

   Possible answers: during staff meetings and one-on-one meetings; when setting expectations; to let people know of changes; during coaching sessions.
2. Continue by saying:

So, everything you do requires you to communicate with others all the time. Why is it important for a supervisor to be a good communicator?

Possible answers: so employees have clear direction and know your expectations; so there’s no duplication of effort; so everyone has the information they need to do a good job; so everyone gets the same information.

3. Continue by saying:

You can see that your employees’ success and, ultimately, the company’s success can depend greatly on the effectiveness of a supervisor’s communication skills.

4. Introduce the concept of effective communication by showing Overhead/PowerPoint® slide A-8, referring to page 15 in the Participant Materials, and saying:

Communication is actually a two-part process. There’s the message you send to others, which you can think of as “communication out,” and the message others try to send to you, which you can think of as “communication in.”

5. Ask the participants to identify effective communication practices by asking them to:
Think of someone they would consider a good communicator.

Turn to page 15 in the Participant Materials and work with a partner to write down what that person does/did that causes them to consider the person a good communicator for both “Communication Out” and “Communication In.”

Assign “Communication Out” practices to half the participants and “Communication In” practices to the other half.

Allow 10-15 minutes and then ask participants to share their work.

Possible answers:

- **Communication Out**: The message was clear; I could understand the message; the person used words I knew; the person didn’t put us down; the person used an appropriate tone of voice; the body language matched the message; the person asked for feedback.

- **Communication In**: The person listened actively; asked questions to clarify what I was saying; tried to understand me; paid attention to me; paraphrased what I was saying; the person’s non-verbals told me he/she was engaged with what I was saying.

6. Introduce the video vignette for this strategy by saying:

   Let’s take a look again at how Monte communicates with Peter in the video. Watch for what Monte, the supervisor, does effectively and add to your lists anything we didn’t discuss that he does well in sending or receiving the message.
7. Refer participants to page 16 of their materials to take notes. Show the vignette (Monte). Stop the video when you see the blue directional sign graphic.

8. Review the vignette by asking:

**What did Monte do well?**

Possible answers: he listened; stayed focused on his message; appealed to what was important to Peter; sought solutions; didn’t allow himself to be sidetracked; asked for commitment; used appropriate non-verbals; gathered facts; asked open-ended questions.

9. (If time permits) Review the other strategies by asking:

**What did Monte do to show he had accepted his new role?**

Possible answers: He brought a sensitive issue to Peter’s attention for resolution; he didn’t play favorites–he put business before buddies.

**What did Monte do to set clear boundaries with Peter?**

Possible answers: He enforced company policy; he enforced performance expectations.

**What did Monte do to take action?**

Possible answers: He verified his facts; he tried to problem-solve with Peter; he sought a solution to the problem and a commitment from Peter.
10. Introduce the concept of behavioral styles/preferences in communication by stating:

Notice that Monte spoke to Peter in a very straightforward way–he used a very direct communication style. Would that style work with everyone?

Wait for answer “No.”

Why not?

Possible answer: Because some people prefer a “softer” or less direct approach in communications with others.

11. Continue by saying:

An important lesson for new supervisors to learn in communicating effectively is that “one size does not fit all.” In other words, you need to modify or vary your communication style and approach depending on the preferences of the person you’re communicating with. Believe it or not, what you say is not always as important as how you say it. How many of you have ever received a compliment, where someone is saying something nice but you can tell from his or her body language that they don’t really mean it? [pause for nods, acknowledgement] So why is it important to be able to modify your approach when communicating with others?
Possible answers: so people will hear you; so you can get the outcomes you want from your message, so you are perceived as genuinely caring.

12. Show Overhead/PowerPoint\textsuperscript{®} slide A-9, refer to page 17 in the Participant Materials, and continue by saying:

Our communication styles and preferences are based on two factors:
First - Our preference for directness in communication. Some of us prefer a straightforward approach and a quick pace, while others prefer less assertive words and a more casual pace.
Second - Our preference for revealing emotion or feelings in communication. Some of us prefer not to show them, while others prefer to let them be known.

How would we know someone’s preferred communication style?

Possible answer: By listening and paying attention over time to how they themselves communicate.

13. Show Overhead/PowerPoint\textsuperscript{®} slide A-10 and refer to page 17 in the Participant Materials.

Put together, the two factors form a matrix of communication styles that helps us know better how to modify our approach. Let’s review some of the ways we can do that, depending on a person’s preferences. Let’s review the
information about styles preferences at the bottom of page 17. [Review the information, focusing on the differences between the styles.]

14. Introduce a case study exercise to help participants apply the style preference concept by referring to page 18 in the Participant Materials and saying:

Now we’re going to practice modifying our message according to someone’s style preference with an exercise that requires us to talk about the same scenario with four people representing the four different styles.

Form four groups. Ask participants to read the case study to themselves. Assign one style to each group and ask them to determine what they would say to someone of that style. They should discuss what they would say and then practice actually saying it. Allow ten minutes, then lead the role-play by asking:

How would you approach me to volunteer for the assignment if I preferred Style A? Encourage participants to actually practice saying what they’ve come up with—not just share what they would do. Repeat for Styles B, C, and D.

Ask the group to provide feedback and modifications to the suggestions.

15. Introduce a communications style skill practice by saying:

We’re going to take the communications style concept one step further with an exercise to help
you send a message effectively to one of your employees.

16. Refer to page 19 in the Participant Materials and ask participants to follow the instructions to: identify an employee with whom they’d like to communicate more effectively; identify what they believe is the employee’s preferred communication style; identify something they need to tell the employee to do; write down some notes (a “script”) to guide the conversation; practice the message with a partner posing as the employee; get feedback on the effectiveness of the communication; and reverse roles.

Trainer’s Note: If any of the participants are not yet supervisors, instruct them to identify someone with whom they work instead of an employee for the skills practice.

17. Debrief the exercise by asking participants what went well and what was difficult about the exercise.

18. Introduce the concept of listening as part of effective communication by saying:

We just spent time focusing on one important aspect of communication, which was sending the message, or “communication out.” Now we need to turn our attention to the other part of communication, which is receiving a message from someone else, or “communication in.” This, of course, involves effective listening.

What is the difference between hearing and listening?
Peer Today, Boss Tomorrow

Possible answers: Hearing is the ability to perceive what is being transmitted; listening requires us to apply ourselves to what we hear, which is called active listening.

What happens on the job when we don’t listen effectively?

Possible answers: We miss information; we send a message that we don’t care about others; we get only part of the message; we can misinterpret what the sender was trying to say.

19. Continue by showing Overhead/PowerPoint® slide A-11, referring to page 20 in the Participant Materials, and saying:

Effective listening has four ingredients: respect for the speaker, attention to the speaker, using appropriate body language, and interaction with the speaker.

20. Ask participants to identify actions involved with each aspect of effective listening by:

- Dividing participants into four small groups
- Assigning each group one aspect of effective listening
- Asking them to identify and write down in their materials what’s involved with each aspect of listening

21. Ask participants to share their group’s work.

Possible answers:

- Respect: put aside any negative attitudes or feelings toward the person; consider each suggestion or complaint with an open mind; show objectivity; keep an impartial attitude
• **Attention:** stop what you’re doing; give the person time; if you can’t stop, ask the person to return at a more convenient time and schedule it; don’t let others interrupt the conversation

• **Body language:** project such positive signals as eye contact, facing the speaker, nodding, leaning toward the speaker; avoid sighing and rolling your eyes

• **Interaction:** paraphrase; say “uh-huh,” “hmmm,” “I see;” ask questions to clarify; repeat/rephrase what you heard to verify your understanding; take notes; ask questions to get additional information

22. Introduce a listening skills practice by saying:

**Effective listening is sometimes easier said than done. Let’s put our listening skills to the test with a skills practice.**

23. Refer to page 21 in the Participant Materials, divide the group into triads and provide each person with one of the following situations [available in the handouts section of the Facilitator Resource Section of this guide on page 86]. Review the instructions provided in the participant materials. Allow 10-15 minutes for practice.

**Situation 1** - You and other members of your work team want to convince your boss to create a new position to hire a support person who will help your team with such administrative tasks as scheduling, payroll, and tracking customer data.

**Situation 2** - You’d like to replace your department’s 10-year-old copier with a new copier that has updated stapling and collating features and must get your boss to agree to the purchase.

**Situation 3** - You are meeting with your boss to propose that he/she approves budget to install a coffee station in your work area as a perk for everyone and to reduce the time the team spends off the job going to the canteen on the other side of the building.
24. Debrief with the whole group by asking one or more of the following questions.

   During the listening exercise, what went well? What was difficult? What did you learn about your listening skills?

Facilitator Resource Section

This section includes valuable information to help you, the trainer, be successful. Included is the following resource information:

1. A note about the word “boss”
2. Suggestions for Course Pre-work
3. Overheads, Flipcharts, and Handouts
4. R.O.L.E. Supplemental Exercise
5. “Take Action” Supplemental Exercise
6. Guidelines for Facilitating the Four-Hour Course
7. Guidelines for Facilitating the One-Hour Overview
8. Facilitation Tips
9. Video Script
10. Suggestions for additional new supervisory training
11. Information about VisionPoint
A note about the word “boss”

It is possible that you may encounter a participant who objects to the word “boss” in the title of the program or when used during discussions. The participant’s objection may arise for a variety of reasons: the participant finds the word derogatory; he/she thinks it refers to unsavory politicians; he/she associates it with a person who dominates others (as in “bossing someone around”); etc. If a participant raises an objection, here are some suggestions about how to handle the situation:

• Acknowledge the objection; don’t defend the word.
• Explore the reason for the objection.
• Ask if others feel the same way.
• Explain that VisionPoint intends the word simply as a term for someone who is newly promoted and is taking that first career step into management. It is just a synonym for the word “supervisor” and means “somebody in charge of others” or “somebody who directs or supervises workers.”
• Mention that in some work environments, the word is actually used as a sign of respect (e.g., law enforcement) or as an indicator of admiration and approval.
• Monitor your language and discontinue using the word if the objection is strong.
• Ask participants for an acceptable substitute word, such as “team leader,” “supervisor,” or “manager.”

A note about participants

Your organization may allow participants who are not yet supervisors to attend the program. Be sensitive to their needs during discussions and exercises by modifying your instructions and providing extra assistance to help them meet their needs (e.g., to prepare for an upcoming promotion or to learn the skills necessary to be considered for promotion).
Suggestions for Course Pre-Work

Assigning pre-work to participants before they attend the course can help engage participants in the course content even before they arrive. If you would like to include pre-work as part of the course design, we have included some suggestions below for integrating pre-work into the course.

Suggestion #1
Ask participants to create a list of concerns or issues that they have as a new supervisor or that they are concerned about regarding their upcoming promotion and bring it with them to the course. Then, before they watch the video, instruct them to watch for specific tips or ideas in the video that address their own issues. After the video, ask participants what ideas they gained that might help them.

Suggestion #2
Create a one-page worksheet explaining that the purpose of the course is to give participants specific tools that they can use to strengthen relationships that have changed or will change as a result of their promotion. Ask them to list on the worksheet the people that they are responsible for and to briefly describe the relationship with each of them before and after the promotion. When participants watch the video or engage in course activities, ask them to return to the worksheet and identify specific ways in which they can apply ideas from the course to those relationships.

Suggestion #3
Ask participants to create a list of aspects about the new role of supervisor that surprised them/they didn’t expect/“nobody told them about” and bring it with them to the course. Instruct them to make notes during the course about ways in which the four strategies discussed during the course can help them with the items they identified. Then, during Step 10, ask a few volunteers to share how they think the course will help them with one of the items on their lists.