



# **The Leadership Strategies Instructional Philosophy**

Our Style Guide for Facilitators

July, 2016

---

Our instructional design framework is based on a simple formula we call PDI: practical, dynamic, interactive. We use documented methods, coupled with our own field experience and research, to isolate and package best practices in a way that is easy for people to understand and apply. We then employ adult learning principles to design highly dynamic and interactive modules that keep people interested and engaged.

As an instructor for Leadership Strategies, you have four major responsibilities as you role model the PDI principles.

### **Responsibility 1: Sell the Why**

When students leave the classroom, our goal is for them to go back and apply as much as possible of what they learned. And they will do this if they have the **opportunity**, the **skill**, and the **will**.

- The opportunity comes in their professional and personal environments. To aid them in application, we constantly suggest ways they can use what they've learned and describe situations where they can apply the tools.
- The skill comes from ensuring they understand the concepts and techniques, and have the experience in the classroom of practicing and gaining valuable feedback to help them improve.
- The will is the critical piece. If they have opportunities and also have learned the skills, but they don't believe the skills are valuable, they simply will leave the learning in the classroom. Very little knowledge transfer to the workplace will occur.

Our clients don't engage us to teach a class to their people. They engage us to help bring about change by providing their people with new skills AND the will to put those skills into practice.

#### **We Inspire!**

*Accordingly, at Leadership Strategies, we want our instructors to first and foremost understand **the critical role they play in inspiring people to have the will to put their new skills to use.***

How do we do it? How do we inspire change? The key is that our instructors spend nearly as much time on selling people on why they should employ a tool as they do on instructing on how to use the tool.

Let's look at an example: How our instructors teach the "Type-B Starting Question"

1. We start by asking, "Have you ever asked a question and got complete and utter silence? It's uncomfortable isn't it? And a little embarrassing too, especially for the participants because they feel they should know the answer. Well, did you know that when you ask a question and get silence, it may very well be because you asked the wrong type of question? Let me show you what I mean..."
2. We then show them two questions and ask, "Which is better?" We gain pretty universal agreement that the Type-B question is better.

- 
3. We then ask them why. Usually we have to help them to discover that the Type-B question draws a visual image and the Type-A doesn't.
  4. We then explain the difference between a Type-A (it's what you want to know) and a Type-B (it draws an image of the answers). And explain that by drawing an image of the answers, people can begin answering right away. But that when you ask the Type-A, you get silence because they are trying to draw the image in their minds *that you didn't draw for them!*
  5. Then we ask the sales question, "Would you like to know a three-step process so that whenever you want to, you can ask a Type-B question?"  
**[At this point, the participants are sold on the Type-B question and are eager to learn how to do it. The sale has been accomplished! They have the will and are ready to learn the skill.]**
  6. We show them the three step formula for building Type-B questions.
  7. We build one together.
  8. We show them "bad" Type-B questions and ask them to identify what mistake was made.
  9. We then have them build one individually and then in teams choose and modify, as needed, the best one from their team.

Note that steps 1 through 5 are all about "selling the why" and only then do we provide the skill with steps 6 through 9.

## **Responsibility 2: Engage, Engage, Engage**

Most of our classes are typically two, three or four days. To keep people learning for that duration requires constant interaction and engagement. Therefore your second major responsibility as an LSI instructor is to create and maintain a highly engaging and dynamic classroom.

How do we do it?

1. Our goal is to begin each module with an interactive activity to get participants engaged right from the start.
2. We then follow-up with some type of participant engagement every 20-30 minutes of teaching.
3. Along with the typical engagement approaches such as question/answer, role play, small group work, and brainstorming, our instructors employ a full staple of unique engagement strategies, including:
  - ❑ Rotating flip charts
  - ❑ Last man standing
  - ❑ Brief encounters
  - ❑ Dump and clump
  - ❑ Think, pair, share
  - ❑ 3 question panic

- 
- ❑ Periodic content reviews
  - ❑ Versions of popular games such as Jeopardy and Family Feud
4. Your energy level is critical. It is important that you start your sessions at level 3 energy and that, following each break, you return to level 3 to help spark the group's energy. We are not asking you to be a game show host. We are asking you to fully buy-in to our belief in the 3 Es of energy:
- ❑ Your high energy ENGAGES the group. It is certainly more interesting to listen to someone with high energy than low energy.
  - ❑ Your high energy ENERGIZES the topic. It subtly says to the group that this topic must be interesting, at least the facilitator seems to think so.
  - ❑ Your high energy ELEVATES you as the facilitator. High energy makes you look confident and encourages people to follow you.

### Responsibility 3: Role Model Before, During, and After

Instructors who teach *The Effective Facilitator* know that teaching facilitation skills is like teaching no other course, with the exception of perhaps presentation skills. Why? Because nearly all the skills that you are teaching the students, **you have to model the entire time you are teaching the class.**

To contrast this point, suppose you were teaching a supervisory skills course and you needed to teach the module on give constructive feedback. You explain, you model it, you have the participants practice it, and then you move on to the next concept. Seldom do you have to model that concept again in the class.

Not the case with *The Effective Facilitator*.

You teach level 3 energy on the third day of the class. Guess what? You have to have used Level 3 every day before you taught the module, you had to use level 3 during the time you are teaching the module, and you have to continue to use level 3 energy after you teach the module.

Likewise, on the morning of day 2, you teach how to use a checkpoint to introduce a new topic. But of course, you had to do a checkpoint every time you started a new topic before day two, you had to use a checkpoint during the time you taught the module on checkpoint, and you have to continue using checkpoints every time after you teach the module.

You get the point. And you have to do this for much of the content that you are teaching. We ask that you pay special attention to modeling these behaviors:

- Starting with IEEI – Inform, excite, empower, involve
- Using ground rules
- Employing parking boards
- Using checkpoints
- Writing first / discussing second
- Writing what they said, not what you heard
- Avoiding lulls while writing
- Asking type-B questions
- Using reacting questions

- Giving directions – PeDeQs: purpose, example, directions, exceptions, questions, starting questions
- Using breakout groups
- Labeling charts
- Listing and brainstorming
- Addressing dysfunction
- Maintaining level 3 Energy
- Closing the session

#### Responsibility 4: Achieve the Module Guidelines

Finally, we want participants in our class to receive a consistent quality of instruction. At the same time, we believe that instructors can achieve a quality result in a myriad of ways. As well, an instructor may find that the needs of the group may be better served by delivering information in a different way, or may have discovered a superior way for him/her to help participants grasp a concept.

Accordingly, we provide our instructors maximum flexibility and encourage them to deliver our courses in the way they believe best maximizes the knowledge transfer and application experience for the participants, with just one stipulation.

#### The Module Guidelines

*Instructors must achieve the guidelines established for each module.*

The module guidelines for all our course are formatted the same, as shown below with this sample from *The Effective Facilitator*.

<b>PRINCIPLE # 2 - GETTING THE SESSION STARTED</b> As a result of this module, participants should...	
<b>Buy-in to...</b>	<b>Know...</b>
<ol style="list-style-type: none"> <li>1. The benefit of starting every session with IEEI.</li> <li>2. The value of ground rules specific to the needs of the group</li> <li>3. The importance of <u>planning</u> to be completely set-up 30 minutes ahead of time</li> <li>4. The value of memorizing your opening words</li> </ol>	<ol style="list-style-type: none"> <li>1. The four steps of IEEI</li> <li>2. The reason to use ground rules (self-correcting)</li> <li>3. The names of the three parking boards</li> <li>4. The definition of consensus</li> </ol>
<b>See you model...</b>	<b>Demonstrate their ability to...</b>
<ol style="list-style-type: none"> <li>1. Checkpoint</li> <li>2. The mnemonic technique for the opening statement</li> <li>3. Creation of a ground rule for a specific situation</li> </ol>	<ol style="list-style-type: none"> <li>1. Playback the items under “Know...”</li> <li>2. Provide an “excite” statement for various scenarios OR create ground rules for one or two specific situations</li> </ol>

- *Buy-in to...* This is the “selling” part for the instructor in this module.
- *Know...* Through your review and repetition, participants should know these items.
- *See you model...* These are specific items that you should demonstrate.

- *Demonstrate their ability to...* Your participants must have executed these activities during the module.

## Other Course Design and Instructional Elements

1. The what – the how – the why – the engagement
  - In our instruction, we focus on three elements
    - The what: What is the concept being taught?
    - The how: How does a person use the concept?
    - The why: Why should this be important to the participants?
    - The engagement: How will you engage the participants in the concept?
  - As you prepare to teach the major concepts in the course, give thought to this framework.

The What	The How	The Why	Engagement
Checkpoint	<ul style="list-style-type: none"> <li>• Review what we've done</li> <li>• Preview what we are going to do</li> <li>• Explain how it fits into the overall session objective</li> </ul>	To communicate that we are about to transition and get everyone clear on why we are taking the next step.	Provide an agenda and have a person from each team execute the checkpoint.

2. Animation bars
  - You may have had the experience of having a page of information put on the screen and then waiting for the instructor to move on to the next slide.
  - To combat this, our PowerPoint decks use considerable “text animation” to keep the screen changing as an aid to you in retaining people’s attentions.
  - So, rather than all the information appearing at once, with text animation one line of information displays with each click of the mouse.
  - But you may have also had the experience as an instructor of having lines of text, but not knowing when you are on the last line...so you end up moving ahead to the next slide because you aren’t sure if there is more information.
  - We have solved this using an animation bar on slides where the text is animated. The animation bar is a white dash that appears near the right edge of the slide. It is so light you might not notice it. It is circled in red below.
  - The animation bar indicates that there is animated text on the slide and once the text reaches or goes past the bar, you have reached the last item of animation.

---

A presentation slide with a light gray background and a green vertical bar on the left. The title "A. Starting Questions" is in blue. Below it, "Three parts to a great starting question" is in green. A single bullet point in blue reads: "Begin with an image building phrase ('think about', 'imagine', 'consider', 'if')". At the bottom, there is a copyright notice, a prohibition on duplication, and the "Leadership Strategies" logo. A red circle highlights a small white square in the bottom right corner of the slide content area.

**A. Starting Questions**

**Three parts to a great starting question**

- Begin with an image building phrase (“think about”, “imagine”, “consider”, “if”)

Copyright 2013 Leadership Strategies, Inc. Duplication prohibited without consent. Leadership Strategies The Facilitation Company

A presentation slide with a light gray background and a green vertical bar on the left. The title "A. Starting Questions" is in blue. Below it, "Three parts to a great starting question" is in green. Three bullet points in blue are listed: "Begin with an image building phrase ('think about', 'imagine', 'consider', 'if')", "Extend the image to the answers (at least 2 phrases)", and "Ask the direct question (Type A) to get the information you want". At the bottom, there is a copyright notice, a prohibition on duplication, and the "Leadership Strategies" logo.

**A. Starting Questions**

**Three parts to a great starting question**

- Begin with an image building phrase (“think about”, “imagine”, “consider”, “if”)
- Extend the image to the answers (at least 2 phrases)
- Ask the direct question (Type A) to get the information you want

Copyright 2013 Leadership Strategies, Inc. Duplication prohibited without consent. Leadership Strategies The Facilitation Company

### 3. Reviewing content

- ❑ There is considerable content in our course modules. We have reviews at the end of each module to ensure participants have gained the key concepts.
- ❑ However, it is often helpful to review with participants the information they have gained once or twice prior to the end to help them to retain the information.
- ❑ Some modules have interim reviews in the slides. You should feel free to hold an interim review anytime it might be helpful.

### 4. Using teams

- ❑ We recommend using teams for engagement and interactivity. We recommend calling on teams rather than calling on individuals because it can be challenging for some who prefer NOT to be put on the spot. We

- 
- recommend calling on teams rather than asking a question to the entire group because extroverts tend to takeover in large group discussions.
- As an example, if there are three questions to ask, you might ask the first question to team 1, the second question to team 2, and so on.
5. Rotating team leader assignment
- When using breakout groups, we recommend assigning team leaders before the breakout. When team leaders aren't assigned, you may find your groups being less productive as time is wasted with a group wandering without leadership or with dysfunction occurring as different people attempt to lead the group in different directions.
  - After assigning team leaders in the first exercise, in subsequent exercises the last team leader can then choose the next leader.

## **Conclusion**

As you become more and more comfortable with executing the practical, dynamic, and interactive methods that make up the LSI instructional philosophy, we believe you will find that your participants will be more engaged and better able and committed to transferring what they learn into their professional and personal lives.

Please join with us in modeling and sharing the power of facilitation with the world!