

**Trainer Booklet**





Business Trainer Certification











A leader is one who knows the way, goes the way and shows the way.

#### John C. Maxwell





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# Sooo... Are you ready to take the leap?

Hi & Welcome to the transformative world of **Points of You®**...

This booklet is your compass, your guide, your trusted companion on the path to becoming a certified **Business Trainer**. If you’re holding this in your hands, it means you’ve made a powerful choice – not just to lead, inspire, and empower individuals, but to become a catalyst for transformation within organizations. You’re here to make a difference, to bring light into the lives of teams and leaders striving for growth and excellence, and to do so with compassion, wisdom, and integrity.

As a **Business Trainer**, you’re not just teaching; you’re shaping the future of organizations. You’re committed to guiding individuals and teams from where they are now to where they aspire to be, creating a ripple effect that impacts the entire organizational ecosystem. This journey is about cultivating a culture of openness, collaboration, and innovation within the workplace – building environments where people can thrive, communicate effectively, and achieve their fullest potential.

We’re honored to walk this path with you and wish you all the luck, light, and miraculous moments as you lead the way in transforming the organizational landscape.

With love and gratitude,

Yaron and **Points of You®** Team





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* ["The Five Dysfunctions of a Team"](https://www.goodreads.com/book/show/21343.The_Five_Dysfunctions_of_a_Team?from_search=true&from_srp=true&qid=gVrlOxzR4D&rank=1) / by Patrick Lencioni



**Enjoy Reading!**

**Focus:** Teamwork and organizational health.

* ["Dare to Lead"](https://www.goodreads.com/book/show/40109367-dare-to-lead?from_search=true&from_srp=true&qid=gozJXDyiBm&rank=1) / by Brené Brown

**Focus:** Leadership and cultivating courage in organizations.

* ["Visual Leadership: Leveraging Visual Thinking in Leadership and in Life"](https://www.goodreads.com/book/show/48673021-visualeadership?from_search=true&from_srp=true&qid=IoWyFmovT8&rank=1) / by Todd Cherches

**Focus:** Using visual thinking, metaphors, and imagery to enhance leadership and communication in organizations.

* ["The Innovator’s Dilemma"](https://www.goodreads.com/book/show/2615.The_Innovator_s_Dilemma?from_search=true&from_srp=true&qid=NwX5RMdUtR&rank=1) / by Clayton M. Christensen

**Focus:** Innovation and how companies can maintain growth.

* ["The Back of the Napkin: Solving Problems and Selling Ideas with Pictures"](https://www.goodreads.com/book/show/2420301.The_Back_of_the_Napkin?from_search=true&from_srp=true&qid=Bn4l56RisL&rank=1) / by Dan Roam

**Focus:** How to use simple drawings and visual thinking to solve problems and communicate ideas.

### TED Talks:

* [Simon Sinek / "How Great Leaders Inspire Action"](https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action?utm_campaign=tedspread&utm_medium=referral&utm_source=tedcomshare)

**Focus:** Leadership and inspiring teams through vision and purpose.

* [Dan Pink / "The Puzzle of Motivation"](https://www.ted.com/talks/dan_pink_the_puzzle_of_motivation?utm_campaign=tedspread&utm_medium=referral&utm_source=tedcomshare)

**Focus:** Motivation and what drives people to perform at their best.

* [David Griffin / "The Power of Visual Storytelling"](https://www.ted.com/talks/david_griffin_how_photography_connects_us?utm_campaign=tedspread&utm_medium=referral&utm_source=tedcomshare)

**Focus:** How photos and visual storytelling can convey powerful messages in organizations.

* [Amy Edmondson / "How to Turn a Group of Strangers into a Team"](https://www.ted.com/talks/amy_edmondson_how_to_turn_a_group_of_strangers_into_a_team?utm_campaign=tedspread&utm_medium=referral&utm_source=tedcomshare)

**Focus:** Teamwork and building trust in teams.

* [Jane Hirshfield / "The Art of Metaphor"](https://www.ted.com/talks/jane_hirshfield_the_art_of_the_metaphor?utm_campaign=tedspread&utm_medium=referral&utm_source=tedcomshare)

**Focus:** How metaphors shape our understanding and communication, with applications in organizational contexts.

### Articles:

* "What Leaders Really Do" / by John P. Kotter (Harvard Business Review)

**Focus:** Leadership and the differences between management and leadership.

* "Using Visuals to Drive Change in Organizations" / by Nancy Duarte (Harvard Business Review)

**Focus:** How visuals can be used to inspire and guide organizational change.

* "The Role of Metaphor in Organizational Change" / by Gareth Morgan (Journal of Organizational Change Management)

**Focus:** How metaphors are used to conceptualize and implement change in organizations.

* "The Hard Truth About Innovative Cultures" / by Gary P. Pisano (Harvard Business Review)

**Focus:** Innovation and building a culture that fosters creative thinking.

* "Building the Emotional Intelligence of Groups" / by Vanessa Urch Druskat and Steven B. Wolff (Harvard Business Review)

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Welcome to your **Business Trainer Certification** journey!

This booklet is your primary resource, carefully crafted to guide you every step of the way. We've poured our passion, experience, and attention to detail into every page. It's the result of countless hours of training, filled with insights from both our successes and challenges. Use it as your trusted guide, knowing each section is designed to help you master the art of training. Take it one step at a time, and remember – we're here with you every step of the way.

To make your experience smoother, this booklet is equipped with internal links for easy navigation between chapters, along with external links to additional files and resources. Explore these as they will enrich your learning journey.

To avoid overwhelming you, the booklet will be released in stages. You'll receive notifications via WhatsApp and email each time a new section becomes available, so there's no need to worry about missing anything.

### Structure of the Booklet:

#### Chapters 1 & 2:

These chapters cover the basic principles – your starting point for understanding our philosophy and approach to working with groups. They lay the foundation for everything that follows.

#### Chapter 3:

Here, we dive into the tools for communication and interaction – your toolkit for when you’re in the training room. Our fourth online session will be an opportunity to explore these tools together in depth.

#### Chapters 4 & 5:

These chapters focus on the building blocks of training. You'll learn about the essential elements of each training session and how to effectively prepare for your role as a trainer.

#### Chapter 6:

This chapter will be rolled out bit by bit, following each session where we experience the official

**Points of You®** trainings together. You'll learn how to facilitate these trainings, understand their structure, and customize them to meet the needs of your audience.

#### Chapter 7:

Tips for online training take center stage here. You'll discover how to create impactful, Points of You® style experiences in a virtual setting, ensuring your sessions are engaging and effective, even when conducted remotely. We will explore these strategies together in session 4.

#### Chapter 8:

The final chapter focuses on marketing. We will touch on these strategies during stage 3 of our program, giving you insights into promoting your trainings and growing your presence as a **Points of You® Business Trainer**.

While this booklet will focus primarily on the **Speak Up** Toolkit / Digital and **ClicKit** – tools designed with an organizational focus – you are encouraged to incorporate them into all your training sessions. For those already experienced with **Points of You®**, there's flexibility to include other tools as well. We plan to offer more examples in the future on how to use the full range of **Points of You®** tools effectively in different training contexts.

Please note that this booklet is packed with valuable knowledge and materials intended solely for your personal use as you develop your skills as a **Points of You® Business Trainer**. We ask that you do not distribute or share its contents with others, as it is designed to support your unique learning journey.

Once you’ve completed the program and earned your certification, the full booklet will be available for download and printing, allowing you to keep a personal copy for ongoing reference.

As you progress, we encourage you to connect with your peers to integrate knowledge, motivate each other, and share experiences through our online community platform. This is a valuable space for learning and support. Remember, practice is key – practice, practice, practice! The more you engage with the materials and apply what you’ve learned, the more confident and effective you will become.

If you encounter any technical issues or have questions about the certification process, please don't hesitate to reach out to our support team at [support@points-of-you.com](mailto:support@points-of-you.com) – we're here to help.

Enjoy the journey, take it step by step, and remember – we're with you every step of the way.

**Speak Up** is a game-changing toolkit to empower open and productive collaboration across organizations.

An everyday companion for HR, L&D, OD professionals and managers in shaping communication, building trust in teams and fostering a positive work environment.

**Speak Up** includes: - 30 Photo cards

* 30 Word cards + 6 blank cards
* 30 Question cards + 6 blank cards
* Inspirational book with stories, quotes and questions
* Dialogue Starter Guide with 4 ready to go processes
* A box that transforms into the Game Board
* Inspiring goodies to decorate your Game Board



### Innovative Training Kits

Transform your trainings into dynamic learning experiences with our versatile participant kits.

**ClicKit** is designed to enhance both participant engagement and facilitator effectiveness. It’s an essential tool for boosting interaction, critical thinking, and collaboration.

Each **ClicKit** includes: - An inspiring journal

* A pen
* 12 engaging Photo cards
* 8 insightful Question cards
* Creative stickers and sticky notes
* A canvas for visual explorations

**ClicKit** serves as your "Workshop in a Box".

It is crafted to meet the demands of modern organizational training, providing a flexible toolkit for any theme, objective, or audience.











### Give Certificates with ClicKit

After completing your training, invite your participants to scan the QR code on the **ClicKit** canvas. They can provide brief, anonymous feedback and receive an official certificate from **Points of You®**, with your name on it, that they can easily share on LinkedIn. [Here is a direct link to the form.](https://points-of-you.com/workshop/certification-page/) You’ll receive your unique Trainer ID after the first session, which you can share with your participants to help them obtain their certificate. Once feedback is submitted, you’ll be notified immediately.

After becoming certified, you’ll be able to issue various certificates for our official trainings, some of which include ICF CCEUs and/or SHRM PDCs.

#### Important Note:

As part of your certification process, you must receive feedback from at least 18 participants you've used **ClicKit** with, submitted through the QR code, by the beginning of the second stage of the program. You can achieve this with one group of 18 participants, smaller groups, or even through one-on-one sessions

- it's entirely up to you.





#### Pause and Encounter

Taking a moment to reflect on our work and life routines from a different perspective. This pause allows for an intimate, authentic, and non-judgmental encounter with oneself and others.



#### Expanding Perspectives

In any situation, there are infinite perspectives. The real challenge is to see viewpoints different from those familiar to us and explore things from new angles.

#### Quality Dialogue

Presenting a wide range of images and texts for discussion on any possible topic, including complex ones, enabling us to communicate in an authentic, precise, and fruitful way.



#### Focus on the Next Step

Formulating new and meaningful insights and defining practical actions for the future.

Our trainings are not in lecture format but rather experiential processes that combine various activities. During these activities, assumptions are challenged, exciting encounters take place, and, most importantly, meaningful encounters with oneself.

#### Be prepared for a deep, enriching, and enjoyable experience.

**Culture of Dialogue**

We build infrastructures for open, disruptive dialogue that enhances teams’ ability to learn from mistakes, tackle challenges, and find creative solutions, fostering a sense of belonging, meaning, and commitment.

#### Experiential Learning

Our interactive, playful, and profound training sessions offer hands-on experience, the quickest and most effective way to implement learning within your organization.

#### Science-Backed Techniques

Our programs use visual, physical, and digital tools based on proven methods from coaching and phototherapy, providing a tangible toolkit that supports growth and meaningful conversations long after the workshop ends.

#### Flexibility and Applicability

Our flexible modules adapt to your needs, whether face-to-face or online, in one-time trainings or ongoing processes, and for one-on-one sessions, small groups, or large conferences.

#### Sustainable Learning

Our empowering trainings focus on proactive, easy-to-implement actions that create immediate turning points and lasting change.



# Points of You® Training Basics



#### Global Reach

Our diverse network of Certified Trainers, highly experienced in coaching, training, and organizational development, ensures cultural relevance and broad perspectives for global organizations.

# The Difference Between Points of You® Facilitation and Training

At **Points of You®**, both facilitation and training are core aspects of how we engage with individuals and groups, yet each serves a distinct purpose and approach.

### Facilitation:

Facilitation within **Points of You®** is about creating **immersive experiences** that evoke emotional responses rather than simply transferring knowledge. The facilitator’s role is to guide participants through a process of self-discovery, helping them connect with their emotions and insights. The focus is on making participants feel something through carefully curated interactions and tools. We use a wide variety

of interventions – from verbal prompts and visual tools like vision boards and photographs, to more experiential techniques like body work, eco-therapy, and group healing(Facilitation.

Facilitation is about **holding space** for participants to reflect and grow, while respecting their personal journeys. The facilitator is never part of the group – they remain an impartial guide, creating conditions for further personal growth. This approach emphasizes diversity and inclusiveness, bridging cultural, linguistic, and demographic differences. The power of **Points of You®** facilitation lies in the emotional connection and shared humanity experience. This is a core principle of what we teach in the

**Points of You®** Academy.

### Training:

Training in **Points of You®** takes on a different role. While facilitation focuses on guiding participants through an emotional experience, training is about **equipping individuals with the skills and tools** necessary to apply them effectively in both their professional and personal lives. As trainers, we provide participants with the methodology behind **Points of You®** – explaining the "why" behind the processes and tools, as well as how to effectively apply them. Training involves a structured approach that combines theory with practical application, giving participants the confidence and competence to use the tools in their professional environments.

Unlike facilitation, which is more fluid and responsive to the emotions and energy of the group, training is designed to impart **specific knowledge and skills**. Trainers offer a clear framework for the tools, focusing on communication, coaching methods, and their practical uses to ensure participants can replicate these experiences in their own contexts. In training, the emphasis is on creating mastery of the **Points of You®** methodology, ensuring that participants not only feel but also understand how to recreate impactful experiences in their own work.

# Points of You® Facilitator vs. Trainer:

**Key Differences**

While facilitation at **Points of You®** centers around **emotionally charged experiences** that lead to personal insights, training is focused on **teaching and developing practical skills**. Facilitators create safe spaces

for self-exploration and emotional breakthroughs, while trainers build the competencies needed to lead such experiences. Both are essential in helping individuals and groups achieve growth, but each plays a different role in the overall **Points of You®** journey.

### Role Focus:

#### Facilitator:

A **Points of You®** Facilitator guides participants through immersive experiences designed to evoke emotions and personal insights. The focus is on creating a safe space for self-discovery, where participants can explore their thoughts and feelings through carefully curated activities and interventions.

#### Trainer:

A **Points of You®** Trainer, on the other hand, is responsible for teaching the **Points of You®** methodology. The Trainer equips participants with the skills and knowledge needed to use the tools effectively in their own professional settings. The emphasis is on imparting practical knowledge and ensuring participants understand the "how" and "why" behind the processes.

### Objective:

#### Facilitator:

The primary objective is to facilitate personal growth and emotional breakthroughs by guiding participants through reflective and experiential activities.

#### Trainer:

The objective is to develop the participants' abilities to independently lead and facilitate **Points of You®**

experiences, focusing on mastery of the tools and techniques.

### Interaction Style:

#### Facilitator:

Works more fluidly, responding to the group's energy and emotions, and remains an impartial guide who does not become part of the group.

#### Trainer:

Provides structured learning, offering a clear framework and instructions, and actively engages with participants to ensure they gain the necessary skills.

# The Trainer's Role

### As a Responsible Adult

#### Accept them as they are:

Accept the group and individuals without judgment or expectation. Be compassionate toward any behavior or characteristic they display.

#### Challenge them:

Encourage participants to step outside their comfort zones, helping them break their patterns and redefine what is possible for them. This might involve offering confrontation, reflection, or support.

#### Caring:

Provide care and attention, listening not only to what participants say but also to what they don’t express verbally.

#### Empathetic:

Understand others by putting yourself in their shoes and showing that you recognize their feelings.

#### Building trust and a safety net:

Create a safe environment where participants feel cared for, trust the process, and are willing to engage fully. Uphold group agreements at all times.

#### Dare to confront:

Ask challenging questions and serve as a mirror. Say what needs to be said in a straightforward manner, always seeking clarification rather than making assumptions.

#### Affectionate:

Show care and tenderness, communicating emotions effectively.

#### Responsible guide:

Take a guiding role, understanding what is right in each situation and managing it effectively. Ensure the group and individuals are safe and supported.

#### Respectful:

Treat everyone with respect, adhering to group agreements and being mindful of sensitive issues such as culture, religion, health, and personal identity.

#### Empowering:

Support participants in regaining their self-confidence and control, helping them take the lead in their own growth.

#### Positive influence on group dynamics:

Maintain positive energy throughout the training, especially during conflicts or challenging moments, turning these into opportunities for growth.

### As a Leader

#### Inspiring figure:

Believe in yourself as a leader and inspire others. Be open to learning and growth, acting authentically to encourage others to do the same.

#### Focus on people and their needs:

Prioritize understanding and addressing the real needs of participants rather than just responding to surface-level requests.

#### Service-oriented:

In every situation, assess what is relevant for both individuals and the group.

Ensure that the needs of all participants are met, maintaining focus on the group’s objectives.

#### Ego-free approach:

Focus on serving the group rather than seeking personal recognition. Your role as a trainer is to meet the group’s needs, not to appear knowledgeable or impressive.

#### Responsible:

Take full responsibility for the training, ensuring everything runs according to plan. Be reliable, accountable, and punctual.

#### Role model:

Training is a performance; every detail matters. Model integrity by aligning your thoughts, words, and actions. Constantly work to become a better version of yourself.

#### Team player:

Consider the needs of the entire team in decision-making. Support and mentor team members, allowing everyone space to grow and contribute.

#### Resilient:

Demonstrate self-confidence and strength in the face of uncertainty. As a resilient trainer, you should be able to handle any situation professionally.





# The Trainer's Qualities

### As a Container

#### Acceptance of any outcome:

Be flexible and open to working with whatever arises during the training. Embrace unpredictability and use it to move the process forward.

#### No expectations:

Avoid assumptions, expectations, or comparisons. While you can control the process to some extent, the outcome is beyond control – work with what happens.

#### No judgment:

Suspend all preconceived ideas about people or situations. Approach each participant’s story and behavior with acceptance, allowing you to work effectively with them.

#### Mature approach:

Use your life experience to hold space for a variety of situations and emotions. Stay centered and unshaken.

#### Flexible:

Adapt to the changing needs of the group. Avoid rigid thinking and always remain relevant to the group’s needs.

#### Hold the space:

Maintain the safety net throughout the training, ensuring that participants feel secure enough to share and express themselves. Set appropriate boundaries to keep everyone safe.

#### Emotional containment:

Manage the full range of emotions present in the group while staying centered and professional.

#### Create a comfortable environment for sharing:

Encourage authentic sharing by fostering a non-judgmental, safe space where participants feel comfortable discussing even difficult truths.

#### Comfortable with sensitive topics:

Be at ease discussing sensitive issues such as discrimination, harassment, mental health,

financial concerns, personal tragedies and more. This requires ongoing inner research and self-awareness.

What sets **Points of You®** trainers apart?

### Inspiring

Courageous, vulnerable, and unafraid to live fully. Constantly engaged in self-reflection.

### Humble

Acting with modesty, acknowledging that even with knowledge, there is always more to learn. Curious about others.

### Devoted

Fully committed to the process, before, during, and after the training. Honest, reliable, and consistent.

### Love in Action

Empathetic and sensitive, able to hold and contain dilemmas and contradictions. Providing a safe environment for others to open their hearts authentically.

### Authentic

Genuine and real, without pretense. Bringing their full selves – knowledge, skills, personality, and unique style – into their work.

### Flexible

Spontaneous and adaptable, leading the group while understanding that no one can control the outcome. Open to the group’s energy, dynamics, and the unexpected.



# Points of You® Training – Ground Principles The Trainer's Responsibility in the Group

### Creating a Safe Space

During our training sessions, participants gradually reveal more of themselves to the group, and sometimes even to themselves for the first time. To facilitate this, we must provide a safe environment where participants feel secure enough to share. Our approach combines classic group dynamics with coaching techniques. A safe space is essential for participants to explore and address their real issues, allowing for deep, transformative experiences.

### Training Through Experience

At **Points of You®**, we focus on creating experiential learning rather than simply teaching theory. By using our tools, methods, and values, we craft training experiences that evoke emotions and foster deep understanding. These experiences and the emotions they generate are what make our training sessions memorable and impactful.

### Embracing Diversity

We bridge personal, cultural, demographic, and linguistic differences through our methods and the language of photos and phototherapy. This diversity allows participants to break down patterns and prejudices, creating a powerful reflection of our shared humanity – our feelings, hopes, and dreams. We are all united in these experiences.

### The Power of Face-to-Face Interaction

In a world dominated by virtual interactions, especially after the global pandemic, we prioritize face-to- face encounters.

There is no substitute for eye contact, a hug, a scent, a voice, or a sound. Being physically present with others helps us to open our hearts, remove our masks, and discover the strength and connection that comes from being together in a shared space.

### Leading the Training Process

Maintain the structure and timing of the training sessions. Your role is to ensure participants receive the full experience they signed up for. Lead the group with attention to both the big picture and the smallest details.

### Serving Both Individuals and the Group:

Ensure that every participant experiences personal growth while also fostering a sense of unity and support within the group. Address personal questions within the training context to benefit the whole group.

### Creating a Safe Learning Environment:

Establish and uphold group norms to build trust and psychological security. Reinforce agreements on sensitivity and respect, ensuring a safe space for open communication and personal sharing.

### Modeling and Mirroring:

Set a personal example for participants by aligning your actions with your words. Authenticity is key – your behavior will guide participants in their own learning and growth.

### Active Listening:

Approach the group with an open mind, free from judgments and assumptions. Listen attentively to both verbal and non-verbal cues to understand and respond to participants' needs effectively.

### Key Reminders for Trainers:

* + Always act in accordance with the group's agreed-upon sensitivity and respect.
  + Be an active presence in the training room.
  + Adapt to the group's needs and dynamics.
  + Different participants have different needs – sometimes you’ll need to support, challenge, or confront them.
  + Maintain humility; the training is about their growth, not your recognition.

# Process Management for Training

### Guiding Group Independence:

Help participants gradually become independent learners and contributors within the group. Encourage reliance on the group rather than on you as the trainer, especially as the training progresses.

### Unifying the Group:

Guide participants to overcome differences and build a cohesive group. Promote mutual support, commitment, and a strong sense of belonging.

### Balancing Personal and Professional Growth:

Ensure that both personal and professional development are integral parts of the training. Teach the **Points of You®** methodology in an engaging, experiential manner.

### Deep Impact:

Aim to touch each participant deeply, facilitating emotional and intellectual growth that moves them from within.

### Efficient Training Management:

Stay in full control of the training logistics, addressing any issues promptly. Work closely with any support staff to ensure the training runs smoothly.

### Fostering a Love for Points of You®:

Cultivate participants’ appreciation for **Points of You®** tools and methods. Encourage them to see the value of these tools for their professional work and inspire them to become active members of the **Points of You®** community.





# Training Energy Modes

As a trainer, understanding and mastering the different energy modes is crucial to creating an impactful and effective learning environment. Energy, when applied thoughtfully and intentionally, can transform your sessions, engaging participants at the right moments and guiding them through their journey of growth.

Each mode – Lift, Cocoon, Grounding, and In the Rhythm – serves a specific purpose, from energizing participants to fostering and reflection. By skillfully applying these modes, you can ensure your participants stay engaged, supported, and connected throughout the training. This guide will help you navigate and balance these energies to lead effective and dynamic sessions.

#### Lift

When we want to engage the room, inspire participants, and capture their attention to deliver a key message. This is the time to be active and energetic, using humor and enthusiasm to elevate the energy in the room. Keeping the atmosphere high and light helps ensure that participants remain focused and motivated.

 **Cocoon**

When we need participants to stay introspective, feeling safe and supported as they work towards their personal breakthroughs. This mode involves slowing down, creating a quiet, reflective space where participants can absorb the material at a deeper level. Use a gentle tone, be attuned to the group's needs, and sometimes allow silence to facilitate internal processing. The goal is to create a nurturing environment that encourages self-discovery and growth.

**Grounding**

After deep or intense sessions, when participants may feel overwhelmed or emotionally drained, grounding helps to stabilize the group’s energy. This mode involves bringing everyone back to the present moment, balancing the energies in the room, and preparing the group for the next part of the training. As a trainer, your role is to be the anchor, helping participants feel centered and ready to continue.

 **In the Rhythm**

This mode is about maintaining a steady, engaging flow throughout the training session. Find a natural rhythm that keeps participants interested and engaged without overextending the energy. Like a river, this rhythm can vary – sometimes flowing slowly, other times picking up pace. Being in rhythm means being authentic and adapting to the group’s needs while ensuring the training progresses smoothly.

# Points of You® Method The Points of You® Values

### Points of View: The Foundation of Organizational Growth

In life and in the workplace, every situation, task, and interaction can be viewed from countless perspectives. The challenge lies in seeing these from a fresh, previously unnoticed angle. This is where real change and innovation begin.

To support this, we’ve developed an effective and easy-to-apply 4-step method that can be integrated into any organizational training context.

**Pause**

#### A Strategic Break

Taking a mindful pause allows teams and individuals to shift from the constant rush of workplace demands to a more reflective state. This step is crucial in breaking free from habitual thought patterns and automatic reactions that may hinder progress and innovation. It prepares us to approach challenges with a clearer, more focused mind.



**Expand**

#### Exploring New Perspectives

In this stage, we encourage exploring the unknown, stepping out of our comfort zones to discover new opportunities and insights. By considering diverse points of view within the team, we unlock creative solutions and innovative strategies. The outcome? A realization that in the workplace, as in life, anything is possible.



**Focus**

#### Making Informed Decisions

With a multitude of new ideas on the table, it’s time to focus on what matters most. By using targeted questions, teams can clarify and prioritize the insights that align best with organizational goals and the task at hand. This stage ensures that decisions are not just reactive, but thoughtful and aligned with long-term objectives.



**Doing**

#### Turning Insights into Action

This is where strategy meets execution. Transitioning from thought to action, we develop detailed action plans and set clear timelines to bring our insights to life. By outlining the steps needed to achieve our goals, we transform ideas into tangible results, driving the organization forward.

Everything we do begins here.

It took us 4 years until we were able to put our values into words.

It started with the understanding that it is not a process of creating a list or a statement but a process of exposing hidden parts inside each one of us (Efrat and Yaron) and revealing who we truly are.

From this understanding we began a journey into our personal worlds of inspiration. We explored situations, people, success stories, failures, different experiences that shaped our lives and were a part of who we would become. We each went to our own storage room, where we literally store our memories. We were looking for objects we kept that could somehow tell our story. We packed them in bags and brought them to the table - a letter, a photo, a pair of jeans, perfume, travel maps and more.

We sat down and shared our life stories. It was an unforgettable evening with lots of tears, laughs and insights. We looked at these significant moments of our lives and tried to extract their true essence.

Slowly, it became clear to us that the values behind our stories connect us to one another. That with these values at heart, we created **Points of You®**.

We understood that the values of **Points of You®** are actually a synchronization of the essence of us. Here are the 5 **Points of You®** Values:



# Inner Research

#### This is a study that takes place in everything we do.

It begins by getting up in the morning, looking at myself in the eyes, and simply asking: “Who am I? How do I feel?” It means being here and now, fully present, alert, with all sensors receiving, collecting data from inside and out.

Moving, stretching and attempting to expand our range of vision, allowing ourselves to see things from a new perspective. It is a study that never ends, a true burning passion that drives our lives.

# Dream

#### This is the big picture that keeps us moving forward.

Dreaming lifts us up, allowing us to explore from above and reach far. As we fly higher, more possibilities and opportunities are spread out before us, everything is possible.

We see the dream as a tool for leadership. A dream translated into a vision and a roadmap, a source of energy, inspiration, passion, and ambition. It can be passed on to more and more people.

Our dreams have led us to where we are today.

# Unexpected but Precise

#### This is the way we communicate with our audience.

We start with the unexpected - we do something different, surprising, captivating, tempting, intriguing, sometimes illogical, it may even be disturbing. The main thing is to shake things up and open people’s eyes.

Behind the unexpected lies a message and it is precise when it is relevant - when we can find ourselves in it, that’s when the penny drops.

This is how we work - the unexpected attracts attention, and in a moment of alertness we put across a clear message. The results are powerful.

# Devotion

#### This is our definition of working together.

We interpret ‘devotion’ in the most intimate sense: To devote yourself it is necessary to strip down and to be together. We believe that forming a true connection begins with putting down the masks and bringing ourselves into

a clean, authentic, informal way. When we achieve closeness and a sense of belonging, it is easier to move together towards the same goals. Bringing the strengths each one of us has, accepting each other with appreciation and kindness.

Togetherness is the strategy we are devoted to. If you want to join us, you’ll have to devote yourself in return.

# Tachles \*

#### This is the excel sheet behind our dreams.

It is important for us to look inward and to fly with our dreams; it is also important to translate them into action.

We are sworn ‘doers’: we mark targets, break them down into tasks, and move forward with determination to carry them out. From time to time we stop, sum up and draw conclusions, so we become more effective and accurate in the future.

True, sometimes it is frustrating, sometimes it takes a long time - but we have staying power, the question is not whether we will succeed, but when.

\* Originally, Tachles is a German word, in Israel it is commonly used as slang, meaning “the bottom line of doing”.



# Group & Team Roles – Theories and Implications









# What is a Group? Stages In a Team’s Development

## Long-term interactions between the same people whose common purpose unites them.

**Dr. Yaron Ziv**

## A number of people whose common outlook or character unites them.

**Harold Behr & Liesel Hearst**

### Definition of a Team:

A team is a group of individuals who work together towards a common goal, with each member playing a specific role that contributes to the success of the team as a whole. Unlike a group, a team relies heavily on collaboration, communication, and mutual accountability to achieve its objectives.

## Never doubt that a small group of thoughtful, committed, citizens can change the world. Indeed, it is the only thing that ever has.

#### Margaret Mead

**Stage 1: Connection**

#### Objective:

Help team members feel part of the team and the process.

#### What Comes Up:

Fears of not being accepted, fear of exclusion, and hesitancy to expose one’s vulnerabilities.

#### Behavior:

Collecting information about other team members and their roles, seeking acceptance, and striving to present a positive image.

#### Trainer’s Role:

Act as a supportive leader, establishing boundaries and reducing anxiety to help the team connect and feel secure.

**Stage 2: Individuation**

#### Objective:

Encourage team members to find and express their authentic voice within the team.

#### What Comes Up:

Focus shifts from belonging to individuality, leading to boundary testing and potential resistance.

#### Behavior:

Participants may test group norms, show self-sufficiency, or engage in power struggles.

#### Trainer’s Role:

Maintain empathy and respect, allow space for negative reactions, and ensure the team remains connected while supporting individual expression.









# Roles in a Team or Group

**Stage 3: Reciprocity**

#### Objective:

Deepen team cohesion and trust, allowing for mutual support and healing.

#### What Comes Up:

A sense of acceptance and vulnerability, with reduced dependence on the trainer.

#### Behavior:

Increased empathy, support, and emotional sharing among team members, balanced with individual and team interests.

#### Trainer’s Role:

Shift from an active to a more passive role, holding space for open expression and allowing the team to take more control.

**Stage 4: Completion**

#### Objective:

Facilitate closure, helping team members integrate their experiences and prepare for separation.

#### What Comes Up:

Fear of closure, nostalgia, and potential withdrawal as the end of the process approaches.

#### Behavior:

Strong group identity, authenticity in expressing feelings, and a sense of responsibility for the team's achievements.

#### Trainer’s Role:

Support the team through the separation process, encouraging resilience and transferring responsibility from the trainer to the team members.

Roles within a team or group can be categorized into three main types: Practical, Sensitive, and Wounded.

Each member may take on different roles depending on the dynamics of the team or group and the specific context.

Understanding these roles helps in managing team dynamics and ensuring effective collaboration.

### Practical Roles

These roles focus on the functional aspects of the team, such as task completion and goal achievement.

1. **Initiator** / Leader / Mission-Oriented:

#### Role:

Proposes new ideas, suggests solutions, and makes decisions.

This person drives the team forward with innovation and a clear vision.

#### In a Team:

The initiator often acts as the leader, setting the direction and inspiring others to follow.

1. **Information Seeker** / Analyzer / Inquirer:

#### Role:

Gathers relevant data, asks for clarification, and ensures that the team has the necessary information to make informed decisions.

#### In a Team:

The information seeker ensures the team stays on track by verifying facts and details.

1. **Information Giver** / Mentor / Influencer:

#### Role:

Shares knowledge, experience, and insights with the team, helping to broaden perspectives.

#### In a Team:

This role is crucial for expanding the team’s understanding and guiding others based on past experiences.

1. **Team Helper** / Collaborator / Supporter:

#### Role:

Handles routine tasks, provides logistical support, and helps maintain order within the team.

#### In a Team:

The helper ensures that all practical needs are met, allowing the team to focus on achieving its goals.

### Sensitive Roles

These roles focus on the emotional and relational aspects of the team, ensuring that the social dynamics are positive and supportive.

1. **Encourager** / Motivator / Optimist:

#### Role:

Offers praise and encouragement, fostering a positive atmosphere within the team.

#### In a Team:

The encourager keeps the team’s morale high and motivates members to continue their efforts.

1. **Harmonizer** / Mediator / Balancer:

#### Role:

Reconciles disagreements, reduces tensions, and ensures that everyone feels heard and valued.

#### In a Team:

The harmonizer plays a key role in maintaining harmony and resolving conflicts within the team.

1. **Tension Reliever** / Clown / Creative:

#### Role:

Uses humor or creative solutions to reduce stress and formalities, making the team environment more relaxed.

#### In a Team:

This role is vital for breaking tension and keeping the team’s energy positive and constructive.

1. **Feeling Expresser** / Emotional Connector / Intuitive:

#### Role:

Makes the team’s emotions and moods explicit, helping to build deeper connections between members.

#### In a Team:

The feeling expresser ensures that emotional undercurrents are acknowledged and addressed.

1. **Follower** / Companion / Supporter:

#### Role:

Goes along with the team’s decisions, providing stability and supporting the team’s direction.

#### In a Team:

The follower helps maintain the team’s cohesion by supporting the group’s decisions and actions.

### Wounded Roles

These roles emerge from a place of hurt and may reflect underlying issues that need attention. While they can be challenging, understanding these roles helps in managing and healing team dynamics.

1. **Blocker** / Resister / Critic:

#### Role:

Rejects ideas, takes a negative stance, and interferes with the team’s progress.

#### In a Team:

The blocker often resists change and can be critical, but understanding their concerns can lead to valuable insights.

1. **Aggressor** / Dominant / Challenger:

#### Role:

Struggles for status by deflating others, boasting, or being overly critical.

#### In a Team:

The aggressor challenges others and can cause tension, but they can also drive the team to address underlying issues.

1. **Deserter** / Withdrawn / Independent:

#### Role:

Withdraws from the team, becomes aloof, and avoids engagement.

#### In a Team:

The deserter may need space or may be dealing with personal challenges that need to be addressed to re-engage them.

1. **Dominator** / Controller / Manipulative:

#### Role:

Monopolizes the team’s time, tries to control the agenda, and seeks attention through exaggerated means.

#### In a Team:

The dominator needs to be managed carefully to ensure that their influence does not overwhelm others.

1. **Player** / Cynic / Disconnected:

#### Role:

Shows a lack of involvement, uses humor or cynicism inappropriately, and disengages from the team.

#### In a Team:

The player’s disengagement can be a sign of deeper dissatisfaction that needs to be explored to bring them back into active participation.

# Communication & Coaching Tools

In **Points of You®** training, we use a variety of communication and coaching tools to effectively deliver our message and achieve our goals. Each tool is designed to facilitate learning, self-reflection, and personal growth.

As trainers, our expertise lies in knowing when to apply a specific tool and when to refrain, ensuring our interventions are timely, impactful, and aligned with the needs of both the participants and the whole group. This balance is key to creating a meaningful and supportive training experience.

# Interaction and Intervention

### Interaction



# Communication & Coaching Tools

Interaction occurs when two or more people communicate or react to each other. In the context of training, this is the process of engaging participants in meaningful exchanges, not just through words, but through various forms of communication. Interaction is a powerful tool for delivering messages and facilitating understanding. It involves two key components:

**Content:** This refers to the subject, product, or message – the "What" and the "Why" that we want to communicate.

**Communication:** This is the "How" – how we deliver the content to the participants effectively.

During a lecture, there is little to no interaction; it is often a monologue where the audience remains passive, merely listening. In contrast, training sessions are highly interactive, with most of the material being delivered through dynamic exchanges, using stimulus and response to engage participants actively.

### Intervention

Intervention is the deliberate action of stepping into a situation, particularly when it's challenging, with the intent to improve it or prevent it from worsening. In training, interventions are used to guide

participants by offering new perspectives, breaking existing patterns, or bringing underlying issues to the surface. This allows participants the space they need for personal growth and healing.

In training, interaction and intervention work hand in hand. While interaction facilitates the flow of content and communication, intervention allows the trainer to step in when necessary to ensure the participant's journey is productive and transformative.

# The Interaction Schema





#### Notes on the Interaction Schema

* The interaction schema serves as a guide to protect and facilitate effective communication, ensuring that the message is delivered clearly. Making mistakes is acceptable as long as they occur within the boundaries of the interaction schema.
* An example of stepping outside the schema is when we don't know the answer but feel compelled to provide one anyway. In this case, we disrupt the schema by shifting the focus to ourselves, leading to self-righteousness or countertransference. It's important to remember – it’s not about us.
* When someone lacks a genuine answer but pretends to have one, they lose humility and become arrogant, potentially leading the interaction to feel patronizing, which can cause detachment in the communication.
* Another common error is answering a question prematurely, before it’s the right time. It’s crucial to remain in a state of active listening when it’s someone else’s turn to speak.
* Our primary focus is on Verbal and Image-based interventions, as these are central to our practice. When in doubt, always return to the participant's card, photo, or image as a grounding tool.
* Before engaging in any intervention always ask for the participant’s permission.







**Trainer**

**Message / Statement / Question**

**Participant**

**Response / Reaction** (Question, acceptance, sharing, opposition, resistance)

**Do I**

**understand?**

**No**

**Trainer**

Ask, be curious, involved

**Yes**

**Is it relevant?**

**No**

**Trainer**

Cutter

**Yes**

**Trainer**

**Response**

Question / content / turn the question with the group and let them answer.









# Content Context – Connecting the Dots

### Objectives of this Tool:

#### Clarity:

To ensure that the message we deliver is clear and easy to understand by connecting the content to a wider context.

#### Engagement:

To engage our audience by explaining the relevance and importance of the content, thereby increasing their understanding and receptiveness.

### When to Use:

Before presenting any significant content or message, especially when we need the audience to grasp the full meaning and implications of what we are sharing. This tool is essential when we want to ensure that our message resonates deeply with the audience.

### Whom to Use With:

Use this tool with any group or individual when delivering important information, ideas, or insights that require the audience to see the bigger picture and understand why the content matters.

### How Not to Use:

Avoid using this tool if the context is not well defined, or if the content lacks substance. Misusing the tool can lead to confusion or disengagement if the connection between content and context is weak or unclear.

### The Tool Structure and Process:

#### The Big Picture:

Begin by explaining why the message is important. Establish the broader context that makes the content relevant.

#### Content:

Clearly define what you want to say – this is the core message.

#### Communication:

Decide how to deliver the message effectively, ensuring that the audience understands both the content and its context.

### Example:

*"We all have endless possibilities to choose from and create (Context), but our limited perspective often narrows these possibilities, as we tend to view things from one fixed point of view (Content). To help*

*us broaden our perspective and expand our viewpoint, let’s explore this idea together through some interactive questions and activities (Communication)."*

**PR**

### Objectives of this tool

#### Reduce Resistance:

To reduce resistance to the message that we must deliver. We prepare the ground for allowing us to

**speak up** our truth.

#### Curiosity

To create curiosity in people. ”Opening the door” for the stakeholders to listen to our message.

### When to Use:

Before we need to deliver a crucial or difficult message. PR comes before the Using PR we “market” the content that we want to deliver, engaging our listeners and reducing resistance.

### Whom to Use With:

In every significant conversation, whether it's personal or professional, when we have a crucial message to deliver that might be confronting and/or unconventional.

### How not to Use:

Keep your PR authentic. It should not be “over the top” and make sure that you can deliver on the promise. Don’t say: ”This data will change the way you see life” if it does not do so, you will loose your entry point next time.

### The Tool Structure and Process:

* 1. Think ahead, do I need to attract attention, or do I need to reduce resistance and speak my truth?
  2. Remind your partner the context of your meeting and your mutual objective
  3. Give your partner heads up why you think the input your about to share is important
  4. Ask for permission to speak freely
  5. Got permission – go all the way!

### Example

*I would like to share with you an important observation I have.*

*I believe it can help us be more precise with the action plan we are preparing, and to increase the chance that we will achieve it successfully.*

*But, my observation might bring a different point of view of what we think now and might challenge us...*

*I would like to share it with authentically and speak freely with you –*

*afterwards, you will decide if to take it into consideration or not. is that ok for you?*

*Great, so...*

# Clarifying Conversation Expectations

### Objectives of this tool



#### Building Trust:

When everyone shares a common understanding of the conversation's purpose and goals, it fosters trust and transparency among participants.

#### Avoiding Misunderstandings:

This tool minimizes the likelihood of miscommunication or misinterpretation of messages, reducing confusion and the potential for conflicts.

#### Encouraging Open Communication:

The tool provides a solid foundation for me (and my partners) to communicate authentically and directly, even when the content might be challenging for the other party to hear.

### When to Use:

At the start of the conversation, following some initial small talk and just before delving into the core discussion.

### Whom to Use With:

In every significant conversation, whether it's personal or professional, where my objective is to foster collaboration and achieve practical outcomes..

### How not to Use:

When clarifying conversation expectations, ensure that you don't make it overly official, formal, or overly technical in tone.

### The Tool Structure and Process:

* 1. Define 2-3 values that are important for me to be expressed in our conversation.
  2. Explain what each value means to me and how I expect it to be expressed.
  3. Ask your partner if it's acceptable to them.
  4. Encourage them to share with you what's important for them in this conversation
  5. Got permission – go all the way!

### Example

*Before we begin, I would like to share what's important to me in our conversation to ensure its success:*

1. *Precision:*

*I aim to provide precise data and inputs for our discussion. I've prepared thoroughly, but if I discover any missing information during our meeting, I won't make assumptions or provide incomplete details. Instead, I'll commit to checking thoroughly after our meeting and providing you with solid input.*

*2 .Integrity:*

*My priority is our mutual success and achieving our goals. If I have something crucial to contribute, even if it may be confronting or unconventional, I'm committed to sharing it authentically and straightforwardly. I value open and honest communication. I expect the same for you and I'm willing to receive any feedback.*

*Is this approach acceptable to you? Now, I'd like to hear from you.*

*Do you have anything to add regarding what's important for you in our conversation?*





# Stimulus Response How to Observe a Photo/Title

### Objectives of this Tool:



#### Enhance Engagement:

To encourage participants to express themselves, ensuring that their contributions hold more significance and are better remembered by the group.

#### Foster Active Participation:

To involve participants actively in the process, making them a central part of the learning experience.

#### Maintain Energy:

This tool helps in maintaining a high level of energy throughout the process by constantly creating awareness and keeping the group engaged.

### When to Use:

Use this tool during any interactive session where participant involvement is crucial. It is particularly effective when the goal is to deepen understanding and make the learning experience more memorable.

### Whom to Use With:

This tool is ideal for use with groups or teams where active engagement and participation are needed to drive the process forward.

### How Not to Use:

* 1. Avoid using this tool if the participants are not ready or willing to engage actively. Forcing participation can lead to resistance and diminish the effectiveness of the session.
  2. Do not use it for rhetorical or obvious questions, or when the participants are unlikely to know the answer, as this can make them feel uncomfortable or inadequate.

### The Tool Structure and Process:

#### Ask Questions:

Continuously ask questions to draw participants into the discussion and encourage them to take ownership of their contributions.

#### Prioritize Participant Voices:

Ensure that participants’ statements take precedence over the facilitator’s, as this increases the impact and retention of the content.

#### Support Expression:

As a trainer,your role is to create a safe space where participants feel comfortable expressing themselves and trusting their insights.

### Example:

*"We’ve discussed the importance of collaboration, but I’d love to hear from you – how do you think we can apply this concept in our current project?"*

### How Do We Look at a Photo?

A photograph captures a moment, bringing the past into the present. It allows us to experience an ongoing moment, encouraging us to look at it deeply. In the context of organizational training, this moment can be used to reflect on various aspects of teamwork, leadership, and organizational culture. Our interpretation of a photograph is subjective. There's no right or wrong interpretation, only opportunities to explore issues relevant to our roles within the organization. As professionals, using photos in training sessions can help shorten conventional verbal processes and lead to deeper, more meaningful conversations about our work environment.

Deep observation enables us to open up to new points of view, expanding our range of feelings, emotions, thoughts, and motivation. By asking questions, we can guide these observations toward specific themes relevant to organizational dynamics.

### Basic Questions for Organizational Context:

1. What do I see in the photo? (Facts related to work dynamics)
2. What do I know about the photo? (Context: Place, time, people, situation in the workplace)
3. What do I feel when I look at the photo? (Emotions related to organizational roles, responsibilities)

If these basic questions don't provide the depth needed, or if nuances are required, consider the following levels of inquiry:







### Advanced Questions for Teamwork, Leadership, and Organizational Culture:

#### The Informative Part – Facts and Knowledge:

* + What do I see in the photo? (Identify specific roles, interactions, or organizational symbols)
  + What do I know about the photo? (Consider the work environment, team structure, or leadership style)
  + What is the setting of the photo? (Time, place, and context within the organization)
  + Who are the people in the photo? (Roles, responsibilities, and relationships within the team)
  + What situation is depicted? (Explore the dynamics between team members or leadership behaviors)

#### The Plot – Observation and Interpretation:

* + What does the photo depict? (Relate to teamwork, leadership moments, or cultural elements)
  + What is the situation described in the photo? (Identify challenges, conflicts, or moments of success)
  + What message does the photo convey? (Reflect on organizational values or leadership principles)
  + What memory does this photo evoke? (Connect with past team experiences or organizational changes)
  + What story does this photo tell me? (Imagine how this scene plays out in your organization, real or hypothetical)
  + What happened just before this moment? (Consider the lead-up to a decision or action)
  + What might happen just after this moment? (Speculate on the outcomes or consequences within the team or organization)



### How Do We Look at a Word?

Words, like photographs, carry significant weight in organizational contexts. They represent the values, roles, and responsibilities that define our workplace. The words we choose hold power; they can shape perceptions, influence behaviors, and drive change within an organization. Additionally, the words we choose reveal our mindset, offering insight into how we perceive and approach situations. By exploring the nuances of words, we can gain deeper insights into leadership styles, team dynamics, and the overall organizational culture.

Below is a set of questions tailored for observing a word within the context of organizational training. These questions can help participants reflect on key themes such as teamwork, leadership, and the roles they play within the organization.

### Questions to Explore Organizational Themes Through Words:

#### Exploring the Word’s Structure and Meaning:

* + What other words can be made up from the same letters?

(Consider the versatility and different interpretations of roles or responsibilities within the team.)

* + What word has the opposite meaning?

(Explore contrasting leadership styles or team dynamics, such as autocracy vs. democracy in decision-making.)

* + Do I like or dislike this word? Why?

(Reflect on personal feelings towards specific organizational values or cultural elements.)

* + What emotions, feelings, and memories does it arouse?

(Connect the word to past experiences in leadership, team projects, or organizational changes.)

#### Connecting the Word to Organizational Context:

* + How does the word connect with the photo I am looking at?

(Link the visual imagery to organizational themes like teamwork, collaboration, or leadership.)

* + Would I connect a different word with the photo?

(Encourage alternative perspectives that might reveal different strengths or weaknesses within the organization.)

* + How does this word relate to the issue that is of concern today?

(Focus the discussion on current organizational challenges, such as improving team cohesion or enhancing leadership effectiveness.)

#### Applying These Insights in Organizational Training:

* + Encourage participants to explore words that describe their roles within the organization. Discuss how these words align with their actual responsibilities and the expectations placed upon them.
  + Leadership and Organizational Culture:
  + Reflect on words that are central to the organization's culture, such as "integrity," "innovation," or "collaboration." Discuss how these words are embodied (or not) within the leadership and day-to- day operations.
  + Identifying Strengths and Areas for Improvement:
  + Use words to pinpoint strengths within the team or organization, as well as areas that may need development. For example, explore the implications of words like "resilience" or "communication" and how they play out in practice.

# Cutters

### Objectives of this Tool:

#### Maintain Focus:

To stop unwanted interactions that are not relevant to the process or the room, ensuring the session remains on track.

#### Manage Participation:

To prevent disruptions caused by participants who may dominate the conversation or steer it away from the intended focus.

### When to Use:

Use this tool during any session when it is necessary to redirect the group’s focus or when certain interactions are not serving the overall objectives of the session.

### Whom to Use With:

This tool is effective for use with participants who may be overly assertive, disruptive, or when the group dynamic needs to be brought back on track.

### How Not to Use:

* 1. Avoid using cutters excessively, as it may create an overly controlled environment where participants feel stifled.
  2. Be cautious when applying cutters to sensitive participants who may take offense or feel discouraged from contributing further.

### The Tool Structure and Process:

#### Light/Friendly Cutters:

These are subtle redirections that participants often do not even notice. Always start with this level:

* + "Right," "Excellent," "You're right."
  + "You are right, but..." or "Wonderful, but not yet" – this approach makes the participant feel acknowledged while gently redirecting the focus.
  + Use body gestures like "No," "In a minute," or "Let’s do it together."
  + "Thank you for sharing," "It’s a nice idea."
  + "What is the question?" or "What do you ask?"

#### Medium Cutters:

These are more noticeable but still need to be executed gently:

* + "Let’s move on," "Let’s continue..."
  + A slight disregard or a simple "Thank you."

These cutters are non-personal and help keep the session moving forward. Use them with sensitivity and respect.

#### Killer Cutters:

These are the most direct and are used when necessary. They will be noticed by everyone:

* + These should be done respectfully, and if needed, in a more private setting outside the room.
  + Directed personally toward the participant, ensuring the interaction remains respectful towards both the participant and the group.
  + "John, I need to deliver an important point to the team, and your interruptions are affecting our focus

Please hold your questions for now, and I promise everything will be clear by the end of the session." This version is concise while still being direct and respectful.





# The T-Junction

### Objectives of this Tool:

#### Encourage Decision-Making:

To help individuals recognize the importance of making decisions, even when they feel uncertain or afraid of making mistakes.

#### Promote Movement:

To emphasize that any decision, whether perceived as good or bad, creates movement – and where there is movement, there is life.

### When to Use:

Use this concept in situations where individuals are hesitating or struggling to make a decision, especially when they’ve been avoiding it for a long time.

### Whom to Use With:

This tool is effective with anyone who feels stuck or is resisting change due to fear of making the wrong choice.

### How Not to Use:

* 1. Avoid pushing someone into a decision without understanding their concerns and fears. Rushing them may cause more resistance.
  2. Be careful not to dismiss the significance of their hesitation; it’s important to empathize with their struggle.

### The Tool Structure and Process:

#### Acknowledge the Struggle:

Begin by empathizing with the individual’s situation. Acknowledge their fears and the challenges they face in making a decision.

#### Present the Cost of Inaction:

Gently highlight that sitting on the fence comes with its own set of costs – lost time, missed opportunities, and unfulfilled potential.

#### Empower Movement:

* + Reinforce that there’s no “right” or “wrong” decision – only the importance of creating movement. Explain that by making a choice, they’ll move forward, and where there is movement, there is life.
  + Ask the participant(s) what price they believe they are paying by not making a decision,

and encourage them to connect with the emotions that might be suppressed. Allow them to feel whatever comes up regarding the price they may have been paying for a long time. This connection can help unlock deeper motivations for change.

#### Validate Their Choice:

Whether they decide to stay where they are or make a change, affirm that consciously choosing their path is an honorable and powerful decision.

### Example:

*"In life, we often avoid making decisions because we fear failure or making a mistake. But what we don’t always realize is that by not deciding, we’re paying a price – time continues to pass, and we miss out on opportunities. The T-Junction concept teaches us that it’s not about making the ‘right’ decision; it’s about making a decision. Movement, any movement, brings life and progress. If you choose to stay where you are, that’s a valid choice – but make it consciously. Understand the costs and own that decision. And remember, we’re here with you, supporting you every step of the way."*







# Integrity Principle

### Objectives of this Tool:

#### Define Integrity:

To build a clear understanding of integrity, emphasizing its meaning as wholeness rather than just honesty.

#### Encourage Alignment:

To help individuals and teams align their words, intentions, and actions, achieving personal and collective integrity.

#### Foster Accountability:

To create awareness of the consequences of losing integrity and the importance of restoring it through acknowledgment and correction.

### When to Use:

Use this tool at the start of a coaching process or when addressing situations where individuals or teams struggle with consistency between what they say, intend, and do.

### Whom to Use With:

This tool is effective for individuals and teams who need to build or restore their integrity, ensuring alignment in their personal or professional lives.

### How Not to Use:

* 1. Avoid using this tool in a way that feels accusatory or judgmental; it should be used to foster understanding and growth, not guilt.
  2. Be careful not to oversimplify the concept of integrity, as it involves complex personal and collective dynamics.

### The Tool Structure and Process:

#### Initiate with a Question:

Begin by asking participants what integrity means to them. Write their responses on the board and acknowledge how their ideas connect to the concept of integrity.

#### Present the Definition:

Explain that integrity refers to wholeness, not just honesty. Discuss the original meaning of the term, which was used to assess whether a machine was in full operational integrity, ready for use.

#### Build the Concept:

* + **Operational Wholeness:**

Just as a car is complete and ready for sale when all its parts are assembled, a person is in integrity when there is wholeness between three essential components: what they say, what they intend, and what they do.

#### The Integrity Building: First Floor (Say):



**Integrity**

Alignment

{

My words

My Intention

My Actions

Represents personal choice – your word that

expresses who you are, your aspirations, thoughts, desires, and actions.

#### Second Floor (Intend):

Represents commitment – your intention behind what you declare.

#### Third Floor (Do):

The physical manifestation of your intention. Without action, your word holds no value; action is what creates results.

#### Acknowledge Human Experience:

* + Explain that we are born with integrity, but as we grow, fear and risk calculations cause us to lose it. We learn to say without meaning, intend without doing, and eventually avoid saying anything to escape commitment.
  + Discuss how losing integrity occurs when any of the components of wholeness are missing, using

the analogy of a malfunctioning car.

#### Create Awareness:

* + Ask participants to reflect on and share the prices they have paid or are still paying for breaches of integrity in their lives.
  + Encourage them to connect with the emotions associated with these breaches and allow

themselves to feel whatever comes up. This helps unlock deeper motivations for change.

#### Restore Integrity:

* + Discuss how to restore wholeness after it has been broken: by acknowledging mistakes, making new declarations, and committing to corrective actions.
  + Emphasize that the goal of coaching is to create areas of correction and commitment to personal

and collective integrity.

# The Lighthouse Principle: Understanding the Physical Universe

#### Example for Reflection:

Imagine two trapeze artists performing in a circus, swinging high above the ground. They arrange to meet in mid-air, where one must let go of their trapeze, trusting the other to catch them. If the catching partner is even a second late, the trapeze artist who let go is left to fall. Often, there’s no safety net – just the cold, hard ground below. In that critical moment, integrity is everything. If the

partner fails to catch them, no amount of apology can undo the consequences. This is the essence of integrity – being where you need to be, doing what you’ve committed to do, when it matters most.

#### Empower Personal Responsibility:

Conclude by inviting participants to ask themselves whether they will be there for themselves at the critical moment when their actions need to match their words. Reinforce that the real responsibility lies in their hands, and it is their choice to maintain integrity.

### Example:

*"In life, just as with trapeze artists, integrity is about trust and timing. It’s not just about honesty but about aligning what you say, intend, and do. When these elements are in sync, you achieve integrity. However, as we grow, fear and hesitation cause us to lose this alignment. The price we pay is frustration, disappointment, and mediocrity. Through this process, we will work on restoring your integrity by acknowledging where it has been lost and committing to corrective actions. Remember, the responsibility for maintaining integrity lies in your hands – it’s your choice."*







### Objectives of this Tool:

#### Illustrate the Power of Results:

To demonstrate that results are non-negotiable and serve as the ultimate guide in decision-making and adjustments.

#### Encourage Corrective Action:

To help individuals recognize when they are off course and prompt them to make necessary adjustments to reach their goals.

### When to Use:

Use this tool when individuals or teams are struggling to understand the importance of results or when there is resistance to making necessary changes. It’s particularly effective in coaching scenarios where goals are not being met.

### Whom to Use With:

This tool is suitable for anyone who needs to align their actions with their desired outcomes, whether in personal relationships, business, or any other area where achieving specific results is crucial.

### How Not to Use:

* 1. Avoid using this tool in a way that could be perceived as dismissive of someone’s efforts or emotions. The focus should be on constructive correction, not blame.
  2. Be mindful not to apply it in situations where results are influenced by factors beyond the individual’s control without acknowledging those factors.

### The Tool Structure and Process:

#### Initiate with a Story:

Start by sharing the story of the American destroyer SS Washington during World War II. Explain how the admiral, upon discovering another vessel on a collision course, ordered the vessel to adjust its course, only to find out that the "vessel" was actually a lighthouse. This story illustrates that, like the lighthouse, results are immovable and non-negotiable. Here’s the complete story:

Two battleships were on a training mission in thick fog. The lookout reported a light on the starboard bow. The admiral, realizing they were on a collision course, ordered the other ship to change course 20 degrees. The reply came back, advising the admiral to change his course instead. Growing frustrated, the admiral asserted his authority, declaring, "I'm an admiral; change course 20 degrees." The response was firm: "I'm a seaman second-class. You should change course 20 degrees." Now furious, the admiral threatened, "I'm commanding a battleship. Alter course 20 degrees or else." The final message read, "I'm a lighthouse." They quickly changed course.

**Personal story of Frank Koch**

# Non-Verbal Communication

#### Present the Principle:

Use the story to highlight the principle that in the face of results, arguments, opinions, and ranks become irrelevant. What matters is the adjustment – or the lack thereof – based on the results at hand. Explain that ignoring results leads to collision and destruction, whether in relationships, business, or other areas.

#### Apply the Principle to Real-Life Scenarios:

* + **Personal Example:**

If someone aims to earn 10,000 a month but consistently earns only 3,000, their results are a clear signal that they are off course. Encourage them to assess what needs to be corrected – whether it’s the quality of their presentations, their pricing strategy, or the frequency of their outreach efforts.

#### Business Example:

If a team intends to reach a specific target but repeatedly misses the mark, the results indicate a need for adjustment. This might involve revisiting the strategy, reallocating resources, or changing the approach entirely.

#### Encourage Reflection and Correction:

Ask participants to reflect on their own experiences where they may have ignored results or failed to adjust when necessary. Encourage them to connect emotionally with the consequences of staying off course and to recognize the value of making timely corrections.

### Example:

*"In life, just like in the story of the lighthouse, results are the ultimate guide. When you set a goal but find yourself repeatedly off course, the results are telling you it’s time to make a correction. Ignoring them only leads to further frustration and potential failure. Whether in personal goals or business objectives,*

*recognizing and responding to these ‘lighthouses’ can mean the difference between success and collision. Remember, the lighthouse doesn’t move – it’s up to you to adjust your course."*

Non-verbal communication is a critical yet often overlooked aspect of interaction within organizations. While words convey explicit messages, our gestures, facial expressions, posture, and even the space we occupy can speak volumes about our intentions, emotions, and underlying attitudes. For trainers understanding and harnessing the power of non-verbal cues is essential to creating a cohesive and supportive environment.

### Appearance

#### Observation, Not Judgment:

Notice how participants are dressed, their hairstyle, and makeup, without passing judgment.

#### Language:

Consider how voice and intonation affect communication. Pay attention to the style of speech, maintaining eye-level interactions. Reflect on the subtext – why something is being said, when it’s being said, and what remains unsaid.

### Body Language

#### Facial Expressions:

Observe the subtle movements of the face.

#### Gestures:

Pay attention to how the body is used to express thoughts and feelings.

#### Posture:

Notice how participants hold their bodies.

#### Mise-en-scène:

Consider how and when participants move, and what these movements convey.

### Enhancements

As a trainer, the tools and elements you incorporate into your sessions – what we call "enhancements" – play a crucial role in supporting the learning environment and reinforcing your message. These enhancements include:

#### Music:

Carefully selected music can set the tone for the session, helping to create the right mood and energy level for your participants.

#### Atmosphere:

The overall atmosphere you cultivate, from lighting to room arrangement, impacts how your participants engage with the material.

#### Location:

The choice of location and the organization of the space can either enhance or hinder the learning process. Ensure the space promotes interaction and focus. However, keep in mind that sometimes we must work with what’s available. For example, if trainers are invited to an organization's conference room, our influence over the setup may be limited. You can learn more about this under [Room Setting](#_bookmark22).

#### Props:

Using props such as study materials, cards, or a centerpiece can make the session more engaging and help participants connect more deeply with the content.

As a trainer, it’s your responsibility to thoughtfully choose and use these enhancements to create a supportive, immersive learning experience that aligns with your training objectives.

#### Silence:

Understand the power of silence as a communicative tool. It allows space for reflection, deeper connection, and can be just as impactful as words in facilitating learning.



### Verbal Communication

#### Language:

Use simple, clear language that is accessible and at eye level with participants.

#### English:

Ensure your pronunciation is clear and your vocabulary is appropriate for the group, aiding in effective communication.

#### Clarity in Speech:

Be straightforward and direct, ensuring your message is easily understood by all participants.

#### Subtext:

Listen for and address the underlying messages in what participants say. Understanding the full context of their words helps in responding more effectively and facilitating deeper discussions.

# Before and After Guide

# Crafting Transformative Training Experiences Room Setting: Creating the Right Environment

The true art of facilitating a successful training lies in what happens before and after the session itself. This chapter is dedicated to the essential preparation and follow-up practices that ensure your training not only runs smoothly but also leaves a lasting impact on participants and clients alike.

Before the training begins, every detail matters – from how the room is set up to how you, as a trainer, prepare mentally and emotionally. We say that “God is in the details” and a big part of the magic of **Points of You®** experiences comes from this planning and going into small details.

The first section, [Room Setting](#_bookmark22), guides you through creating an inviting and purposeful space that encourages open communication and creativity. The physical environment you create can either enhance or hinder the participant’s experience, making it a critical component of your preparation.

Next, in [Mindset](#_bookmark24), we delve into the importance of your own mental preparation. Your mindset as a trainer sets the tone for the entire training. We offer strategies to help you enter the session with clarity, confidence, and the flexibility needed to navigate the dynamics of the group.

Understanding and aligning with the client’s needs is the cornerstone of any successful training. In [Touchbase with Client’s Needs](#_bookmark25), we explore how to conduct effective pre-training discussions that ensure your session meets the client’s objectives while leveraging the **Points of You®** methodology to its fullest potential.

Finally, a training’s true success is measured by its lasting impact. The [Follow-Up](#_bookmark26) section emphasizes the importance of continued engagement, offering practical tips for reinforcing the lessons learned, gathering feedback, and planning ongoing support to help participants and clients implement changes long after the training has ended.

By focusing on these critical "Before & After" elements, you’ll be well-equipped to deliver trainings that are not only impactful in the moment but also resonate long after the participants leave the room.

### Introduction:

The physical space where your training takes place is more than just a venue; it’s the foundation upon which the entire experience is built. Room setting is where the experience starts by welcoming the participants. As a trainer, the room is our home, and the participants are our guests during the experience. How we set up the space can significantly impact the dynamics of the training, influencing everything from participant engagement to the overall atmosphere.

A well-prepared room creates a sense of safety, openness, and curiosity, encouraging participants to fully engage with the content and each other. Conversely, a poorly arranged or cluttered room can create barriers to communication, hinder participation, and disrupt the flow of the session. Therefore, it’s essential to align the space with the objectives of the training, taking into account time constraints, communication needs, and the participants themselves.

### Objectives:

* Prepare the environment to support the participants’ learning experience.
* Learn how to align with the physical conditions of the space.
* Get inspired by different room setting ideas that provoke curiosity and playfulness.

### Tips for Effective Room Setting:

#### Consider the Participant Experience:

As you prepare the room, put yourself in the participants’ shoes. Visualize each step of the training: What will they need at each stage? Where and how will they access these resources? How much time will it take? Is it eco-friendly? This perspective helps you create a room setting that is welcoming, functional, and aligned with the **Points of You®** ethos.

#### Hygiene and Freshness:

The room must be neat, clean, and inviting. It’s our responsibility as facilitators to maintain this environment. Make sure the room looks and smells fresh, with no clutter, empty bottles, or discarded papers. Consider using essential oils like lavender to refresh the air, and open windows during breaks to circulate fresh air.

#### Be Prepared:

Arrive at least 45 minutes before the training begins to set up the space and manage any unexpected surprises. Hide personal belongings to keep the room looking tidy and professional.

### Ideal Space Arrangement:

At **Points of You®**, we recommend arranging chairs in a circle. This layout fosters equality, inclusivity, and connection, as everyone can see and be seen. It breaks down hierarchical barriers, encouraging open dialogue and active participation. The circle symbolizes unity, where each participant’s point of view holds equal value.

If possible, place tables at the sides of the room to provide space for writing materials or refreshments without obstructing the circle. Especially when working with **ClicKit** and processes where participants need to create something, it will be more comfortable to sit by the table. However, we don’t want them obstructing communication during the beginning and end of the training. As a trainer, it’s important that you sit on the same type of chair as the participants. This reinforces the concept of equality and helps build trust and openness within the group.

Ideally, we want a room with windows to let natural light in, as natural light creates a more relaxed atmosphere and energizes the space. If natural light is unavailable, consider how the room’s artificial lighting can be adjusted to create a warm, inviting environment. Dim or harsh lighting can strain participants' focus and mood, so aim for lighting that is gentle on the eyes and conducive to interaction. In the middle of the room, place the centerpiece – the heart of the room. This is where participants' materials will be waiting, intriguing them as they enter. The arrangement of the materials should spark interest and curiosity, drawing participants into the experience right from the start. Additionally, we’ve created special roll-ups just for you, which you can find in the [Marketing Kit](https://drive.google.com/drive/folders/10DqwBkzYcbbbj-5BGHWO0gDb4JC09euA?usp=drive_link). Once printed, position them strategically around the room to help set the stage and enhance the atmosphere..

### The Centerpiece:

The centerpiece is a focal point that anchors the training and reflects its theme. Whether you’re using a regular **Points of You®** centerpiece or creating one that resonates with the group or organization, it’s important to think about what will best support the training’s objectives.

If you’re working with **ClicKit**, consider how you want to present the kits – either on the chairs or arranged around the centerpiece. Similarly, if you’re using **Speak Up**, decide how the cards will be spread out and how you want the room to look when participants enter.

The centerpiece can also be customized to reflect the client’s industry or theme. For example, if you’re working with a shipping company, you might include model ships or related products. This adds a personal touch and helps participants feel more connected to the process.

You can also use the centerpiece as an element of group creation, where participants can add elements and co-create the space. This interactive approach not only personalizes the environment but also fosters a sense of ownership and involvement among the participants.

### Checklist:

Here are some questions to consider when setting up the room:

* What are the content’s objectives and the participants’ profiles? Do you need a formal or relaxed setting?
* Do you want tables, just chairs, or cushions on the floor? Where do you want participants to be during the experience?
* Will participants need space to move around or a place to write easily?
* Will you sit or stand during the training? Where will you place yourself in the room?
* How should the room look when participants first arrive?
* Where will you place the cards, tools, or stationery – on the floor, in the center, on the chairs, or on side tables?
* Do you need a centerpiece? What will it include, and how does it relate to the content or the group?
* Do you need to place something on the walls, such as flipcharts? How many, and where will they go?
* Will participants move around during the process? Do they need to carry their own materials while moving?
* How are the acoustics in the room? Depending on the number of participants and the room size, will you need a microphone?
* Will you use music during the Pause, sharing part, or writing part? Where will you place the speaker?
* How should the lighting be set for a better-quality training?
* Where will the closure take place, and how will the environment support the power of this final moment?
* Will you need a projector for the training? If yes, where will you project the presentation to? Will everyone be able to see it clearly?
* Are there any cultural sensitivities that might influence the room setup? Is the space inclusive for everyone?
* Can participants move easily around the room without tripping over cords or furniture?
* Do you have a back up plan if something doesn’t work as expected (e.g., projector issues, space constraints)? Be prepared with alternatives to keep the training flowing smoothly.

### Adaptations:

Sometimes, the client’s physical space may not be ideal for the training. Always ask for photos of the room beforehand and learn about its conditions. Then, think creatively about how you can adapt the space to meet your needs. Change the content or adjust your approach according to the reality of the space you have. The key is to create an environment that supports the training’s goals, even if it’s not exactly what you envisioned.

For example, if you have to use tables, try round ones with no corners to maintain a sense of openness and reduce barriers. In short sessions, consider doing parts of the training standing up together to create a more dynamic energy.

However, we recognize that not every venue will allow for this ideal setup. In such cases, adapt the space as best as you can.

### Interaction and Visibility

#### Key Principle:

Whatever you decide to do in the room, ensure that it has a purpose and relevance to the group and the training. If an element doesn’t serve the training’s objectives or doesn’t add value to the participants, consider whether it’s necessary. The environment should be intentional, focused, and supportive of the training’s goals.

# Mindset: Preparing for a Successful Training

### Introduction:

Defining your mindset before facilitating a training is like building a strong foundation for the event, significantly increasing the likelihood of a successful and impactful session. Your mindset shapes how you approach the training, interact with participants, and manage the dynamics of the room. It’s about entering the space as a "container," ready to hold the room and guide participants through their journey. By taking the time to set your mindset, you align yourself with the objectives, anticipate challenges, and prepare to lead with confidence and clarity.

### Objectives:

#### Focus and Mental Preparation:

Defining your mindset helps you mentally prepare for the training, ensuring you have a clear understanding of the goals, participant expectations, and how you plan to lead the session.

#### Flexibility and Adaptability:

A well-defined mindset allows you to adapt your approach to various situations that may arise during the training, enabling effective and constructive responses.

#### Effective Communication:

Setting a mindset beforehand helps maintain open and respectful communication with participants, fostering a safe environment for sharing and learning.

#### Understanding Participants' Needs:

A participant-centered mindset keeps the focus on the attendees’ needs, helping you tailor content and approaches to meet their expectations.

#### Building Confidence and Effectiveness:

A clear and defined mindset enhances your self-confidence, allowing you to lead the training more effectively and assuredly.

### Tips for Setting Your Mindset:

#### Clarify Goals and Objectives:

Connect deeply with the goals of the training. Understand what you want to achieve, the key messages you want to convey, and the change you aim to bring about in the participants.

#### Understand Your Audience:

Get to know the company or participants you will be working with. Understand why they might need you at this training and what their expectations might be. Try to sense where they are coming from, why they are in the training, and what the “context” is for their participation.

#### Define Your Approach and Atmosphere:

Decide on the facilitation style you want to use – whether it will be formal or informal, whether you will incorporate humor or maintain a serious tone. Determine the type of atmosphere you want to create – open, creative, supportive, or focused.

#### Boost Your Self-Confidence:

Reflect on your strengths as a trainer. Remember the experience and knowledge you bring to the training. Prepare yourself to handle pressure or unexpected challenges in a positive and constructive manner. Consider your growth – what do you want to do better this time? Will you approach anything differently?

#### Mental Practice:

Engage in guided visualization exercises: imagine yourself successfully leading the training, handling challenges, and receiving positive feedback from participants. This practice helps you enter a mindset of success and feel prepared for any scenario.

#### Physical Preparation:

Ensure you are physically prepared: get enough sleep, eat well, and manage stress before the training. Your physical well-being directly impacts your mental readiness and ability to engage fully with the group.

# Touch Base with Client’s Needs

### Time:

The process of setting your mindset should begin during the preparation stage of the training, as you go over the content, refine open points, and understand what is required of you as a trainer. On the day of the training, allocate at least 30 minutes for a personal process in a quiet and comfortable space. Use this time to revisit the main points, remind yourself of your goals and strengths, and fill yourself with confidence and clear intentions.

Additionally, take at least 10 minutes to pause with yourself – listen to music, take a walk in nature, or engage in another activity that helps center you. Reflect on the qualities and intentions you want to bring into the room, ensuring you enter the training with a mindset that supports both you and the participants.

### Integration with the Training Flow:

Your mindset is not just about preparing for the training; it’s also about how you carry that preparation into the session itself. From the moment you step into the room, your mindset influences how you interact with participants, respond to challenges, and guide the flow of the training. It’s part of "walking the talk" – showing up as a clean, centered trainer who is ready to hold the space and lead with intention.

### Introduction:

Aligning the training with the client’s needs is crucial for delivering a successful session and building a trustworthy, long-term relationship. As trainers, we may not always be the ones who initially communicated with the client, and sometimes the person who ordered the training isn't the manager who will attend. Additionally, if a significant amount of time has passed since the initial conversation, things could have changed, making it important to recheck the client’s current needs and objectives..

Our role extends beyond simply meeting client expectations; it involves guiding them toward outcomes that are realistically achievable within the training’s framework. While it’s important to adapt to the client’s goals, we must also trust our expertise in the **Points of You®** method to deliver the most impactful experience. By balancing the client’s objectives with our proven process, we can create meaningful and lasting outcomes.

### Objectives:

#### Clarify Client Needs:

Develop a deep understanding of the client’s goals, challenges, and expectations.

#### Align Training Goals:

Adapt the training to meet client needs while preserving the integrity of the **Points of You®** method.

#### Build Trust and Partnership:

Foster a collaborative relationship with the client through clear communication and expert guidance.

#### Prepare for Continuous Feedback:

Establish a feedback loop to address emerging needs and adjust the training in real time.

### Tips for Effective Touchbase:

#### Clarify Goals and Objectives:

Begin by thoroughly understanding the client’s goals. Identify the changes they wish to see and how the training can contribute to achieving these outcomes.

#### Understand the Client’s Context:

Engage with the client to learn about their organizational culture, current challenges, and broader context. This helps tailor the training content to be both relevant and impactful.

#### Trust the Process:

As an expert in the **Points of You®** method, trust in the facilitation process. While aligning with client needs is important, use your expertise to guide them back to effective approaches if their requests deviate from the training’s objectives.

#### Address Resistance or Misalignment:

If client expectations cannot be met within the training’s constraints, be transparent about it. Offer alternative solutions or adjust the session scope to ensure outcomes are both achievable and meaningful.

* **Engage Key Stakeholders:** Involve important organizational stakeholders early on to secure broader support for the training’s goals. This might include department heads or HR managers whose buy-in is crucial for success.
* **Cultural Sensitivity:** Be mindful of cultural differences within the client’s organization that may influence training dynamics. Adapt your approach as needed to respect and integrate these elements.
* **Be Prepared for the Unexpected:** Stay flexible and ready to adapt to last-minute changes, unexpected participant behavior, or technical issues. Being prepared for the unexpected ensures a smooth training experience.

### Checklist:

#### Clarify Goals and Objectives:

* + Understand the client’s desired outcomes and how they envision the training contributing to these goals.
  + Identify key messages that need to be conveyed and the changes expected.

#### Understand Your Audience:

* + Gather insights about the company, its culture, and the participants. Understand why they are attending the training and what they hope to gain.

#### Define Your Approach and Atmosphere:

* + Decide on the facilitation style and atmosphere that will best support the training’s objectives and resonate with the participants.

#### Address Gaps and Misalignment:

* + Identify any gaps between the client’s expectations and what the training can deliver. Address these openly and adjust the session scope if necessary.

#### Build a Continuous Feedback Loop:

* + Establish a mechanism for ongoing feedback during the touchbase phase and throughout the training to adapt to emerging needs.

#### Finalize the Training Structure:

* + Ensure the training structure aligns with the client’s needs while staying true to the

**Points of You®** method.

#### Conduct a Pre-Session Check-In:

* + Before the session, have a final check-in with the client to confirm there are no last-minute changes or new developments.

### Time:

#### Initial Touchbase Meeting:

Allocate 45-60 minutes for a thorough discussion of the client’s needs and expectations. It’s recommended to schedule this call 12-21 days prior to the training. This helps ensure that the training is aligned with the client’s current situation and objectives, reducing the likelihood of unexpected surprises.

#### Pre-Session Check-In:

1-5 days prior to the training, conduct a brief 10-15 minute check-in closer to the training date to ensure alignment and address any last-minute updates.

### Other Comments/ Tips/Ideas:

#### Present Yourself as the Expert:

Before diving into the client’s needs, introduce yourself and your experience with the **Points of You®**

method. Share previous successes to build confidence.

#### Follow-Up with a Summary:

After the touchbase meeting, send a summary to the client for approval. This ensures everyone is on the same page.

#### Involve Key Representatives:

If possible, invite a representative manager of the employees who will benefit from the training to a second meeting. This helps fine-tune the training content and ensures it meets the needs of those on the ground.

#### Set Realistic Expectations:

Be clear about what the training can achieve within the given timeframe. If the client’s goals are too ambitious for the session length, discuss realistic alternatives.

#### Maintain Flexibility:

While it’s important to have a structured plan, remain open to adjustments based on the client’s feedback and the dynamics of the training.

### Integration with the Training Flow:

The insights gained from the touchbase meeting should be integrated into the training’s flow. From initial planning to final delivery, these insights guide how the training is structured, what content is prioritized, and how the trainer engages with participants. Keeping the client informed throughout the process ensures that the training remains aligned with their expectations and objectives.

By taking the time to thoroughly understand and align with the client’s needs, trainers can deliver trainings that are not only effective but also deeply resonant with the participants, leading to more meaningful and lasting outcomes.

# Follow-Up: Reinforcing and Sustaining Training Impact

### Introduction:

Following up after a training is crucial for ensuring that the insights and skills gained during the session are effectively integrated into participants’ daily routines. It helps assess the training’s impact, provide ongoing support, and maintain a strong relationship with the client. By implementing a thoughtful follow- up strategy, trainers can extend the training’s value, promote continuous growth, and reinforce the key messages delivered during the session.

### Objectives:

#### Reinforce Learning:

Support participants in applying the key insights and skills from the training to their everyday lives and work environments.

#### Evaluate and Improve:

Collect feedback to assess the training’s effectiveness and identify areas for improvement in future sessions.

#### Sustain Client Engagement:

Strengthen the long-term relationship with the client through continuous communication and follow- up, ensuring ongoing development and alignment with their goals.

### Tips for Effective Follow-Up:

#### Plan and Budget Follow-Ups in Pre-Meetings:

During the initial pre-meetings with the client, discuss, plan, and budget all follow-up activities. This ensures that both parties have clear expectations and that follow-up actions are integrated into the overall training strategy from the outset.

#### Gather Participant Feedback:

Collect feedback from participants to evaluate the training’s impact, effectiveness, and areas for improvement. This can be done through surveys, evaluations, or one-on-one conversations. The **ClicKit** QR code is particularly valuable, allowing participants to quickly provide light feedback about the trainer and the session. Analyze this feedback and prepare a summary report to share with the client in a follow-up meeting.

#### Provide Additional Resources:

To help participants reinforce their learning, offer additional resources such as reading materials, online resources, or exercises. Encourage participants to continue using their **ClicKit** sets to further explore the insights gained during the training.

#### Follow-Up Coaching Sessions:

Schedule follow-up coaching sessions to revisit key points, address challenges, and provide additional guidance. These sessions, conducted at intervals like 1 week, 1 month, and 3 months after the training, help sustain and integrate the learning. During these sessions, revisit the action items set during the training and help participants translate insights into tangible outcomes.

#### Maintain Open Communication:

Keep communication lines open with both participants and the client. Encourage them to reach out with any questions or for further support. Regular check-ins help maintain momentum and demonstrate your commitment to their ongoing development.

#### Share Follow-Up Reports:

Prepare a comprehensive report for the client after gathering feedback and conducting follow-up sessions. This report should include an overview of the training's impact, participant feedback, areas for improvement, and additional recommendations. Sharing this report in a follow-up meeting reinforces the training's value and identifies opportunities for future collaboration.

#### Customize the Follow-Up Plan:

Tailor your follow-up approach based on the specific needs of the client and participants. Some groups may benefit from more frequent follow-up sessions, while others might require additional resources or different forms of support. Flexibility ensures that the follow-up is as effective as possible.

### Checklist:

#### Plan and Budget Follow-Ups in Pre-Meetings:

* + Discuss and plan all follow-up activities during the initial client meetings.
  + Ensure the follow-up is budgeted and integrated into the overall training strategy.

#### Collect Feedback:

* + Use surveys, one-on-one conversations, or **ClicKit**’s QR code to gather participant feedback.
  + Analyze feedback and prepare a summary report.

#### Provide Additional Resources:

* + Offer tailored materials to reinforce learning.
  + Encourage continued use of **ClicKit** sets to deepen understanding.

#### Schedule Follow-Up Coaching Sessions:

* + Plan follow-up sessions at key intervals (1 week, 1 month, 3 months).
  + Revisit key points, address challenges, finalize action items, and answer questions.

#### Maintain Open Communication:

* + Encourage participants to reach out with questions or for further support.
  + Regularly check in with both participants and the client to maintain momentum.

#### Prepare and Share Follow-Up Reports:

* + Create a detailed report on the training’s impact and participant feedback.
  + Share the report with the client in a follow-up meeting.

#### Customize the Follow-Up Plan:

* + Adapt the follow-up approach based on the client’s specific needs.
  + Be flexible in your methods and timing to maximize effectiveness.

#### Encourage Continuous Engagement:

* + Suggest periodic follow-up sessions as part of an ongoing development strategy.
  + Reinforce the training’s key messages through repeated engagement.

### Time:

#### Initial Follow-Up Meeting:

Schedule a meeting with the client within a week of the training to review feedback and discuss the next steps.

#### Follow-Up Coaching Sessions:

Conduct these sessions at intervals of 1 week, 1 month, and 3 months after the training.

#### Ongoing Communication:

Maintain regular check-ins with participants and the client, adjusting the frequency based on their needs.

### Other Comments/ Tips/Ideas:

#### Integrate Feedback into Future Training:

Use the feedback collected to refine and improve future trainings. This not only enhances the quality of your sessions but also shows the client that you value their input and are committed to continuous improvement.

#### Celebrate Successes:

Acknowledge the successes and progress that participants have made since the training. This positive reinforcement can motivate them to continue applying what they’ve learned and stay engaged in their development journey.

#### Leverage Technology for Follow-Up:

Consider using technology platforms for ongoing engagement, such as creating a private online group where participants can continue discussions, share insights, and support each other’s growth. This fosters long-term connections and collaboration.

By implementing a comprehensive follow-up plan, trainers can ensure that the impact of the

**Points of You®** training extends beyond the initial session, leading to sustained personal and professional growth for participants and continued value for the client.



# Training Building Blocks

# Building Blocks of Training Welcome & Opening

In this chapter, we break down the training process into essential building blocks to help you, as trainers, customize your sessions to meet the needs of your clients and participants. These building blocks are fundamental elements that should be included in all of your **Points of You®** training, and we recommend them for any training you conduct. By focusing on these core components, you can ensure that each session is structured, meaningful, and impactful. These building blocks guide you in

creating a welcoming atmosphere from the beginning, reducing participant resistance, and boosting their excitement. They provide a reliable and practical framework to set the right pace for your training, from the opening to the closing, leaving participants feeling inspired and fulfilled.

Our goal is to provide you with a solid foundation while giving you the flexibility to make each training your own. The text and guidelines we offer are not meant to be memorized but are designed to inspire you and serve as a backbone you can always rely on when seeking ideas.

For each building block, we provide the rationale behind its inclusion, key points to focus on as a trainer, logistics, and the flow of the process, along with examples of what to say. At the end of the chapter, we offer suggestions on how to adjust the timing of these elements based on the length of your session.

Feel free to adapt the language to fit your style, ensuring that the essence of what we aim to deliver remains intact. This approach allows you to stay true to the **Points of You®** methodology while infusing your unique personality and perspective into the training.

Remember, this chapter provides the structure – you bring the content. The more you internalize and personalize these elements, the more natural and effective your facilitation will become.

Once you master these basics, you’ll be ready to move on to the next chapter, where you will find detailed templates for our official trainings.

As you become proficient in facilitating these building blocks and understanding how they work, you’ll be able to personalize and customize them easily to meet your clients' specific needs.

Let’s dive in!

In this chapter we will explore the following Building Blocks:

* [**Welcome & Opening** >](#_bookmark28)
* [**Objectives** >](#_bookmark29)
* [**Sensitivity & Respect** >](#_bookmark30)
* [**Pause** >](#_bookmark31)
* [**Points of You / Points of View** >](#_bookmark32)
* [**Focus & Action** >](#_bookmark33)
* [**Closure** >](#_bookmark35)
* [**Building Block Timing Guide** >](#_bookmark36)

### Introduction:

The opening is the cornerstone on which we will build the entire process. This is the opportunity to set the tone and energy of the meeting, introduce yourself and the process, and create a first impression that will connect the participants to you. If done well, it sets the stage for a successful and engaging session, limiting the resistance in the room. If done poorly, it may lead to disengagement and a lack of connection.

### Objectives:

* Create a welcoming environment.
* Encourage openness and ease through self-introduction.
* Establish a sense of partnership and commitment to the process.

### Training Highlights:

* This is the moment when the session is starting; participants may feel excited, stressed, or tired – we want to make them feel welcomed and in the right place.
* Be welcoming and inviting, showing your energy and personality.
* Use humor and personal warmth to make participants feel comfortable.
* Pay attention to non-verbal cues and the energy in the room; adapt as needed.

### Key Points to Remember:

#### Opening Greeting:

* + Begin with a warm, friendly greeting to make participants feel welcome.
  + Express gratitude for the time and effort participants have taken to join the training.

#### Trainer Introduction:

* + Introduce yourself, including your professional background.
  + Share a personal anecdote or experience related to the training topic to create a personal connection.
  + Introduce **Points of You®** and the unique tools you'll be using, building excitement for the

experience ahead.

#### PR to the Process:

* + Use the PR tool to spark curiosity and reduce resistance. Keep the opening short and light – it’s the warm-up to the training.
  + Encourage participants to engage, ask questions, and offer insights throughout the training.
  + Briefly share the theme of the day and what participants will explore. Offer just a highlight, a promise of what’s to come.

### Logistics & Special Preparations:

* Follow the room setup guidelines outlined in the earlier chapter on [Mindset](#_bookmark24) and [Room Setting](#_bookmark22).
* Memorize your text to convey control and confidence.
* Ensure the room is welcoming and that all necessary materials, such as a speaker for background music, are prepared.
* Be mindful of where you will sit, ensuring it supports your ability to engage with the group and hold the room.

### Welcoming Modules:

* Opening Greeting
* Trainer Introduction + Points of You® Overview
* PR Tool Introduction

### Example – Flow

Below is an example of an inviting high energy opening that you can follow. Your opening will be the same, both in the face-to-face setting and online.:

#### Welcome:

Hello everyone, and welcome to our training. I’m happy and excited to be here with you today, and I thank you for making the time to join us.

#### A Simple Self-Introduction:

Share your name, age, something personal, and something professional. For example: Hi, I’m Yaron Golan. I’m 48 years old, a father of three boys. My background is in business management and psychology, and I’m a business coach. As a certified **Points of You® business trainer**, I lead groups and sessions like this all over the world.

#### About Points of You®:

We create innovative tools for training and development, utilizing the powerful language of photos and metaphors – the language of the 21st century. Our programs teach professionals and organizations worldwide how to implement these tools and methodologies to meet their unique needs. We collaborate with global leaders like Google, Intel, and NASA, as well as small startups,

delivering content focused on deep, transformative experiences that foster mindshifts and cultivate a culture of dialogue.

#### PR:

Our goal is to create a sense of acceptance, letting participants know that whatever they choose to do is perfectly fine, while also inviting them to embrace a challenge with excitement. For example, you might say: We're here to explore together, but there’s no obligation to do anything. If you decide to take a time out, that’s absolutely fine. However, I’d like to gently challenge you to try something very,

very small – just a little different from what you usually do. If you allow yourself to take this small step, you might be surprised by what you discover. No pressure, but if you’re open to doing something a bit differently, it could be an amazing and significant experience for you.

### Timing Adjustments

Adjust your welcome to fit the overall timing of your process, ensuring it remains engaging for participants. It's crucial to set the right tone and atmosphere for the group, providing the necessary information while transitioning smoothly into the experiential activities as quickly as possible.

# Objectives

### Introduction

Presenting the objectives at the start of a training is crucial for laying the foundation for its success. It provides clarity, focus, and a shared framework for all participants, setting the stage for a productive and engaging session. When done correctly, it connects participants to the process and encourages their cooperation. On the other hand, if objectives are not clearly communicated, participants may feel disconnected, leading to confusion or lack of engagement.

### Objectives

* To ensure participants understand the purpose of the training and the goals they are working towards.
* To create a safe and focused environment by clearly outlining what will be covered in the session.
* To foster a sense of shared purpose and cooperation by clearly communicating why the group has gathered.

### Training Highlights

* Preparation: The process of specifying and choosing the objectives begins long before the training. It's essential to align these objectives with the participants' needs and the goals of the organization.

See the respective section in [Chapter 4: Touch Base with Client Needs](#_bookmark25)

* Hidden Objectives: Often, the inviting organization may have additional, less visible objectives. For instance, in a team facing communication challenges, beyond the visible objectives like creating a safe space for conversation, there might be a goal to encourage open dialogue on complex issues.
* Ensure the objectives are presented in a clear, focused manner with high energy to motivate participation. Avoid overloading with information.
* We should have a more focused energy at this stage, to make sure we present in a clear and easy to understand way.
* Cultural Sensitivity: Be aware of cultural differences in communication styles and expectations. Adjust your approach to ensure all participants feel included and respected, tailoring your language and presentation style to suit the group’s cultural diversity.

### Key Points to Remember

#### Direction and Focus:

Clear objectives help participants understand the training's direction and what they are expected to achieve, aiding their focus and engagement. Ideally they should be one sentence in length.

#### Assessing Success:

Clear objectives allow both the trainer and participants to track progress and measure the training's success based on these predefined goals.

#### Taking a Time Out:

We recommend that the first objective in every training be: "To take a time out for yourself." This invites participants to slow down, step away from their hectic routines, and reconnect with themselves and their colleagues from a fresh perspective. It is an objective that resonates with everyone in the

room, offering a much-needed pause and helping to set a different tone of energy. This creates the space for participants to be present, fostering genuine connection and engagement.

### Logistics & Special Preparations

* No special preparations, same setting as for the whole Welcome and Opening.
* In the online setting you may want to create a visual like presentation slides, so that participants can also read the objectives from their screens as you explain them.

### Objective Modules

* Introduction to the objectives
* Presentation of objectives
* Check clarity

### Example – Flow

Below is an example of a focused objectives introduction, that you can follow. Your opening will be the same, both in theface-to-face setting and online:

#### Introduction of Objectives

Our meeting today has several objectives. I will present these to ensure we all know what to expect and what we aim to achieve together.

#### Presentation of objectives

Present the objectives as defined in the training structure. These are some examples of objectives from our trainings:

* + Explore and identify the personal strengths each team member brings to the team.
  + Recognize and appreciate the unique contributions of each team member to our success.
  + Reflect and connect to enhance teamwork and performance.
  + Identify personal and professional stressors.
  + Distinguish between motivating factors versus inhibiting stress factors.
  + Find new coping strategies to deal with pressures.
  + To take a time-out and see things from a wider perspective.
  + To meet with my colleagues from a new and collaborative point of view.
  + To co-create a shared understanding of what bonding and connection mean to the team.
  + Gain new perspectives about myself.

#### Ckeck clarity

Check if the objectives understood by everyone.

### Timing Adjustments

* Adjust your objectives to fit the overall timing of your process, ensuring it remains engaging for participants. We recommend not to have more than three objectives for your sessions.

# Sensitivity & Respect

### Introduction:

Establishing a group contract that emphasizes sensitivity and respect is crucial for a **Points of You®** training. By setting clear group norms, we create a safe environment where participants feel valued and heard. This foundation fosters open, honest dialogue, leading to more meaningful connections and

impactful outcomes. Without these norms, participants may feel uncomfortable and disengaged, limiting their willingness to share and explore deeply.

### Objectives:

* Establish a safe space where participants feel comfortable sharing.
* Promote empathy and respect for diverse perspectives.
* Ensure the group remains focused on the training's goals.

### Training Highlights:

* Non-verbal Communication: Use open body language and positive facial expressions to encourage participation and make participants feel comfortable.
* Language Sensitivity: Choose your words carefully to avoid bias or insensitivity. Take your time to ensure that everyone understands and feels included.
* Adaptability: Stay flexible and be ready to adjust your approach based on the group’s needs and dynamics.

### Key Points to Remember:

#### Clarity:

* + Ensure that the Sensitivity & Respect guidelines are clear and understandable for all participants.
  + Remember, this is your foundation for creating a safe space, so don’t hesitate to revisit and reinforce these points as needed.

#### Walk the Talk:

* + Whatever is agreed upon by the group applies to you as well.
  + For example, if the rule is to keep phones on airplane mode, make sure your phone is also on airplane mode.
  + Lead by example, showing that you are committed to the same standards.

#### Upholding the Guidelines:

* + Be proactive in maintaining the Sensitivity & Respect agreement throughout the training.
  + If you notice any breaches, address them personally in a gentle, private manner, ensuring the participant is aware of the issue without bringing unnecessary attention or embarrassment to them in front of the group.
  + If you feel the group is not fully upholding the agreement, bring everyone together to discuss and reaffirm the guidelines.

### Logistics & Special Preparations:

* Follow the room setup guidelines outlined in the earlier chapter on [Mindset](#_bookmark24) and [Room Setting](#_bookmark22).
* In the online setting, consider having a slide with the Sensitivity & Respect points listed out.

### Sensitivity & Respect Modules:

* Introduction of Sensitivity & Respect
* Sensitivity & Respect Points
* Check for Understanding and Agreement

### Example – Flow

Below is an example of a grounded and clear Sensitivity & Respect you can follow. Your approach should be consistent, whether in a face-to-face setting or online:

#### Introduction of Sensitivity & Respect:

We will start by creating a safe space that supports us in being ourselves. In many trainings, this is called the ‘group contract.’ But for us, it’s more than that. It’s about making us all feel comfortable and safe to bring our authentic selves into the room. Sensitivity and Respect are for ourselves and for others.

#### Sensitivity & Respect Points:

Introduce the key points that you wish the group to follow:

#### What said in here stays here in the room

This is how we build our safety net. Of course, you can share the experience with others outside – but only about yourself. We want you to feel free and confident to express yourself fully. 'Sharing out' includes all social media like Facebook, Instagram, etc. Please ask for permission if you want to upload someone’s picture.

#### Be Gentle To

'Be Gentle' means approaching yourself and others without judgment or expectation. During the training, be patient and gentle with yourself regarding what you are willing to share. If something feels too much, don’t push it. Respect the other participants by being compassionate as you listen to their opinions, and do your best to withhold judgment, expectations, or criticism.

#### No distractions

Smartphones as communication devices are not allowed during the training. Smartphones are designed to grab our attention. Let’s try to break this pattern, even an addiction. It’s not easy, but use your phone only as a camera. No texts, apps, or anything else. Let’s give ourselves a chance to focus inward rather than outward.

# Pause

#### Presence

We want your 100% presence here – not just your body, but also your mind and heart. Listen to yourself and others, and observe what is happening within you. Notice what triggers you, what catches your attention, and what brings you stillness. I would appreciate it if you stay in the room during sessions and avoid small breaks unless absolutely necessary. Ask yourself why you need to step out. The more you are present, the more you will benefit.

#### Be on time

Punctuality is key – not just according to the clock, but in the process. I recommend arriving 5 minutes before we start. The training room will be open 10 minutes before. Give yourself a smooth transition. If someone is not here, I will not start, so it’s your responsibility to be on time because everyone else will be waiting for you. Remember, being on time is a state of mind, not just a time on the clock. When we are on time, everything happens at the right moment

#### I statement

We are here to share ourselves. Often, we talk about 'we,' 'others,' or 'people,' and it stops being about us and becomes about them. We will use 'I statements' – I feel... I think... We are here to be daring and take ownership of our words and perspectives.

#### Check for Understanding and Agreement:

Does anyone have any questions or want to add anything to our Sensitivity & Respect? (give some time for the question to echo in the room and see do the participants wish to add anything, then continue).

Does everyone agree? Please raise your hand so I can see that we have everyone’s approval. (Check that everyone in the room is raising their hands. Encourage them to raise their hands fully, reinforcing the sense of a binding agreement.)

### Timing Adjustments

Tailor the Sensitivity & Respect section to fit the length and needs of your training. For shorter sessions (up to 2 hours), focus on key points A to C. In longer sessions, include the additional points as well.

Remember, Sensitivity & Respect is designed to create a safe environment that supports your training’s objectives. Feel free to add any additional points that will help achieve this.

### Introduction:

Pausing is a fundamental part of the **Points of You®** Method. No matter the length of the training, we always begin with a Pause, setting the stage for everything that follows. Pausing allows participants to disconnect from the hectic pace of their daily lives, step out of the constant "doing" mode, and simply "be." This moment of stillness helps participants to meet themselves, observe their physical body, thoughts, and emotions from different points of view, and prepare their minds for deeper engagement with the training content. The efficiency of how we pause directly impacts the quality of the training experience.

### Objectives:

* Encourage participants to take a time out.
* Create space for participants to connect with themselves and reflect on their inner state.
* Help participants tune their energy and mindset to align with the workshop’s content and theme.

### Training Highlights:

* Softer Energy: As you guide the pause, slow down your energy to create a calming, grounding atmosphere. Transition smoothly from the excitement of the opening to a more subtle, reflective energy. This shift helps participants stop "running" and truly pause.
* Explain the Pause: Before initiating the pause, clearly explain its purpose. Emphasize the importance of stepping out of the "doing" state and simply being. If participants understand the purpose behind the pause, they will be more receptive to the experience.
* Tailor the Pause: The pause must be relevant to the content, timing, and participants. Whether it’s a music pause, dynamic pause, or another method, choose the approach that best suits the training’s objectives and the group’s needs.
* Handling Resistance: Some participants might find it challenging to pause, especially if they’re not used to slowing down. If discomfort or resistance arises, encourage participants to embrace whatever feelings come up, even if it’s discomfort. Remind them that it’s normal to feel uneasy when stepping out of their usual rhythm, and that this discomfort can be part of the process of reconnecting with themselves.

### Key Points to Remember:

#### Power of Pause:

In many trainings, the Pause is one of the most impactful moments for participants. It provides a rare opportunity to sit and do nothing – don’t skip it.

#### Focus on the Theme:

The Pause helps participants begin the training on a personal, internal level. By encouraging them to think about the training's theme, they begin to connect with its meaning, making it the start of their experiential process.

#### Pause is for you

The Pause is also your time to ground and reconnect with yourself. After the excitement of the opening, take this moment to center yourself and gather the energy and clarity needed for the process ahead.

### Logistics & Special Preparations:

* + Ensure you have your speaker and playlist ready before the training begins.
  + In official **Points of You®** trainings, specific music tracks are provided. You can find them in the respective chapter or below:
    - Click & Connect: [Apple Music](https://music.apple.com/il/playlist/click-connect-2-pause/pl.u-RRbVvlxIebYAoxV) | [Spotify](https://open.spotify.com/playlist/7IJ1r9yiGDZZZ21VsQTpDs?si=85b7c886f1d04ea3)
    - Team Fusion: [Apple Music](https://music.apple.com/il/playlist/team-fusion-1-pause/pl.u-RRbVv1WuebYAoxV) | [Spotify](https://open.spotify.com/playlist/35V0G49oRaG6ujig0MB9qg?si=d241fd1c48fb4642&nd=1&dlsi=bd4f89e7700d419e)
    - The Culture Compass: [Apple Music](https://music.apple.com/il/playlist/culture-compass-1-pause/pl.u-RRbVvBVFebYAoxV) | [Spotify](https://open.spotify.com/playlist/5h3SfKF9BTUDEyETcAKHkQ?si=JcsWTgkqR-6TX_6SZ5hQ0g)
    - **Speak Up** Official TTT: [Apple Music](https://music.apple.com/il/playlist/speak-up-ttt-module-1-pause/pl.u-PDb40gDCy6pDokz) | [Spotify](https://open.spotify.com/playlist/4eBUFB4r3twaFeP5s3k9kC?si=uquuFR9YTL6Xj24nkJNZ3A&nd=1&dlsi=40b43a73c62344f9)
    - Discovery with **ClicKit**: [Apple Music](https://music.apple.com/il/playlist/click-connect-1-discovery/pl.u-AkAmPNbFlAqJV7X) | [Spotify](https://open.spotify.com/playlist/7gJzvhJDTnfjKqyKdRT6a6?si=3d76215a00924c9e)
  + For other trainings, you can choose your own music that aligns with the session’s objectives. For inspiration, look inside the Tribe Space about [Pause](https://tribe.points-of-you.com/c/pauses/)

### Pause Modules:

* + Preprataion with **ClicKit** - only when using **ClicKit**
  + PR to Pause
  + Pause Activity
  + Closing of Pause

### Example – Flow

Below is an example of how to guide participants through the closure process:

#### Preparation with ClickIt

Before we dive deep into the process, let’s take a moment to make all the necessary preparations so that we can be fully present. In a moment, I will ask you to open your **ClicKit**. I’ll play some music (Discovery Playlist: [Apple Music](https://music.apple.com/il/playlist/click-connect-1-discovery/pl.u-AkAmPNbFlAqJV7X) | [Spotify](https://open.spotify.com/playlist/7gJzvhJDTnfjKqyKdRT6a6?si=3d76215a00924c9e)), and you will have 4 minutes to explore and familiarize yourself with this special kit.

First, separate the Photo cards and Question cards from the set by carefully tearing them apart. Then, take a moment to browse through the journal and other materials. After 4 minutes, ensure you have 12 individual Photo cards and 8 Question cards ready, along with your journal, a pen, and the sticky notes. Once you've completed this, close your **ClicKit** and set it aside. You should only have the separated cards, your journal, pen, and sticky notes in front of you.

Any questions? Great. We’ll do this in silence, allowing the music to guide you. Take this time to explore and connect with the materials, and let the process unfold mindfully. Enjoy this moment of discovery. See you in four minutes.

#### PR to Pause:

Pausing is an integral part of the **Points of You®** Method. We are going to take some time to ourselves and just be – meeting ourselves, observing, and reflecting on our physical body, our thoughts, and our emotions. In the 21st century, it’s almost a radical act to do nothing. We’re constantly in a doing mode, rushing from one task to the next, with deadlines and to-do lists controlling our day. But here, today, we’re giving ourselves permission to take a time-out, to pause. If you allow yourself to truly pause today, it could be priceless.

#### Pause Activity:

* + - In **Points of You®** we pause by sitting and listening to music. In a minute I will play a track of music lasting 5 minutes. Please sit comfortably, without anything in your hands, no equipment on your lap, and try to sit in an open position, what I mean without crossing your legs or arms. If you need to, lean on something for support. I'm inviting you to close your eyes during the music, so you

can really tune in to yourself. Try to stay as aware as possible, be still, and allow yourself to fully engage in this Pause. To simply doing nothing – but it’s all about feeling at ease and at home in this moment. Prepare yourself, and remember, the most important thing is to feel comfortable.

* + - During the pause I invite you to think about the theme of the training and what it means for you.

You can remind the participants about the core theme of your training.

* + - We recommend to switch off the lights, close the window shades to create this space of being with yourself. Play the pause music and do the Pause together with your participants.

#### Closing of Pause:

* + - After the music ends, take a moment to slowly transition back. Count to ten in your head before speaking, then softly say: "Thank you for the Pause. Take your time, and when you’re ready, I invite you to come back to us." As you speak, gently bring the lights back on and open the window shades, allowing natural light to flow into the room. Gradually increase your pace and energy, guiding the participants to the level of energy you want them to reach. This shift in both pace and

# Points of You / Points of View

environment helps participants transition smoothly, aligning them with the precise energy you intend, while maintaining the grounding atmosphere you've established.

* + - After the Pause,move to the next part of the training. This calm and reflective state that they’ve reached during the Pause will help them engage more deeply with the content that follows.

Pause is not an isolated activity but a crucial part of the overall flow that enhances their ability to connect with the content of the training and with each other.

### Different Pause Variations:

Below are some ideas for other versions of Pause that you can do. What is important check that it fits the theme of your trainings, the audience, group's physical ability and that you have the space to do what you want to do:

#### Music Pause:

Select music that disrupts patterns and takes participants out of their comfort zones. Less familiar, non- lyrical tracks in rare languages work well. Experiment with the music, it can be calm but also up beat. The pause should last at least 5 minutes, and you can extend it by playing multiple tracks.

#### Dynamic Pause (Dancing):

If space allows, guide participants in a dynamic pause with music. Be mindful of the participants' physical abilities, and ensure the space is suitable. Keep the activity at least 5 minutes long.

#### Walking Pause:

Instruct participants to walk at a certain pace, to be in silence and engage in non-verbal communication through eye contact. Instrumental music can guide the pace. If in nature, provide specific instructions related to the training’s objectives and ensure participants are prepared (e.g., comfortable walking shoes).

#### Writing Pause:

Encourage participants to reflect by writing for at least 4 minutes. This kick-starts inner dialogue and is especially effective when paired with non-verbal music. Ensure writing materials are ready before the pause begins.

#### Guided Meditation, Breathwork, or Storytelling:

These are active forms of pausing where the trainer leads with clear, timed instructions. Slow down your speech, allow pauses between instructions, and adjust your voice volume to maintain a calming atmosphere.

### Timing Adjustments

* + Shorter Sessions (under 60 minutes): A minimal pause could involve just taking a few deep breaths or listening to a short piece of music.
  + Longer Sessions (over 4 hours): Considerr a longer playlist or offer participants time to write in their journals after the music to kick-start their inner dialogue and reflect on what came up for them.

### Introduction:

At **Points of You®**, our approach is all about embracing multiple perspectives. Whether in a personal or professional setting, the ability to explore different points of view fosters open-mindedness, empathy, and deeper understanding. The name "Points of You" reflects this philosophy: while it is spelled "You" – Y-O-U – it sounds like "Points of View," emphasizing the idea that there are infinite ways to see and interpret the world around us.

This approach is foundational not only to our training but to the core philosophy of our company. When introduced effectively, it helps participants and teams break free from rigid thinking patterns, foster collaboration, and achieve meaningful personal and professional growth. It also plays a crucial role in reducing resistance to hearing other perspectives. Without this understanding, participants may struggle to open themselves to new viewpoints, feeling a need to “protect” their own.

### Objectives:

* + Encourage participants to feel safe in sharing their unique points of view.
  + Reduce resistance in the room. By acknowledging that if participants feel anger, confusion, or disagreement, it means they are stepping out of their regular points of view and engaging in meaningful work.
  + Expand perspectives to gain new insights, enabling new actions.
  + Introduce the foundational philosophy of **Points of You®** and how we work.

### Trainer Highlights:

* + Introduce Early: Present the concept at the beginning of the training. This sets the stage for what’s to come and builds curiosity.
  + Be Prepared: Have examples ready to illustrate the concept effectively.

### Key Points to Remember:

#### Clarity:

Ensure that participants understand the concept of **Points of You®** and its importance throughout the training.

#### Reinforce Through Examples:

Use relatable stories, like how different people perceive the same piece of music in unique ways. Encourage participants to reflect on their own experiences and how they form their points of view.

#### Invite Participation:

Create a safe space for participants to openly share their perspectives without judgment. Reinforce that there is no right or wrong perspective–only different points of view.

### Points of You / Points of View Modules:

* + Understanding the Essence of **Points of You®**
  + Experiencing Perspectives
  + Exploring Your Own Perspective

### Example – Flow

Below is an example of a high-energy and interesting Points of You / Points of View block that you can follow. Your approach should be consistent, whether in a face-to-face setting or online:

#### Understanding the Essence of Points of You®:

Welcome, everyone. Before we dive in, I want to take a moment to share the essence of what we do at **Points of You®** and what today’s training is all about. The name "Points of You" holds a deeper meaning. While it’s spelled "Points of You" – Y-O-U – it sounds like "Points of View." This double meaning reflects what we believe: that there are infinite perspectives on everything – whether it’s an object, a situation, a person, or even a sound.

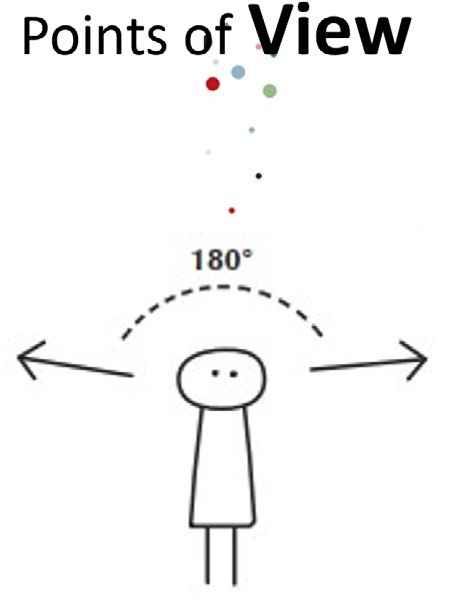
At any given moment, we each view the world from our own unique angle, shaped by our experiences, beliefs, and emotions. Today, we will explore how these different points of view help us grow and see beyond what’s in front of us. Our goal in this training is to create a space for you to share your perspective, challenge fixed ways of thinking, and unlock new insights.

#### Experiencing Perspective:

To demonstrate this idea of varied perspectives, I’m going to ask you a few simple questions about the music we just listened to. Please respond by raising your hand based on how you authentically feel:

* + - If you enjoyed the music, please raise your hand.
    - If it wasn’t your style, raise your hand.
    - If you thought the music was too long, raise your hand.
    - If it went by quickly, raise your hand.
    - If the music felt too loud, raise your hand.
    - If the volume was perfect, raise your hand.
    - Finally, If you wanted the music even louder, raise your hand.

Thank you. Now here’s something interesting: although we all listened to the same music, you just saw that each of us experienced it differently. Some of you might have imagined yourself dancing, while others felt a bit uncomfortable. This is the power of perspective – the sound was the same for everyone, but the experience was unique for each person.

This brings us to the core of **Points of You®**. When we talk about points of view, we’re really talking about our sight, our ability to see. At any given moment, we can see about 170 to 180 degrees in front of us. But there’s another 180 to 190 degrees behind us – our blind spots, areas we cannot see but which hold new opportunities and insights for growth.

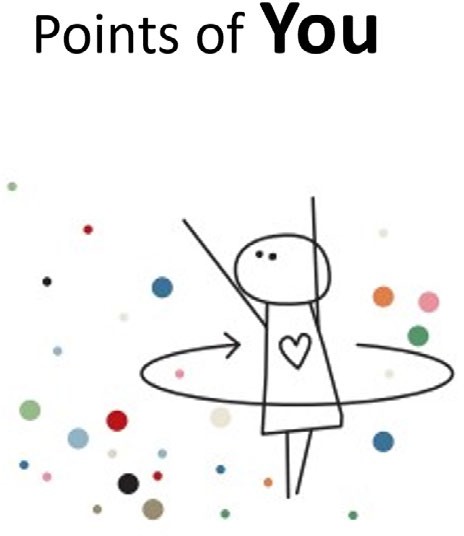
In our daily lives, our fixed points of view represent the habits and patterns we rely on – the stories we tell ourselves. These are the things we’re so sure about that we often don’t even question them. But when we explore those blind spots, we step outside our comfort zone and start to see new possibilities.

At **Points of You®**, we aim to help you expand your point of view. Today, we’ll guide you in stepping outside your fixed perspectives and looking at things from different angles. It might feel uncomfortable at first – but that discomfort is a sign of growth. When you feel confused or frustrated, it means you’re accessing new areas you usually don’t see.

#### Exploring Your Own Perspective

Now, let’s talk about the "You" in **Points of You®** – your authentic point of view. How much of your life do you really express as yourself? In the way you speak, dress, or work, how often do you show up

as the real you? And how often do you hold back, staying silent because you worry, “Maybe people won’t like it?”

In today’s training, you will have the space to bring your authentic self to the table. I invite you to leave behind calculations and speak up as you truly are. You’ll also have the chance to reflect – to ask yourself how much you’re truly allowing yourself to express who you are.

Remember, this training is about more than just theory. It’s about practising the ability to see and hear different points of view and share your own!

So, are you ready? Let’s begin.

### Timing Adjustments

* + Short Sessions (up to an hour): Focus on the practical example in the "Experiencing Perspective" module. Ask participants how they experienced the exercise, whether they found the music too long, too short, too quiet, or too loud. Highlight the diversity of perspectives and emphasize that there’s

no right or wrong way to experience something. If time is limited, avoid the longer stories like the "Balloon" story and keep the session focused on quick, interactive demonstrations.

* + Longer Sessions: In extended training sessions, you can delve deeper into the "Understanding the Essence of Points of You" module by exploring how perspectives influence different aspects of life – family, work, relationships. Transition smoothly into the "Exploring Your Own Perspective" module by inviting participants to reflect on their own lives. Ask them to consider: How often do I hold back

from being my authentic self? Encourage participants to bring their true selves into the space, without judgment. In these longer sessions, you can also discuss how expanding our points of view unlocks new opportunities and helps navigate life’s challenges more effectively.

* + Additional Inspiration: For longer sessions, you can introduce the story of "Points of View" from The **Coaching Game**, which explores the opportunities hiding in seeing a different perspective. You can share the story at the beginning in the Understanding the Essence of **Points of You®** part.

# Focus & Action

#### Points of View Story (from The Coaching Game):

Many years ago, the owner of a large shoe factory decided to expand his business and open up new markets. To this end, he sent two of his top executives to investigate the Asian market, giving each one the task of collecting data and all kinds of information from different parts of the continent. After weeks of sailing, the first executive arrived at his destination, disembarked, and was shocked by what he found: none of the natives wore shoes; in fact, they had never heard of them. The man sent an urgent message to his boss: "I have arrived and found that no one here knows about shoes. We will not be able to sell a single pair. I will return immediately..."

The second employee also sailed for several weeks until he landed at another port on the Asian continent. He too could not believe what he saw when he disembarked: not a single person wore shoes; in fact, they had never heard of them. The man sent an urgent telegram to his boss: "I have arrived.

People here do not wear shoes; in fact, they know nothing about them. The potential is enormous, and the market is huge. We can sell millions of pairs a year. I have already started making contacts."

### Introduction:

As we move toward the end of our training, the focus shifts from expanding perspectives to organizing and applying the insights gained. After the expansive phase of exploring various points of view, it’s crucial to help participants focus on the most relevant insights for them, both personally and professionally. This process allows them to organize their thoughts, create clarity, and translate these insights into actionable steps. When done well, this final stage ensures that participants leave with a clear sense of purpose

and practical steps to take forward. However, if we rush or skip this process, participants may feel overwhelmed, leaving them confused and unable to apply what they’ve learned effectively.

### Objectives:

* Understand the importance of the focusing and action process within the training structure.
* Inspire participants with different strategies for translating insights into actions.
* Prepare for potential difficulties that participants may face during these stages.

### Training Highlights:

* Collecting Insights: At this stage, participants are often filled with thoughts and ideas. Help them organize these into clear, actionable insights.
* Energy Management: As energy may decline towards the end of the session, it’s important to re- energize the group and focus on the outcomes of the process.

### Key Points to Remember:

#### Clarity and Focus:

Encourage participants to organize their thoughts and focus on the most meaningful insights. This process helps create inner clarity and a sense of completion.

#### Actionable Steps:

Emphasize the importance of moving from insight to action. Without this step, participants may leave with a good feeling but no practical way to implement what they’ve learned.

#### Supporting Implementation:

Offer support in formulating practical actions. Encourage participants to share their plans and get feedback to ensure their actions are realistic and achievable.

#### Small Bites:

Sometimes, after having a significant insight, participants feel compelled to take big, bold steps. However, in reality, when they start moving forward, they might find it difficult to execute such large actions, causing them to stall and stay where they are. Our goal is to encourage participants to take small, manageable steps **–** actions that are completely doable, dependent only on them, with a clear

starting and ending time that they are willing to commit to. By successfully completing these small actions, participants can create a ripple effect, leading to more significant and lasting change.

### Logistics & Special Preparations:

* Ensure participants have physical or digital means to write down their insights and actions. In face-to- face settings, they can use their journals from **ClicKit**; in digital settings, they can use their **Speak Up** Digital Journal.

### Focus & Action Modules:

* Introducing to Focusing
* Focusing
* Sharing Insights
* Introduction to Action
* Action
* Closing

### Example – Flow

Below is an example of how to guide participants through the focusing and action process. Please note that the official templates have specific steps in this phase of the process. However, the structure below will be perfect for any general trainings and serves as the backbone for other variations:

#### Introduction to Focusing:

Thank you for sharing and expanding perspectives. We are now approaching the final stages of our meeting. It’s time to collect our thoughts and reflect on the insights that have emerged, whether through individual work or group discussions. We believe it’s important to organize what we’ve gone through, so let’s take a few minutes for personal reflection.

#### Focusing:

* + Self-Reflection: Invite the participants to take a few minutes to write down their main insights, conclusions, or relevant points that stand out to them. Allow 2 to 5 minutes for this.
  + Main Insight: Now that participants have had some time to reflect, ask them to choose one main insight they are taking with them.

#### Sharing Insights:

* + Option 1: Ask if anyone would like to share their key insight. Depending on the time available, allow 2-3 participants to share.
  + Option 2: Ask participants to choose one word or title that represents their main insight, and then each participant can share it with the group.

#### Introduction to Action

Now that you have identified your main insight, it’s time to think about how to turn that insight into real, tangible change. This step may seem easy, but it is a critical stage where true transformation begins. I encourage you to commit to an action that is outside of your regular routine **–** something that may challenge you, but which you believe has the power to bring about the change and clarity you are seeking. Remember, this is the moment where ideas turn into impact.

#### Action:

Our goal now is not only to leave with meaningful insights but to apply them in our daily lives. I invite you to move from the insight phase to the action phase. Focus on your main insight and ask yourself: What actions can I take to express this in my everyday life? Each action should be practical, measurable, and something you can control. Please write down one action you can take in the next 24 hours, a second action for the coming week, and a third action to implement in the coming month.

#### Closing:

Check that everyone has written their action steps, and then we will move to the closure of the training.

### Timing Adjustments

* For Shorter Sessions (up to 2 hours): Invite participants to quickly write down their main insight and skip the sharing phase. Move directly to action planning and ask them to share their main insight in just one word during a quick round.
* For Longer Sessions: If more time is available, allow for more extensive sharing of insights and actions. Participants can work in pairs or small groups to discuss their main insight and help each other with action planning. Encourage them to find accountability partners within the group to support the implementation of their chosen actions.

# Closure

### Introduction:

Closure is a crucial component of any training, reinforcing learning and ensuring that participants leave with a clear understanding of the key takeaways. During the closure, we summarize the main points covered, revisit key insights, and solidify action items. This process helps participants consolidate their understanding and prepares them to apply their new knowledge in real-world scenarios. Skipping or rushing through the closure can leave participants feeling unsettled or confused, diminishing the impact of the session.

### Objectives:

* Define how to effectively close a training session.
* Ensure participants leave with a clear understanding of the key takeaways and action items.
* Reinforce the importance of the closure in creating a lasting impact.

### Training Highlights:

* Energy Management: As we close the training, it’s important to lift the energy and leave participants feeling excited about their journey. Acknowledge their efforts and celebrate their achievements.
* Creating Wholeness: Ensure all participants feel complete and energized by the journey they’ve been on. Leave them with a strong desire for more, creating anticipation for future sessions.
* Positive Closure: End the session on a positive note, whether through a group photo, clapping together, or another symbolic gesture. Be the last to leave the space, ensuring everyone feels complete and ready to move forward.

### Key Points to Remember:

#### Summarize Key Points::

Recap the key moments and insights from the session, including participant feedback and reactions.

#### Clarify Next Steps:

Clearly outline any follow-up actions or steps that will take place after the session, emphasizing their importance in driving change.

#### Invite for Feedback:

Encourage participants to provide feedback on the session, highlighting its importance for future improvements and collaborations.

### Logistics & Special Preparations:

* + Ensure that the space is arranged to facilitate an open and warm environment for final reflections and farewells.
  + Have your **ClicKit** Trainer ID code ready so participants can provide feedback and receive their certificates.

### Closure Modules:

* + Summarize Key Points
  + Clarifying Next Steps
  + Feedback & Certificates
  + Sharing Reflections and Takeaways
  + Say Goodbye

### Example – Flow

Below is an example of how to guide participants through the closure process:

#### Summarize Key Points:

As we come to the end of our session, let’s take a moment to revisit the key points we’ve covered today. From our initial discussions to the insights we’ve gained, each step has been crucial in shaping the outcomes of this training.

#### Clarify Next Steps:

Moving forward, remember the action plans we’ve discussed. These steps are essential in translating today’s insights into real-world changes. We’ll be following up with [specific follow-up actions, if any], and I’m here to support you as you take these next steps.

For more details on how to continue your journey, see the [Follow-Up section in Chapter](#_bookmark26) 4.

#### Feedback & Certificates:

Your feedback is invaluable to me, as it helps us continuously improve and create even more meaningful experiences. At the bottom corner of your **ClicKit**, you’ll find a QR code. Please scan it, enter my Trainer ID (e.g. 0001), and from the list select our training. You’ll be prompted to answer a few questions about today’s meeting, and afterwards, your certificate will be emailed to you.

(Give participants time to fill out the feedback form).

#### Sharing Reflections:

* + - Participants: Before we close, I’d love to hear any final reflections or takeaways. What stood out to you most today? What are you taking with you as you leave? You can share in one word or a short sentence.
    - Trainer: Before we say our final goodbyes, today, I want to take a moment to express my gratitude to each of you for your contributions today. Your openness and engagement have made this session truly impactful. This session reminded me of the power of collective learning and the incredible potential we all have when we come together with open minds and hearts.

# Building Block Timing Guide

#### Say Goodbye:

As we conclude, let’s celebrate the journey we’ve been on together. Consider a group photo or another closing ritual. Thank you again for your participation. I wish you all the best as you carry these insights forward.

### Timing Adjustments

* + Shorter Sessions (up to 2 hours): Focus on summarizing key points, expressing gratitude, and clarifying next steps. Invite participants to quickly share a single word or short reflection that captures their key takeaway before saying goodbye.
  + Longer Sessions (over 2 hours): Allow more time for sharing reflections and takeaways. You can also incorporate a more elaborate closing ritual, such as pairing participants to discuss their insights

or sharing action plans in small groups. This extra time can help deepen the sense of closure and community among participants.

The timing of your training is a crucial factor in ensuring that the participants remain engaged, energized, and fully benefit from the experience. The structure we've provided in the building blocks – from Welcome to Closure – serves as a comprehensive guide for crafting a successful session. However, depending on the overall duration of your training, you’ll need to adjust the timing of each section to fit the flow and maintain the right balance of energy and focus.

### Opening the Training: Setting the Stage

The first five building blocks ([Welcome](#_bookmark28), [Objectives](#_bookmark29), [Sensitivity & Respect](#_bookmark30), [Pause](#_bookmark31), and [Points of You /](#_bookmark32) [Points of View](#_bookmark32)) form the opening of your training. This stage is all about getting your participants excited, aligned, and ready to dive into the content. It’s during this phase that you establish the tone, set expectations, and create the right atmosphere for exploration.

**Timing Recommendations for the Opening:**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Training Duration** | **Welcome** | **Objectives** | **Sensitivity & Respect** | **Pause** | **Points of You / Points of View** | **Total Time** |
| Up to 2 hours | 2 minutes | 2 minutes | 1 minute | 10 minutes | 5 minutes | 20 minutes |
| 2-4 hours | 5 minutes | 3 minutes | 2 minutes | 10 minutes | 5 minutes | 25 minutes |
| Over 4 hours | 5 minutes | 5 minutes | 5 minutes | 15 minutes | 5 minutes | 35 minutes |

### Closing the Training: Bringing It All Together

The last two building blocks ([Focus & Action](#_bookmark34) and [Closure](#_bookmark35)) are designed to help participants consolidate their insights and translate them into actionable steps. These parts are vital for ensuring that the training doesn’t just end with good feelings but leads to concrete outcomes and a sense of accomplishment.

**Timing Recommendations for the Closing:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Training Duration** | **Focus & Action** | **Closure** | **Total Time** |
| Up to 2 hours | 5 minutes | 5 minutes | 10 minutes |
| 2-4 hours | 10 minutes | 10 minutes | 20 minutes |
| Over 4 hours | 20 minutes | 10 minutes | 30 minutes |

### Adapting the Timing

While the timing guidelines above provide a structure, it’s important to remain flexible and responsive to the needs of your participants.

Consider the group dynamics: Sometimes the pace of the training may need to be adjusted based on the energy and dynamics of the group. For example, if the group is particularly engaged in a discussion, it might be worth extending that part and adjusting the time spent on other activities. Reading the room and making these adjustments on the fly will help maintain a productive and engaging atmosphere.

Be aware of potential pitfalls: A common mistake is spending too much time on the opening and then rushing through the closure. Watch the clock and keep an eye on how much time is left throughout the training to ensure each section receives adequate attention.

Additionally, don’t forget the use of breaks: Especially for longer trainings, well-timed breaks are essential for keeping participants focused and energized. Plan breaks according to the overall timing of the training to ensure participants remain refreshed and engaged.

In the next chapter, you will find the official training templates, where the focus shifts to the middle part – the expanding phase of the meeting. This is where the core content of the training unfolds, and

where timing becomes even more crucial to maintaining engagement. As you work with these templates, refer back to this section to ensure that the opening and closing elements are well-integrated, creating a cohesive and impactful training experience.

Remember, each training is unique, and while structure is important, the true magic lies in how you adapt and deliver it. The timings provided are recommendations to help guide you, but the most important factor is how you connect with your participants and bring the **Points of You®** Method to life.



# Official Training Templates

**Who is it for:** All employees and teams

[**Click & Connect**](#_bookmark38)

[**60-120 min.**](#_bookmark38)

[**Team Fusion**](#_bookmark42)

[**120-240 min.**](#_bookmark42)

[**The Culture Compass**](#_bookmark47)

[**120-240 min.**](#_bookmark47)

(10 to over 1,000 participants)

**Purpose:** Fostering bonding, belonging, and interpersonal

connections within the organization

### Who is it for:

Teams

(4-16 participants)

**Purpose:** Maximizing team potential through individual strengths and cohesive collaborations

**Who is it for:** Leadership teams, managers

(2-20 participants)

**Purpose:** Navigating organizational DNA

and essence for clarity and distinction

### Who is it for:

HR, L&D, OD

[**Train the Trainer**](#_bookmark52)

[**120-360 min.**](#_bookmark52)



personnel, and team leaders (4-20 participants)

**Purpose:** Mastery in experiential tools, integrating the **Speak Up** Toolkit for

your organization's needs.

**Objectives:** Build a deeper sense of connection, develop

trust, and maintain relationships even in challenging situations

### Participant’s Level of Engagement Needed:

**Moderate involvement:** Participants engage in reflective dialogues and connection- building activities, requiring attentive participation

**What’s Included: ClicKit**, Certificate of Attendance

**Objectives:** Identify personal and team strengths, develop teamwork strategies, and enhance team efficiency

### Participant’s Level of Engagement Needed:

**High involvement:** Requires active participation in team- building exercises, role clarification, and collaboration activities

**What’s Included: ClicKit**, Certificate of Attendance

**Objectives:** Define core values, align communication

strategies, and reinforce the organization's distinct market identity

### Participant’s Level of Engagement Needed:

**High involvement:** Focused on strategic discussions and active participation in value- setting exercises

**What’s Included: ClicKit**, Certificate of Attendance

**Objectives:** Equip leaders with tools for dynamic

assessments, feedback, and team facilitation through experiential methods

### Participant’s Level of Engagement Needed:

**Very high involvement:** Participants first experience the tools, then learn how to

use them, and finally practice training others with these tools

**What’s Included: ClicKit**, Certificate of Attendance, CCEU’s by ICF, PDC’s by SHRM

# Official Training Template

### Introduction

Welcome to the Click & Connect Training, a powerful training designed to bring team members together across the organization, fostering a deep sense of belonging, visibility and value among participants.

Whether you're using this training as a stand-alone experience or as a dynamic warm-up for a larger event, Click & Connect has the flexibility to meet your needs.

This training is not just about forming connections – it's about creating meaningful dialogues that elevate energy levels, build intimacy, and strengthen friendships within the team/organization.

As trainers, you have the opportunity to guide participants through a process that can vary in depth, depending on your objectives and the time available. From exploring challenges and roles to clarifying responsibilities and expectations, this training opens doors to expanded perspectives and insightful revelations. There will be moments when participants might even share something personal about themselves, offering a unique opportunity to get to know each other from a new angle.

In this chapter, we will introduce you to the Click & Connect template. This template is versatile, enabling you to adapt it to various organizational settings and goals. We'll also share an example of how we utilized this template to onboard our new **Business Trainers**, helping them define their visions and expectations for their roles.

### Training Overview

#### Duration:

60 to 120 minutes

Below you will see suggestions on how to manage the time

#### Format:

Face-to-face and/or online using the **ClicKit**

#### Participants:

Suitable for groups ranging from 8 to over 1,000 participants

#### Materials Needed:

**ClicKit** Sets, colorful sharpies/markers, **Speak Up** Book, Speaker and the following Playlists:

* + Discovery [Apple Music](https://music.apple.com/il/playlist/click-connect-1-discovery/pl.u-AkAmPNbFlAqJV7X) | [Spotify](https://open.spotify.com/playlist/7gJzvhJDTnfjKqyKdRT6a6?si=3d76215a00924c9e)
  + Pause [Apple Music](https://music.apple.com/il/playlist/click-connect-2-pause/pl.u-RRbVvlxIebYAoxV) | [Spotify](https://open.spotify.com/playlist/7IJ1r9yiGDZZZ21VsQTpDs?si=85b7c886f1d04ea3)
  + Journaling [Apple Music](https://music.apple.com/il/playlist/click-connect-3-journaling/pl.u-vxy693XC82ZaP1R) | [Spotify](https://open.spotify.com/playlist/0F1Jn2rSb3qI3onCqActc7?si=607ad7e89fe94370)
  + Sharing [Apple Music](https://music.apple.com/il/playlist/click-connect-4-sharing/pl.u-b3b8VGGC3EBWdLG) | [Spotify](https://open.spotify.com/playlist/0DG9JitudSul54ISOaPBz7?si=4bc0679dc2e64071)
  + Creating [Apple Music](https://music.apple.com/il/playlist/click-connect-4-creating/pl.u-leyl0yeCPRrV0xz) | [Spotify](https://open.spotify.com/playlist/1YiRWTnxyW16V6zwXCuGXp?si=d503a45e11ef4f6e)

This training consists of several Building Blocks. Below, you'll discover the Click & Connect Structure featuring all the building blocks essential for this training. Detailed activity flow examples follow in this chapter. Click on the blocks to find out more:

1. [**Welcome** >](#_bookmark27)
2. [**Objectives** >](#_bookmark29)
3. [**Sensitivity & Respect** >](#_bookmark30)
4. [**Pause** >](#_bookmark31)
5. [**Points of You / Points of View** >](#_bookmark32)
6. **Click & Connect Activity:**
   * [Introduction to the activity](#_bookmark39)
   * [Round 1 – Sharing in Pairs](#_bookmark39)
   * [Round 2 – Sharing in Pairs](#_bookmark40)
   * [Integration Before Round 3](#_bookmark40)
   * [Round 3 – Vision Board](#_bookmark41)
7. [**Focus & Action** >](#_bookmark34)
8. [**Closure** >](#_bookmark35)

### Example Session: Onboarding New Business Trainers

In our session, we employed the Click & Connect template as a dynamic approach to welcome you, our newly-appointed **Business Trainers**. This engaging session kicked off exploring different perspectives on our expectations in the upcoming roles. The session culminated in a creative activity where each participant crafted a vision board. This creative process provided a tangible and visual means for participants to map out their aspirations and establish clear intentions for their professional journey ahead.

The objectives of the session were:

* + To take a time out and bond with fellow participants from around the world.
  + To build clarity around the expectations of your new role as a **Points of You® Business Trainer**.
  + To bring your vision of this role to life.

### Detailed Activity Flow for a Face-to-Face Setting:

Your experience was in the online setting that you can useas an example for your own online trainings. Below you can read the structure of the activity in a face-to-face Setting. Be aware that small parts differ in the online setting due to logistics. Taking inspiration from the structure mentioned above, the following detailed flow outlines the steps of the Activity:

### Introduction to the activity:

#### Spread the Materials:

Before the pause, participants opened their **ClicKit** materials. Now, the Photo Cards are ready for use. For more details, refer to Chapter 5 – [Pause](#_bookmark31).

#### Generate Excitement:

Begin by creating a high-energy atmosphere to spark enthusiasm for the upcoming activity.

#### Simple Rules:

Before we start and choose our first Photo card, I want to share two important rules to remember during the process:

* + - No good cards or bad cards – it’s only a perspective, what you hear from others is also a perspective, be open to listen and take from it whatever is precise for you.
    - Rule of the Deck – at any time in the process you can change any of your cards, you don’t need to ask for permission, only ask yourself why am I changing it.

#### Introduce the Activity's Focus:

Inform participants that today’s session will explore their expectation and intentions for the **Business Trainer Certification Program** as well as their role as a **Business Trainer**. Let them know that this is also a chance to meet and connect with new people from all over the world, providing opportunities to inspire and learn from each other. Then, ask them to select a Photo card that resonates with their perception of this role.

#### Simplify the Set-up:

Once everyone has selected a card, instruct participants to return the remaining Photo cards to their journal pocket.

#### Observe the Photo Card:

Ask participants to observe their chosen Photo card and reflect internally on a series of questions:

* + - What is the first thing you notice?
    - Are the colors vibrant, or is it black and white? How does this choice in color speak to you?
    - Describe what you see in simple terms.
    - Imagine what might be just beyond the frame of the photo.
    - If this scene were a video on pause, what do you imagine happening in the next 10 seconds?
    - What might have occurred just before this moment was captured?
    - How does this image make you feel, honestly?
    - If you could alter something in the photo, what would it be?
    - How does this Photo connect to your role as a **Business Trainer**?
    - Alternatively your participants can also place their Photo cards in their **ClicKit** journal on page 5.

#### Journaling Time:

Give participants a minute to write in their journals their first observations that came to their mind about their new role. Their thoughts, feelings, what came to them from observing the card.

#### Find your partner:

Encourage participants to maintain the thoughts and emotions triggered by their Photo cards and invite them to find a partner. Emphasize choosing someone they are less familiar with to broaden perspectives. Once a partner is chosen, they should take their journal with the goodies inside of the pocket and ther Photo card.

### Round 1 – Sharing in Pairs

#### Establishing Connection:

When you have found your partner, sit in the 'dyad' position, meaning knee to knee, eye to eye. Adjust your sitting distance to ensure comfort for both.

#### Determine Roles:

Decide who will be Person A and Person B.

#### Person A's Turn:

* + - Person A will take 5 minutes to respond to the question:

#### “What am I expecting from this program (Business Trainer Certification Program)?”

* + - Cover aspects such as personal expectations, desired achievements, and anticipated professional and personal growth.
    - Person B should actively listen, ask for clarification if needed, and mainly focus on understanding Person A's perspective.

#### Time Management:

* + - Person A should utilize the full 5 minutes for sharing – this is not a race who finishes first.
    - Check for any questions before starting.
    - Play the Sharing playlist ([Apple Music](https://music.apple.com/il/playlist/click-connect-4-sharing/pl.u-b3b8VGGC3EBWdLG) | [Spotify](https://open.spotify.com/playlist/0DG9JitudSul54ISOaPBz7?si=4bc0679dc2e64071)) during the sharing time and announce when 1 minute remains.

#### Person B's Turn:

* + - After thanking Person A for their sharing, it's now Person B's opportunity to share their thoughts on the same question.
    - Continue the playlist as Person B speaks.

#### Story Break:

After both partners have shared, we give a small “break” by sharing a story. Read "Dialogue" from the

**Speak Up** Book (page 32) to the group.

#### Crafting Empowerment Messages:

Participants then use their memo notes to write a short, empowering message to their partner, inspired by what they've heard. Allow 1 minute for writing. Participants should keep their messages private for the moment.

#### Message Exchange:

After writing, allocate 2 minutes for partners to exchange the gifts they prepared for each other, in the form of the messages they have written to each other.

#### Transitioning:

* + - As the sharing concludes, have participants thank one another. Each participant now holds their photo card along with the message they've received.
    - Before moving on, invite participants to take a moment to look at their Photo card one more time.

Ask the question that echoes in the room: **“Did I connect with my expectations, and are they supporting me or holding me back?”** Allow this moment of reflection to settle.

* + - Prompt them to seek a new partner for the next round.

### Round 2 – Sharing In Pairs

#### Reconnecting in Pairs:

Everyone should pair up in the 'dyad' position as before. Take a moment to decide upon roles, determining who will be Person A and Person B.

#### Exchange of Photo Cards:

Partners A and B switch their Photo cards, so each person is holding their partner's card.

#### Observing Photo Cards:

Invite the participants to observe the Photo card they've received. Following the same structure as in round 1.

#### Sharing, starting with Person B:

* + - Person B begins this round by reflecting on the prompt:

#### “What is expected from me?”

* + - Consider everyone involved and their expectations, **Points of You®**, your clients, your organization and yourself.
    - You may also choose to connect this reflection with the story or insights shared during the first round, linking it to the Photo card from earlier.
    - Allocate 5 minutes for Person B to share, followed by Person A's turn to share for 5 minutes.
    - The Sharing playlist should continue in the background, and inform participants when they have 1 minute left to share.

#### Discussion on Expectations and Support:

With both partners having shared, discuss how expectations can potentially lead to disappointment, particularly during challenging times.

#### Finding a Question:

After hearing from each other, have participants select a Question card intended to offer support to their partner when they are going through difficult moments in this role or any challenge they might encounter.

#### Reviewing the Question Card:

Give participants 2 minutes to share with each other the Question cards they selected for them and their message. It’s a gift they are receiving on this journey to support them.

#### Closing the Sharing Session:

* + - Upon completion, participants should offer thanks to their partners.
    - Before regathering, invite participants to take a moment to reflect. Ask the question that echoes in the room**: “In what ways do my expectations and my partner's meet, and how does this create a connection?”** Allow a brief pause for participants to consider this connection before moving on.
    - Each person now has their partner's Photo card, a Question card, and the empowering messages from Round 1.
    - Regathering as a Group: Finally, have everyone reconvene in the larger circle to proceed with the next round.

### Integration Before Round 3

#### Journal Reflection:

Encourage participants to reflect on their new role and expectations – both their own and those perceived from others. Guide with questions to probe deeper insights:

* + - Is there a gap between your expectations and what is expected from you?
    - How can you bridge this gap to align both areas?
    - How do the insights received today connect with your view on your new role?

#### Encouraging Group Sharing:

Open the floor for participants willing to share their reflections and breakthroughs. Handle moments of silence with patience, highlighting that sometimes waiting facilitates voluntary sharing.

#### Trainer tips:

To promote a sharing culture without forcing participation:

* + - Remind that sharing is caring and can enhance individual processing of insights.
    - Assure added value in collective reflections and learning.

#### Continuation After Sharing:

Aim to have 3-4 participants share their insights to foster a rich group dialogue. Adjust the number of participants sharing on your training timing.

Continue to the next round.

### Round 3 – Vision Board

#### Preparation:

Spread out the colorful markers and pens around the room during Round 2 sharing if you haven’t done so before.

#### Vision Board Instructions:

* + - Invite the participants to take their **ClicKit** sets we will be working with the whole set now
    - Task is to create a Vision Board representing: What do I want to achieve at the end of this program?
    - Explain: The assignment is to create a vision for themselves, on what they want to achieve for themselves in this program. Integrating the expectations from themselves and what they think others expect from them. Even though it’s the beginning of the journey it’s the step to create some clarity and intention for ourselves. A road map of where they want to go. You can make it philosophical or practical, a collage of your intention and impact.

#### Activity Time:

* + - Give participants 15 minutes to work on their vision boards.
    - Suggest spreading out in the room to find a comfortable workspace.
    - Play the Creating Playlist ([Apple Music](https://music.apple.com/il/playlist/click-connect-4-creating/pl.u-leyl0yeCPRrV0xz) | [Spotify](https://open.spotify.com/playlist/1YiRWTnxyW16V6zwXCuGXp?si=d503a45e11ef4f6e)) music to maintain energy and focus.

#### Time Check and Closure:

* + - Notify participants when there are 5 minutes remaining.
    - Gather everyone back in a circle to conclude the vision board activity.

### Focus & Action

For the Details of the [Focus](#_bookmark34) and [Closure](#_bookmark35) Building Blocks please see the respective chapter. Below is the Focus & Action adaptation for the Click & Connect Process:

#### Journal Reflection:

Dedicate 5 minutes for participants to write in their journals about,their creative process and feelings while making the vision board. Their current feelings about their role after this visual exercise. Some guiding questions for Reflection:

* + - How was the experience of creating your vision board?
    - How do you feel looking at your vision board now?
    - Has your perception of your role changed or solidified?

#### Sharing Vision Boards:

Open the floor for voluntary sharing of vision boards

* + - Encourage participants to describe their creation, feelings, and reflections.
    - After sharing, each participant gives a title to their vision board.
    - Continue until 3-4 people have shared, reinforcing the value of shared insights.

#### All Participants Title Their Vision Boards:

After sharing, prompt every participant to title their vision board, even if they didn't share publicly.

#### Action Steps:

Guide everyone to identify three actions to bring their vision board closer to reality:

* + - Immediate Action: Something they can achieve within the next 24 hours.
    - Short-Term Goal: A slightly larger goal to accomplish in 7 days.
    - Long-Term Milestone: A significant step they aim to complete in 30 days.

#### Training Closure:

Acknowledge the collective effort and progress, marking the official end of the training.

### Timing Adjustments

Our Activity is designed with flexibility to cater to your needs, whether you have a concise hour or an entire day. Below are some guidelines on how to adjust the recommended flow based on your available time:

* + **If your session duration is closer to 60 minutes**, prioritize the core elements of the flow. Given the time constraint, consider omitting Round 2 and the group discussions to maintain a focused,

uninterrupted experience for journaling and utilizing the **ClicKit**. This streamlined session will engage participants in the most crucial aspects without feeling rushed.

* + **For sessions lasting between 60 and 120 minutes**, you'll have the opportunity to delve a bit deeper. Use the additional time to facilitate brief sharing after journaling, allowing participants to voice their reflections and insights. This will encourage a more interactive and enriching training while still keeping within a manageable timeframe. You can easily follow the flow of the session
  + **Should you have the luxury of a full-day training**, embrace the complete flow. Here, not only can you incorporate extensive group discussions, but you can also allot additional time for participants to share and journal. This extended interaction deepens the training experience, fostering richer conversations and more profound personal reflection.

Regardless of session length, our aim is to create a transformative experience. Adjust the flow to fit your allocated time, and be assured that whether it's a brief encounter or an all-day immersion, the training will be impactful.

### Examples of Time Adaptations:

Below is an overview how you can vary the Click & Connect Template according to the time you have for the process: **60 minutes 90 minutes 120 minutes**

#### Welcome | Objectives | Sensitivity & Respect

**5 min.** According to the building blocks. Keep sensitivity & respect short and simple **5 min.** According to the building blocks. Keep sensitivity & respect short and simple **10 min.** According to the building blocks. Keep sensitivity & respect short and simple

**Pause | Points of You / Points of View 15 min.** Short pause only

**5 min.** Short pause only

**15 min.** You can give a longer pause. After pause give time to connect to the training flow

**Click & Connect Activity: Introduction to the process 5 min.** According to the proposed flow

**5 min.** According to the proposed flow

**5 min.** According to the proposed flow

**Round 1 – Sharing in Pairs 10 min.** Skip the story

**15 min.** According to the proposed flow

**15 min.** According to the proposed flow

#### Round 2 – Sharing in Pairs

**–** Skip this round

**15 min.** According to the proposed flow

**15 min.** According to the proposed flow

#### Integration Before Round 3

**5 min.** Skip the discussion part

**10 min.** Have time for 1-2 sharings

**15 min.** You have 10 minutes of Sharing you can ask questions to the participants to help them go deeper

#### Round 3 – Vision Board

**10 min.** Give 10 minutes for creating vision

**15 min.** With 15 minutes creating

**20 min.** With 15 minutes creating

#### Focus & Action | Closure

**10 min.** Skip the discussion part, go straight to title and action steps, asking for 1 action item **10 min.** Skip the discussion part, go straight to title and action steps, asking for 3 action items **25 min.** Discussion giving time for 2-3 participants to share.

During the action stage ask for 3 action items

### Online Setting:

If you are facilitating the training online, here are some important notes to consider. For more general information about online facilitation, refer to the relevant chapter.

#### Logistics:

Ensure that you have sufficient time to send out materials so that participants receive their **ClicKit** sets. We recommend sending the same **ClicKit** set to each participant to make card exchanges easier.

Before the session, inform the participants to have colorful markers on hand to use during the vision board round 3.

#### Round 1:

Participants will be randomly paired by the meeting platform, removing the choice of partner. Present this as similar to drawing a card face down – you won’t know who you’ll meet.

After the first round of sharing, bring participants back to the main meeting room. Read the story and ask participants to prepare a message for their partners. Then, reopen the breakout rooms for message exchanges.

Do not play any music while participants are in the breakout rooms.

#### Round 2:

Follow the same process as in Round 1. After sharing, gather participants in the main room to select a question, then return them to breakout rooms for further sharing.

Again, no music should be played while participants are in the breakout rooms.

#### Round 3:

Play a playlist while participants create their vision boards to maintain high energy during the process. Continue to support participants by holding space for them as they work.

### Click & Connect Recording

Below is the recording of the Click & Connect activity from Session 1. Feel free to watch it to explore an example of a Click & Connect setting in an online environment, and see how the building blocks come together in practice.

### Adaptations and Flexibility

The Click & Connect template can be adapted to various contexts, such as leadership training, employee self-discovery sessions, team bonding events, and company integration processes. It’s all about adjusting the questions and focus areas to align with your specific objectives.

Here are 8 examples of how th**e** Click & Connect template can be adapted for various contexts, such as leadership development, teamwork, annual events, employee assessments, and company-wide events:

#### Leadership Development:

* + **Session Theme:** "My Leadership Journey"

#### Key Questions:

* + - Round 1: What kind of leader do I want to be?
    - Round 2: How can I better support my team?
    - Round 3: My Leadership Vision Board: A roadmap for personal growth as a leader.

#### Teamwork Enhancement:

* + **Session Theme:** "Building Effective Teams"

#### Key Questions:

* + - What strengths do I bring to the team?
    - What challenges do we face as a team?
    - My Role in the Team Vision Board: How I contribute to our collective success.

#### Opening the Year:

* + **Session Theme:** "Setting the Tone for the Year"

#### Key Questions:

* + - What are my goals for this year?
    - What can support my growth?
    - New Year Vision Board: Visualizing our individual and collective aspirations for the year.

#### Employee Assessment:

* + **Session Theme:** "Self-Reflection and Growth"

#### Key Questions:

* + - What are my key strengths?
    - What are my key areas for improvement?
    - Personal Growth Vision Board: Mapping out the next steps for development and success

#### Leadership Visioning:

* + **Session Theme:** "Crafting the Future"

#### Key Questions:

* + - What challenges do I anticipate in my leadership role?
    - How can I prepare to lead through change?
    - Future Leadership Vision Board: My leadership in a changing environment.

#### Mid-Year Review:

* + **Session Theme:** "Checking In"

#### Key Questions:

* + - How am I progressing towards my goals?
    - What adjustments do I need to make for the remainder of the year?
    - Mid-Year Vision Board: realizing my goals for a successful year..

These examples demonstrate how the Click & Connect template can be tailored to various organizational needs, helping to foster connection, alignment, and growth across different contexts and purposes.

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#### Company Event – Integration:

* + **Session Theme:** "Aligning Our Values"

#### Key Questions:

* + - What do I value most about our company culture?
    - How can I contribute to our shared vision?
    - Company Culture Vision Board: Me in the Organization

#### Team Bonding Event:

* + **Session Theme:** "Strengthening Our Team"

#### Key Questions:

* + - What do I appreciate about my colleagues?
    - How can we better collaborate and support each other?
    - Team Connection Vision Board: Our teamwork and collaboration.

# Team Fusion

### Introduction



Welcome to Team Fusion, a dynamic training designed to unlock the full potential of a team by harmonising individual strengths and fostering seamless collaboration. Tailored for groups eager to elevate their collaboration, Team Fusion melds personal and collective growth within your organization.

This training embarks on a profound journey to the core of effective teamwork. Far beyond mere coexistence, it reveals the power of a truly interconnected unit, where every member’s distinct talents fortify the team's collective success.

As trainers, you will play an instrumental role in guiding teams through an enlightening process. This journey not only highlights individual contributions but also fosters a shared vision, Team Fusion is a catalyst for transformational dialogue and tangible insights. Whether light and integrating or deep and challenging, this training is designed to push the boundaries of traditional collaboration, inviting teams to explore and establish a foundation for genuine cooperation.

In this section, we introduce the Team Fusion framework – a thoughtfully crafted methodology to boost team performance through strategic collaboration and mutual understanding.

**Introduction to Personas**

# Official Training Template

In this Training, we use the concept of a Persona to help participants explore their roles within the team. The term "Persona" comes from the work of Carl Jung, who used it to describe the outward face or mask that individuals present to the world. According to Jung, the Persona is not the entirety of who we are, but rather a role we play based on societal and situational expectations.

### Why use a Persona in Team Training?

The Persona allows us to look at how we consciously choose to behave within a team or group, reflecting the aspects of ourselves that we present to others. In a team setting, the Persona represents the behaviours, mindsets, and actions that individuals project to achieve collective goals. It’s a useful tool for self-reflection because it helps us observe how we navigate team dynamics, balance individual and collective needs, and how we contribute to the team’s success.

By using Personas in this training, we encourage participants to:

* + - * Understand their role in the team as shaped by their thoughts, emotions, and actions.
      * Observe the difference between their inner self (their authentic values and feelings) and the Persona they project to the team.
      * Consciously refine their Persona so that it best supports team collaboration and aligns with the team’s objectives.

The Persona is not static – it changes based on context and interaction, giving us the flexibility to adapt to the team’s evolving needs.

In this training, participants will have the opportunity to explore their Persona in relation to the team and observe how it interacts with other Personas. Through this process, they will sync their roles and contributions with the team’s goals, leading to greater cohesion and success.

### Training Overview

#### Duration:

120 to 240 minutes (can be extended to a full-day training)

#### Format:

Face-to-face and/or online using the **ClicKit**

#### Participants:

Suitable for groups ranging from 4 to over 16 participants

#### Materials Needed:

**ClicKit** Sets, colorful sharpies/markers, string, tape, washi tapes, yarn, glue, Speaker and Playlists:

* + Pause [Apple Music](https://music.apple.com/il/playlist/team-fusion-1-pause/pl.u-RRbVv1WuebYAoxV) | [Spotify](https://open.spotify.com/playlist/35V0G49oRaG6ujig0MB9qg?si=d241fd1c48fb4642)
  + Creating [Apple Music](https://music.apple.com/il/playlist/team-fusion-2-creating/pl.u-leyl0Y6tPRrV0xz) | [Spotify](https://open.spotify.com/playlist/2hTtXJJIiv3bv7hcdqcyGK?si=0ef260f2f3604225)

This training consists of several Building Blocks. Below, you'll discover the Team Fusion Structure

# Team Fusion Modules:

featuring all the building blocks essential for this training. Detailed activity flow examples follow in this chapter. Click on the blocks to find out more:

1. [**Welcome** >](#_bookmark27)
2. [**Objectives** >](#_bookmark29)
3. [**Sensitivity & Respect** >](#_bookmark30)
4. [**Pause** >](#_bookmark31)
5. [**Points of You / Points of View** >](#_bookmark32)
6. **Team Fusion Activity:**
   * [Introduction to the process](#_bookmark43)
   * [Round 1 – My Persona](#_bookmark44)
   * [Round 2 – Introducing our Personas](#_bookmark45)
   * [Round 3 – Team Persona](#_bookmark46)
7. [**Focus & Action** >](#_bookmark34)
8. [**Closure** >](#_bookmark35)

### Example Session:

Team Fusion is a powerful process that explores the dynamics of a group, helping individuals gain insight into how they interact, collaborate, and contribute within a shared environment. While we are not a team, we all work with people in different social and professional interactions. With this in mind, we adjusted the process to ensure it was relevant to our experience together, allowing you to experience the process and gain valuable insights.

In our session, we focused on the first part of the Team Fusion process, allowing participants to explore their individual personas. In the second round, we adapted the experience to observe deeper the different parts of our persona's and practicing our observation and interaction skills. In a workplace setting, where participants are part of a team, the process would naturally progress toward deeper team bonding and integration.

Below you will find an example of the session that can be led in a face-to-face setting for a team that is during their connection stage of the [team development](#_bookmark10). The objectives of this session were:

* + To meet each other as a team
  + To observe my Persona within the team, refining how it aligns with the team’s needs.
  + To synchronise and integrate the team’s Personas, ensuring they work together effectively to achieve the team’s goals.

### Detailed Activity Flow for a Face-to-Face Setting:

**Introduction to the activity:**

#### Spread the Materials:

Before the pause, participants opened their **ClicKit** materials. Now, it’s time to have the **ClicKit** in front of us, with all the stickers, markers that we have.

#### Generate Excitement:

* + - Start by saying: We will be exploring how we behave and interact as part of a team – how our actions, thoughts, and behaviours align with our roles and the goals of the team. This is a chance to see how our individual Personas contribute to the team’s collective success.
    - Remind the team of their shared goal: It’s also crucial to keep in mind the goals of the team. As we move forward, let’s remember that our individual efforts must come together to support those

objectives. Today is about discovering how we can synchronize our strengths to achieve the team’s shared vision.

* + - Invite Participation and Encourage Involvement: As we go through this process, we encourage you to speak up and be involved. This is your chance to shape the team and the way you work together. You may find yourself stepping out of your comfort zone to approach things a little differently, and that’s a good thing. By pushing your boundaries, you can unlock new ways of contributing to the team’s success.
    - PR for the Process – Building Patience and Long-Term Value: This process goes beyond just today’s session. It’s important to be patient with the process, as the insights and connections we build today can continue to evolve long after the training. The work we do together here will set the foundation for stronger teamwork and collaboration going forward. You’ll have the tools to keep this process alive and thriving, long after this session ends.

#### Simple Rules:

We are going to work with each other and interact around various topics. What you hear from others may offer new perspectives, and it’s important to remain open to different views. This is an opportunity to learn not only about ourselves but also about how we behave within the team context.

Be open to listening, and take from it whatever resonates with you. You don’t have to agree with everything, and there’s no need to fight, prove, or justify your way of thinking. Simply remain open to the different perspectives shared.

#### Pre-Activity Reflection:

Before we begin creating our Personas, take a moment to reflect and journal about your role in the team. As you write, think about how you currently perceive yourself in the team, your contributions, and how you interact with others.

While the participants are journaling ask additional questions to deepen their reflection:

* How do I typically behave in the team?
* What mindset do I bring to team discussions or challenges?
* What am I known for in the team?
* What strengths do I bring to the team?
* How do I contribute to achieving the team’s goals?
* What do I need from others to work effectively?
* What do others expect from me in our collaboration?
* From 1-10 how close i am to my authentic self during teamwork
* Who do I commit more to the team or to myself?
* How do I act in this team, is it my typical role or do I act differently here?

#### Introduce the Activity's Focus:

Inform participants that today’s session is about observing how we work together in this team. The goal is to understand each other better, not only who we are but also what we need from others and what others need from us. This will give us insight into how we can support and collaborate more effectively.

### Round 1 – My Persona

#### Introduction

In a moment, I will invite you to create your own Persona of you in the team. By "Persona," I mean a representation of yourself in the team, encompassing not only your role but also how you think,

feel, and act within the team. We’ve chosen the concept of a Persona because it allows for a broader understanding of who you are beyond just one role – it includes your mind, body, and heart in the team.

As we begin this activity, I invite you to think about all the elements that make you who you are in the team. We will create something abstract that represents the figure or person you are within the team.

#### Creation

* + You now have 15 minutes to create your Persona. We invite you to engage in a free-flow, creative process. We do encourage that you include some form of a body, a figure that symbolizes how you think, feel, and act within the team.
  + Take your time with this process. You have 15 minutes, so don’t rush. Reflect on the different aspects of your Persona and how they connect to your role within the team. Think about the details and nuances that make you unique, and add elements that represent these traits.
  + Using the different elements provided in your **ClicKit** set, along with your markers, design your Persona in a way that feels authentic to you. You can explore various forms, colors, and shapes to express the unique combination of mind, body, and heart that you bring to the team.
  + Check if everyone understands what you mean by Persona and if there are any questions.
  + Feel free to let your creativity guide you as you create something that reflects how you contribute to the team dynamic.
  + Play the Creating Playlist (Apple Music | [Spotify](https://open.spotify.com/playlist/2hTtXJJIiv3bv7hcdqcyGK?si=0ef260f2f3604225)) music to maintain energy and focus

#### Observation

* Before we dive deeper, take a moment to observe your Persona. Look at it closely, and in your journal, reflect on the following:
  + What do you see? How does this Persona look like for you?
  + We invite you to be curious like you are seeing this Persona for the first time. What can you say about this Persona?
  + Is there something dominant that stands out to you – a theme or a common thread that runs through all parts?
  + What is your "punctum" – the part of your Persona that’s drawing your attention, asking for more focus?
  + How do you feel about how you’ve expressed yourself through this Persona?
  + Is this Persona a reflection of who you are today, or does it represent an idealized version of yourself?

Spend a few minutes exploring these questions in your journal before we continue.

* Now let’s observe deeper. I invite you to find the area that represents the head of your Persona. This part represents your thoughts and mindset – how you approach challenges, process information, and what expertise you bring to the team.
  + Where is the head of this Persona? What expression do they have? Where are they looking?
  + What mindset do they bring to the team? And point to where you are seeing this in the Persona.
  + What knowledge or skills do they contribute to the team’s success? Where do you see it in your Persona?
  + What thoughts hold them back from being their best self in the team?

Once you’ve reflected, write down on a Memo Note:

#### What is the strength of this Persona in the area of the Head?

* Now, let’s move to the Center of your Persona, which symbolizes your core values, your purpose, emotional energy, and strengths. This is where your motivation and passion lie – how you engage with the team from a place of purpose. Reflect on these questions:
  + How is it represented in your Persona? What are the dominant colors? What can you say about the Centre of this Persona?
  + Looking at the Persona, what motivates them in this team?
  + What allows them to belong to the team? Where do you see it in the Persona
  + What drains their energy while working in the team?

After reflecting, write on a Post-it:

#### What is the added value I bring to the team in this area?

* Lastly, let's focus on the feet and hands,which represent how you take action, move things forward, and connect with others in the team. Reflect on the following:
  + Does this Persona have hands and feet? What do they represent? Are they moving or still?

How do they move?

* + What steps do they take to accomplish their tasks?
  + How do they help the team move forward? Do they have a superpower?
  + What do they avoid doing in the team? Can you identify it on the Persona?

After reflecting, write on a Post-it:

#### How do I want this area to be? What change can I do to better support the team?

* **Adaptation** (5 minutes)

Now that you’ve observed and reflected on your Persona, take around 5 minutes to make any changes or adjustments. Feel free to adapt your Persona to better align it with who you are now and how you’d like to contribute to the team moving forward.

### Round 2 – Introducing our Personas

#### Introduction:

We will now take the opportunity to introduce ourselves through the Personas we’ve created. This is a chance to see how others perceive our contributions to the team and gain insight into how we are seen.

Before we begin, it’s important to build encouragement for everyone to participate. Remember, this is about perspectives – what we see in the Persona, not what we think about the person. As we share, focus on what we observe visually in the Persona and how it represents the strengths the person brings to the team. It’s also an opportunity to observe how you feel when receiving feedback – there’s no right or wrong, just different perspectives.

Let’s make sure we focus on strengths, pointing out what stands out in the visual representation, and share with a spirit of openness and support.

Ask for a volunteer to start, and once you have one, proceed with the sharing.

* **First Person’s Turn** (approximately 7 minutes per person)**:**
* Observations from the Group (5 minutes): The first person will present their Persona without speaking initially. The group will observe the Persona and share their thoughts. Invite the group to discuss:
  + What do you observe about this Persona?
  + What strengths do you see that this Persona brings to the team?
  + When a strength is shared, encourage participants to be specific about where they see it in the created Persona – focus on the visual representation.

Allow 3-4 people to share their observations. If the same individuals are consistently sharing, encourage others to speak to ensure a variety of voices are heard.

* Persona Owner’s Reflection (2 minutes): Now, the person who created the Persona will share their thoughts:
  + What main insights do you have from observing your Persona?
  + What do they feel they bring to the team through this Persona?
* After the first person finishes, move on to the next person, following the same process until everyone has introduced their Persona.

#### Collection

After everyone has shared, invite participants to take a moment to reflect on their Persona in light of what they heard from the group. Ask them to journal on the following:

* + The insights and feedbacks they received during this sharing round.
  + Do I want to take on this Persona?
  + What price am I paying for taking on this Persona?
  + What do I gain from being this Persona?
  + How does this Persona impact my team dynamic?
  + Are there any small changes or refinements I want to make to my Persona based on what I heard?

Allow 2-3 minutes for them to make any final changes to the Persona, to represent their part in the team.

### Round 3 – Team Persona

#### Introduction:

In the previous rounds, we created our Personas individually, each representing how we see ourselves in the team – our mind, body, and heart. Now, we are going to bring these Personas into action and explore how they interact together as a team.

This part of the training is about understanding how we connect and collaborate as a team. We will now come together to create a Team Persona – a collective representation that integrates all of our individual strengths and contributions. This Team Persona will symbolize how we, as a team, align our unique qualities to support and fulfill the team’s goals.

#### Connecting the Personas:

Participants will have 15 minutes to use their Personas and the additional materials (string, tape, etc.) to create a visual representation of how their Personas connect and work together as a team.

* + Task: The team is tasked with representing how their Personas connect in a way that reflects how they collaborate to achieve their shared objectives.
  + Encourage Reflection: Ask participants to think about the strengths of their Personas and to bring these strengths into the connections they create. This may feel natural for some, while others might find it a new challenge.
  + Materials: Use the provided materials – string, tape, and markers – to attach Personas and symbolize connections. Each connection should reflect how individuals work together and support one another in the team.
  + As the Trainer, observe the process, taking note of how participants make decisions, who takes the lead, and how they communicate. This process should represent where the team is now, but also keep in mind that their goals may evolve over time.

#### Two Tracks for Facilitating the Process:

* + Track A: Smooth Process

If the team is working well and everyone is participating effectively, allow the process to flow naturally. Let them complete their creation and proceed to the debrief when ready.

* + Track B: Challenging Process

If the team is struggling – whether there is disagreement, conflict, or lack of participation – pause the activity and take a time out. Facilitate a short session to address what is happening. Use the following guiding questions:

* + - Who wants to share about the process? (start with this one)
    - How do you feel about the process?
    - Do you have any observations about the team in this process?
    - What’s happening right now in the team?
    - What are the barriers to collaboration that you’re noticing?
    - How are different members contributing, or holding back?
    - What can we do as a team to move forward together?

This reflection should help the team refocus and better understand the dynamics at play. Afterward, resume the activity and encourage the team to continue creating their Team Persona.

* **Debrief** (at least 45 minutes):

Once the team has completed the activity, gather everyone for a group discussion. It's best to stay near the Team Persona to maintain a sense of connection to it. This is an opportunity to reflect on the process and explore how the connections they created align with the team’s objectives. Some questions to guide the conversation (in bold we marked the questions that always work) :

#### How was the process for you?

* + Who are you connecting with, and why? What is the nature of the connection you’ve created with others?
  + How was the process of creating these connections? Did it feel natural, or did you have to adapt your Persona in any way?

#### Were you acting in alignment with your Persona, or was it different in the group setting? If it was different, why do you think that happened?

* + How do these connections support the team’s goals? Reflect on whether your Persona is contributing to the team’s objectives and where adjustments might be needed.
  + Do you feel aligned with your Persona during the process? Was there a need to adapt to the group dynamic, and if so, how did you adjust?

#### Is there anything you would change or add to your Persona to better align with the team? What final changes or additions would help your Persona better support the team’s goals?

* **Purpose of the Debrief:**

The purpose of the debrief is to provide space for participants to reflect on their experience and share insights about how the creation process unfolded. This is an opportunity for the team to:

* + Observe how the process felt for them: Was it smooth or challenging? What dynamics emerged within the group?
  + Explore the connections they’ve made: Understand the significance of these connections in the context of the team’s goals.
  + Identify any personal or team-wide adjustments: Encourage participants to recognize areas where they may need to adapt their approach for greater team cohesion.

As the Trainer, your role during this debrief is to:

* + Facilitate discussion in a way that allows participants to express their thoughts openly.
  + Observe and guide them to deeper insights about how they collaborated and contributed to the team’s objectives.
  + Highlight growth opportunities and areas where the team can improve their dynamics moving forward.
  + By doing so, you help the team solidify their learning and ensure that the reflections are not just abstract thoughts, but practical insights that will support their future collaboration.
  + Additionally, your role is to hold space for the group, especially if the process was challenging and emotions like frustration or anger surfaced. It's important to acknowledge and name these emotions, reassuring participants that it's okay to feel them.
  + Finally, ensure the debrief ends on a high note by bringing everyone together and leaving participants feeling empowered. Acknowledge their efforts and progress, and encourage them to carry these reflections forward.

However, if the outcome of the process reveals challenges within the team – such as tension, frustration, or disengagement – this is an opportunity to understand where the team currently stands. Reflect on what these challenges reveal about the team’s current dynamics and discuss what they may need to work on to move forward.

In some cases, if the team is going through a crisis or intense conflict, it may be necessary to recognize that this particular process might not be suitable at this time. The key is to remain adaptable and aware of what the team needs to grow and progress.

### Focus & Action

For the Details of the Focus and Closure Building Blocks please see the respective chapter. Below is the Focus & Action adaptation for the Team Fusion Process:

#### Reflecting on Persona and Collaboration

After the team activity, bring everyone together to shift the focus inward – this is a time for personal reflection.

Invite participants to reflect silently on their Persona, with a specific focus on how they can collaborate more effectively as part of the team. Guide their reflection with the following prompts:

* + How does my Persona support the team’s objectives?
  + What specific qualities or strengths do I need to bring from my Persona to help the team succeed?
  + Is there an aspect of my Persona that I need to adapt to improve my collaboration within the team?

Give participants a few minutes to consider these questions and gather their thoughts before moving on to the next step.

#### Summarizing Insights – Giving the Persona a Title:

Next, invite participants to summarize their insights by distilling their thoughts into one word or a short phrase – a title for their Persona. This title should reflect the essence of who they are in the team after everything they’ve learned during the session. Ask them to write their titles on their Personas before gathering back in the circle to close the session.

#### Action:

Give participants some time to write down reflections and insights in their journals before moving on. After reflecting, ask each participant to define one individual action item that they will commit to based on their insights. This action item should focus on:

* + How they will contribute to team success by leveraging the strengths of their Persona.
  + What they can improve or adapt to better align with the team’s needs and goals.

Encourage participants to take this action item seriously, as a personal commitment to help the team move forward.

#### Closure:

Conclude the session by acknowledging the progress made during the training. Reinforce the importance of continuous collaboration and remind the team that applying the action items will help them grow and achieve their goals more effectively.

Thank the team for their participation, and emphasize that the insights gained today will help them build a stronger, more cohesive unit.

### Timing Adjustments

Our Team Fusion activity is designed with flexibility, allowing it to fit within various schedules, whether you have a concise session or a full-day experience. Below are guidelines to help you adjust the flow of the training based on the time available:

#### For shorter sessions (under 2 hours):

If your session is less than 2 hours, we recommend focusing on Round 1 – My Persona and Round 2 – Introducing Personas. These rounds help participants reflect on and share their Personas, emphasizing strengths and contributions to the team. However, skipping Round 3 means the session will focus more on individual introductions rather than developing true team dynamics or fully engaging in the team fusion process.

For sessions closer to 2 hours, we recommend that only skilled facilitators proceed with the full process. Managing the time will require sharp facilitation to guide participants through the deeper team dynamics effectively. It’s a fast-paced environment where every minute counts, and you’ll need to be precise to highlight the most important insights without losing the flow. This approach requires confidence in the process and a deep understanding of how to extract key moments from a shorter discussion.

#### For longer sessions:

The more time you have, the more space you create for in-depth discussions and group interactions. With additional time, you can dive deeper into the dynamics of the group through Round 3 – Team Persona, where participants explore how their individual Personas connect and collaborate as a team. This extended engagement allows for reflection not only on individual strengths but also on how the team can enhance its collective effectiveness.

Even a full-day session can be highly beneficial, as it provides ample time for the team to work through each round thoroughly, leading to a richer exploration of how their Personas integrate into the team’s collective dynamic. The more time available, the greater the opportunity to address the crucial aspects of team cohesion and explore the deeper dynamics that emerge in Round 3 – Team Persona. If time is limited, the session may not

fully capture the important, more intricate aspects

of how the team works together, which are vital for long-term success.

### Examples of Time Adaptations:

Below is an overview of how you can vary the Click & Connect Template according to the time available for the process: **120 minutes 180 minutes 240 minutes**

#### Welcome | Objectives | Sensitivity & Respect

**10 min.** Keep sensitivity & respect short and simple According to the building blocks. **10 min.** Keep sensitivity & respect short and simple According to the building blocks. **15 min.** According to the building blocks.

**Pause | Points of You / Points of View 15 min.** Short pause only.

**15 min.** Short pause only.

**20 min.** Plan for a good pause.

#### Team Fusion Activity: Introduction to the process

**10 min.** According to the process flow. Giving time for journaling. **10 min.** According to the process flow. Giving time for journaling. **15 min.** You have more time for journaling.

#### Round 1 – My Persona

**20 min.** According to the process flow. **20 min.** According to the process flow. **25 min.** According to the process flow.

#### Round 2 – Introducing Personas

**10 min.** Just give time for the participants to introduce their Persona without sharing the strengths.

**40 min.** According to the process flow.

**60 min.** Give time for the introductions to analyze the Personas.

#### Round 3 – Team Persona

**40 min.** Give time to create and a space for a discussion, make sure to finish off with everyone feeling whole.

**60 min.** You have enough time to go to a deep discussion about how the team works.

**80 min.** You have enough time, go to a deep discussion about both the process and the outcome.

#### Focus & Action | Closure

**15 min.** According to the process flow.

**25 min.** Give time for sharing and writing action items.

**25 min.** Give time for sharing and writing action items.







The true magic of this template lies in the hands of the Trainer. Unlike the structured nature of Click & Connect, the Trainer in this process plays a much deeper role, leading the team in a way that profoundly shapes the experience. How you observe, contain, and reflect the team’s dynamics will determine how far the process goes.

### Observation and Reflection: The Trainer’s Role

As the Responsible Adult, you are there to observe and reflect what is happening in the room. You must be attuned to both spoken and unspoken dynamics, such as body language, energy shifts, and emotions that may not be fully expressed. Your role is not to provide answers but to act as a mirror, helping the team see themselves and their dynamics more clearly.

It’s essential to bring empathy into your observations. You should be sensitive to how the participants feel – whether they are engaged, hesitant, or frustrated – and adjust your approach accordingly. When

participants introduce their Personas, ensure the conversation focuses on genuine strengths. If humour or mockery creeps in, gently intervene to guide the team back to serious reflection. Encourage participants to interact with the visual elements of the Personas and ask them to identify where they see the qualities they’re discussing.

### Challenging and Guiding: Asking the Right Questions

As the Leader, you guide the team by asking thoughtful questions and gently challenging their perspectives. Your role is to foster curiosity and help participants explore deeper insights, rather than providing answers. The goal is to encourage open dialogue that supports the team’s growth, without creating complexity where it doesn’t naturally exist.

For example, during the debrief, you can invite the team to reflect on the process:

* Who do you feel naturally took the lead?
* Who do you feel was less involved?
* On a personal level, you can ask: Who feels they led? Who feels they could have been more involved?

Alternatively, you can guide them to reflect on the team Persona they’ve created:

* What do the physical arrangements signify?
* Why are some participants grouped closer together than others?

In this role, it's also important to gently challenge the team when necessary. If you notice tension or disengagement, bring it to light with empathy and courage. The more willing you are to reflect on these unsaid dynamics, the deeper the process will go, while always focusing on promoting positive team growth.

As the Container, your role is to hold space for the team’s emotional journey. This means creating an environment where all emotions – joy, frustration, anger – are acknowledged and normalized. You must ensure that the team feels safe to express themselves fully, knowing that their emotions will be contained without judgement.

In moments of intensity, you act as the team’s anchor. Whether the team is navigating uncertainty, discomfort, or heightened emotions, you provide the stability they need to explore these dynamics. Your presence allows participants to lean on you for support while encouraging them to move through their emotions toward resolution.

Part of being the container also means accepting that the process may not always be smooth or predictable. As the Trainer, you must be comfortable with different outcomes, and prepared to guide the team through both easy and challenging moments. Make sure that every voice is heard, and reflect back any disengagement or tension to the team with care and neutrality.

### Trusting Your Intuition: The Key to Anchoring the Process

Finally, across all of these roles – Responsible Adult, Leader, and Container – your intuition and experience will guide you. Trust your instincts about when to challenge, when to step back, and when to hold space. The process will only go as deep as the team is ready to go, but your ability to observe, reflect, and contain their experience will be key to facilitating lasting change.

By holding space with empathy, leading with courage, and being the stable anchor for the team, you can create a powerful, transformative experience. The magic is truly in your hands – guide the team confidently, knowing you are shaping an experience with the potential for lasting impact.

Below is the recording of the Team Fusion activity from our Session 2. This version of the process was adapted to fit our setting, and we hope it serves as an inspiration for understanding the core principles of Team Fusion.

In this session, you will see an example of how Team Fusion unfolds in an online environment and how its building blocks come together in practice. Please note that we only completed Round 1 and Round 2 was different than in the book. We also missed Round 3 - Team Persona, as the process was adjusted to match the context of the session.

This template is adaptable to the various stages of team development. Read more about it in [Chapter 2 –](#_bookmark10) [Stages In a Team’s Development](#_bookmark10). Below are adjustments that can be made to align with each stage:

#### Connection:

* + At this stage, teams are still getting to know one another. Facilitation should focus on building trust and creating openness. Encourage participants to share openly, helping them establish a strong foundation of connection.
  + Provide clearer guidance in reflections and discussions, as the team may not yet feel fully comfortable addressing deeper or challenging dynamics. To further enhance bonding, you can guide the team to create a team manifesto based on their team Persona. This manifesto would represent their shared values, goals, and vision, serving as a guiding principle for how they work together as they continue to develop as a team.

#### Individuation:

* + During the storming phase, tensions and conflicts are more likely to arise. As a Trainer, be attuned to unresolved issues and tensions.
  + Guide the team to confront discomfort head-on, encouraging honest discussions about frustrations and disagreements. It’s important to ensure that every voice is heard and that conflicts are not avoided but explored in a safe space.

#### Reciprocity:

* + In the norming phase, the team is beginning to work more harmoniously. Facilitation should now aim to reinforce positive behaviors and encourage reflection on how the team can continue to build upon their growing collaboration.
  + Provide opportunities for more self-led reflection, with you acting as a support, while staying mindful of any underlying tensions that may need to be addressed.

#### Completion:

* + In this high-functioning stage, the team operates smoothly, and your role as a Trainer is to help them prepare for upcoming changes. Focus on how they can further enhance their agility to be ready for any future challenges or transitions.
  + While the team may feel they are in a good place, encourage them to continue reflecting on areas for growth, ensuring that no important issues are overlooked. Help the team solidify their strengths while also staying adaptable for the road ahead.

# The Culture Compass







# Official Training Template

Welcome to the Culture Compass Training, a transformative experience designed to help participants connect their personal values with the core values of the organization. In today's fast-evolving workplace, understanding and articulating an organization’s values and DNA is crucial for fostering cohesion, enhancing collaboration, and building a distinct identity that resonates both internally and externally.

This Training will guide you through a reflective process, helping you align your own guiding principles with those of the organization, creating a unified vision for future success.

The Culture Compass is not just about identifying values; it’s about ensuring that these values are lived and embodied in every aspect of our work. By the end of this Training, participants will have a clear understanding of their personal values and how they connect to the organization’s goals, paving the way for clearer communication, stronger partnerships, and long-term resilience.

At the heart of this training is the belief that personal values are deeply interconnected with the culture of an organization. When these values are aligned, they foster greater clarity, distinction, and strategic focus.

The Culture Compass process focuses on:

* Crafting a cohesive code of values that guides your actions and decisions.
* Strengthening internal communication by aligning personal values with organizational goals.
* Building partnerships across teams by fostering shared understanding.
* Enhancing your organization’s market identity by ensuring that values are lived out authentically. This alignment doesn't just bring internal cohesion; it also amplifies your organization’s distinct identity in the marketplace, setting the foundation for long-term success.

### The Importance of Values

Research consistently shows that aligning personal and organizational values has a profound impact on both individuals and the organization. According to Person-Organization Fit Theory, when employees' values align with the company’s, they are more motivated, engaged, and committed. This leads to higher job satisfaction, better performance, and stronger retention.

Moreover, Self-Determination Theory highlights that individuals who experience autonomy and alignment between their personal values and organizational culture tend to experience greater well- being, contributing more meaningfully to the success of the organization. A shared sense of values builds trust, strengthens communication, and leads to more cohesive teamwork, all of which are essential for navigating today’s competitive business landscape.

By connecting your personal values to the organization’s core principles, you are contributing to a more engaged, motivated, and aligned workplace culture.

### Why the Culture Compass Training Matters

As trainers, you will lead participants through a powerful process that helps them uncover the deeper connections between their personal values and the organization’s values. This Training fosters authentic dialogue, reflection, and the identification of concrete actions that will help individuals embody both their personal values and the organization's principles in their day-to-day work.

The Culture Compass is designed to be flexible and adaptable, whether used as a stand-alone session for aligning values or as part of a broader strategic training or workshop. From shaping how team members collaborate to refining how your organization communicates its identity in the marketplace, this training offers valuable insights and practical steps for sustained growth and success.

#### Further Reading:

Person-Organization Fit Theory (P-O Fit Theory):

* [Kristof-Brown, A. L., Zimmerman, R. D., & Johnson, E. C. (2005). Consequences of individuals' fit at](https://onlinelibrary.wiley.com/doi/full/10.1111/j.1744-6570.2005.00672.x?casa_token=nzoXuQ7sZNoAAAAA%3AbeqNdeOgoN9BujLJoap3kgjim9uqf1SoxWsxrgP-2dFu5oj5fZ99G13XLrvhRz-jYSljqbTjf3P0LXxL) [work: A meta-analysis of person–job, person–organization, person–group, and person–supervisor fit.](https://onlinelibrary.wiley.com/doi/full/10.1111/j.1744-6570.2005.00672.x?casa_token=nzoXuQ7sZNoAAAAA%3AbeqNdeOgoN9BujLJoap3kgjim9uqf1SoxWsxrgP-2dFu5oj5fZ99G13XLrvhRz-jYSljqbTjf3P0LXxL) [Personnel Psychology, 58(2), 281-342.](https://onlinelibrary.wiley.com/doi/full/10.1111/j.1744-6570.2005.00672.x?casa_token=nzoXuQ7sZNoAAAAA%3AbeqNdeOgoN9BujLJoap3kgjim9uqf1SoxWsxrgP-2dFu5oj5fZ99G13XLrvhRz-jYSljqbTjf3P0LXxL)

Self-Determination Theory (SDT):

* [Deci, E. L., & Ryan, R. M. (1985). Intrinsic motivation and self-determination in human behavior.](https://www.goodreads.com/book/show/1041225.Intrinsic_Motivation_and_Self_Determination_in_Human_Behavior?from_search=true&from_srp=true&qid=82GaeJH7mv&rank=1) [New York: Plenum.](https://www.goodreads.com/book/show/1041225.Intrinsic_Motivation_and_Self_Determination_in_Human_Behavior?from_search=true&from_srp=true&qid=82GaeJH7mv&rank=1)
* [Ryan, R. M., & Deci, E. L. (2000). Self-determination theory and the facilitation of intrinsic motivation,](https://psycnet.apa.org/record/2000-13324-007) [social development, and well-being. American Psychologist, 55(1), 68-78.](https://psycnet.apa.org/record/2000-13324-007)

### Training Overview

#### Duration:

120-240 minutes (can be extended to a full-day training)

#### Format:

Face-to-face using **ClicKit** or online using **Speak Up**

#### Participants:

Suitable for groups ranging from 2 to over 20 participants (Leadership teams, managers)

#### Materials Needed:

**ClicKit** Sets / **Speak Up**, Culture Compass Handout (one for each participant), Speaker and Playlists:

* + Pause [Apple Music](https://music.apple.com/il/playlist/culture-compass-1-pause/pl.u-RRbVvBVFebYAoxV) | [Spotify](https://open.spotify.com/playlist/5h3SfKF9BTUDEyETcAKHkQ?si=JcsWTgkqR-6TX_6SZ5hQ0g)
  + Sharing [Apple Music](https://music.apple.com/il/playlist/culture-compass-2-sharing/pl.u-leyl0k8SPRrV0xz) | [Spotify](https://open.spotify.com/playlist/7uaQFZjUPQ9mpyWyrMcDPy?si=9q93XJVcR7ydIKadgbaD2A)

# The Culture Compass Modules:

This training consists of several Building Blocks. Below, you'll discover The Culture Compass Structure featuring all the building blocks essential for this training. Detailed activity flow examples follow in this chapter. Click on the blocks to find out more:

1. [Welcome >](#_bookmark27)
2. [Objectives >](#_bookmark29)
3. [Sensitivity & Respect >](#_bookmark30)
4. [Pause >](#_bookmark31)
5. [Points of You / Points of View >](#_bookmark32)

#### The Culture Compass Activity:

* + [Introduction to the process](#_bookmark49)
  + [Round 1 - My Lead Value](#_bookmark50)
  + [Round 2 - Exploring Organization Values](#_bookmark50)
  + [Round 3 - Bridge](#_bookmark51)

1. [Focus & Action >](#_bookmark34)
2. [Closure >](#_bookmark35)

### Example Session:

In our Culture Compass Training, we invited you, our Future Business Trainers, to explore how

**Points of You®** values can be integrated into your own training practices. The session focused on aligning personal values with organizational values to deepen the trainers’ understanding of how they can authentically live and deliver these values in their sessions. Being the face of Points of You® to your clients.

This example outlines a face-to-face session designed for trainers who are seeking to strengthen their alignment with the organization's core values. The purpose of this session is to help participants experience the process of linking personal values with team or organizational values, allowing them to embody these values in their work.

While this session assumes the presence of organizational or team values, later in this chapter, we will provide an adaptation of Round 2 for situations where organizational values are not yet defined.

Objectives of the session:

* To reflect on Leading personal value and explore how it serves me in my professional life.
* To integrate how my Lead Value links to **Points of You®** DNA.
* To develop strategies to embody and live out these values in my professional life.

### Introduction to the Process

#### Generating Excitement and Setting the Context:

Welcome everyone to the Culture Compass Training, where we will embark on a journey of connecting our personal values to our organization’s core values. Today’s session is designed to help you reflect on your own guiding principles and how they align with the mission and values of our organization. By the end of this session, you will have a clearer understanding of how your unique strengths contribute to the collective success of our team.

#### Why Values Matter:

Before we dive in, let’s talk briefly about why values are so important. Values are the principles that guide our decisions, actions, and how we interact with the world around us. They shape who we are as individuals and define what matters most to us in our personal and professional lives.

Research shows that aligning personal values with organizational values leads to greater engagement, satisfaction, and commitment. When our personal values resonate with those of the organization, we feel a stronger sense of belonging and purpose in the work we do. According to Person-Organization Fit Theory, individuals who experience this alignment are more motivated and perform better, because their work feels meaningful and aligned with who they are.

#### Introducing the Activity’s Focus:

Today, we’ll be working with Photo cards to help bring out the values that resonate with you on a personal level. We’ll then explore how these values align with those of the organization. Trust your intuition as you go through this process – there are no right or wrong answers. The first things that come to your mind are usually the most meaningful, so give yourself the freedom to explore and reflect.

#### Simple Rules of the Process:

Before we begin, let’s go over a couple of simple rules to guide us through the activity:

* + Trust Your Perspective: Every card you choose, every story you share, is your perspective. There's no right or wrong answer – just your experience. Be open to hearing the perspectives of others as well.
  + Rule of the Deck: If at any point during the activity you feel the need to change your card, you don’t need to ask for permission. Just ask yourself, Why am I changing it? and trust your intuition.

#### Warm-Up - Identifying Key Values:

* + To get us started, let’s do a quick warm-up activity to begin thinking about values on a broader level. We’ll share a list of some common values, and I’d like you to take a moment to choose your top three values that resonate with you most in your professional life.
  + For example the Dare to Lead Values by Brene Brown
  + We will be using Mentimeter or a flipchart for this exercise. As you choose your top three values, we’ll display them and gather a collective list of the most important values in the room.
  + Trainer Tip: Use Mentimeter to gather the results live, or ask participants to mark their top three values on a flipchart or whiteboard. As the results come in, we’ll highlight the most common values chosen.

#### Moving Deeper - From the Mind to the Heart:

What we’ve just done is a great exercise for engaging our minds. But now, we’re going to go deeper – into our hearts and experiences. In the next part of the session, we’ll explore values in a more personal and intuitive way by reflecting on a moment where you felt you were at your best professionally. Through this, we’ll mine the personal values that guide you in your daily actions and decisions.

#### Preparing for the Next Steps:

Now that we’ve set the stage, we’ll move into using photo cards to help uncover the values that resonate with you the most. Remember, this is a time to trust your instincts and be open to whatever arises in the process. Let the cards speak to you, and we’ll guide you through how to connect these values with the organization.

### Round 1 - My Lead Value

#### Guided Imagery Process:

* + Establishing Connection: Before we dive, I invite you to close your eyes and take a few deep breaths. Allow yourself to relax into this moment, leaving behind any distractions or worries from today. Let your body settle into a comfortable position, and let your mind become fully present here, in this space.
  + Guided Imagery: Now, I want you to take a journey back in time. Think of a moment in your professional life when you felt at your absolute best – a time when you were proud of something you did, and your actions led to a meaningful outcome. Maybe it was a big achievement or a small moment that made a huge impact. Focus on this memory.
  + Give time for participants to find this memory before continuing.
  + As you recall the experience:
    - Where were you?
    - Who was involved?
    - What happened?
    - What did you do that led to the outcome you are proud of?
    - How did it make you feel at that moment?
    - How does it feel to recall it now?
    - Hold this memory in your mind, remember the actions you took and how they aligned with who you are at your core?

Take a few more moments to relive this memory fully, feeling the emotions, the energy, and the pride that came from this experience. When you are ready, slowly open your eyes

#### Journaling:

Take 3-5 minutes to write down the key details of this moment. Use the following questions to guide your journaling:

* + What was the situation?
  + What did you do to make it successful?
  + How did your actions influence the outcome?
  + How can you name what supported you in this action?
  + What personal strengths or values guided you through this moment?

#### Partner Sharing:

Now that you’ve reflected on your story, we will move into pair sharing. Find a partner and decide who will be Person A and Person B.

#### Person A's Turn:

* + Person A has 5 minutes to share their story with their partner.
  + Describe the situation, what you did, the outcome, and why this moment made you feel proud.
  + Person B: Your role is to listen with all your senses. Focus fully on what Person A is saying. Don’t interrupt or ask questions – simply listen. While doing so write down on your memo-note, words that title the values that you hear in this person. Around 5 values that you pick up (values, characteristics, the essence of the story)
  + Once Person A has finished sharing: Person B will choose a photo card from their ClicKit, a card that resonates with the story they just heard.
  + Person B then takes 2 minutes to explain their choice:
    - Why did you choose this card?
    - What values or strengths did you see in Person A’s story and give the memo notes with your words.

#### Switch Roles:

* + Now, Person B shares their story, and Person A listens.
  + Person B has 5 minutes to share their story of a moment where they felt at their best professionally.
  + Person A listens without interrupting.
  + Once Person B has finished: Person A selects a photo card that best represents what they heard and the words on memo notes.
  + Person A then shares why they chose this card and the words they wrote, for 2 minutes.

#### Second Turn: New Partner, New Sharing:

* + Now, it’s time to find a new partner.
  + Once again, decide who will be Person A and Person B.
  + Repeat the same sharing process:
  + Each person takes turns sharing their story for 5 minutes.
  + The listener selects a photo card and writes down 3-5 words on a memo note, explaining their choice.

#### Closing Round 1:

* + By the end of this round, each participant will have received two photo cards and two memo notes from their partners, reflecting on the values or qualities their partners saw in them.
  + Reflection:
    - Take a moment to look at both photo cards and the words your partners shared with you. Think about the story you shared and what you heard.
    - Take a few minutes and write to yourself: What was new for you in the conversation or the photo that you received? Has something changed in the way you see the value that emerged from your story? Do you know this value in other examples of your work?
    - From the two photos you received, choose one photo card that resonates most deeply with you and represents the essence of your story.
    - Reflect on this card and give it a name – a single word or phrase that represents The Lead Value that guided you in the moment you shared.
    - Place the Photo Card on the left hand side of the handout and write the Title of your Lead Value below.

We will move forward into the next round with this photo card and value in mind.

While the participants are in pairs sharing play the Sharing playlist ([Apple Music](https://music.apple.com/il/playlist/culture-compass-2-sharing/pl.u-leyl0k8SPRrV0xz) | [Spotify](https://open.spotify.com/playlist/7uaQFZjUPQ9mpyWyrMcDPy?si=9q93XJVcR7ydIKadgbaD2A))

### Round 2 - Exploring Organization Value

#### Introduction to Organizational Values:

Now that we’ve reflected on our personal values and shared stories of moments where we felt professionally at our best, we are going to take a step forward and explore how these values align with our organization’s core values.

#### Establishing Connection:

We believe that when personal values align with organizational values, it strengthens our connection

to the work we do and creates a more purposeful, impactful experience. In this next step, we will explore how your personal stories relate to the values of our organization.

#### Presenting the Organizational Values:

* + Take a moment to listen carefully as we share the core values that drive our organization. These values represent the foundation of who we are, what we stand for, and how we engage with the world.
  + Share each organizational value one at a time. For each value:
    - Read the Official Description: Share the formal definition or description of the value as it’s written by your organization.
    - Show a Visual Representation: Provide a photo or visual symbol that reflects the essence of the value. This adds a deeper layer of understanding for the participants.
    - Pause for Reflection: After presenting each value, give participants a moment to reflect on how the value resonates with their story.

#### Finding Gaps:

* + Exploring: Spend a few minutes reflecting on the story you shared in Round 1 and the organizational values we explored in Round 2. Identify the value that feels furthest from you—the one that is least present in your natural approach or daily work.

Ask yourself:

* + - Which organizational value feels the most distant from me?
    - Why does this value feel less connected to my natural way of working or thinking?

#### Choosing a Photo Card:

* + Now that you’ve reflected on which organizational value feels the most distant from you, it's time to express this value visually.
  + Look through the available photo cards and select a new one that represents what this value means

to you or how you currently relate to it. It's not a literal representation of the value—it can reflect how you see it, your feelings toward it or the challenge of embodying it.

* + Place the photo card that represents your connection to the organizational value on the right-hand side of your handout. Beneath the photo card, write the organizational value that you’ve chosen.

#### Closing Round 2:

By the end of this round, you will have visually represented your personal value alongside an organizational value that feels most distant to you. This step prepares us to explore how we can build a bridge between these values and find ways to connect with the organizational value more intentionally.

We will now transition into the next phase, where we’ll work on integrating this value into our actions and mindset, using our lead value as a guide.

### Round 3 - Bridge

#### Introduction to Round 3:

In this round, we will work together in small groups to find the bridge between your lead value and the organizational value that feels most distant from you. The goal is to explore how your core

strength can help you connect with this value in a meaningful way—allowing you to "make friends" with it and integrate it into your work.

Rather than seeing this value as something disconnected from you, this is an opportunity to find common ground and identify specific behaviors that will help you embody both values in your daily actions.

#### Grouping by Organizational Values:

* + You will now be divided into small groups of about three participants, each based on the organizational value you selected in the previous round. This ensures that each group is focused on a specific value, creating a meaningful conversation around how to find a bridge and make this value a natural part of your approach.
  + In your group, you will explore how your lead value can help you connect with this organizational value. Rather than seeing it as something distant, consider how your personal strengths can support, complement, and enhance it. Together, discuss ways to re-frame this value so that it feels more aligned with your work and contributes to the collective success of the organization.
  + Divide the participants according to the chosen values.

#### Discussion Structure:

You will have 20 minutes per group. Here’s how the discussion will flow:

* + Individual Sharing: Each participant will have 3-4 minutes to share:
    - Their personal value they identified in Round 1.
    - The organizational value they selected in Round 2 (the one that feels most distant).
    - Why this value feels far from them or challenging to connect with.
    - How their lead value could help them build a bridge and form a connection with this value. – Group Discussion: After all participants have shared, spend 10-15 minutes discussing and

brainstorming behaviors that can bridge the personal and organizational values. Explore questions such as:

* + - How can my lead value help me integrate this organizational value into my work?
    - What actions or behaviors will allow us to live out both values in a meaningful way?
    - How can these values be reflected in the way we train, market, or interact with our teams and clients?
    - What practical steps can we take to bring these values to life in our daily work?

#### Using the Handout - Writing Behaviors on the Arrows:

* + Once you return from your group discussions, take a few minutes to reflect and write down your thoughts. On your handout, you will see arrows between the personal value (on the left) and

the organizational value (on the right). This is where you will write down the behaviors that can connect these two values.

* + Write down 2-3 specific behaviors that connect your personal value to the organizational value on the arrows in the center of your handout.
  + These behaviors should be actionable steps or practices that help you live out both values in your work.

#### Trainer Tip:

* + Encourage the groups to think practically but also creatively about how to embody both values in their day-to-day activities. Remind them that these behaviors don’t need to be complex – they can be small actions that make a big impact.
  + Reflect specifically on how these values and behaviors can enhance the training experience (e.g., making sessions more engaging, fostering deeper connections) or marketing efforts (e.g., creating authentic, values-driven communication).
  + When participants are sharining in the groups continue with the Sharing Playlist (Apple Music | Spotify)

#### Closing the Round:

* + By the end of this round, each participant should have a clear understanding of specific behaviors that bridge their personal values and the organization’s values. These behaviors will serve as the actionable steps that help you live out both values in your daily work.
  + Next, we’ll move on to Focus & Action stages to close this trainig.

### Focus & Action

For the Details of the Focus and Closure Building Blocks please see the respective chapter. Below is the Focus & Action adaptation for the Click & Connect Process:

#### Journal Reflection:

We’ve come a long way in today’s training, connecting our personal values with the organization’s values and identifying actionable behaviours that bridge both. Before we move into sharing and final action steps, take a few minutes to reflect in your journal.

Dedicate 5 minutes for participants to journal on the following:

* + What were the main insights you gained during the discussions about linking your personal and organizational values?
  + How did it feel to identify specific behaviors that can help bridge the personal and organizational value?
  + Which behaviour or action do you feel most excited or motivated to live out in your work?

#### Sharing Insights:

Give the space for participants to share their reflections. This is a valuable moment for participants to verbalize their insights and strengthen their connection to the values.

* + Invite one participant from each value group to share their reflections on how they plan to live out the organizational value they connected with.
  + Encourage them to describe the behaviours or actions they identified and how they feel about embodying these values in their daily work.
  + Trainer Tip: Encourage at least one person from each value group to share to ensure that different organizational values are discussed, creating a sense of shared understanding and connection across all groups.

#### Action Steps:

* + Now that participants have reflected on the link between personal and organizational values, it’s time to turn those reflections into concrete action steps.
  + Guide participants to identify three specific actions that will help them live out the behaviours they identified in Round 3.
  + Trainer Tip: Encourage participants to write down these action steps on their handout, so they leave the session with a clear, tangible plan.

#### Training Closure:

* + As we close the session, acknowledge the collective effort and shared insights that have emerged. Thank the participants for their engagement and remind them that the process doesn’t end here – these values are part of their ongoing journey with the organization.
  + Follow-Up: Consider follow-up sessions to deepen value alignment, such as workshops on integrating values into daily actions or team-specific discussions.

#### Closing Thoughts:

Reinforce that living out these values is an evolving process that will shape their personal growth and the organization’s culture.

Encourage participants to support each other in their journeys, offering accountability and encouragement as they pursue their action steps.

### Round 2 Adjustment for Organizations without defined values

#### Introduction to Organizational Values:

Now that we’ve explored our personal stories and identified the values that guide us individually, it’s time to look at how these values can align with the broader group values. In cases where an organization has not yet formally defined its core values, we can use the collective wisdom and shared perspectives of this group to define temporary guiding values for today’s session.

In our earlier warm-up activity, we gathered and prioritized a set of values from everyone here. These are the values that this group feels are most important in the way we work together, communicate, and succeed as a team. While they may not be the formal organizational values yet, they reflect the collective perspective of those who are part of this organization.

#### Why These Values Matter:

By using the values we collectively identified, we are tapping into the shared beliefs and principles that already exist within this group. These values:

* + Represent the qualities that are most meaningful to the team at this moment.
  + Reflect what we collectively believe is important for success, collaboration, and personal growth.
  + Offer a foundation for building a shared culture, even if it is not formally defined yet.

Rationale: While these values are not the official organizational values, they give us a starting point. Values come from the people who embody them, and as such, we are laying the groundwork for what could become the future values of this organization. By working with these values, we are shaping the culture as we move forward, creating a cohesive environment where everyone feels connected to the guiding principles that influence their daily actions.

#### Presenting the Group-Selected Values:

* + We have identified the top 5 values chosen by the group earlier in our warm-up activity. These values reflect what this team collectively feels are the most important principles that should guide our actions, decisions, and interactions within the organization.
  + Take a moment to listen carefully as we introduce each value. These values will serve as a temporary foundation for today’s session, helping us align our personal stories with shared team beliefs.
  + Step-by-Step Presentation: For each of the top 5 values, the trainer will:
    - Introduce the Value: Start by sharing the name of the value selected by the group.
    - Facilitate a Discussion: Rather than providing a formal definition, open the floor to participants for a brief discussion:
      * What does this value mean to you in the context of our organization or team?
      * How do you think this value shows up (or should show up) in our day-to-day work?
  + Encourage participants to offer their own interpretations and examples of how this value might manifest in their specific roles or teams.

#### Choosing a Value That Feels Most Distant:

Find the value that feels furthest from you—the one that you don’t naturally connect with or that feels the least familiar to your approach to work.

Take a moment to reflect on the group-selected values and ask yourself:

* + Which value feels most distant from me?
  + Why do I feel disconnected from this value?
  + How might this value play an important role in my work, even if it doesn’t feel natural to me? Each participant will choose one value that they feel least connected to. This will serve as the starting point for the next round, where we will explore how to find alignment with this value using our lead value from Round 1.

#### Choosing a Photo Card:

Now that you’ve reflected on the organizational value that feels most distant from you, it's time to express this connection visually.

* + Select a new Photo card that represents what this value means to you, or how you currently relate to it. This card does not need to be a literal representation—it can reflect your feelings toward the value, the challenge of embodying it, or your aspiration to connect with it.
  + Placing the photo card that represents the organizational value you are working to connect with on the right-hand side of your handout. Beneath this new card, write the value that you’ve chosen.

#### Closing Round 2:

Now that we’ve introduced and discussed the shared values chosen by the group, you will take these values into smaller groups. This is where you will explore how your personal value connects with one of these shared values, and how you can embody both in your work.

### Supporting Participants in Connecting Values to Behaviors and Actions

It’s common for participants to struggle with translating abstract values into concrete behaviors and actions. They may tend to offer vague examples such as “I will be creative,” “I will show my passion,” or “I will walk the talk,” but these statements remain general and don’t lead to specific outcomes. As a trainer, your role is to guide participants through this process, offering practical tools and techniques to help them move from abstract ideas to clear, actionable steps. Below are several strategies to support your participants:

#### Use Practical Examples

One of the best ways to help participants connect values to behaviors is by offering specific examples that demonstrate how a value can manifest in day-to-day actions. For example:

* Value: Integrity
  + Behavior: "Being transparent in team meetings about project progress and challenges."
  + Action: "Provide a weekly update email that highlights key achievements, roadblocks, and solutions."
* Value: Collaboration
  + Behavior: "Actively seeking input from all team members during brainstorming sessions."
  + Action: "Use tools like surveys or voting systems to ensure everyone’s ideas are heard before decisions are made."
* Value: Empathy
  + Behavior: "Listen without interrupting during one-on-one meetings."
  + Action: "In my next meeting, I will focus on asking open-ended questions and allowing my team member to fully express their thoughts."

#### Pitfalls to Avoid:

Participants may stay vague and non-specific, offering action plans like “I will schedule a meeting soon” without a concrete timeline or detail. Instead, encourage them to set clear, measurable steps such as, “I will schedule a team check-in by Wednesday and outline the project’s current status.” The more specific the action, the more likely it will be carried out.

#### Ask Behavior-Driven Questions

Encourage participants to think about how their values translate into specific actions by asking targeted, behavior-driven questions. For example:

* What does this value look like in action during your daily work?
* If someone were watching you embody this value, what would they see you doing?
* What specific actions can you take tomorrow to live out this value?

These prompts help participants focus on concrete actions rather than staying in the realm of abstract ideas.

#### Break Down the Value into Specific Situations

Encourage participants to think about different situations in their work where the value can show up. For example:

* Value: Creativity
  + Ask: How can you show creativity in problem-solving? In project planning? In communication?

By focusing on specific situations, participants can see how their value applies to various aspects of their work, making it easier to connect it to behaviors.

#### Confront and Challenge with the Right Intention

As trainers, sometimes we need to challenge participants when they remain vague or avoid translating values into specific actions. It may feel uncomfortable for them when we repeatedly push them to clarify, but this is an essential part of the process.

* Confront participants in a supportive manner, asking them to dig deeper into what their value really looks like in action.
* Encourage them to move beyond abstract concepts like “I will be a better listener” and instead provide examples like, “In my next team meeting, I will actively ask for feedback from quieter team members.”

Your role as a trainer is to challenge participants with the right intention, helping them turn values into behaviors that lead to meaningful change. This may involve asking probing questions, even when it feels uncomfortable, but it’s part of the service you’re providing to help them grow.

### Final Thought

Helping participants bridge the gap between values, behaviors, and actions is crucial for translating abstract ideas into meaningful, real-world outcomes. This way, they will be able to embody their values in life and avoid staying in observation mode. As a trainer, offering practical examples and behavior-driven questions, and challenging participants when necessary, helps ground their values in specific, achievable steps. The clearer they are on how to live their values, the more impactful their work will be.

### The Culture Compass Recording

Below is the recording of The Culture Compass activity. Feel free to watch it to explore an

example of The Culture Compass setting in an online environment, and see how the building blocks come together in practice.

### Timing Adjustments



The Culture Compass Training is designed with flexibility to cater to your specific needs, whether you have a concise 2-hour session or a full-day training. Below are guidelines on how to adjust the recommended flow based on your available time:

* For 2 hour sessions: Prioritize the core elements of the training. Given the time constraint, consider streamlining the presentations and discussions while still maintaining time for personal reflection and key value alignment. This session will engage participants in the essential aspects without feeling rushed.
* For 2 hour sessions: With additional time, you can delve a bit deeper into each activity. Use this time to allow more sharing and reflection during group discussions, ensuring participants have the space to express their insights.
* 3 hours or longer: Embrace the full training flow. Incorporate extended group discussions and reflection time, and allow participants more opportunities to share their values and action plans. The extra time deepens the experience, fostering richer discussions and more thorough personal reflection.

Regardless of the session length, the aim of the Culture Compass Training is to create a transformative experience. Adjust the flow to fit your allocated time, and be assured that whether it's a brief encounter or an all-day immersion, the training will be impactful.





### Examples of Time Adaptations:

Below is an overview how you can vary The Culture Compass Template according to the time you have for the process: **120 minutes 180 minutes 240 minutes**

#### Welcome | Objectives | Sensitivity & Respect

**5 min** According to the building blocks. Keep sensitivity & respect short and simple **5 min.** According to the building blocks. Keep sensitivity & respect short and simple **10 min.** According to the building blocks. Keep sensitivity & respect short and simple

**Pause | Points of You / Points of View 15 min** Short pause only

**15 min.** Short pause only

**20 min.** You can give a longer pause. After pause give time to connect to the training flow

#### Introduction to the process

**5 min** According to the proposed flow. **10 min.** According to the proposed flow. **15 min.** According to the proposed flow.

#### Round 1 - My Lead Value

**35 min** Shorten the sharining to 3 min **45 min.** According to the proposed flow. **50 min.** According to the proposed flow.

**Round 2 - Exploring Organizational Values 25 min** Short presentation of values only **35 min.** According to the proposed flow.

**50 min.** Includes a 10 minute break. Ask questions about Organizational Values to build connections.

#### Round 3 - Bridge

**30 min** According to the proposed flow

**40 min.** According to the proposed flow (you can even extend the discussion to 25 minutes)

**50 min.** Extend the group sharining

#### Focus & Action | Closure

**10 min** Very short sharining

**30 min.** Give a chance for each value to be discussed

**45 min.** Give a chance for each value to be discussed and a group discussion.

### Online Setting:

If you are conducting the Culture Compass Training in an online environment, there are a few important adjustments to make for a smooth, engaging experience. Below are key guidelines to ensure participants can fully engage with the process, whether they are using physical ClicKit sets or the digital Speak Up tool.

For more general tips about online training facilitation, refer to the relevant chapter.

#### Logistics:

* **Using ClicKit:**

If you're using the physical ClicKit sets, ensure that participants receive their materials on time. We recommend sending the same set to each participant to simplify card exchanges and references. Don’t forget to add the handout printed in A3.

#### Using Speak Up Digital:

If you’re using the Speak Up digital tool, make sure you are familiar with the platform’s functionality. During the training, send participants the invite link to your open meeting. At the beginning of the session, allocate time to walk participants through the platform’s functionality, ensuring they know how to navigate the digital tools for card selection, journaling, and sharing.

#### Round 1:

* **Partnering:**

Participants will be randomly paired using the meeting platform’s breakout room feature. Present this as similar to drawing a card face down – you won’t know who you’ll meet, and that adds a layer of curiosity and surprise to the process.

#### Instructions for Breakout Rooms:

To ensure the flow of the activity is smooth, send clear instructions to participants once they are in their breakout rooms. Make sure they know the structure and timing:

* + Person A starts by sharing their story for 5 minutes.
  + After Person A finishes, Person B will write down 3-5 words to describe what they heard and then share the words with Person A for 2 minutes.
  + After Person B shares the words, they switch roles and repeat the process, with Person B sharing their story and Person A providing words.
  + You can send these instructions through the chat feature or broadcast a message to all breakout rooms during the session to keep participants on track.

#### Photo Exchange:

* + If using physical ClicKit sets, participants can show their selected photo to their partner by holding it up to the camera.
  + If using digital Speak Up, participants will share which photo they choose for them, later the participants will select the photo card of their choice in the template.

#### Words of Reflection:

Instruct participants to write down 3-5 words that describe the qualities or values they heard in their partner’s story. They can then share their words:

* + Physically: Hold up their words to the camera.
  + Digitally: Send the message via the chat function or show their words on a shared screen.

#### Returning to the Main Room:

* + After both participants have shared their stories and exchanged words, instruct everyone to return to the main meeting room.
  + Allow for a short pause, if needed, for reflection or questions, and then recreate the breakout rooms for the second pairing.
  + Participants will then repeat the same process in the newly created rooms, sharing their stories with a new partner.

#### Round 2:

* **Staying Together:**

For Round 2, participants will remain together in the main training room. This is a collective moment where we introduce and reflect on the organizational values that drive our team or company. To make this process more engaging and visually impactful, use slides to present each of the organizational values.

#### Round 3:

* **Group Discussions & Behavior Identification:**

Participants will work in groups of three based on the value they selected in Round 2. Use the breakout rooms to facilitate these small-group discussions.

#### Digital Journaling:

* + If using the digital Speak Up, participants will write down the behaviors they identified in their digital journals. Encourage participants to be specific about how they plan to live out these behaviors in their day-to-day work.
  + In the digital version, there will be no handout with arrows. Instead, participants will work with two cards in their digital journal and write the behaviors between them as a way of bridging the personal and group values.
  + In the physical version, they can write these behaviors in their handouts

### Adaptations and Flexibility

The Culture Compass Training is designed with flexibility, allowing trainers to tailor the focus of discussions and activities to meet the specific objectives of the organization.

A key adjustment can be made in Round 2, where participants either:

* Choose an organizational value they resonate with, focusing on strengthening and integrating it into their work.
* Select a value that feels distant, using their lead value as a bridge to connect with it more meaningfully.

Depending on the chosen approach, Round 3 (The Bridge) can then explore different ways of integration, whether that means reinforcing a familiar value or working to embody a value that is less natural.

Below are different ways to adapt Round 3, ensuring that the training remains relevant to various organizational needs. Some adaptations focus on deepening an existing connection, while others emphasize finding alignment with a distant value.

#### Organizational Strategy & Values Alignment

* + Objective: To align the organization’s long-term strategy with its core values.
  + Round 2 Focus: Participants identify an organizational value and explore how it aligns (or doesn’t) with strategic goals. They may choose a value they strongly connect with to reinforce, or a distant value to explore how they can integrate it into strategic decision-making.
  + Round 3 Discussion:
    - If working with a connected value → Discuss how to strengthen alignment between this value and strategy.
    - If working with a distant value → Explore why it feels disconnected and what actions could integrate it into decision-making.Example Questions:
    - How can our values guide our long-term strategic goals?
    - What actions can we take to ensure our values are reflected in the strategic initiatives we pursue?
    - If this value feels distant, what changes in mindset or actions could help align it with strategic decision-making?

#### Organizational Culture Building

* + Objective: To shape and build a cohesive organizational culture around shared values.
  + Round 2 Focus: Participants choose a value that influences culture—either one they embody naturally or one that feels less present in their daily experience.
  + Round 3
    - If working with a connected value → Discuss how to amplify and reinforce this value within the organization’s culture.
    - If working with a distant value → Explore what barriers prevent them from connecting with it and how it could become more relevant in their work.
  + Example Questions:
    - How can we build a culture that truly reflects our organizational values?
    - What daily actions and rituals will ensure our values become part of our DNA?
    - If this value feels distant, how can we start integrating it into our interactions and decisions?

#### Corporate Social Responsibility (CSR) & Values

* + Objective: To align the organization’s CSR efforts with its core values.
  + Round 2 Focus: Participants select a CSR-related value that is either already meaningful to them or one they struggle to connect with but recognize its importance in the organization.
  + Round 3 Discussion:
    - If working with a connected value → Discuss ways to amplify CSR efforts and align them with this value.
    - If working with a distant value → Explore how they can personally connect with it and contribute to CSR efforts in a way that feels authentic.
  + Example Questions:
    - How can we ensure our CSR initiatives reflect our values of sustainability and empathy?
    - What behaviors should we adopt to maximize our positive social impact?
    - If this value feels distant, how can we take small steps to engage with it in a way that aligns with our strengths?

#### Defining Organizational Values

* + Objective: To collaboratively identify and define core values for an organization that doesn’t have formal values yet.
  + Round 2 Focus: Participants explore which values should guide the organization—choosing either a value that already aligns with their personal values or one they struggle with but believe is essential.
  + Round 3 Discussion:
    - If working with a connected value → Discuss how to bring this value into the company’s identity.
    - If working with a distant value → Explore what barriers exist and how this value could become more integrated into the organization.
  + Example Questions:
    - What values should guide us as an organization?
    - How can our personal values help us define a strong organizational culture?
    - If this value feels distant, what personal shifts or team behaviors could help bring it to life?

#### Internal Communication Alignment

* + Objective: To improve internal communication and ensure that it aligns with the organization’s core values.
  + Round 2 Focus: Participants choose a communication-related value—either one they naturally practice or one they find challenging to embody in communication.
  + Round 3 Discussion:
    - If working with a connected value → Discuss how to improve communication practices through this value.
    - If working with a distant value → Explore how they can adopt behaviors that make this value more natural in communication.
  + Example Questions:
    - How can our internal communication reflect integrity and transparency?
    - How do we ensure that our messages foster connection and trust across departments?
    - If this value feels distant, what small steps can we take to make it a more intentional part of our interactions?

#### Marketing & Client Communication

* + Objective: To ensure that marketing efforts and external communications align with the organization’s values.
  + Round 2 Focus: Participants identify a value related to external communication—either one they already practice or one they struggle to connect with.
  + Round 3 Discussion:
    - If working with a connected value → Discuss how to ensure marketing messages reflect this value.
    - If working with a distant value → Explore what challenges prevent its integration and how to bridge the gap.
  + Example Questions:
    - How can our marketing materials reflect our values of innovation and authenticity?
    - What behaviors should guide our client communication to ensure transparency and trust?
    - If this value feels distant, how can we shift our messaging or approach to align with it?

#### Product Development & Innovation

* + Objective: To ensure that the development of products and services aligns with the organization’s values.
  + Round 2 Focus: Participants select a value that should influence product development—either one they already connect with or one they find challenging to integrate.
  + Round 3 Discussion:
    - If working with a connected value → Discuss how to infuse this value into product development.
    - If working with a distant value → Explore what obstacles exist and how to start integrating this value into innovation efforts..
  + Example Questions:
    - How can we embed our values into the design and innovation of our products?
    - What actions can we take to ensure that our product development reflects our commitment to quality and excellence?
    - How can our values guide innovation while staying true to our mission?
    - If this value feels distant, what changes in perspective or approach could help bring it into our work?

#### Leadership Team Bonding

* + Objective: To strengthen leadership team cohesion through shared values and aligned behaviors.
  + Round 2 Focus: Participants choose a value that impacts leadership—either one they already embody or one they struggle to connect with as a leader.
  + Round 3 Discussion:
    - If working with a connected value → Discuss how to use this value to build leadership cohesion.
    - If working with a distant value → Explore how leaders can develop behaviors that bring this value into their leadership style.
  + Example Questions:
    - How can we, as leaders, embody the organization’s values to build a cohesive team?
    - What behaviors will help us create a culture of trust and shared accountability?
    - If this value feels distant, how can we adopt leadership behaviors that integrate it into our style?

# Train the Trainer Module 1: Icebreakers & Closures

### Introduction



Welcome to the first module of the **Speak Up** training program. This foundational module spans a full day (6 hours) and can be completed either in one continuous session or divided into two parts. If split, we recommend dedicating the first half (2.5-3 hours) to icebreakers and following with the closures portion after a break or on a separate day.

In this training, we’ll focus on how to use **Speak Up** to open and close meetings effectively. Participants will experience and learn how to apply icebreakers and closures, setting the stage for meaningful, reflective conversations in everyday work settings.

# Official Training Template

Our goal is to equip and empower managers, many of whom may be new to using such tools and balancing busy schedules. While they may not have formal facilitation experience, we aim to make this training accessible and engaging, helping them understand how to incorporate **Speak Up** into their daily meetings and team interactions.

Since many participants may be unfamiliar with tools like these, the full-day format allows us to share knowledge, guide them through hands-on experience, answer questions, and help them develop confidence with **Speak Up**. We want

them to leave excited, equipped, and ready to bring these practices into their work. This training serves two key purposes:

**Module 1:** Icebreakers & Closures

1. Experience the tools firsthand: Participants will explore icebreakers and closures, experiencing how these activities foster trust, reflection, and engagement.
2. Learn practical integration: Trainers will teach straightforward techniques and tips to ensure these tools feel natural and achievable in daily meetings, helping participants adapt them to their team’s needs.

**Speak Up** was designed to address the challenges of traditional dialogue. Meetings often feel rushed, disconnected, or transactional, leaving little space for authentic conversations. **Speak Up** uses photos, words, and metaphors to open channels of communication, bridge gaps, and create safe spaces for sharing.

This full-day training will provide participants with the tools and strategies they need to engage their teams from the start of meetings through icebreakers and end with impact using thoughtful closures.

### Training Overview

#### Duration:

6 hours as one session or split into two session

#### Format:

Face-to-face using **Speak Up** or online using **Speak Up** Digital

#### Participants:

Suitable for groups ranging from 8 to 15 participants (People Managers, HR, OD & LD Specialists)

#### Materials Needed:

**Speak Up**/ **Speak Up** Digital, Closure Handouts (coming soon), Speaker and the following Playlists: – Pause [Apple Music](https://music.apple.com/il/playlist/speak-up-ttt-module-1-pause/pl.u-PDb40gDCy6pDokz) | [Spotify](https://open.spotify.com/playlist/4eBUFB4r3twaFeP5s3k9kC?si=uquuFR9YTL6Xj24nkJNZ3A)

### Training Flow

#### Here’s the flow of the 6 hour TTT Module 1: Icebreakers & Closures: Timing Structure

10 min [Welcome & Opening >](#_bookmark53)

10 min [Objectives & Sensitivity and Respect >](#_bookmark54) 10min [Introducing **Points of You®** and **Speak Up** >](#_bookmark54) 10 min [Pause >](#_bookmark55)

30 min [Icebreaker: "What Do I Want to Leave Outside?" >](#_bookmark55)

10 min [Icebreaker Module: Setting the Tone for Engagement and Connection >](#_bookmark56) 50 min [Icebreaker in Pairs: "What is My Superpower?" >](#_bookmark57)

30 min [Q&A on Handling Resistance & Challenges >](#_bookmark57) 45 min [Break >](#_bookmark58)

15 min [Introduction to Closures >](#_bookmark58)

30 min [Closure Activity 1: What Am I Taking from Today? >](#_bookmark58) 15 min [Debrief on Closures >](#_bookmark59)

30 min [Closure Activity 2: form Focus to Action >](#_bookmark59) 40 min [Q&A on Icebreakers & Closures >](#_bookmark60)

10 min [PR & Final Words >](#_bookmark60)

15 min [Closure: One-Word Summary >](#_bookmark61)

# By-the-Book Guide for Trainers

This next section provides a step-by-step, by-the-book guide for trainers to facilitate the session with confidence. Each activity includes detailed instructions, scripts, and tips to help you guide participants through the session effectively. These instructions are designed to make the learning experience straightforward, meaningful, and adaptable, ensuring managers feel equipped and inspired to use **Speak Up** tools in their own meetings.

1. **Welcome & Opening** (10 minutes)

Welcome, everyone, to our Train the Trainer session! We’re excited to have you here today. This will be a training full of hands-on experiences and practical learning. You’ll engage with the tools directly and explore how they can open the door to deeper conversations. It’s our goal to ensure you leave today feeling confident and excited to bring these tools into your daily work with your teams.

Before we dive in, let me introduce myself [ this is the space for your self introduction - see the [Welcome](#_bookmark28) [Chapter for more inspiration](#_bookmark28)]

In today’s fast-moving world, communication often faces real challenges. Time constraints, distractions, and fear of judgement can prevent authentic dialogue. As a result, meetings become rushed, conversations remain surface-level, and people may not feel comfortable expressing their true thoughts. When teams struggle with these barriers, creativity, connection, and collaboration suffer.

This is where **Speak Up** comes in. **Speak Up** helps overcome these challenges by providing a new way to connect through visual tools – specifically photos and words. These tools don’t just spark conversation; they help us see things differently by inviting multiple perspectives, making it easier to engage in open, meaningful exchanges.

Using photography and metaphors in conversations is powerful because they bridge the gap between logical thinking and emotional connection – between the heart and the mind. A single image can evoke memories, feelings, and ideas that words alone often can’t express. This connection between our thoughts and emotions helps people open up, explore new insights, and build trust.

Today’s training will be an opportunity for you to experience these tools firsthand, understand how they work, and explore ways to apply them in your teams. We want you to feel the impact of these methods yourself so you can confidently share that experience with others.

#### Trainer Tip:

Emphasize that the **Speak Up** tool goes beyond typical icebreakers. It fosters reflection and openness, which leads to more authentic team interactions.

1. **Objectives & Sensitivity and Respect** (10 minutes)

#### Objectives:

Before we dive in, I want to share the key objectives for today’s training. These will guide everything we do, helping you understand what to focus on and how this session will benefit you in your daily work.

Our objectives are:

#### Experience the Power of Icebreakers and Closures:

Today, you’ll engage with these tools firsthand to see how they set the tone at the beginning of conversations and bring closure with meaningful reflection or action at the end.

#### Understand the Impact of Speak Up Tools on Building Connections:

You’ll explore how photos and words work to break down barriers, create safe spaces, and foster genuine, open dialogue in meetings and team interactions.

#### Develop Practical Skills to Use Speak Up in Your Daily Work:

By the end of today’s session, you’ll feel confident leading these activities. You’ll learn how to adapt these tools to your team's needs and integrate them naturally into your meetings.

#### Sensitivity & Respect:

To create a safe, supportive environment where we can all engage fully, let’s agree on our group contract:.

#### What is said in the room, stays in the room:

This will help us feel safe to share openly.

#### No judgement, no expectations:

Allow yourself to explore freely – there are no wrong answers.

#### Be present:

Let’s minimize distractions. Please silence your phones and turn off notifications. Give yourself permission to be fully present in this experience.

#### Respect everyone’s space to share:

Let’s give space for each voice in the room. No interruptions – listen with an open mind, even when perspectives differ.

#### Be mindful of emotions:

Some activities may evoke unexpected emotions. Let’s hold space for each other and practice empathy if strong emotions arise.

#### Trainer Tip:

**Invite Reflection:** You can ask participants: "What else do we need to feel safe and engaged in this space today?" This allows them to contribute additional guidelines that matter to them.

1. **Introducing Points of You® & Speak Up** (10 minutes)

At **Points of You®**, everything we do is about the power of perspectives. Our name reflects this philosophy: it’s spelled ‘Points of You,’ but it sounds like ‘Points of View.’ This dual meaning is intentional because we believe that there are infinite perspectives on every person, object, and experience.

Each of us sees the world through our own unique lens, shaped by our experiences, beliefs, and emotions. In any situation, there are multiple points of view – some we see clearly, and others we may overlook. By taking the time to pause, reflect, and explore different perspectives, we open ourselves to new ways of thinking and fresh insights.

Today’s training will encourage us to step outside our usual viewpoints. The tools we use – photos, words, and metaphors – are designed to help us shift perspectives and make unexpected connections. Photos invite us to look at things differently, words encourage new interpretations, and metaphors connect logic with emotion.

When we open ourselves to the many Points of View, we gain the ability to see beyond the obvious and uncover insights we might have missed. This is where the magic happens: when people feel seen and heard through these new perspectives, it builds trust and opens the door to meaningful conversations.

In today’s session, we’ll explore how these tools can help managers foster openness and connection within their teams, helping people engage not just with their minds, but with their hearts as well.

Now, let’s take a closer look at the **Speak Up** tool. It’s a tool that promotes creativity, reflection, and meaningful conversations. Whether you are working with a small group or a larger team, **Speak Up** helps participants express themselves in ways they might not through traditional dialogue. Key elements include:

#### Photo Cards:

At the heart of **Speak Up** are 30 Photo cards – each designed to ignite imagination, trigger intuition, and provoke meaningful dialogue. These images are intentionally open to interpretation, allowing participants to connect with them in their own unique way.

When we engage with an image, we activate parts of the brain responsible for creative thinking. This allows participants to express emotions and thoughts that might not surface through words alone.

#### Word Cards:

Complementing the Photo cards are 30 Word cards. These cards reflect workplace themes and add another dimension to the conversation. The combination of photos and words creates a unique way to connect emotions with logic, helping participants express both thoughts and feelings.

Each Word card also includes a story, quote, and question in the accompanying **Speak Up** book, allowing deeper exploration. Participants can scan a QR code on the card or refer to the corresponding page number in the book.

#### Question Cards:

The 30 Question cards provide powerful prompts that trigger meaningful dialogue. These cards are versatile – perfect for one-on-one conversations, team meetings, or group sessions. You can use them freestyle or follow one of the pre-built scenarios in the Dialogue Starters guide.

#### Inspirational Book:

The **Speak Up** book is a treasure trove of stories, quotes, and questions. It serves as a companion to the cards, providing inspiration and guidance on how to use the toolkit. Each card connects to a specific page in the book, helping participants deepen their reflection with relevant content.

* There are more components in the **Speak Up** toolkit waiting for you to explore, with Inspiring stickers, blank cards and a book that turns into the game board.

With **Speak Up**, the possibilities are endless. The combination of photos, words, and questions creates a space where participants can connect with their thoughts, emotions, and each other.

As we move through today’s session, you’ll see firsthand how this tool inspires reflection, builds trust, and sparks meaningful conversations.

1. **Pause & Reflection with Journal Writing** (10 minutes)

We are starting with the first step of the **Points of You®** Method: pause. In our busy daily lives – running from task to task, following up on meetings and emails – we often forget to check in with ourselves. One of the most powerful aspects of our Method is that it gives us permission to slow down, disconnect from the noise, and reconnect with ourselves.

In today’s fast-paced work environment, it’s rare to get moments like this for personal reflection.

Right now, I invite you to pause, center yourself, and engage with your thoughts. Take your journals and reflect on this question:

#### What do I want to leave outside the room?

There are many noises, tasks, and thoughts that can distract us. Take this time to reflect on what you want to leave outside this space – what you’d like to set aside to be fully present here.

This exercise isn’t about finding the perfect answer – it’s an opportunity to explore your mind freely, without judgement. Let the pen flow naturally as your thoughts arise.

#### Trainer Tip:

* Use Music: Play soft, instrumental music in the background to help participants relax and focus.
* Guide Presence: Let participants know this time is for them. "This is your moment to be with your thoughts – there are no wrong answers here."
* Keep the Room Quiet: Ask participants to silence phones and minimize distractions. Encourage them to be fully present.

Thank you for taking this moment to reflect. Journaling allows us to connect with ourselves and create space for new insights to emerge. In a fast-paced world, even these short pauses can bring clarity and intention to our conversations.

We are ready to begin.

### Icebreaker Activity: "What Do I Want to Leave Outside the Room?" (30 minutes)

A moment ago I invited you to write What do you want to leave outside the room. Now I will invite us to take it a step forward and to intentionally decide to leave those thoughts outside so you can be fully present here.

In front of you are the **Speak Up** Photo cards facing up. I invite you to pick one card that best represents “What Do I Want to Leave Outside the Room? Follow your intuition and see which photo image is calling you.

Once you’ve selected your Photo card, let’s take a few moments to **observe the card**. I’ll ask you some questions and I invite you to answer them in your mind:

* + What do you notice first in the photo? What colours, shapes, or elements stand out?
  + What does the photo remind you of? If you imagine what happened before or after this moment, what might that look like?
  + What feelings arise when you look at this image? How does it connect to something you’d like to let go of today?
  + If this photo could speak, what would it say about what you need to leave outside the room?

Now that you’ve had a moment to connect with your photo, I invite you to share with us about your card and briefly explain what you’ve chosen to leave outside the room and why. Who would like to begin?

After each participant shares, give them a Blank card or a post-it note and invite them to write down a word or short phrase representing what they are leaving outside the room. Once everyone has shared, let’s stand up together and place our cards outside as a symbolic gesture of “parking” these thoughts until the end of the day. At the end of our session, you may take it back or leave it behind, depending on how you feel.

#### Trainer Tip:

* + **General:**
    - Encourage participants to keep their sharing brief (1-2 minutes per person).
    - After the first person shares, ask: “Shall we move to the left or right?”
    - Or allow participants to share spontaneously as they feel ready.

#### Adjustment: Group Reflection:

After each participant shares, invite the group to briefly reflect on what they heard. Encourage them to suggest a word or phrase the person might write down, fostering a collective understanding.

#### Adjustment: Play with Placement:

Allow participants to choose how far they want to place their card or post-it. Some may choose to put it just outside the door, while others might want to keep it closer, perhaps in a pocket.

#### End-of-Day Reflection:

At the closure of the day/training, revisit the cards participants “left behind” and ask them to reflect: Did you let go of what you intended to leave? This reinforces the significance of the exercise and offers closure.

#### TTT Reminder:

Encourage trainers to mention this activity at the session’s end, reminding participants of the exercise and inviting them to consider how it felt to “leave something behind” and whether it helped them remain present throughout the day.

This was an example of an icebreaker – a simple activity to help participants clear their minds and be fully engaged in a session. You can use this activity at the beginning of meetings to shift the energy and help participants focus. Even a brief reflection like this can create a meaningful change.

Now, let’s dive deeper into the topic of icebreakers.

### Icebreakers Module: Setting the Tone for Engagement and Connection (10 min)

Icebreakers are powerful tools to start meetings or workshops on the right note. They help participants ground themselves in the moment, engage with one another, and set a positive, collaborative tone. By breaking down barriers and encouraging playful connection, icebreakers make it easier for participants to speak openly and build trust.

In this module, we’ll explore three types of icebreakers and how they can be used effectively to create connection, spark reflection, or focus the conversation on a specific theme."

#### The Three Types of Icebreakers

1. **Meeting Others:**

These icebreakers are designed to help participants get to know one another and build trust. In a few minutes we will experience an icebreaker that also includes this component.

#### Self-Reflection:

Self-reflection icebreakers allow participants to check in with themselves and express their current state of mind. These activities create a mindful space and help participants become aware of their emotions, thoughts, or energy levels. We just experienced this type of icebreaker.

#### Thematic Discussions:

These icebreakers introduce the topic or theme of the session, encouraging participants to start thinking about it from different angles. The idea is to spark curiosity and dialogue that aligns with the session’s objectives. We could have changed the question in the icebreaker we just experienced to “What is Leadership for me? And this would be this kind of icebreaker.

#### What Makes a Great Icebreaker?

A great icebreaker needs to create a safe, open environment where everyone feels comfortable participating. Here are a few key elements to keep in mind when facilitating icebreakers:

#### Be inclusive:

Ensure that everyone feels comfortable, regardless of personality type or role.

#### Keep it brief and focused:

Icebreakers should usually last no more than 10-15 minutes (for groups up to 15 people). The goal is to set the tone, not take over the session.

#### Connect to the session’s purpose:

Choose icebreakers that align with the goals of the meeting or training – whether it’s building trust, encouraging reflection, or introducing a theme.

#### Be creative and engaging:

Use Photo, Word, and Question cards to spark curiosity and make the process fun.

#### Be Flexible:

You don’t need to include all the elements in every session. Pick one or combine parts that best suit your goals and time constraints.

#### Trainer Tip:

If time allows encourage participants to reflect on their own experiences:

* + What kinds of icebreakers have worked well for you in the past?
  + How would you adapt an icebreaker to different teams or situations?
  + What can help participants feel more willing to engage with icebreakers?

#### Common Pitfalls to Avoid (for Managers)

Here are some common challenges you might encounter when leading icebreakers and how to avoid them:

#### Overcomplicating the activity:

Keep it simple. Icebreakers are meant to be fun and easy to follow. If the instructions are too complex, it can cause confusion and drain energy.

#### Taking too long:

Icebreakers should last no more than 10-15 minutes. If they go on too long, the session may lose momentum.

#### Forcing participation:

While it’s great to encourage participation, never pressure anyone to share if they aren’t comfortable. The goal is to create a space where people feel invited to join, not obligated.

#### Ignoring the session’s focus:

Make sure the icebreaker connects to the goals of the meeting or training. A disconnected activity can cause participants to disengage."

#### Wrapping Up the Icebreaker Module

Thank you for engaging in this exploration of icebreakers. Icebreakers aren’t just a warm-up – they’re an essential part of building trust, connection, and focus.

Remember, a great icebreaker breaks down barriers, encourages participation, and creates a space where participants feel safe to share. Whether your goal is to build relationships, spark reflection, or dive into a theme, icebreakers help set the tone for meaningful dialogue. Let’s experience a different ice breaker.

1. **Second Icebreaker: "What is My Superpower?"** (50 minutes)

For this next icebreaker, we’re going to reflect on our superpowers – the unique strengths that we bring to our work and personal lives.

As you see in the center of the room, I’ve changed the setting slightly. The Photo cards are now face- down, and I’ve placed the Word cards face-up.

Think about what your superpower is. Please pick one Photo card and one Word card that together represent your superpower. Take your time – follow your intuition and see which cards call to you.

Take a moment to observe the card you picked. Reflect on how the image connects to your unique strengths and consider these questions:

* + What details stand out to you in the photo? Is there a specific part of the image that catches your attention?
  + If you were to zoom out or zoom in on this photo, what else might you see?
  + What emotions arise when you look at the image? How do these emotions relate to your superpower?
  + How does the word card connect with the photo card you’ve selected? Do they align with or contrast each other? What new insights do they reveal together?

#### Sharing in Pairs

Now, I invite you to pair up. In each pair, choose who will be Partner A and who will be Partner B.

* + Partner A will begin by sharing what their superpower is, using the photo and word cards to tell their story. Partner B will listen actively without interrupting. You’ll have 5 minutes for this.

After 5 minutes, I will read a short story from the **Speak Up** book. Then we’ll switch roles, and Partner B will share their superpower for the next 5 minutes.

#### Group Sharing

Now, let’s come back together as a full group and share each other’s superpowers.

But this time, we’ll do it differently. I invite you to speak as your partner in an ‘I statement.’ So, when you share, say:

‘I am [your partner’s name], and my superpower is...’

Once the first partner shares, their partner will continue before we move to the next pair

Now that everyone has shared, if anyone would like to add something – either as themselves or their partner – this is the moment for your P.S. Feel free to share any additional reflections that arose during the activity.

Thank you all for sharing. This exercise not only helps us recognize our own strengths, but it also shows the impact of being seen and acknowledged by others.

When we hear our superpower reflected back through someone else’s voice, it strengthens our sense of self and helps us show up more confidently.

Now, imagine how powerful this can be for your teams – helping them discover and appreciate one another’s strengths. This icebreaker is a longer activity, designed for times when you’re starting a full-day session or multi-session program. Expect it to take 45 minutes to an hour.

When you’re beginning an intensive program, setting aside this time for participants to share on a deeper level will establish a foundation of trust and mutual respect. This investment in time allows for a powerful bonding experience, which can enhance collaboration and engagement throughout the day or program.

1. **Q&A on Handling Resistance & Challenges** (30 minutes)

Thank you all for participating in the icebreakers. Now, let’s take a moment to reflect on what we experienced and discuss why icebreakers are such powerful tools.

Icebreakers help us do more than just start conversations – they break down barriers, create psychological safety, and encourage trust and openness. When used effectively, they can shift the energy in a room, make space for different perspectives, and foster meaningful connections.

#### Addressing Challenges & Resistance

Sometimes, participants may be hesitant to engage in icebreaker activities – and that’s okay. As a manager or facilitator, it’s important to:

#### Explain the purpose:

Make it clear why the icebreaker matters and how it connects to the session's goals.

#### Invite participation without pressure:

Let participants know that it’s okay to pass if they aren’t ready to share.

#### Acknowledge resistance:

Understand that some participants might feel uncomfortable or think the activity isn’t relevant. Your role is to create a safe space that allows them to engage at their own pace.

#### Adjust the activity if needed:

If resistance persists, be flexible – switch to a simpler or smaller-scale version of the activity to help participants ease into it.

#### Q&A with the Group

I’d love to hear your questions, concerns, or ideas about implementing these tools.

* + What concerns or doubts do you have about using icebreakers or closures with your teams?
  + What challenges do you think might arise when introducing these activities?
  + How do you think you can inspire your participants to engage more fully and make these activities meaningful?

#### Trainer Tip:

* + Encourage participants to express any concerns or doubts they have about introducing the tools.m
  + Create a space where ideas are exchanged, and motivation is built through discussion.
  + Offer guidance not just with examples of icebreakers but with ways to lead participants through resistance and ignite enthusiasm. For instance:
    - Share personal success stories of overcoming initial skepticism.
    - Highlight the long-term benefits of using these tools, such as improved team connection and trust.

#### Wrap Up:

As we wrap up this section, remember that icebreakers are more than just warm-ups. They help set the tone for trust, collaboration, and open communication, creating a safe environment where people feel heard.

Managers can use these tools in everyday meetings, not just workshops. Even a brief reflective moment at the start of a meeting can shift the energy and create meaningful engagement.

1. **Break** (45 minutes) - or end of session 1

### Transition to Closures: Importance & Integration (15 minutes)

We’ve explored how icebreakers help us open sessions and create the right tone. Now, let’s shift to closures, which are equally important but often overlooked.

Closures are more than just formalities – they are moments for reflection and integration, ensuring participants leave with a sense of clarity and completion. A well-executed closure helps participants solidify key takeaways and set intentions for action beyond the session.

#### The Importance of Closures

Here’s why closures matter:

#### Reflection & Integration:

Closures give participants space to reflect on the experience and internalise the insights they’ve gained.

#### Clarity & Focus:

They help participants consolidate what they’ve learned and leave with a clear sense of their main takeaways.

#### Motivation & Next Steps:

A thoughtful closure inspires participants to turn insights into action, ensuring they leave the session with a sense of momentum and purpose.

#### Energy Management:

Ending on a positive, reflective note leaves participants feeling energized and focused, rather than rushed or disconnected.

Rather than just discussing closures, it’s time for you to experience a closure firsthand. We’ll now move into an activity that will give you a feel for how closures can bring a session full circle and create space for reflection and intention.

### Closure Activity: "What Am I Taking from Today?" (30 minutes)

Let’s wrap up where we are at this moment of our journey together. We'll do a simple yet meaningful closure called **‘What Am I Taking From Today?’**. This exercise gives you the opportunity to reflect on your insights and consider how you’ll carry them forward.

We’ve spent time exploring how to use icebreakers and closures to foster meaningful conversations. Now, let’s reflect on what today’s experience has brought you.

In front of you, you’ll find Photo cards placed face-down. Take a moment to pick one card that feels right to you. This card will represent the key insight or take away you are leaving with today.

Once you have selected your Photo card, take a moment to observe the image and reflect on how it connects to what you’ve learned today

Now, let’s come together and share our insights. When it’s your turn, briefly tell us what your card represents and what you’re taking from today’s session.

Who wants to start?

Thank you all for sharing your thoughts and reflections. This activity reminds us of the importance of taking a moment to pause and reflect at the end of every session.

#### Trainer Tip:

* Encourage participants to keep their reflections brief (1-2 minutes).
* Remind them that sharing is optional and that there are no right or wrong answers.

1. **Debrief on Closures** (15 minutes)

As we experienced in the previous activity, **closings are more than just endings**. They help participants reflect, consolidate insights, and leave with direction. Closures can be tailored to fit the needs of the session – sometimes focusing on reflection and other times on concrete actions.

#### The Two Main Types of Closures

1. **Light & Reflective Closures**

Light & Reflective Closures are a great way to close sessions quickly while still creating space for reflection. They help participants express how they feel or what they’re taking away in a fun and engaging way.

#### Example:

Ask participants to share a single word or sentence describing what they are taking away from the session. This quick exercise provides a collective snapshot of the group’s experience.

#### Trainer Tip:

These closures are great when time is limited or when you want to leave participants feeling light and energised. Use them when the focus is more on the experience rather than setting specific next steps.

#### Action-Oriented Closures

Action-Oriented Closures push participants to move from reflection to action. These types of closures are powerful because they create accountability – ensuring that insights gained in the session are translated into real-world actions.

#### Example:

Ask participants to share one specific action they will take based on today’s session. This helps participants leave with a plan in mind and ensures that the session has a lasting impact.

#### Trainer Tip:

Use action-oriented closures when you want to motivate participants to act or when the session’s focus is on driving change or strategic planning. They’re particularly effective for team meetings or workshops with specific outcomes.

#### When to Use Which Type of Closure

Choosing between a light & reflective closure or an action-oriented one depends on the **context and goals** of your session:

* Use Light & Reflective Closures when the goal is to consolidate feelings or emotions and leave participants with a sense of completion. They’re great for short meetings or informal gatherings.
* Use Action-Oriented Closures when the goal is to motivate participants to apply what they’ve

learned or to create a plan of action. These are ideal for team meetings, planning sessions, or strategy workshops."

#### Trainer Tip: Adapting Closures to Your Team’s Needs

* Feel the Energy: If participants seem tired or drained, a light closure might work better. If the group is energised, an action-oriented closure can harness that energy for forward momentum.
* Combine Both: In some cases, it’s useful to start with a reflective closure and then move into action steps. For example, participants can first share a word about the session and then commit to an action.

1. **Closure Activity 2: From Focus to Action** (30 minutes)

For this closure, we’re going to focus on turning insights into action. It’s one thing to reflect on what we’ve learned today, but real growth happens when we take concrete steps to apply our insights in everyday life.

I will invite each of you to select a Word card that represents your next step or commitment. This word will act as a reminder of your action plan, helping you stay focused as you move forward.

#### Selecting the Word Card (2-3 minutes)

In front of you are the Word cards face-up. Take a moment to look through them and select a card that resonates with your next step.

The word you choose should reflect either:

* + The action you plan to take, or
  + A mindset or value that will support you in following through on your plan.

#### Journaling and Reflection (3)

If time allows, invite participants to journal a few thoughts about their action plan before sharing. Ask them to reflect briefly on:

* + What specific action will I take based on today’s insights?
  + How will the word I’ve chosen help me stay committed to this action?

#### Group Sharing (15-20 minutes)

Now, let’s come together to share:

One specific action you are committing to, after today’s session.

1. We’ll go around the group, and each person will have the opportunity to share briefly.

#### Trainer Tip:

* Encourage specificity: Ask participants to be clear and specific about their action step rather than sharing broad or vague intentions.
* Check for practicality: Ensure that the action item is doable and tangible – not something theoretical, general, or abstract. Ask follow-up questions to help participants clarify and make their action precise, ensuring it’s something they can realistically implement.

#### Wrap-Up: Closing the Mission-Oriented Activity

Thank you all for sharing your words and commitments. This mission-oriented closure helps us bridge the gap between reflection and action.

Remember, small, intentional steps can lead to meaningful change. Keep your word card close – whether on your desk, in your journal, or on your phone – and let it serve as a reminder of the action you’re committed to taking.

1. **Q&A on Implementing Icebreakers & Closures** (40 minutes)

We’ve explored the importance of icebreakers and closures and experienced them firsthand. Now, I’d like to open the floor for any questions about how you can implement these tools in your meetings or team settings?

This is your time to ask anything on your mind – whether it’s about handling resistance, adjusting the activity to fit your group, or incorporating closures into everyday meetings."

#### Anticipating Key Questions & Prompts

If participants need help getting started, consider using these prompts to encourage discussion:

* + "How do I manage resistance from participants?"
  + "What if someone feels uncomfortable sharing during an icebreaker or closure?"
  + "How can I adapt these activities for remote or hybrid meetings?"
  + "What strategies can I use to make closures actionable in shorter meetings?"

#### Trainer Tip:

If participants seem hesitant, ask specific questions like:

* + "What challenges do you foresee when introducing icebreakers to your team?"
  + "What type of closure would feel most aligned with your team’s dynamics?" Handling Common Challenges: Trainer Responses

#### Managing Resistance to Icebreakers or Closures

It’s normal for some participants to feel hesitant, especially if they are unfamiliar with these types of activities. The key is to explain the purpose clearly – why the activity matters and how it connects to the session’s goals.

Also, invite but don’t force participation. Remind participants that it’s okay to pass if they don’t feel ready to share, as this helps build psychological safety over time.

#### Adapting for Remote or Hybrid Teams

In a virtual setting, icebreakers and closures can be just as powerful if adapted properly. You can use breakout rooms for pair work or small group activities and digital versions of Photo and Word cards to maintain engagement.

Keep virtual activities short and focused, and ensure everyone has a chance to participate.

#### Making Closures Action-Oriented in Short Meetings

When time is limited, a quick but powerful closure can be asking participants to share one action they’ll take as a result of the meeting. Even a brief round of ‘What’s one thing I’m doing next?’ can leave participants feeling focused and motivated.

#### Wrapping Up the Q&A Session

Thank you for your thoughtful questions. Remember that icebreakers and closures are adaptable tools – there’s no one-size-fits-all approach. What’s most important is that they fit your team’s dynamics and goals. Experiment with different styles, and don’t be afraid to adjust based on the energy in the room. The more you practice using these tools, the more comfortable your team will become with them – and the more impactful your conversations will be.

1. **PR & Final Words** (10 minutes)

Today’s session has been a taste of what’s possible when we use **Speak Up** tools in meetings and team interactions. But there’s so much more you can explore and adapt as you practice using these tools with your teams.

Remember, **Speak Up** isn’t just a tool – it’s a mindset shift. It’s about creating a space where people feel safe, connected, and motivated to express themselves fully. Your role as a manager is to foster that environment consistently.

#### Connecting to the Manager Booklet

To help you along the way, we’ve provided a manager booklet – your go-to guide for using **Speak Up**

tools. Inside the booklet, you’ll find:

* + Detailed instructions for various icebreaker and closure activities.
  + Practical tips and strategies to overcome challenges, like managing resistance or adapting activities for remote meetings.

This booklet will be a companion for you after today’s training. Whenever you need ideas, instructions, or encouragement, it’s there to support you. You will receive it once you fill out the feedback form together with the certificate you will be able to download this booklet.

#### Trainer Tip:

* + Have the printed booklet with you so you can show it to participants during the session.
  + Throughout the day, highlight where the relevant content can be found in the booklet. This helps participants see how they can use it as a practical resource beyond the training.

#### PR & Experimentation

One of the best things about **Speak Up** is that it encourages creativity and experimentation. We want to invite you to try out different tools and activities in your meetings. Don’t be afraid to adapt the activities to suit your team’s needs – that’s where the magic happens.

Even small changes, like starting a meeting with a reflective moment or ending with a quick closure, can transform the energy in the room and make people feel more connected.

#### Encouraging Feedback & Certificates

Before we wrap up, I would appreciate your feedback to help us improve and grow. Please take a moment to share your thoughts on today’s session.

Once you’ve completed the feedback, you’ll receive your certificate of completion. Thank you for your participation and for committing to building more meaningful conversations within your team.

#### Trainer Tip:

* + Create enthusiasm: Highlight the practical value of the booklet to motivate participants to use it beyond the session.
  + Emphasize experimentation: Encourage participants to start small – try one icebreaker or closure in their next meeting to build confidence with the tools.

1. **Final Closure: One Word to End the Day** (15 minutes)

As we wrap up today’s session, I invite each of you to share one word that represents **What you are taking away from today**. It could be a thought, an emotion, an intention, or anything that stands out to you.

Closures don’t always need to be complicated to be effective. Sometimes a simple and concise reflection is all it takes to leave participants with clarity and a sense of connection. This is just another way of closing the loop – quick, yet powerful.

* + **Sharing One Word** (3-4 minutes):

We’ll take a moment to go around the group. When it’s your turn, please share your word maximum a sentence. You don’t need to explain it – just say what comes to mind.

* + **Creating a Flow** (Optional):
    - Go in order: You can invite the group to share based on where they are seated.
    - Spontaneous flow: Alternatively, let participants share when they feel ready, creating an organic rhythm.

#### Final Words of Encouragement

Thank you all for your openness and participation today. The word you’ve shared is not just a reflection – it’s also an intention you can carry with you.

**Speak Up** is not just about the activities we do – it’s about how we close each interaction thoughtfully. Even a simple closure like this can create a lasting impact. Take what you’ve learned today, experiment with these tools, and see the difference they can make in your meetings and team dynamics.

# Adjustments for Two-Session Delivery

If the training is split into two sessions, consider the following adjustments to create a smooth transition and reinforce continuity between the two parts.

#### Closing the First Session

To close the first session, use an icebreaker or closure activity focused on revisiting what participants left outside the room at the beginning. Invite each participant to reflect on how much they were able to “leave it outside” on a scale from 1-10. Then, ask them to consider one small step they can take to improve, let go further, or maintain this progress in future sessions. This helps participants end on a reflective note, acknowledging any progress they’ve made and setting intentions for the next part.

#### Opening the Second Session

When the group reconvenes, start with a brief check-in to see how participants have been since they last met. This can include an opportunity to share any insights or observations from the days in between.

Before diving back into the main content, facilitate a short pause to help participants connect with insights from the previous session or any personal reflections they observed in the workplace since then. This pause reinforces the continuity of the training and underscores the value of integrating **Speak Up** tools into daily practice, while also giving participants space to reconnect with the process.



Below is the recording of Icebreaker part of the TTT Module 1. Feel free to watch it to explore an example of TTT in an online environment, and see how the building blocks come together in practice.





# Official Training Template

**Module 2:** Feedback & Assessment

#### Duration:

6 hours as one session or split into two session

### Introduction

This training is part of the second module in our Train the Trainer (TTT) program, where we shift focus from using **Speak Up** for opening and closing meetings to applying it in more structured, impactful conversations. The goal of this module is to equip managers with the tools and skills needed to transform

their meetings with employees – whether it’s goal setting, feedback discussions, mid-year check-ins, or year- end performance reviews – into meaningful, engaging dialogues that go beyond numbers and metrics.

Traditional, task-driven reviews can often feel mechanical and disconnected. In contrast, this approach focuses on building deeper connections, fostering trust, and truly listening to team members. Here, we are introducing managers to a new language – one that uses photographs, stories, and metaphors to convey important messages and inspire deeper conversations.

Our participants today are busy managers, many of whom may have never used reflective tools like **Speak Up** before. It’s crucial that they leave today feeling empowered and confident in their ability to integrate these tools into their everyday work. This training is designed to provide both the hands- on experience and practical skills needed to make this integration seamless. Most importantly, the techniques must be straightforward and easy to incorporate into their existing workflows.

This session serves two primary objectives:

#### Experience the Speak Up tools:

Explore how to use these tools to foster more meaningful and authentic feedback conversations.

#### Build practical skills for impactful feedback and assessments:

Equip managers to confidently lead end-of-year conversations and seamlessly incorporate these techniques into their regular management practices, such as performance reviews, mid-year evaluations, and goal-setting discussions.

#### Format:

Face-to-face using **Speak Up** or online using **Speak Up** Digital

#### Participants:

Suitable for groups ranging from 8 to 15 participants (People Managers, HR, OD & LD Specialists)

#### Materials Needed:

* + - **Speak Up** / **Speak Up** Digital
    - Manager Booklet (coming soon)
    - [Dialogue Starters A3 Handouts](https://drive.google.com/drive/folders/1eqG0clEPTKQRYIZ7fuN9nGWmMb-FvEba?usp=drive_link)

### Logistics & Tools Setup

To ensure the success of this training, it’s essential to have the right tools in place. This session is designed specifically for organizations that have already invested in the **Speak Up** toolkit, and it’s crucial that we simulate the types of conversations managers will be leading within their teams. For this reason, we highly recommend that each pair has their own set of tools to work with throughout the exercises.

Here’s what you need to keep in mind:

#### Ensuring Each Pair Has a Set

* + - Ideally, each pair of participants should have access to their own **Speak Up** game set. This not only helps them engage more deeply but also mirrors the real-life conversations they will be having with their team members back at work.
    - Whenever possible, use the tools that the organization has already purchased. This will make the training more relevant and immediately applicable.

#### Bringing Extra Tools

* + - If you have extra **Speak Up** games available, bring them along. The more tools each pair has, the more authentic and immersive the experience will be.

#### Alternative Setup: Using Centrepieces

* + - In situations where there aren’t enough sets for every pair, you can set up centrepieces around the room. Here’s how:
      * Arrange several stations with **Speak Up** cards placed at each centrepiece.
      * At each stage of the dialogue process, participants can stand up, move to a station, and choose the cards they need.
      * This approach adds an interactive element while still allowing participants to engage with the tools meaningfully.

#### Creating a Seamless Flow

* + - Whether participants have their own sets or are using centrepieces, emphasize the importance of maintaining the flow of the conversation. Encourage participants to be mindful of time and to use the cards thoughtfully, even when they need to move around the room.

#### Trainer Tip:

Remind participants that the goal is to practice real-world conversations. Using the actual tools their organization has invested in will help them feel more confident and prepared to lead these dialogues back in their workplace.

### Training Flow

#### Here’s the flow of the 3 hour TTT Module 2:

**Timing Structure**

10 min [Welcome & Opening >](#_bookmark63)

5 min [Objectives & Sensitivity and Respect >](#_bookmark64)

5 min [Introducing **Points of You®** / Points of view >](#_bookmark64)

5 min [Explanation of the Method - How to Lead a Dialogue >](#_bookmark65) 5 min [Paring Up - Manager & Employee >](#_bookmark66)

10 min [Stage 1 - Pause >](#_bookmark66) 25 min [Stage 2 - Expand >](#_bookmark67) 10 min [Stage 3 - Focus >](#_bookmark68) 10 min [Stage 4 - Doing >](#_bookmark68)

10 min [Feedback to the Manager >](#_bookmark69) 10 min [Break >](#_bookmark69)

10 min [Tips & Pointers >](#_bookmark69)

35 min [Switch Roles and Facilitate the Full Process >](#_bookmark70) 10 min [Feedback to the Manager >](#_bookmark70)

15 min [Q&A >](#_bookmark70)

5 min [Closure + Talk about Manager Booklet >](#_bookmark71)

# By-the-Book Guide for Trainers

The following section provides a clear, step-by-step guide for trainers to confidently lead this session. Each activity is accompanied by detailed instructions, scripts, and practical tips to help you facilitate the process effectively. These guidelines are crafted to ensure a smooth, engaging, and adaptable learning experience, empowering managers to confidently integrate the **Speak Up** tools into their meetings.

While this guide focuses on a standard 3-hour session, you can adapt the format using different layouts provided in the Manager Booklet. Whether it’s a performance conversation, goal-setting, or a mid-year check-in, you have the flexibility to modify the approach based on the specific needs of your team.

1. **Welcome & Opening** (10 minutes)

Welcome back, everyone! It’s great to see you all here for Module 2 of our Train the Trainer series. Today, we’re diving deeper into the art of feedback and assessments, but with a fresh perspective.

As managers, you engage in several crucial conversations throughout the year, whether it’s setting goals at the beginning of the year, mid-year check-ins to assess progress, or end-of-year reviews. These discussions are not just about evaluating performance – they are opportunities to create a learning environment where feedback becomes a tool for growth.

In today’s session, we will focus on how to use feedback to foster an atmosphere of continuous learning and improvement. The goal is to transform these conversations into moments where you and your team can observe what’s working, identify areas for development, and become better at achieving your goals. We recognize that many of us are technically equipped to deliver feedback. However, what often holds us back is the courage to **speak up**, to truly listen, and to engage in meaningful conversations. Today, we’ll explore how to create a safe space where team members feel heard and supported. This approach isn’t just about critiquing performance – it’s about fostering a culture where everyone can learn, grow, and reach their full potential.

By practicing this today, you will not only learn how to give feedback differently, but also how to receive it in a way that drives engagement and inspires continuous improvement. The techniques we cover will help you apply these skills across all types of crucial conversations, whether it’s setting goals, checking in mid-year, or conducting year-end reviews.

#### The Shift from Old Manager to New Manager

We’re all familiar with the traditional management approach, where the focus was solely on delivering results and meeting targets. The old manager operated with a top-down, task-driven mindset.

But in today’s workplace, managers are expected to do more than just achieve goals. The New Manager is all about listening, fostering trust, and building relationships. It’s not just about getting the job done but also about understanding and supporting your team members on a deeper level. Today, we’ll explore how **Speak Up** can support you in this shift – helping you become a manager who engages and empowers your team.

#### The Power of Speak Up & Using Visual Tools:

As we move through today’s session, remember that traditional dialogue often falls short because we focus too much on metrics and KPIs. People can feel judged, rushed, or unheard. **Speak Up** helps bridge

this gap by using photos, stories, and metaphors to create a space where people feel safe to share. This shift engages both the logical and emotional sides of the brain, making conversations more meaningful and resonant.

#### Trainer Note:

We won’t dive into detailed introductions since we’ve already connected in Module 1. Instead, let’s focus on re-engaging and preparing for today’s deeper conversations.

1. **Objectives & Sensitivity and Respect** (5 minutes)

#### Trainer Script:

Before we dive into the content, let’s take a moment to set clear objectives for today’s session and create a safe space where everyone feels comfortable exploring these new tools.

Today, we have two main objectives:

* + To equip you with powerful skills and tools that will elevate your performance conversations, making them more engaging, meaningful, and impactful.
  + To provide hands-on experience by guiding you through the process: first as a participant and then as a facilitator in performance conversations.

#### Sensitivity & Respect:

Since today’s session involves trying out new tools and approaches, it’s essential that we create an environment of respect and openness. We’re learning a new language – one that involves listening, empathy, and using visual tools to guide conversations. This might come naturally to some of you, while for others, it could be an entirely new experience. Let’s embrace that learning process together.

Here are a few ground rules to ensure everyone feels comfortable:

#### What’s shared in this room, stays in this room:

We want to create a safe space for honest sharing.

#### No expectations, no judgement:

Allow yourself to explore without the pressure of getting it ‘right.’ This is a space for experimentation and growth.

#### No distractions:

Let’s silence our phones and minimize interruptions so we can be fully present.

#### Respect each other’s space:

Give everyone a chance to share and listen without interruptions.”

#### Trainer Tip:

If you notice participants hesitating to engage, gently remind them that this is a supportive space where they can explore and take risks. Encourage them to embrace the discomfort of learning something new, as this is where growth happens.

1. **Introducing Points of You® & Speak Up** (5 minutes)

Before we dive deeper into today’s session, I’d like to introduce you to the essence of **Points of You®** and the philosophy behind it. The name ‘Points of You’ holds a deeper, intentional meaning that aligns perfectly with what we are exploring today.

On the surface, it’s spelled as ‘Points of You’ – Y-O-U – but if you say it aloud, it sounds like ‘Points of View.’ This double meaning reflects what we believe: that there are infinite perspectives on everything – whether it’s an object, a situation, a person, or even a conversation.

At any given moment, we each view the world through our own unique lens, shaped by our experiences, beliefs, and emotions. Our goal in today’s training is to tap into those different points of view to foster deeper connections and insights. The beauty of using tools like photos, words, and metaphors is that they help us break away from our usual way of thinking and open up to new perspectives.”

#### The Power of Seeing Things Differently: The Story of the Shoe Factory

To illustrate this idea, let me share a story. Imagine two salespeople from a shoe factory are sent to a remote village to explore new markets. The first salesperson reports back saying, ‘No one here wears shoes, there’s no market for us.’ The second salesperson, however, sees it differently and says, ‘No one here wears shoes yet – there’s a huge opportunity for us!’

This story shows how two people can look at the same situation and see completely different possibilities. That’s what we aim to do here: help you and your teams shift your perspectives and unlock new opportunities in conversations.

#### Why Feedback Conversations Matter

In traditional feedback and assessment conversations, we often get stuck focusing solely on metrics, tasks, and numbers. However, when we shift our perspective, we can create a space for employees to share their own points of view, struggles, goals, and personal stories. This shift isn’t just about listening for the sake of it – it's about unlocking deeper insights that can drive engagement and motivation.

#### The Benefit to You as a Manager:

When you understand your team members on a deeper level, you’re not just managing performance – you’re building trust and fostering loyalty. By using **Speak Up** tools to uncover these perspectives, you can:

#### Increase Engagement:

Employees who feel heard are more likely to be invested in their work, leading to higher productivity.

#### Boost Retention:

A manager who takes the time to understand their team members’ personal challenges and aspirations builds a more loyal team, reducing turnover rates.

#### Enhance Collaboration:

By appreciating different perspectives, you create a more open, inclusive environment that encourages creativity and teamwork.

This is where the true impact happens – when feedback conversations transform from mere evaluations into meaningful, trust-building dialogues that inspire growth and commitment.

#### Trainer Tip:

Encourage managers to reflect on the idea that every employee sees their work through a unique lens. By tapping into those perspectives, they can unlock a wealth of insights that not only enhance performance but also strengthen team morale and cohesion. Remind them that investing time in understanding their employees' viewpoints can lead to a more engaged, motivated, and loyal team.

### Explanation of the Method - How to Lead a Dialogue (10 minutes)

Before we dive into the practical exercises today, I want to introduce you to the framework we’ll be using throughout our session – the **Points of You®** Method. This is a simple yet powerful approach designed to help you lead more meaningful and effective conversations with your team members, whether during performance reviews, goal-setting meetings, or feedback discussions.

In today’s fast-paced work environment, it’s easy to get caught up in the ‘what’ – the tasks, metrics, and targets. But we often forget about the ‘who’ – the person behind those numbers. This method is a way to shift that focus, helping you to connect on a deeper level with your team members and uncover new insights.

#### The Four Steps of the Points of You® Method:

We’ve developed a 4-step method that you can use to guide your conversations. This method is designed to bring structure to your dialogues, ensuring that they are not just transactional but truly transformational. Let’s walk through each step together:



### Pause – A Strategic Break:

The first step is to pause – to step back from the rush and take a moment to reflect. This conscious pause is about breaking free from automatic thought patterns and opening up space for new insights. **Why it matters**: In conversations, pausing helps both you and your team member approach the discussion with a clear mind, ready to listen and engage.



### Expand – Exploring New Perspectives:

Once we’ve paused, it’s time to expand. This step encourages stepping out of the usual mindset and exploring new perspectives. By examining different viewpoints, you can unlock creative solutions and discover hidden opportunities.

**Why it matters:** In performance reviews, this can mean exploring the employee’s perspective, understanding their challenges, and seeing opportunities for growth that might otherwise be missed.



### Focus – Making Informed Decisions:

After exploring different angles, it’s crucial to focus. This step is about narrowing down the insights gathered and prioritizing what’s most relevant. It ensures that decisions are thoughtful and aligned with both individual and organizational goals.

**Why it matters:** This step is key in feedback conversations where you want to focus on actionable takeaways that can drive meaningful change.

### Doing – Turning Insights into Action:

The final step is doing – putting those insights into action. This is where strategy meets execution, turning reflections into concrete steps that drive progress.

**Why it matters:** A conversation isn’t complete until it leads to action. This step helps ensure that your dialogue with your team members translates into real-world results.

Throughout today’s session, we’ll guide you through each of these steps, helping you experience how they work in practice. By the end of the training, you’ll not only have practiced these skills but also feel confident to implement them with your team.

This structure is designed to be flexible. Whether you’re conducting an end-of-year review, a goal- setting session, or a feedback meeting, these four steps will provide a clear pathway to more meaningful conversations.

We’ll be practising this method in pairs today, giving you a chance to play both the role of manager and employee. This will help you see both sides of the conversation and give you hands-on experience with how to guide it effectively.

1. **Pairing Up for Practice & Assigning Roles** (5 minutes)

Now that we’re moving into the practical part of today’s session, we’ll be working in pairs to practice the end of year conversation through the **Points of You®** Method. As today is about expanding perspectives, I invite you to pair up with someone you don’t know that well. It’s easy to stick with people we’re familiar with, but sometimes the most meaningful conversations happen when we connect with someone new. Now, here’s an interesting perspective to consider: in life, we always have a choice. Right now, you can decide whether you want to actively seek out a partner or prefer to wait and be chosen. Both choices are valid, but I invite you to notice what you tend to do. Are you someone who takes the lead, or do you prefer to observe and wait?

This exercise is a chance to reflect on how you approach situations in general. Are you someone who dives in, or do you take a step back? There’s no right or wrong way – it’s just an observation about yourself.

#### Activity Instructions:

* + **Pairing Up:**
    - Take a moment to find a partner. Remember, try to pair up with someone you haven’t worked with before.
    - Once you’ve found your partner, decide who will be Partner A (Manager) and who will be Partner B (Employee).

#### Clarifying Roles:

* + - Partner A will take on the role of the manager, responsible for leading the conversation.
    - As the manager, Partner A will guide the dialogue, ask questions, and prompt Partner B throughout the exercise.
    - Partner B’s role is to respond and engage, but Person A will be the one driving the conversation.

#### How This Will Work:

* + - Throughout the exercise, I will provide instructions to Person A. Your task as Person A is to take charge of the process while allowing Person B to share their thoughts and reflections.
    - For example:
      * When it’s time to select or discuss a card, Person A will prompt Person B on what to do.
      * If there are specific reflections or actions required, Person A will guide Partner B through them. – In the first round, Partner A will lead the conversation, while Partner B plays the role of the

employee. Later, you’ll switch roles so everyone gets to experience both perspectives.

#### Creating a Safe Space:

* + - Take a moment to connect with your partner. This exercise is about creating a safe and open environment for dialogue, so let’s start by getting comfortable with each other. Once everyone is ready, we’ll move into the first stage – Pause.

#### Trainer Tip:

* + Encourage participants to spread out around the room for privacy and ease.
  + Remind Partner A to guide the conversation, using open-ended questions and reflective listening. Encourage them to focus on keeping the dialogue flowing naturally.
  + As you walk around, ensure each pair has enough space to engage meaningfully and that Partner A is taking the lead as instructed.

1. **Stage One: Pause – A Strategic Break** (15 minutes)



Now that you’re paired up, we’re moving into the first stage of our **Points of You®** Method: Pause. This step is about creating space for reflection and truly listening.

In this exercise, Partner A will take on the role of the manager, while Partner B will be the employee. We will go through the entire year-end conversation step by step, starting with this first phase. The goal here is to understand the employee’s journey, achievements, and the goals they’ve set for themselves.

During the Pause stage, we want to slow down, to tune in to each other, and to create the space for a meaningful conversation. This is about stopping the daily rush and shifting into an observer’s mindset, allowing us to connect on a deeper level.

#### Activity Instructions:

* + **Partner A (Manager):**
    - Invite Partner B to share about their 1-2 goals that they set for the year.
    - Your role is to listen actively, being curious and open. Focus on understanding your partner’s journey and their reflections on their goals.
    - Give space to hear Partner B.

Let’s begin! You have 5 minutes for this conversation.

#### Mid-Conversation Check-In (Trainer Intervention)

After 2-3 minutes, the trainer stops the conversation briefly:

Let’s pause for a moment. I’d like to check in: Is the conversation staying on track? Are we focused on the goals and reflections related to performance, or has the conversation shifted to more personal or emotional topics?

As managers, it’s important to create a safe space for sharing, but also to gently guide the conversation back to its intended focus. If the discussion has drifted, use this moment to respectfully reconnect to the performance review goals.

#### Trainer Tips:

* + Gentle Redirection: If the conversation drifts too far into personal territory, it’s important to guide it back to the performance review. Try something like:
    - That’s really insightful – let’s connect it back to the goals we’re reviewing.”
    - Thank you for sharing that. Let’s focus now on how it ties into the goals you set for this year.
  + Active Listening: Encourage managers to focus on listening with curiosity, rather than jumping in to fix or redirect too quickly. The pause is about giving space for the employee to express themselves.
  + Balance: Remind participants that while it’s valuable to acknowledge personal aspects, the goal of this exercise is to connect the dialogue to performance and goals. It’s about striking the right balance between empathy and focus.
  + Encourage the groups to use the whole 5 minutes to stay on the topic, if they finish earlier to sit in silence and just be.
  + Collect non-verbal cues such as body language and posture, as these can be important to reflect upon later in the process to better understand underlying emotions and engagement.

#### Trainer Note:

* + This pause is different from the typical Points of You® pause (i.e., closing eyes and listening to music). Instead, it’s a pause through conversation—a shift in energy that helps managers and participants become more present.
  + Emphasize that this is an opportunity to teach managers the importance of being present and actively listening to their team members. It’s about grounding the conversation and focusing on what truly matters.

#### Handouts & Tools Distribution:

While participants are engaged in their conversations:

* + Hand out the Dialogue Starter handout to each pair.
  + Place a set of **Speak Up** Photo cards with each pair. These will be used in the next phase to expand the conversation.

1. **Stage Two: Expand – Exploring New Perspectives** (20 minutes)



Now that we’ve taken the time to pause and reflect, let’s move to the next stage in our **Points of You®** Method: Expand. This phase is all about broadening our perspective, stepping out of the familiar, and exploring new ways of looking at a situation.

In this stage, Partner B will focus on answering the questions on the layout chart. Partner A will guide them through this process, using the Photo cards to bring out deeper insights.

#### Activity Instructions:

* + **Partner A (Manager):**
    - Invite Partner B to look at the first question: **What am I grateful for?**
    - Afterwards invite them to choose a Photo card (face up) that best represents their response.

Encourage them to select the image that resonates with their feelings of gratitude in their goal (if choose two to focus on one). What worked for them, what they accomplished, etc.

* + - As a manager this is also an opportunity for you to act as a mirror, reflecting on what was shared and adding your own thoughts or observations in a supportive and constructive way.
    - The aim is not to direct the conversation, but rather to acknowledge and validate the employee’s perspective, showing that their voice is heard and valued.

#### Trainer Instruction:

* + - Once you see that each pair has selected a Photo card, invite both Partner A and B to observe the chosen image together.
    - Let’s take a moment to observe the card. I’ll guide you with a few reflective questions to deepen your observation:
      * What details stand out to you in the photo? Is there a particular element that draws your attention?
      * What emotions or thoughts come up when you look at this image?
      * If you were to interpret this image as a metaphor, what might it symbolize in the context of gratitude?
      * How does this image connect to your journey and what you’re grateful for?”

#### Metaphors: Introducing the Power of Symbolism

Before we dive into the sharing, let’s talk about metaphors. Metaphors help us express complex feelings and ideas in a way that words alone sometimes can’t. They’re powerful because they connect our logical thinking with our emotions.

Let’s try something quick together: If I say the word ‘winter,’ what might it symbolise? (Pause for responses). Yes, it could mean coldness, stillness, or even a time of rest.

Now, imagine your Photo card as a metaphor for what you’re feeling grateful for. Think about what that image represents beyond what’s immediately visible.”

**Pair Sharing** (5 minutes)

#### Partner A (Manager):

* + - Invite Partner B to share with you what they are grateful for through the chosen Photo card as a metaphor. Let the image guide their storytelling and add layers of meaning to your response.
    - Listen actively and use curiosity to explore the metaphor. Ask questions like, “What does that part of the image represent for you?” or “How does that metaphor connect with your gratitude?
    - Don’t forget to connect the conversation to the goals and the end year conversation that you are having.

#### Trainer Tips:

* + Realignment: If you notice participants are feeling lost or drifting off-track, don’t hesitate to call a brief time-out. Gently remind them of the exercise’s purpose and bring their focus back to the current step. Explain what we are doing, give an example, monitor what is happening inside of the room.
    - Tip: “If the conversation has strayed, take a moment to pause, breathe, and reconnect with the question at hand. It’s okay to realign and take a moment to refocus.”
  + Encourage Use of Metaphors: Remind managers that metaphors are a tool to unlock deeper insights. If someone struggles, suggest they think of the image as a symbol and ask what it could represent.
  + Encourage managers to use phrases like, “What I’m hearing is…” or “I noticed that…” to provide feedback that feels more like a reflection than a critique. This approach helps build trust and openness in the conversation.

**Continuing Stage Two: Expand – Diving Deeper into Reflection** (12 minutes) Now that we’ve explored gratitude, let’s move deeper into reflection by looking at:

#### What is it time for me to leave behind?

Reflect on behaviours, thoughts, projects, or people that contributed to your professional journey this year, but that you would like to release in order to make space for new growth.

#### What are my expectations for the next year?

Consider your professional goals for the coming year, as well as areas you’d like to focus on or develop.

This is an opportunity to release what no longer serves you and to identify the areas you’d like to focus on in the upcoming year.

You will work through the next two questions on your own, at your own pace. Remember, this is your time to reflect deeply, so take it step by step.

You now have 12 minutes to work through these two questions with your partner. Use the Photo cards to guide your reflections and storytelling. Partner B, as you share, use the images as metaphors to express your thoughts. Partner A, remember to listen deeply, ask clarifying questions if needed, and

provide supportive feedback. When working on the second question use the Photo card to also give your feedback to your employee.

Take your time to move through both questions. You’re in control of how you divide your time between the two reflections.

#### Trainer Intervention (Mid-Conversation Time-Out):

Let’s pause here for a moment. Now that you’ve heard your partner’s reflections, let’s take this opportunity to deepen the exchange.

Instructions for Trainers:

* + Reflect Back as a Manager:
    - Summarize what you’ve heard to acknowledge your partner’s perspective.
    - Act as a mirror, showing you’ve truly listened.
  + Using the Photo Cards for Feedback:
    - Option 1: Reflect using your partner’s chosen card, linking their insights to the image.
    - Option 2: Select a new Photo card to offer as a symbolic gift, indicating what they might leave behind or focus on.
  + Encourage Empathy:
  + Frame feedback constructively, aligned with your partner’s goals.
  + Use prompts like:
  + What resonates with you here?
  + How does this image connect to what we discussed?

#### Trainer Tip:

Focus on supportive, empathetic feedback that guides rather than critiques. Encourage managers to foster a safe, positive space for dialogue.

**Final Reflection on the Set of Cards** (5 minutes)

Once you’ve gone through both questions, take a moment to look at all three Photo cards you selected Observing all three images together can reveal new insights and connections.

Consider:

* + How do the three cards align with each other?
  + What themes or patterns emerge?
  + How do these images together tell the story of your past year and your vision for the next?”

#### Trainer Tip:

* + Walk around and check in with participants, ensuring they are making progress and staying focused.
  + Remind participants to be mindful of the time but not to rush the process – encourage a steady, reflective pace.
  + Encourage managers to consider how this exercise could be applied in their own performance reviews, fostering deeper, more meaningful conversations with their teams.
  + If at any point you notice participants getting off track or appearing confused, call for a brief time-out. Gather everyone’s attention to realign them with the process and guide them back on track.

#### Tools Distribution:

While participants are engaged in their conversations:

* + Before moving into the next phase, discreetly place the **Speak Up** Word cards and **Speak Up** books beside each pair. This ensures participants have all the resources they need to seamlessly continue their reflections and conversations.

1. **Stage Three: Focus – Identifying the Main Insight** (10-12 minutes) **9. Stage Four: Doing – Turning Insights into Actions** (10-12 minutes)



In the Focus phase, we shift from exploration to identifying what truly matters most. This step is about identifying the core insight that will serve as a guiding light moving forward. By narrowing down to one key takeaway, participants can focus their energy on making meaningful changes that align with their goals.

The idea behind this phase is to distil all the reflections, thoughts, and discoveries from the previous stages into a single, powerful insight. This insight should feel like a “lightbulb moment” – something that truly resonates with the employee and can serve as a focal point for future actions. It’s about clarity and commitment.

#### Partner A (Manager):

* + - Invite your partner to reflect on everything you’ve discussed so far. What is the main insight or key takeaway they are walking away with? What’s the one thing that stands out as most meaningful for them?
    - Once they have identified their main insight, invite them to select a Word card that captures this insight. Use the Word card to articulate your reflection.
    - Your role is to guide your partner in clarifying their insight. Ask questions to help them get more specific and precise. Encourage them to reflect on why this particular insight is so significant.
    - Use the **Speak Up** book if needed. You can read a story, quote, or question related to the Word card your partner has chosen. This can add layers of meaning and inspiration to the reflection.
    - Remember, your goal is to support your partner in turning their insight into something actionable and clear. Help them put their thoughts into words by reflecting and paraphrasing, making it easier for them to articulate and capture their key takeaways.

Now that we’ve explored gratitude, what to leave behind, and future expectations, let’s focus on identifying the one key insight that stands out for you. This insight should capture the essence of everything you’ve reflected on so far.

Partner B, take a moment to think about what truly resonated with you. What’s the one thing that you’re taking away from this conversation? Once you’ve identified it, pick a Word card that represents this insight.

Partner A, your role is to guide your partner. Help them dig deeper and clarify their insight. You can use the **Speak Up** book for added inspiration – whether it’s reading a relevant story, a thought-provoking quote, or a question that connects to the Word card. This can enrich the reflection and make it even more powerful.

#### Trainer Tip:

* + Encourage participants to be specific. The insight should be clear.
  + Walk around the room and check in with pairs to ensure they are staying focused and making progress.
  + If you notice participants getting stuck, prompt them with questions like:
    - “What does this insight mean to you personally?”
    - “How can this insight guide your actions moving forward?”

We’ve now explored reflections, identified key insights, and it’s time to move into the final stage: **Action**. This phase is where ideas turn into tangible steps. The focus here is to transform the insights gained during the conversation into specific, actionable commitments that can be carried forward into daily work.

In the **Action** phase, we encourage participants to take their insights and transform them into clear, concrete actions. The goal is to ensure that these commitments are practical, achievable, and aligned with their personal and professional growth. Remember, the more specific the action, the easier it will be to follow through.

#### Partner A (Manager):

* + - Invite your partner to identify one concrete action they can commit to that will help bring that insight to life?
    - Guide your partner to ensure their action step is clear, achievable, and aligned with their goals.
    - Ask clarifying questions to make sure the action step is not too vague or abstract. Encourage your partner to commit to something measurable and time-bound.

We’re now in the final stage of our conversation – Doing. This is where we take everything you’ve reflected on and turn it into something practical. Partner B, think about the key insight you identified earlier. What’s one specific action you can take to bring this insight to life?

Partner A, your role is to guide your partner in refining their action. Make sure it’s clear, actionable, and aligned with their goals.

#### Trainer Tip:

* + Encourage specificity: Ask participants to be clear and concrete about their action step. Focus on defining an action item that will directly support their performance for the upcoming year, rather than sharing broad intentions.
  + Check that the action is achievable: Ensure the commitment is practical and not overly ambitious. It should be something they can realistically achieve within a set timeframe.
  + Break it down into small steps: Remind participants that sometimes big insights can lead to overly ambitious goals. Encourage them to start small. At **Points of You®**, we often use the “1-1-1 rule”: One thing you’ll do in the next 24 hours, one thing within a week, and one thing within a month. This keeps the momentum going without feeling overwhelming.
  + Use the SMART framework (Specific, Measurable, Achievable, Relevant, Time-bound): Guide participants to refine their action steps so they’re clear and focused.
  + Walk around and provide support: If you notice any participants struggling to pinpoint a concrete action, step in and help them refine their idea into something small and achievable.

1. **Feedback to the Manager** (15 minutes)

Now that we’ve completed the four stages of the dialogue, we will shift gears and provide feedback to the managers. This time, Partner B (Employee) will give feedback to Partner A (Manager) on how they facilitated the conversation. This feedback session follows the **Points of You®** style, the key it to help Person to feel more confident in leading these sessions for their employees.

We’ve now moved through the entire structured dialogue process, and it’s time for some feedback. This part of the exercise is crucial because it allows managers to hear directly from their ‘employee’ on what worked well, what can be polished, and the main takeaway as a manager. The goal is not to criticize but to provide constructive feedback that fosters growth.

#### Activity Instructions:

* + **Partner B (Employee):**
    - What Worked for Me: Share what the manager did well during the conversation. Focus on specific actions or behaviours that made the dialogue effective.
    - Polish Points: Provide what elements could be improved. Again, be specific – share how slight adjustments could enhance the conversation.
    - Key Takeaway for the Manager: Highlight one main takeaway you have as a manager from this conversation.

#### Partner A (Manager):

* + - Listen actively and take notes. This is an opportunity for reflection and growth.
    - Feel free to ask clarifying questions to better understand the feedback.

Feedback is a gift that allows us to see ourselves through the eyes of others. As managers, embracing this feedback can help you build stronger, more meaningful connections with your teams.

#### Trainer Tip:

Encourage Partner B to be specific and constructive. Instead of saying, “You were good,” guide them to share details like, “I appreciated how you paused and gave me space to think.”

Remind Partner A to listen without interrupting and to view the feedback as an opportunity for self- improvement.

If you notice that some participants are struggling with giving constructive feedback, gently intervene and offer prompts to guide them.

1. **Break** (10-15 minutes)

We’ve made great progress so far, and it’s time to take a short break. Use this time to stretch, grab a coffee, and clear your mind. When we come back, we’ll continue with the next phase of our training.

#### Trainer Tip:

* + **Reconnect to the Process:**
    - Before participants leave for their break, remind them to carry the insights from the previous session with them. You could say:
      * “As you take this break, think about what you’ve learned so far. Let these thoughts simmer, and when we come back, we’ll build on them.”

#### Set the Tone for Return:

* + - Mention that when participants return, they will be engaging in the next phase, where they will use the insights and reflections to further deepen their understanding.

#### Use the Time Wisely:

* + - During the break, check in with participants who may seem unsure or hesitant about the process so far. It’s a great opportunity for some informal one-on-one conversations to ensure everyone feels supported.

1. **Tips & Pointers** (10 minutes)

Now that we’ve completed the first round of the dialogue process, let’s take a moment to reflect on what we observed. As we switch roles, I want to share some practical tips to help you facilitate the process more effectively in the next round. This time, you’ll be leading on your own, so keep these pointers in mind as you step into the role of the manager.

#### Key Tips to Share with Participants

* + **Be Present and Listen Fully**
    - Focus on creating a space where your partner feels safe to express themselves openly. Practice active listening – this means being fully present, without interrupting or jumping in with solutions.
    - Tip: Sometimes, the best insights come from simply allowing silence to happen. Give your partner time to think and process before responding.

#### Guide, Don’t Dominate

* + - Encourage your partner (employee) to lead the conversation. Use open-ended questions to explore their thoughts without pushing them toward a specific outcome. This will empower them to find their own insights.
    - Tip: Instead of trying to solve their problems, focus on guiding them toward self-reflection.

#### Use Metaphors to Deepen Understanding

* + - Metaphors can unlock deeper insights by connecting abstract ideas with tangible images. If a partner is struggling to articulate their thoughts, suggest using a metaphor:
      * For example, ask, “If your goal was a journey, what kind of road are you on right now?”
      * Or, “Imagine your current project as a tree – what stage of growth is it in?”

#### Encourage Specificity

* + - When it comes to action steps, encourage your partner to be as specific as possible. Use questions like, “How exactly will you implement this?” or “What’s the first small step you can take?”
    - Tip: If they are stuck, revisit the conversation to identify concrete, actionable takeaways.

#### Stay Mindful of Time

* + - The second round will be led by you, so be conscious of the time for each phase. It’s easy to get absorbed, but keeping an eye on the clock ensures you cover all the stages effectively.
    - Tip: Use your phone or a timer to stay on track without being too obvious.

#### Choose Photo Cards Face Down for an Element of Surprise

* + - To encourage creativity and spontaneity, consider selecting Photo cards face down. This can help bring fresh, unexpected perspectives into the conversation.
    - Tip: Let your intuition guide the selection – sometimes the image you don’t expect to choose can provide the deepest insights.

#### Reconnect to the Performance Meeting if It Gets Emotional

* + - Sometimes, conversations can veer into personal or emotional territory, especially when discussing growth and performance. It’s crucial to acknowledge feelings but also to gently steer the conversation back on track:
      * For example, you might say, “I hear that this is really important to you. Let’s explore how it connects to your goals for the upcoming year.”
      * Use tools like the Photo or Word cards to re-energize and refocus the dialogue.

#### Adjust If Needed

* + - Be flexible and adapt as the conversation unfolds. If your partner gets stuck or if the discussion drifts off topic, don’t hesitate to redirect. Use the cards to shift the energy and bring in new perspectives.
    - Trainer Tip: Remind participants that the goal of this exercise is not perfection, but practice and growth. Encourage them to be curious, to experiment, and to enjoy the process.

#### Expanded Trainer Tips: Effective Use of Time-Outs

Throughout today’s session, as a trainer, you have the flexibility to call a time-out whenever necessary. These pauses are essential to guide participants, correct behaviours, or highlight learning moments without overwhelming the group. However, using time-outs effectively requires balancing between addressing immediate issues and deciding what can be discussed later during feedback or Q&A sessions.

#### Guidelines for Trainers on Using Time-Outs

When to Call a Time-Out:

* + The Group Is Off Track: If the conversation has strayed too far from the objective, pause to realign everyone with the intended focus of the exercise.
  + A Teachable Moment Arises: If you notice a behavior that can serve as a learning opportunity – such as effective use of body language or a missed opportunity to listen – pause to highlight it.
  + Behavior Needs Immediate Correction: For issues like dominating the conversation, not using the tools properly, or a lack of engagement, pause to address it directly and guide participants back on track.

When to Save It for Later:

* + Minor Observations: If it’s a minor point that doesn’t impact the flow, jot it down and address it during the feedback or Q&A sessions.
  + Avoid Overloading Participants: If managers are already focused on the exercise, avoid interrupting too frequently. Save less critical feedback for the debrief.
  + Reflection Points: If an issue requires more reflection, wait until the end of the exercise to provide comprehensive feedback.

#### What to Watch Out For (Behavioral Cues)

Include these cues in your time-outs to make managers aware of behaviors they might not be noticing:

#### Phone Usage:

I noticed some participants checking their phones. Remember, staying fully present is crucial in creating a meaningful conversation.”

#### Body Language (Crossed Arms or Closed Posture):

Let’s pause here. Notice how your body language impacts the dialogue. An open posture invites openness from your partner.

#### Cutting Off or Dominating the Conversation:

Let’s take a moment. Are we giving enough space for the other person to share their thoughts, or are we steering the conversation too much?

#### Not Using the Cards or Drifting Off Topic:

I’m seeing some drift from the topic. Let’s refocus on the cards and the question at hand to guide our dialogue.

#### Rushing Through the Conversation:

I noticed we’re moving quickly. Let’s slow down to allow time for deeper reflection and responses.

1. **Switch Roles & Facilitate the Full Process** (35 minutes)

Now it’s time for the second partner to step into the role of the manager and lead the session. This time, the first partner will experience the conversation from the perspective of the employee. Unlike the first round, where we paused to reflect on each step, this round will be a continuous, uninterrupted experience. The goal is to simulate a complete meeting, allowing you to practice guiding the conversation fluidly from start to finish.

#### Step 1: Role Reversal

Partner A (who was the manager) will now take on the role of the employee. Partner B (who was the employee) will now act as the manager.

#### Step 2: Facilitate the Dialogue Process

The new manager (Partner B) will guide their partner (Partner A) through all four steps of the **Points of You®** Method:

* + - Pause – Create a reflective space to start the conversation.
    - Expand – Use Photo cards to explore new perspectives.
    - Focus – Select a Word card to identify a key insight.
    - Doing – Turn insights into concrete action steps.
  + Participants will have 30 minutes to complete the full process without interruptions.

#### Trainer Tips

* + Using the Manager’s Booklet: Encourage managers to refer to the booklet throughout the exercise. It includes a structured outline and prompts to help guide the conversation effectively.
  + Whiteboard Support: Write a few key questions on the whiteboard for participants to refer to, such as:
    - What details stand out in the photo?
    - How does this image relate to your current challenges or goals?
    - What new insights are emerging from this reflection?
  + Time Management: Remind managers to be mindful of the time to ensure they cover all four stages. A timer can be helpful to stay on track.
  + Flexibility & Adaptation: Encourage managers to stay adaptable. If the conversation starts to drift or they get stuck, remind them to use the Photo or Word cards to shift perspectives and re-energize the dialogue.
  + Time-Out Option: Let participants know that if the conversation becomes unproductive or they feel lost, it’s perfectly okay to call a time-out.

1. **Feedback to the Manager** (10 minutes)

Now that we’ve completed the second round of the dialogue process, it’s time to shift gears and provide feedback to the new managers. This feedback session is crucial because it helps managers understand how they are facilitating conversations and where they can improve. Remember, the goal here is to foster growth, not to criticize. Let’s focus on providing constructive, specific feedback that can help build confidence and refine facilitation skills.

#### Partner A (Employee):

* + - What Worked for Me: Share what the manager did well during the conversation. Be specific about actions or behaviours that made the dialogue effective and meaningful.
    - Polish Points: Identify areas that could be improved. Again, be specific – suggest how slight adjustments could enhance the conversation.
    - Key Takeaway for me as a Manager: Highlight one main takeaway you have for the manager from this conversation. This could be a particular strength you noticed or an area to focus on moving forward.

#### Partner B (Manager):

* + - Listen Actively: Take notes during the feedback. This is your opportunity to learn and grow.
    - Ask Clarifying Questions: If something isn’t clear, feel free to ask for more details to better understand the feedback.
    - Embrace the Feedback: View this session as a gift that allows you to see your facilitation through someone else’s eyes. This is an opportunity to build stronger skills and connections with your team.

#### Trainer Tips

* + Encourage Specificity: Guide Partner A to be as specific as possible. Instead of general praise like, “You were good,” encourage feedback like, “I appreciated how you paused to give me space to think about my response.”
  + Focus on Constructive Feedback: Remind participants that feedback should be constructive and focused on growth. This isn’t about perfection but rather about continuous improvement.
  + Support Active Listening: Remind Partner B (Manager) to listen without interrupting. Encourage them to see feedback as a valuable tool for self-reflection and growth.
  + Intervene if Needed: If you notice participants struggling to give constructive feedback, gently intervene and offer prompts like:
    - Can you share a specific example of what worked well?
    - What’s one thing they could do differently to enhance the dialogue?
    - How did their facilitation style impact your experience as the employee?

1. **Q&A Session** (15 minutes)

Now that we’ve gone through the full process and received feedback, let’s take some time for any final questions. This is your opportunity to ask anything that’s on your mind. The goal is to ensure you feel confident and ready to use the process chart and tools in your own sessions.

#### Open the Floor for Questions:

* + - Encourage participants to ask about any part of the process, techniques, or challenges they may face when applying these tools with their teams.
    - If questions are slow to come in, prompt participants with examples like:
      * Is there a specific part of the process you’re unsure about?
      * Are there scenarios where you feel you might struggle to apply this method?
      * Any concerns about using these tools in real-world conversations?

#### Encourage Peer Sharing:

* + - Allow managers who have already tried similar techniques to share their experiences or tips with the group. This helps create a collaborative learning environment.

#### Trainer Tip:

* + Ensure that the atmosphere remains open and supportive. Emphasize that there are no ‘wrong’ questions – this is a safe space for exploration and clarity.

1. **Closure & Talk About the Manager Booklet** (10 minutes)

Before we wrap up, I want to leave you with a few final thoughts on how to continue practicing and refining these skills.

#### Introducing the Manager Booklet:

* + - Highlight the Content:
      * You all have the Manager Booklet with you, which includes everything we covered today. It contains structured scripts, prompts, and different layouts you can use to adapt the process to your own style.
      * This booklet is designed to be your guide as you start applying these techniques. Whenever you’re unsure, refer back to it – it’s a resource to support you in real-world conversations.
    - Encouragement to Practice:
      * Remember, confidence comes with practice. The more you use these tools, the more natural it will feel. Don’t hesitate to try out different layouts and approaches.
      * Learning happens through doing. Take the techniques we’ve covered today, experiment with them, and see what works best for you and your team.

And now, to close our session, let’s take a moment to reflect. I invite each of you to share just one word that captures what you’re taking away from today’s training. It could be a new insight, a feeling, or even something you’re excited to explore further.

#### One-Word Reflection:

* + - Setting the Tone: Now, let’s take a moment to reflect on today’s session. I’d like each of you to share just one word that captures what you’re taking away from today’s training.
    - How It Works:
      * Invite who is ready to share their one word, continue till everyone has shared.
      * This final reflection helps consolidate the learning experience and ends the session on a positive, thoughtful note.

Thank you all for your enthusiasm and active participation today. I hope you leave feeling inspired and equipped to bring these tools into your work. Keep experimenting, keep learning, and remember – you’ve got all the resources you need to succeed. Let’s go out there and make our conversations more meaningful. Well done, everyone!"

# Adjustments & Flexibility

In this module, we’ve focused on guiding you through the feedback and assessment process using the End-of-Year Conversation template. This approach is ideal for reflecting on past achievements, setting new goals, and aligning expectations for the upcoming year. However, the Manager Booklet offers a range of other templates that can be adapted to fit different conversations throughout the year.

This session plan is designed with flexibility in mind, allowing you to extend or shorten the training based on your team’s specific needs. The same structure we’ve practiced today can be applied using different templates to address various conversations, whether it’s goal-setting, mid-year check-ins, or performance reviews.

#### Why This Matters:

* + It’s crucial to teach managers something that is relevant right now, not just a conversation they might have in six months. By selecting the template that aligns with the current needs of your organization, you ensure the training is timely and impactful.
  + Managers can immediately apply these skills with their teams, enhancing engagement and effectiveness in their everyday interactions.

Expanding the Application: Each of these templates can also be adapted into standalone training sessions that you can facilitate within your organization. This means that, as a trainer, you can use the same structure we’ve covered but switch out the templates to fit the needs of your managers at any given time of year. By doing so, you create ongoing opportunities for growth, helping managers develop specific skills tailored to their current challenges.

Below are examples of how you can adapt the template to different conversations:

# Beginning-of-Year Conversation

**Objective:** Set the tone for the year by establishing clear expectations and identifying growth opportunities.

# Mid-Year Check-In

**Objective:** Evaluate progress, address challenges, and adjust strategies to achieve year-end goals.

**What are my expectations?**

**What do I believe is expected of me?**

**What opportunities do I want to create this year?**

**What will help me achieve my goal?**

**What could prevent me from reaching my goal?**

**What should I focus on?**

Clarify what am I expecting from my role, team, manager and organization.

Understand what is anticipated from me in terms of my role and my contribution to the team.

Focus on areas of growth, new projects, or skills to develop.

Resources, support (from the team, manager), tools that will help me achieve my goals.

Reflect on potential blocks and challenges.

Consider areas, tasks, or skills that are important to prioritize for the rest of the year.

Action Items: Due Date: Action Items: Due Date:

Don’t lower your expectations to meet your performance. Raise your level of performance to meet your expectations. Expect the best from

yourself, and do what’s necessary to make it a reality.

**Ralph Marston Jr.**

[**Link to print PDF**](https://drive.google.com/drive/folders/1eqG0clEPTKQRYIZ7fuN9nGWmMb-FvEba?usp=drive_link)

If you can’t fly, then run. If you can’t run, then walk. If you can’t walk, then crawl. But whatever you do, you have to keep moving forward.

**Martin Luther King Jr.**



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# End-of-Year Conversation

**Objective:** eflect on achievements, assess performance, and align on goals and expectations for the year ahead.

#### Trainer Tip:

* Use the templates to adapt the training session to your organization’s current needs. For example, if it’s the beginning of the year, leverage the Beginning-of-Year Conversation template to help managers set clear expectations and goals.
* Encourage managers to replicate this structure with their own teams. Each of these templates can serve as a blueprint for conversations that drive meaningful engagement and growth throughout the year.

Take a moment to acknowledge the achievements, people, and experiences you are thankful for.

**What am I grateful for?**

Identify behaviours, projects or habits to let go of for improved performance in the coming year.

**What is it time for me to leave behind?**

Consider your professional goals for the coming year, as well as areas you’d like to focus on or develop.

**What are my expectations for the next year?**

By incorporating these different templates, you ensure that managers are not only equipped to lead impactful conversations but also empowered to teach and guide their teams, fostering a culture of continuous development.

Action Items: Due Date:

Closing a circle is not about tying up loose ends, but about recognizing the impact of past experiences on us and finding a way to integrate them into our lives.

**John Whittington**



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Below is the recording of part of the TTT Module 2. Feel free to watch it to explore an

example of TTT in an online environment, and see how the building blocks come together in practice.





# Official Training Template

**Module 3:** Coaching Conversations

### Introduction

This module is part of the Train the Trainer (TTT) program and focuses on equipping managers with the tools and skills needed to conduct impactful **coaching conversations**. Unlike Module 2, which emphasized structured feedback and assessment processes, Module 3 highlights **freestyle coaching**

**conversations** – spontaneous, meaningful exchanges that empower employees to reflect, grow, and take action.

Coaching conversations are not full coaching sessions but practical, outcome-driven interactions designed to build trust and foster impactful results. They are essential for new managers learning to listen, guide, and connect with their team members on a deeper level.

The techniques in this module will help managers:

* Be present and listen: Cultivate the skill of active listening and understanding employees.
* Focus on small, manageable issues: Avoid overwhelming conversations and instead address topics with achievable outcomes.
* Guide conversations toward action: Conclude every conversation with a clear, actionable next step.

### Session Objectives

* **Teach Managers advanced listening and questioning skills** to build trust and drive impactful conversations.
* **Equip Managers to confidently use the SpeakUp Toolkit** to lead coaching conversations with their employees during one-on-one meetings.

### Training Overview

* **Duration:** 3.5 hours
* **Format:** Face-to-face using SpeakUp tools or online with SpeakUp Digital.
* **Participants:** Groups of 8-15 People Managers, HR, OD, or LD Specialists.

### Materials Needed:

* **SpeakUp** Toolkit (photo cards, question cards, word cards).
* Manager Booklet.
* A whiteboard or flipchart for trainer notes.
* Speaker and Pause Music. ([Apple Music](https://music.apple.com/il/playlist/speak-up-ttt-module-3-pause/pl.u-Ymb09MRsDy081xo) | [Spotify](https://open.spotify.com/playlist/4P2MivcyxUJrSrUNECxMF6?si=w23wCZAFR7StEiM6KbE8aQ))

To ensure an engaging and effective experience:

1. **Provide SpeakUp Sets**: Ideally, each pair has a full toolkit (photo cards, question cards, word cards).
2. **Centerpiece Option**: If tools are limited, set up interactive stations around the room with cards and prompts for participants to use.
3. **Simulate Real Conversations:** Emphasize that managers are practicing the type of conversations they will lead with their teams.

### Training Flow

1. **Welcome & Why Coaching Matters** (15 min)
   * Warm introduction and objectives.
   * Research-backed reasons for the importance of coaching conversations.
   * Quick group engagement on the impact of coaching.
2. **Flexible Coaching Framework** (15 min)
   * Introduce Pause → Expand → Focus & Action as a coaching toolkit.
   * Explain how the toolkit enables deeper, more meaningful conversations.
3. **Core Coaching Tools** (65 min)
   * **Introduction to Tools** (10 min):

Paraphrasing, rephrasing, powerful questions, and PR.

* + **Partner Exercise** (55 min):

Practice in pairs with structured timing for paraphrasing, questioning, rephrasing, and feedback.

**Break** (15 minutes)

#### Applying the Framework in Pairs (75 min)

* + **Trainer Demo** (15 min):

Show the framework in action with a volunteer.

* + **Practice** (60 min):

Participants work in pairs to apply Pause → Expand → Focus & Action. Rotate roles (Coach, Coachee).

1. **Bringing It Back to Work** (15 min)
   * Discuss real-world applications (e.g., one-on-one meetings, performance discussions).
   * Action planning: Identify immediate ways to integrate coaching tools.
2. **Closure & Reflection** (10 min)
   * Card exercise: Reflect on “What am I ending with?”
   * One-word takeaway to summarize learning.

# By-the-Book Guide for Trainers

The following section provides a clear, step-by-step guide for trainers to confidently lead this session. Each activity is accompanied by detailed instructions, scripts, and practical tips to help you facilitate the process effectively. These guidelines are crafted to ensure a smooth, engaging, and adaptable learning experience, empowering managers to confidently integrate the Speak Up tool into their coaching conversations.

While this guide focuses on a standard 3.5-hour session, you can adapt the format, having more time gives you time to practice more.

1. **Welcome & Why Coaching Matters** (10 min)

Welcome, everyone! It’s great to have you back for the next module of the Speak Up Train the Trainer series. Building on the skills we developed previously, today we’re expanding into the world of coaching conversations.

Unlike structured feedback sessions, coaching conversations are shorter, more spontaneous interactions designed to guide employees toward growth and actionable solutions. These conversations are less about solving problems for your team and more about creating a space for them to reflect, uncover insights, and take meaningful steps forward.

Before we dive into the framework, let’s start with some reflection:

* + What is coaching?
  + How do you know when you’re having a coaching conversation instead of a conventional one?

Let’s hear your thoughts.

Summarize answers into key principles:

* + Coaching is about asking questions rather than giving answers.
  + It’s focused on reflection, insight, and action.
  + Coaching conversations empower employees to take ownership of their growth.
  + Define Coaching for the Group:

Coaching is a process of guiding individuals to uncover their own insights, solutions, and next steps through reflective dialogue and open-ended questions. It’s a shift from directive management to collaborative leadership.

#### Objectives

In this session, we have two key objectives:

1. To teach Managers advanced listening and questioning skills to build trust and drive impactful conversations.
2. To equip Managers to confidently use the SpeakUp Toolkit to lead coaching conversations during one- on-one meetings.

By the end of this session, you’ll have the tools and confidence to conduct coaching conversations that are engaging, effective, and action-oriented.

#### Why Coaching Conversations Matter

Traditionally, managers have been expected to deliver results through instruction, evaluation, and control. This top-down approach often misses opportunities for growth and engagement.

Today, managers are expected to do more than just manage tasks – they’re expected to build trust, foster relationships, and empower their teams. Coaching conversations are a powerful way to make this shift. They allow managers to approach challenges with curiosity and empathy, turning everyday interactions into moments of growth and connection.

Research shows the importance of coaching conversations for managers and teams:

1. **Improves Performance:** Coaching helps employees gain clarity and take ownership of their goals. According to the International Coach Federation (ICF), 86% of companies report improved work performance due to coaching. [(Institute of Coaching)](https://instituteofcoaching.org/coaching-overview/coaching-benefits)
2. **Increases Engagement:** Employees who feel heard are more motivated and committed to their work. Research from Gallup shows that managers account for 70% of the variance in team engagement, and coaching helps foster trust and motivation. (T[he leadership Variance)](https://theleadershipprocess.com/blog/managers-account-for-70-of-variance-in-employee-engagement/)
3. **Encourages Growth:** Coaching builds self-awareness, adaptability, and problem-solving skills. Harvard Business Review notes that employees coached to develop these qualities are more likely to adapt and thrive in dynamic work environments. [(Harvard Business Review)](http://www.harvardbusiness.org/the-ladder-of-inference-building-self-awareness-to-be-a-better-human-centered-leader/)
4. **Boosts Retention:** Coached employees are more likely to feel supported and stay with the organization. A study by the Corporate Leadership Council found that managers who coach effectively can improve employee retention rates by up to 40%. [(British Council)](https://corporate.britishcouncil.org/insights/why-developing-coaching-management-style-essential-managers)

When managers use coaching conversations as part of their leadership style, they create trust, connection, and an environment where team members feel valued and supported.

Reflective Engagement: The Knowledge-Practice Gap

Many of you may have attended coaching or leadership training sessions before, so let me ask:

* + How many of you have attended coaching training or coaching-oriented leadership sessions?
  + Great. Now, how many of you are applying those coaching skills in your daily work? Would you say:

– 100%?

– 50%?

* + - Less than 50%?

Let’s talk about why this happens. What makes it challenging to consistently use these skills?

#### Facilitate Discussion:

Gather responses, which may include time constraints, habit, or balancing coaching with other priorities.

#### Bridge to Speak Up:

These challenges are common and highlight why tools like Speak Up are so valuable. Speak Up simplifies coaching conversations, offering a practical framework that’s easy to apply. It helps managers stay present and guide employees effectively, creating healthier and more productive relationships.

Today, we’ll explore how this tool makes coaching approachable and impactful – even in the busiest of work environments.”

#### Leaving with a Reflective Question

(Use this part if your participants have not attended coaching-oriented workshops before.) As we move into today’s session, I’d like you to reflect on this:

#### How can coaching skills improve and influence your leadership?

Take a moment to consider this as we dive into the coaching framework that will guide our work today.

#### Trainer Tip:

* + Emphasize the Connection Between Modules:
    - If participants have completed Module 2, highlight how structured feedback conversations provide the foundation, while coaching conversations add flexibility for real-time growth opportunities.
    - If participants are coming from Module 1, connect to the idea of shifting perspectives and using visual tools to create meaningful conversations.
  + Reinforce Coaching as a Mindset Shift:

Coaching isn’t just a skill set; it’s a mindset shift toward fostering trust, connection, and growth in every interaction. Encourage participants to see coaching conversations as an opportunity to build deeper relationships while driving action and accountability.

1. **Flexible Coaching Framework** (15 min)

Before we dive into practice, let’s revisit the core method we’re using today:

**Pause** → **Expand** → **Focus** → **Doing**. This framework is a guide to help you lead meaningful coaching conversations, taking your employee through a process that’s thoughtful, empowering, and actionable. By following these steps, you’ll create a space where employees feel truly heard. This isn’t about solving everything at once or rushing to action – it’s about guiding a conversation where employees can reflect, explore, and take ownership of their next steps.

#### The Four Steps of the Points of You® Method:

**Pause:**



* + What It Is: A moment to shift energy, become present and set the tone for the conversation.
  + Why It Matters: This step creates presence and focus, helping both you and your employee leave distractions behind and start with clarity.
  + Example: Taking a few deep breaths, listening to music, writing, self-journaling.



#### Expand:

* + What It Is: A space to explore new perspectives, to see things from different angles, to explore thoughts and emotions..
  + Why It Matters: This step is about looking up, to break the pattern of thought, to look at different perspectives before rushing to conclusions.
  + Example: Use the Photo cards and open-ended questions to explore your issue.

#### Focus:



* + What It Is: Narrowing down insights into a clear priority or key takeaway.
  + Why It Matters: This step identifies the main point of the conversation, helping both you and your employee concentrate on what’s most important.
  + Example: Summarizing: what is the main insight you take, what sounds as the most important right now, using a word card to frame the conversation.

#### Doing:

* + - What It Is: Turning insights into actionable steps.
    - Why It Matters: This step ensures the conversation ends with a concrete plan, giving your employee something to work on or reflect on. To make the conversation change something.
    - Example: Co-creating an action item: “What’s one thing you can commit to doing this week to address this?”

#### Why the Method Works:

It’s tempting as managers to jump straight to action – we want to solve the problem quickly and move forward. But by following these steps, you ensure that you’re addressing the real issue, not just the symptoms.

At the same time, this process helps employees who feel stuck. By pausing and expanding first, you create the space they need to gain clarity and momentum. Most importantly, this method helps employees feel valued and heard, whether the conversation lasts five minutes or half an hour.

#### Trainer Tips:

* **Remind Participants of the Speak Up Tools:**

If you’re unsure where to start or feel stuck in the moment, remember what’s in the Speak Up toolkit. The photo cards, question cards, word cards, stickers and the gameboard are all designed to guide and inspire these conversations.

#### Reconnect to Points of You®:

Don’t forget the essence of Points of You® – the idea that every situation has multiple perspectives. When you use the tools, you’re helping employees step back, shift their perspective, and uncover new insights. That’s the magic of this approach.

#### Empower Managers to Adapt:

This method is flexible. Use the steps that resonate most in the moment and adjust the length of the conversation based on the context. The goal is to help employees feel heard and leave with a clear next step.

#### Experience Pause Points of You® Style

Now that we’ve explored the framework, let’s take a moment to ground ourselves before moving into the tools. As we’ve discussed, Pause is about creating space to connect and shift energy.

This time, we’ll experience a Pause Points of You® style. It’s an opportunity to connect with yourself – your body, thoughts, and feelings – and notice where you are in this moment.

Here’s what we’ll do:

* We’ll listen to a short piece of music (Pause playlist: [Apple Music](https://music.apple.com/il/playlist/speak-up-ttt-module-3-pause/pl.u-Ymb09MRsDy081xo) | [Spotify](https://open.spotify.com/playlist/4P2MivcyxUJrSrUNECxMF6?si=w23wCZAFR7StEiM6KbE8aQ)) while everyone is sitting quietly.
* If you feel comfortable, I invite you to close your eyes and simply be present.
* Use this time to connect to yourself, your emotions, and your thoughts. There’s no right or wrong way to experience this – it’s about being in the moment.
* After the pause count to 10 before continuing.

1. **Core Coaching Tools** (65 min)

Before we dive into practice, let’s take a moment to understand the tools we’ll be working with. These tools – paraphrasing, rephrasing, asking powerful questions, and the PR framework – are the building blocks of coaching.

What makes them powerful is their versatility. These aren’t just techniques for formal coaching conversations – they’re skills you can use in everyday interactions with your team. Whether it’s a quick check-in, addressing a challenge, or guiding someone through a decision, these tools help you connect, listen, and guide more effectively.

Coaching is about creating a space where your employee feels heard and empowered to uncover their own solutions. These tools enable you to do just that.

#### Introducing the Tools

1. **Paraphrasing:**
   * Paraphrasing is about reflecting back what the other person said. We try to capture the main words that we hear. It shows that you’re truly listening and helps clarify what’s being communicated. It’s also a way to ensure mutual understanding.
   * Example:
     + Coachee: “I’m feeling overwhelmed by deadlines.”
     + Paraphrase: “It sounds like you’re under a lot of pressure to meet your deadlines.”

#### Rephrasing:

* + Rephrasing takes paraphrasing a step further. It’s about listening deeply to the tone, body language, and context of what’s being said and reflecting back what you hear. Think of it as 'hearing the music of the conversation.' Your goal is to surface underlying emotions or subtext gently, without projecting your own assumptions.
  + Example:
    - Coachee: “I’m worried about making mistakes.”
    - Rephrase: “I am also hearing frustration from your voice, is it true? If yes, why? (Retell the story told by the employee with your own words.)

#### Asking Powerful Questions:

* + Questions are at the heart of coaching. A good question invites the coachee to reflect, explore, and uncover their own insights. The best questions are open-ended and focused on growth – not solving the problem for them, but helping them find their own answers. The Speak Up toolkit equips you with 30 powerful questions you can always use
  + Example Questions:
    - “What feels most important about this issue?”
    - “What’s holding you back from moving forward?”
    - “If success in this situation were guaranteed, what would it look like?”

#### PR Framework:

* + The PR framework is a simple yet effective way to approach tough conversations. It’s to prepare the coachee for a message that we want to say. It’s to create a space for the message we want to deliver. It helps you frame your message clearly and considers how the other person might feel, so your message lands with empathy.
  + Read more about PR here
  + Example:
    - Our relationship is important for me, so this is why I want to share it with you .
    - What am I about to share is just my perspective, you can take from it what resonates with you

#### Trainer Tip:

* Emphasize that these tools are not just techniques – they’re habits that build trust and connection. They’re skills that can transform everyday conversations into opportunities for growth and understanding.
* Ask One Question at a Time: Avoid asking multiple questions at once, as this can confuse the coachee or dilute the focus of the conversation. Give them space to think and respond to each question before moving on.
* Prepare Employees for the Approach (PR):
  + Encourage managers to explain to their employees that this is a shift toward a more reflective and collaborative conversation style.
  + Framing it positively ensures employees feel comfortable and engaged, rather than surprised or resistant.
  + Example for Managers to Use: We’re going to try a different way of working together, one that focuses more on reflection and exploring ideas. I’d love to hear your thoughts and see how this approach works for us both.

#### Partner Exercise

* You’ll work in pairs to practice the flow of a coaching conversation using the tools we’ve discussed. This isn’t about solving problems but being present and creating space for your partner to explore. We invite you to find a partner and choose who is going to be A and B. A you will be the coachee and B you will be the coach.
* **Structure** (25 min per person):

#### 5 min – Sharing

* + The coachee (Person A) shares anything they want – a challenge, a reflection, or a thought they’re working through or dealing with.
  + The coachee (Person A) selects a photo card to deepen or illustrate their sharing.

#### 2 min – Paraphrasing

* + The coach (Person B) reflects back what they heard, staying closely aligned with the coachee’s words.

#### 1 min – Question Card Selection

* + The coach (Person B) selects 1-3 Question cards to guide the conversation.
  + During this time, the coachee (Person A) reflects silently and writes down any key points they feel the coach heard.

#### 5 min – Asking Questions

* + The coach (Person B) uses the selected Question cards to guide exploration, focusing on the coachee’s issue and the coachee (Person A) answers. There may be enough time to ask 1 question, maybe 2.

#### 5 min – Rephrasing and Summarizing

* + The coach (Person B) reflects back key themes, tone, and subtext they observed during the conversation.

#### 5 min – Feedback

* + The coachee (Person A) provides feedback to the coach:
    - What worked well?
    - What could be polished?
    - Their main takeaway from the Coach and how they worked.

#### Trainer Tip:

* In this exercise, we’re intentionally pushing for the full 15 minutes. This isn’t about conducting a full coaching session – it’s about practicing how to start a meaningful conversation and take that first step.
* Focus on Presence: Remind participants that the silence and photo card selection are intentional pauses to shift energy and center the conversation.
* Avoid Overcomplicating: Encourage coaches to focus on paraphrasing and asking meaningful questions rather than trying to do everything at once.
* The Map and the Territory Concept:
  + Remember, each person has their own “map” of every situation, shaped by their unique experiences and perspectives. As a Coach or Manager, it’s essential to respect and work within the coachee’s “territory.”
  + Be mindful not to impose your own narrative or add words that haven’t been said. Instead, focus on taking the coachee’s words and narrative as they are, reflecting them back with accuracy and care.
* Trust Your Intuition: If a question you chose doesn’t feel relevant to what the coachee brought to the conversation, trust your intuition. Instead, ask an open-ended question that resonates with the flow of the dialogue. Coaching conversations are dynamic, and your ability to adapt makes them more meaningful.

### Section 4: Applying the Framework in Pairs (75 min)

“Now that you’ve practiced the individual tools, it’s time to bring everything together. In this section, we’ll work with the full coaching framework – **Pause** → **Expand** → **Focus & Action** – to simulate a complete coaching conversation.

I’ll begin by demonstrating the framework with a volunteer so you can observe how the flow works. After the demo, you’ll practice in pairs, taking turns as Coach and Coachee, to experience the framework firsthand.”

**Trainer Demo** (15 min)

For this demo, I’ll act as the Coach, and I will invite one of you to be the coachee. I’ll guide the conversation using the full coaching framework – **Pause** → **Expand** → **Focus & Action** – to show you how these steps work in a real-time coaching conversation.

This is meant to feel natural and spontaneous, so don’t worry about perfection. The goal is to create momentum and focus on small, actionable steps.

Before we begin the demo, I’d like to invite one of you to volunteer to act as the Coachee for this exercise. I understand it might feel a bit intimidating to come up here in front of your peers, but let me share why this is a unique opportunity:

* Experience the Framework Firsthand: By stepping into the role of the Coachee, you’ll see how the coaching framework works from the inside, giving you valuable insights into how it feels for your team members during a real conversation.
* Focus on a Small Challenge: This is not about solving a big, complex problem. We’ll focus on a small, manageable challenge or reflection, so it stays light and comfortable.
* Safe and Supportive Environment: Remember, this is a learning space. Everyone here is in the same process, practicing and growing together.

Taking part in this demo is a way to explore, try something new, and experience coaching in a guided and supportive way. If this resonates with you, I’d love for you to join me.

**Demo Steps** (15 min):

#### Pause

* + Begin by helping the Coachee settle into the conversation.
  + Ask about a communication challenge they may be facing and give them space to share.
  + Allow time for the Coachee to “arrive” mentally in the conversation, creating presence and focus.

#### Expand

* + While listening to the issue, invite the Coachee to choose a Photo card that resonates with them and explore its connection to their challenge.
  + Use a Question card to expand the conversation and help uncover new perspectives.
  + Focus on listening deeply and rephrasing their insights to surface deeper meaning.

#### Focus

* + Invite the Coachee to choose a Word card that summarizes what they shared.
  + Ask them to reflect on their main takeaway and rephrase it back to them to check alignment.
  + Confirm with the Coachee how it feels and ensure clarity.

#### Action

* + Guide the Coachee toward identifying a small, clear next step based on the conversation.
  + Support them in articulating this step as something achievable and actionable.

**Debrief the Demo** (5 min):

* “What did you notice about the flow of the conversation?”
* “How did the tools (cards, stickers, board) support the conversation?”
* “What felt spontaneous or natural about this process?”

#### Trainer Tips:

* **Focus on Manageable Challenges:**

If the Coachee presents a big challenge, focus on finding one small, actionable part to address. This keeps the conversation productive and manageable.

Additionally, guide the Coachee to explore what’s within their control to change. Ask reflective questions like, How does this challenge make you feel? or What part of this is up to you to act on? Even if the situation itself cannot change, the conversation can help the Coachee shift their perspective, empowering them to approach it with clarity and confidence.

#### Integrate Tools Seamlessly:

Make use of the tools you practiced earlier – photo cards, question cards, word cards, and even the board or stickers. These elements keep the conversation engaging and visually rich.

#### Highlight Spontaneity:

Remind participants that while we learned tools earlier in a structured way, this exercise is about applying them naturally. Coaching conversations don’t have to be perfect – they just need to create movement and clarity.

#### Create Momentum:

The focus is on progress, not resolution. Help the Coachee take one clear step forward, even if it’s small.

**Pair Practice** (55 min)

#### Explain the Pair Practice Setup (5 min):

* + “You’ll work in pairs, taking turns as Coach and Coachee. The Coach will lead a 15-minute coaching conversation using the full framework, and then you’ll switch roles.”

1. **Structure for Each Round** (20 min per person):

#### 15 min Coaching Conversation:

* + - **Pause:** Begin with presence and establish focus.
    - **Expand:** Explore the topic through open-ended questions.
    - **Focus:** Summarize key insights and clarify priorities.



* + - **Action:** End with a clear, actionable next step.

#### 5 min Feedback:

* + - The Coachee shares feedback with the Coach:
      * What worked well?
      * Where could the Coach improve?

#### Switch Roles:

– After the first 20-minute round, participants switch roles and repeat the process (55 minutes total for both rounds, including transitions).

#### Trainer Tips:

* + **Reinforce Presence:**

Encourage the Coach to spend enough time in Pause and Expand before moving to Focus and Action. Rushing can lead to surface-level solutions.”

#### Support the Coachee’s Role:

As the Coachee, share a manageable challenge or topic – it doesn’t need to be big or complicated. This keeps the conversation realistic and actionable, but works on a real issue.

#### Facilitate as Needed:

During practice, move around the room to observe. If you notice a pair struggling or getting stuck, gently intervene with suggestions or prompts.”

### Section 5: Bringing It Back to Work (15 min)

Now that you’ve practiced the coaching framework and tools, let’s take some time to reflect on the experience, ask any questions, and think about how these skills can fit into your leadership.

Coaching conversations are not about fixing everything in one go. Sometimes the most valuable action item is simply to schedule a follow-up conversation. This shows your employees that you’re committed to their growth and keeps the momentum going.

#### Open the Space for Questions and Reflections:

* + - Invite participants to share their thoughts, ask questions, or reflect on their experience with the exercises.
    - Use prompts to guide the discussion:
      * What worked well for you during the coaching exercises?
      * What felt challenging or unfamiliar?
      * What’s one insight you gained about coaching conversations?
    - Acknowledge participant contributions and use their input to deepen the discussion.

#### Explore Practical Applications:

Shift the conversation to where and how participants can integrate coaching conversations into their leadership. Use the following areas to guide exploration:

#### One-on-One Check-Ins:

* + - * How can coaching tools help guide your regular check-ins?

#### Handling Challenges:

* + - * How could these tools support a team member dealing with a problem or conflict?

#### Quick Conversations:

* + - * What are some ways to use this framework in short, informal interactions?

#### Follow-Up:

* + - * When a challenge is too big to address in one conversation, how might scheduling a follow-up keep the momentum going?

#### Encourage Peer Sharing:

* + - Prompt participants to share how they might use coaching conversations in their specific contexts.

Coaching conversations don’t have to be formal or lengthy – they’re flexible tools that can be adapted to your leadership style. Whether it’s a five-minute check-in or a deeper discussion, the goal is to create clarity and action, and sometimes that action is simply scheduling a follow-up.

#### Trainer Tip:

* + **Stay Focused:**

Encourage participants to think practically about where coaching fits into their current workflow and leadership style.

#### Acknowledge Challenges:

If participants bring up concerns like time constraints or team resistance, share that coaching conversations can be short, focused, and often lead to stronger team engagement over time.

**Section 6: Closure & Reflection** (10 min)

As we wrap up today’s session, let’s take a moment to reflect on what we’ve covered and how you can bring these tools into your leadership. Today, you’ve explored the coaching framework, practiced tools like paraphrasing, rephrasing, and powerful questions, and discovered how to guide coaching conversations toward actionable next steps.

Remember, you also have the Manager Booklet as a resource. It contains all the tools and methods we’ve worked on today, along with guidance on how to adapt them to different situations. Be sure to revisit it as you integrate these practices into your day-to-day conversations.

* + **Recap Key Tools and Learnings** (2-3 min)
    - Today, we explored the tools and framework for effective coaching conversations:
      * **Pause** → **Expand** → **Focus** → **Action** to guide conversations.
      * Tools like paraphrasing, rephrasing, and asking powerful questions to deepen reflection and connection.
      * Using Speak Up elements – photo cards, question cards, word cards, and more – to make conversations engaging and meaningful.
      * These tools are outlined in your Manager Booklet, along with additional tips and templates to support your practice. Keep it handy as you begin applying these skills in your professional work.
  + **Capture Insight and Action Item** (4-5 min)

Take a moment to reflect: What’s one key insight you gained from today? Now think about how you can apply this insight in your professional work. What’s one small action item you can commit to taking that will help you start integrating what you’ve learned?

* + **End with One Word** (2 min)

Finally, let’s go around and share one word that captures what you’re taking away from today’s session. It could reflect how you’re feeling, something you’ve learned, or your intention moving forward.

#### Trainer Tip:

* + **Keep it Practical:**

Encourage participants to choose an action item that feels realistic and achievable. Remind them that coaching is a process, and small steps can lead to big changes over time.”

#### Celebrate Progress:

Acknowledge the effort participants have put into today’s session and the importance of their commitment to growth.

#### Encouraging Managers to Try the Tools:

As you begin using these tools with your employees, remember to introduce the process thoughtfully. Let them know you’re trying a different approach to create space for reflection and growth.

#### Final Words from the Trainer

Thank you all for your engagement and openness today. Coaching is a skill that develops over time, and every conversation you have strengthens your ability to connect, guide, and empower your team. I look forward to hearing how these tools make an impact in your leadership journey!

### Time Adjustments

#### If You Have Less Time

If time is limited, the session can be streamlined while still maintaining its impact:

#### Partner Exercise (Core Coaching Tools):

* + - Instead of two rounds, complete only one round:
      * **A is the Coachee and B** is the Coach for the entire exercise.

#### Coaching Framework in Pairs (Full Coaching Conversation):

* + - In this activity, switch roles:
      * **A becomes the Coach for B**, completing a 15-minute coaching conversation.
    - This ensures that both participants experience the role of Coach and Coachee across the two activities.

By simplifying the exercises to one round each, you save time while still giving participants a meaningful opportunity to practice both roles.

#### If You Have More Time

If additional time is available, consider the following adjustments to deepen learning and reflection:

#### Extended Debriefing:

Spend more time debriefing each activity. Encourage participants to share insights, discuss challenges, and explore how the tools felt in practice.

#### Q&A Sessions:

Create more space for participants to ask questions and reflect on their learning. Use this time to explore challenges they foresee in applying the tools and brainstorm strategies as a group.

#### Longer Practice Rounds:

Extend the duration of each coaching conversation. Allow Coaches to spend more time in the Expand phase to explore perspectives more thoroughly or dive deeper into Focus and Action to refine next steps.

# TTT Module 3 - Recording

Below is the recording of the overview of the TTT Module 3. Feel free to watch it to explore an example of TTT in an online environment, and see how the building blocks come together in practice.



# Training Online Marketing





# Marketing – The Points of You® Engagement Method Reach Out

### Introduction

The **Points of You® Engagement Method** is designed to help us find the right clients, build meaningful relationships, and close deals that create real impact. Rather than relying on traditional sales tactics, our approach focuses on attracting the right people, engaging them through experience, and fostering long- term partnerships.

This method follows a structured three-step process:



[**1.**](#_bookmark73)

[**Reach Out**](#_bookmark73)

[Identifying the right audience, creating curiosity, and opening doors.](#_bookmark73)

[**2.**](#_bookmark74)

[**Marketing Meeting**](#_bookmark74)

[Offering a hands-on experience that deepens the connection and builds trust.](#_bookmark74)

[**3.**](#_bookmark80)

[**Follow-Up**](#_bookmark80)

[Sustaining engagement, addressing concerns, and guiding the client toward a decision.](#_bookmark80)

The goal is to **attract, connect, and convert – not through pressure, but through value**. By ensuring that clients experience **the essence of Points of You®** firsthand, we position ourselves not just as service providers but as trusted partners in their growth and development.

In the next sections, we will explore each step in depth – how to find the right clients, engage them authentically, and build sustainable, long-term relationships.

### Introduction

The Reaching Out phase is all about finding the right clients, creating curiosity, and opening doors for meaningful conversations. It is not about selling immediately but about initiating connections with HR professionals, L&D managers, and organizational decision-makers in a way that is relevant, engaging, and valuable to them.

Our goal in this stage is to:

#### Identify the right audience –

Be clear on who to reach out to and why they would be interested.

#### Use the right marketing channels –

LinkedIn, conferences, email, referrals, and campaigns.

#### Craft a strong marketing message –

One that is precise, engaging, and leads to a meeting.

#### Track and organize outreach efforts –

Maintain a structured database of contacts and interactions.

This section will guide you through the key steps to make your outreach process effective and structured.

### Step 1: Defining Your Target Audience

Before reaching out, you need to be crystal clear on who you are targeting and why. Ask yourself:

#### Who is my ideal audience?

(HR Directors, L&D Managers, Talent Development Leaders, etc.)

#### Which organizations am I targeting?

(Multinational companies, startups, NGOs, family businesses, etc.)

#### Why am I reaching out to this person/organization?

* + **What is their need?**

(Employee engagement, leadership development, innovative training tools, etc.)

#### What solutions are they already looking for?

Being specific allows us to craft messages that truly resonate with their needs and increases our chances of setting up a meeting.

**Write down your target audience and their needs below:**

Target Group:

Their Needs:

### Step 2: Finding and Reaching Your Audience

New Channels I want to try:

Once you know who you want to reach, the next step is how to connect with them.

#### LinkedIn & Professional Networks

Research HR & L&D professionals, send strategic messages, engage with their content.

#### Conferences & Industry Events

Attend relevant HR summits and networking events to meet potential clients.

#### Email & Direct Messaging

Send personalized, concise outreach messages that highlight the value of a conversation.

#### Referrals & Recommendations

Leverage existing relationships to get introduced to key decision-makers.

#### Online & Offline Campaigns

Use targeted social media ads, webinars, or content marketing to attract interest.

Different organizations respond to different channels, so test multiple approaches to see what works best.

**Plan your marketing channels:**

Channels I already used:

### Step 3: Crafting the Perfect Outreach Message

Your marketing message should not be a sales pitch – it should:

* + Be short, engaging, and precise.
  + Not attempt to sell over a message – the objective is to schedule a meeting.
  + Create curiosity and interest to explore a potential collaboration.

#### Best Practices for Outreach Messages:

* + **Make it personal & relevant**

Show that you understand their work and needs.

#### Keep it short & clear

No long paragraphs – just enough to intrigue them.

#### Make the meeting sound valuable

The session itself should be seen as a gift, not a sales call.

#### Position yourself as a coach, not a salesperson

This shifts the focus to insights and value rather than a product pitch.

#### Example LinkedIn/Email Outreach Message:

Subject: Exploring New Possibilities for Leadership & Team Development Hi [Name],

Nice to e-meet you! My name is [Your Name], and I’m a Points of You® Business Trainer, working with organizations worldwide to enhance leadership, communication, and team development through creative and experiential learning.

I came across your work in [HR/L&D field] and really connected with [mention something specific from their website, LinkedIn, or company mission]. It’s inspiring to see how you [acknowledge their focus, e.g., prioritize leadership engagement, foster a strong workplace culture, or invest in employee growth].

I’d love to invite you to a short session where I’ll guide you through an interactive experience – something you can use immediately with your teams. It’s a great opportunity to explore new approaches, and it will be valuable for you, whether we end up working together or not.

Would you be open to a quick call next week? Let me know a time that works for you. Looking forward to hearing your thoughts!

With good vibes, [Your Name]

[Your Contact Information]

#### Write your own outreach message here:

My Outreach Message:

**Tip: Framing the Meeting as a Valuable Experience**

Most decision-makers won’t book a meeting just for a sales pitch. Instead, position the meeting as a valuable experience where they can learn something, gain insight, or explore new tools.

* + Instead of: *“Let’s schedule a call so I can tell you about Points of You®”*
  + Say: *“I’d love to invite you for a short session where I’ll share an interactive experience – something you can use immediately with your teams.”*

By making the meeting experiential, we increase engagement and interest while setting the foundation for a long-term relationship.

### Step 4: Managing Follow-Ups & Next Steps

If they don’t respond immediately, it doesn’t mean they’re not interested. HR and L&D managers are busy professionals, and follow-ups are a natural part of the process.

#### Best follow-up strategy:

1. **First message** – Initial outreach.

#### Follow-up #1 (3-5 days later) –

*“Just checking in to see if this could be relevant for you. Happy to find a time that works.”*

#### Follow-up #2 (7-10 days later) –

*“I know schedules get busy! Let me know if you'd be open to a short chat this month.”*

#### Final follow-up (after 2 weeks) –

*“Totally understand if now isn’t the right time. Would you be open to staying in touch for future opportunities?”*

Keep it light, professional, and respectful – we want to build relationships, not pressure anyone.

### Step 5: Building & Managing Your Contact Database

To track your outreach efforts effectively, it's important to maintain a structured database of contacts and conversations.

#### What to Track in Your Outreach Database?

A simple **Excel** or **CRM** system can help organize your efforts. Below are essential fields to include:

|  |  |
| --- | --- |
| **Field Name** | **Purpose** |
| Name | The contact’s full name |
| Organization | The company they work for |
| Position | Their job title (HR Director, L&D Manager, etc.) |
| Contact Details | Email, LinkedIn, phone number |
| Outreach Channel | How you contacted them (LinkedIn, email, conference, etc.) |
| Date of First Contact | When you first reached out |
| Response Received? | Yes/No |
| Follow-Up Needed? | Schedule follow-up date |
| Meeting Scheduled? | Yes/No, date set |
| Notes | Any key details from conversations |

# Marketing Meeting

**Start building your outreach database. Write down 3-5 potential contacts to reach out to:**

My Potential Contacts:

### Key Takeaways

* Reaching out is about connection, not selling.
* Define your target audience clearly before engaging.
* Use the right channels – LinkedIn, events, referrals, and campaigns.
* Keep messages short, personal, and engaging.
* Position the meeting as an experience, not a pitch.
* Follow up strategically – persistence is key, but always with professionalism.

This phase sets the foundation for everything that follows. When done right, it leads to high-quality meetings, stronger relationships, and long-term opportunities.

### Introduction

The Marketing Meeting is a crucial step in the **Points of You®** Engagement Method. It is designed to share an experience, create a meaningful relationship, and spark the interest of the organization or client. This meeting is more than just a presentation – it’s about building a connection and allowing potential clients to experience our unique approach firsthand.

Below is a structure and guidance on conducting a Marketing Meeting, made up of 5 crucial stages. Whether it’s conducted online or in person, the structure ensures that the experience is engaging, professional, and aligned with the **Points of You®** approach.

### Before the Meeting

#### Technical & Professional Preparation:

* + If online, ensure you are already connected through Zoom.
  + Check your video frame, lighting, and background (use a virtual background if needed).
  + Log in to Speak Up Digital with the relevant process open.
  + Have the tools (Speak Up/ ClicKits ready at hand).
  + Research the client or company via LinkedIn/Google to identify key talking points.

#### Content & Context Preparation:

* + Review the organization’s industry, challenges, and any relevant information.
  + Underline key points that might be interesting for the conversation.
  + During the meeting, observe the setting – what does their office environment tell you about their values and priorities?

**A breakdown of the key phases of the marketing meeting:**

### 1.

**Bonding Stage**

**2.**

### Questioning Stage

**3.**

### Experience Stage

**4.**

### Guiding Stage

**5.**

### Closing the Deal



Establishing an authentic connection.

Exploring needs and challenges.

Hands-on engagement with **Points of You®**.

Connecting the experience to solutions and next steps.

Creating clarity and defining the next steps.

**Stage 1: Bonding**



**Goal**: Establish an authentic connection and create the feeling of a long-term journey together. At this stage, focus on reading the person in front of you and working with what they bring to the conversation:

#### Energy Level:

Are they enthusiastic, reserved, formal, or casual? Match their tone accordingly.

#### Content & Expression

Listen not only to what they say but how they say it – observe their tone, intonation, and emotional or logical framing.

#### Visual & Environmental Cues:

* + If on Zoom: How do they position themselves? What’s in the background?
  + If in person: What does their office or meeting room say about them? Notice personal items like a family photo, a book, or an award – these can be conversation starters.
  + ​

**Example:** If you notice a family photo behind them, you might say: *“I see a beautiful photo behind you – family is important to you?”* This helps establish a personal, but not intrusive, connection.

### The Power of Authenticity

To create a real connection, be willing to share your own authenticity – even small, personal moments can make a difference.

#### Example:

*“Wow, today has been non-stop for me! But I love that we get to pause and have this conversation.”* This humanizes the interaction, making it genuine rather than transactional. Make it authentic, not something you prepare upfront.

### Introduce Yourself & Points of You®

After a few minutes of informal bonding, it’s time to shift the focus and introduce yourself as well as

**Points of You®**. You can say something like:

*“So, I’d love to share a bit about myself and Points of You® before we dive into your world.”*

At this point:

#### Introduce Yourself (Briefly, 1-2 minutes)

* + Name & role (e.g., *“I’m Yaron Golan, a Points of You® Certified Business Trainer and coach with a background in psychology and business management.”*)
  + A small personal note (e.g., *“And most importantly, I’m a father of three boys!”*)

#### Introduce Points of You® (Max 5 minutes)

* + *“Points of You® is a unique methodology that bridges the gap between the left and right brain, blending structured learning with creative exploration. Our approach is designed to help organizations improve communication, strengthen emotional intelligence, and enhance creativity by creating spaces where participants can open up, share, be heard, and truly listen.*

*We offer hands-on experiential workshops that engage teams in meaningful conversations, professional training programs that develop leadership and coaching skills, and custom experiential toolkits tailored to support corporate learning and organizational growth.”*

Used in 147 countries and available in 30+ languages, our tools have been implemented by leading companies such as Google, Intel, and NASA.

(This can be supported by a simple slide or a one-pager if presenting online.)

### Shifting to the Questioning Stage

Once you’ve introduced yourself and **Points of You®**, transition the conversation towards the client’s needs: Example bridging sentence:

*“So that was a little about us, but I’d love to hear more about you and your organization – what’s on your mind?”*

This opens the floor for the client to share their current challenges and needs, leading seamlessly into the next phase of the meeting.

**Stage 2: Questioning**



**Goal:** At this stage, the focus shifts to active listening and understanding. The objective is to gather essential insights about the conversation partner – whether an HR leader, L&D manager, or another organizational decision-maker.

This is the time to step back, give them space, and create an environment where they feel comfortable sharing. Our role is to:

* Be fully present – Observe non-verbal cues, listen closely to their words, tone, and expressions.
* Ask the right questions – Help them articulate their organizational needs, challenges, and aspirations.
* Use reflective listening – Rephrase and confirm their statements to show understanding.

### Setting the Tone

Begin the conversation with an open invitation:

*“I’d love to hear more about your role and what’s important for you in your organization this year? What are some of your key focus areas?”*

This allows them to freely express themselves, focusing on their priorities and challenges for the upcoming year, setting the stage for a deeper conversation.

### Understanding Their Organization and Context

Now that they’ve introduced themselves, shift towards understanding their organization’s landscape and key needs.

#### Uncovering Organizational Priorities and Challenges

*“I’d love to hear about some of the challenges you and your organization are currently facing – whether in leadership, employee engagement, or team development.”*

Our role is to help them articulate their needs, whether they relate to:

* Leadership challenges such as engagement, retention, or communication.
* Training gaps where managers struggle to develop soft skills.
* Team development issues, including collaboration, innovation, or employee well-being.
* Broader organizational challenges, such as cultural shifts or change management.

#### Key Context for the Interviewer

* If the client shares a personal challenge in their role (such as their own leadership struggles or navigating team issues), this is an opportunity to build rapport and become their partner in solving it.
* If they describe a wider challenge affecting their managers or employees, guide the discussion towards understanding what’s missing in their current learning and development approach.
* In both cases, the approach should be one of curiosity, asking open-ended questions, and allowing them to lead the discussion while uncovering potential gaps where **Points of You®** could add value.

### Follow-Up Questions to Dig Deeper

Before diving deeper, it’s important to set the tone for this part of the conversation. We want them to feel comfortable exploring their challenges openly without pressure.

*“I really appreciate everything you’ve shared so far. If it’s okay with you, I’d love to use my experience and resources to help you explore this further. Whether we end up working together or not, my goal is to bring as much value as possible to this conversation. Let’s take a few minutes to reflect on this together – does that sound good to you?”*

This ensures that:

* They feel safe to open up.
* It doesn’t feel like we are selling – instead, we are supporting them.
* It shows genuine care and partnership.

Once we have their permission to explore, we move into deeper questions:

* How long has this been an issue?
* What have you tried so far to solve it?
* What impact is this challenge having on employees, managers, or the organization?
* What do you believe needs to happen to improve the situation?
* What obstacles are preventing this change from happening?

If responses remain surface-level, encourage deeper sharing by asking:

* That’s interesting – can you tell me more about that?
* Let me check if I understood correctly – what you’re saying is… (paraphrase). Is that right?
* You mentioned [specific point] – why do you think that is happening?

These techniques help uncover hidden insights while ensuring the conversation remains collaborative and engaging.

### Transitioning to the Experience Stage

Once the conversation has uncovered key needs and gaps, transition smoothly into an experiential session that allows them to experience the impact of **Points of You®** firsthand.

*“Thank you for sharing. I already have a lot of ideas on how we might work together, but before I share them, I’d love to invite you to experience one of our tools.”*

#### Introducing Speak Up

*“Speak Up is an interactive tool designed to open up new perspectives through visual metaphors, powerful words, and thought-provoking questions. It’s structured to spark meaningful conversations and reveal insights that might not be immediately visible.”*

*“Let’s do a short experience together. You can choose to focus on something we just discussed or any other topic you’d like to explore further. I’ll guide you through the process, and my goal is for you to gain at least one valuable insight from it.”*

*“What do you say? Let’s give it a try.”*

**Stage 3: Experience**



The Experience Stage is where we shift from discussion to immersion – allowing the participant to experience firsthand how **Points of You®** creates insights and deep conversations. Rather than just talking about solutions, we guide them through a reflective process that helps them see their challenges, opportunities, and next steps in a new way.

Through this guided experience, they will connect with their thoughts, explore different perspectives, and gain clarity – whether or not we move forward together. The focus is not on selling but on creating a meaningful and memorable interaction.

### Step 1: Choosing a Photo Card

The facilitator spreads out the Speak Up photo cards in front of the participant or opens the Speak Up digital layout chart if using a virtual format. The participant is invited to select a photo card from the deck.

Facilitator’s Instructions:

*“Take a look at the images in front of you. If there were no limitations – if you had unlimited resources, full creative freedom, and no external constraints – what would the ideal solution to your challenge look like?”*

Encourage them to think beyond their usual boundaries:

* Imagine there are no budget restrictions, no HQ approvals, and you can hire or restructure teams as needed. Anything is possible.
* Let yourself be drawn to an image – whether it’s the colors, themes, or even something that feels missing. You can go through them one by one or choose intuitively – whatever speaks to you.

Once the participant selects a card, guide them in exploring their choice:

* *“What stands out to you in this image?”*
* *“How does this image connect to the challenge you are facing?”*
* *“What does this tell you about the solution you are looking for?”*

If relevant, the facilitator can offer a gentle reflection, linking their selection to earlier insights from the conversation, and inviting them to expand on their thoughts.

### Step 2: Adding a Word Card – Moving Toward Action

After reflecting on the photo card, the participant is guided to choose a word card – but this time, face down, so it is selected randomly.

Facilitator’s Instructions:

*“Now, let’s take this one step further. The photo gave us insight into your ideal solution – now let’s look at the next step. In front of you is a deck of word cards, but this time, we will select one without looking.” “Once you pick a card, let’s explore how it connects to your image and your journey forward.”*

Once they reveal their word card, guide the discussion:

* What is your first reaction to this word?
* How does it connect to your photo card?
* Does this word offer a new perspective on your challenge or the solution you envisioned?

Now, bringing it to action:

*“Looking at both your photo and this word – what does this tell you about the next step?” “What is one small action that you can take to move closer to your solution?”*

*“What would help you bridge the gap between where you are now and where you want to be?”*

This is key: We don’t want them to leave the conversation only in the fantasy of possibilities; we anchor it in movement.

If they struggle to connect the word to a clear next step, guide them:

* If you had to take one step toward your ideal situation, what would it be?
* How can this word serve as a reminder or guide for that next step?

If they feel the word doesn’t fit, offer them the possibility to switch:

*“If this word doesn’t quite resonate, you’re welcome to pick another one – sometimes, a different word reveals a new angle. But before you do, let’s see if we can find a connection together.”*

The facilitator can also:

* Read a quote from the book related to the word, if relevant.
* Offer a simple question from the book that deepens reflection.

### Step 3: Concluding the Experience

As the participant reflects on both the photo and word connection, guide them toward consolidating their insight into action.

Facilitator’s Instructions:

*“This was a short experience, but we can already see how powerful it is when we step back and explore challenges visually. What is one insight you are taking from this?”*

Acknowledge the depth of the conversation:

*“Thank you for sharing and for going deep into this process. It’s not always easy to pause and reflect in this way.”*

Before moving into the guiding stage, set the context:

*“What we just experienced was just a glimpse of what’s possible. In our longer programs, we can dive even deeper – sometimes over several days – to create real, lasting transformation. Based on what we explored, I have some ideas for how we can continue this journey together.”*

This naturally transitions into the Guiding Stage, where recommendations and next steps are discussed.

**Stage 4: Guiding**

**Goal:** Connecting the Dots

At this stage, we shift from exploration to action – translating insights from the Experience Stage into a clear, relevant solution for the client.

The participant has now expressed their challenges, reflected on them through the Speak Up experience, and gained insights about their situation. Now, we offer a pathway forward using **Points of You®** solutions.

The purpose of this stage is to:

* Show them that a solution exists.
* Connect their pain points to the potential impact of our approach.
* Create excitement and curiosity about working together.
* Provide a first idea of what a collaboration could look like.

This is where we position ourselves as a strategic partner rather than just a service provider.

### Presenting the Solution

Rather than offering a generic pitch, we tailor the approach based on the conversation.

*“From everything we've discussed today, I see a few ways we could move forward together. Let me share some initial thoughts with you.”*

Depending on the situation, we frame our solution in one of three ways:

#### Experiential Workshops – Learning Through Doing

*“One way we could approach this is through an interactive, hands-on workshop that directly addresses [insert challenge they mentioned].”*

Workshops are designed to:

* + Create impactful learning experiences that are highly engaging.
  + Encourage personal and team reflection through **Points of You®** tools.
  + Support leadership and communication skills development in a safe and creative environment.
  + Generate immediate takeaways that participants can apply in their work.

*“For example, we could design a one-day experience for your leadership team to help them explore [insert relevant theme] in a way that is meaningful and transformative.”*

#### Professional Trainings – Teaching Them the Tools

*“If you're looking for something deeper, we could consider a training program – where instead of just delivering an experience, we teach your managers how to apply these tools themselves.”*

Professional training is ideal when:

* + The organization wants an ongoing learning process rather than a one-time experience.
  + The client is interested in building an internal capacity for coaching, communication, and team development.
  + There’s a need to empower HR, managers, or leaders to create change inside their teams.

“For example, we could run a program where we train HR professionals and team leaders to use **Points of You®** methodologies within their organization, helping them to integrate creative thinking and deep conversations into their leadership approach.”

#### Developing Organizational Toolkits – Customized Solutions

*“Another way we could work together is by developing a custom toolkit – something designed specifically for your organization, aligned with your culture and strategic goals.”*

This is particularly relevant when:

* + The company wants a long-term impact and not just a single event.
  + They have specific organizational needs that require a tailored solution.
  + They value internal ownership, meaning they want their people to have structured tools they can use consistently.

*“For example, we could design a series of conversation tools that managers in your company can use during team meetings to improve communication and alignment.”*

### Guiding the Discussion – Refining the Offer

At this point, we open the conversation rather than just presenting a fixed package.

*“I see a lot of potential in these directions. What resonates with you the most?”*

This allows them to:

* Share their initial reaction.
* Express preferences or concerns.
* Refine the direction to ensure the solution feels relevant to them.

If they seem unsure, we guide the conversation with more direct questions:

* “*What type of format do you think would work best for your team?”*
* *“Are you looking for a solution that is quick and impactful, or something more long-term?”*
* *“Do you see this as something for a small leadership group, or something that could eventually expand to more teams?”*

The goal is to co-create the idea rather than just selling something pre-packaged.

### Understanding the Scope and Next Steps

Once the discussion starts shaping into a direction, we sense the scope of collaboration and explore next steps.

#### If it’s a one-time workshop, confirm details and try to seal it on the spot.

*“It sounds like a workshop could be a great way to introduce this approach to your team. If this makes sense, we can start looking at possible dates and structure.”*

If there’s enthusiasm, lock it in immediately rather than postponing decisions.

#### If it’s a bigger program, define the next step.

*“If this is something that could be part of a broader initiative, I’d love to develop a structured plan and present it to you. Would it make sense to schedule a follow-up to refine the details?”*

This shows commitment without pressure, allowing them to think through logistics.

#### If it requires internal discussions on their end, set a follow-up point.

*“I know these decisions often require internal alignment. Would it be helpful if I sent you a brief outline of what we discussed so you can easily share it with your team?”*

**Proactive Tip**: Instead of waiting for them to relay the information, offer to be part of the follow-up meetings.

*“I’d be happy to join your next discussion with key decision-makers to present the approach firsthand and answer any questions. That way, we can ensure everyone has the clarity they need.”*

By staying engaged in their internal process, the conversation remains active rather than stalling, increasing the chances of a successful outcome.

### Creating Excitement and Momentum

We want them to leave this stage feeling energized and optimistic about the potential collaboration.

* Show belief in the solution:

*“I genuinely believe that this could create a real shift in how your team approaches [specific challenge].”*

* Show flexibility and partnership:

*“I want to make sure this fits your needs perfectly, so we can refine things together as we move forward.”*

* Show enthusiasm for next steps:

*“I’m really excited about the possibilities here. Let’s set a time to finalize how we want to proceed.”*

### Final Transition – Moving Toward Closing Deal Stage

*“I really appreciate this conversation, and I see a lot of exciting potential in working together. What would be the best way for you to move forward from here?”*

This gently moves them toward making a decision, whether it’s a firm commitment, a follow-up, or a structured next step.

**Stage 5: Closing Deal**

**Goal:** Creating Clarity and Defining Next Steps.

Closing the deal is not just about getting a “yes.” The most important outcome of this stage is clarity – understanding where the client stands and ensuring both sides agree on the next steps, whatever they may be.

Regardless of the outcome, we leave the meeting with alignment and a positive connection.

### Guiding the Decision: Yes, No, or Not Now

If the client is interested and ready to move forward, we clarify the next steps:

* For a workshop or training:

*“Great! Let's look at scheduling dates and finalizing details.”*

* For a larger collaboration:

*“Would it be helpful if I put together a detailed proposal so we can refine it further?”*

* If they need internal approval:

*“What’s the best way to support you in presenting this internally?”*

If the client expresses hesitation:

* Budget concerns:

*“I completely understand budget constraints. If this approach makes sense for your team, we can explore different options – whether that’s a phased approach or a pilot program to start small.”*

* Timing concerns:

*“I get that timing is everything. If now isn’t the right moment, when do you think would be a better time to revisit?”*

* Uncertainty about value:

*“Would it be helpful to share more examples of how other organizations have used this to drive impact?”*

If the answer is a clear “no”, that’s also a great outcome:

* *“I appreciate your honesty. Even if this isn’t the right fit today, I’d love to stay in touch and see how things evolve in the future.”*
* *“Let’s keep the door open for later. If something changes, I’d be happy to reconnect.”*

The key is to leave on a positive note – even a “no” today can be a “yes” later.

### Understanding Decision Timelines

Different organizations have different decision-making processes:

* Small organizations can often make faster decisions and move forward quickly.
* Larger organizations tend to require more time – sometimes months or even a year – due to internal approval processes.

Finding the balance:

* For small organizations:
  + If they’re ready, close the deal on the spot.
  + If they need a little more time, set a clear follow-up timeline.
* For larger organizations:
  + Understand their approval process and key decision-makers.
  + Offer to provide additional materials or follow-up meetings to help move things forward.
  + Be patient but proactive – stay in touch without being overly pushy.

In an ideal situation, you should have a mix of small and large clients:

* Small projects → Bring immediate results and early success.
* Bigger partnerships → Take longer but offer long-term growth and impact.

### Final Transition & Follow-Up Strategy

Before closing, we clarify next steps based on the conversation:

*“This has been a really valuable discussion. I want to make sure we move forward in a way that makes the most sense for you. What’s the best next step from here?”*

Depending on their response:

1. If moving forward → Confirm details immediately.
2. If needing time → Set a clear follow-up.
3. If they say no → Keep the relationship open for future engagement.

After the meeting, always follow up – whether to confirm next steps, send materials, or simply express gratitude for the conversation.

**Resistance**

**What It Really Means**

**How to Address It**

**Dealing with Resistance – Organizational Context**

#### Resistance is a Positive Sign

When organizations express resistance, it’s not a rejection – it’s an opportunity. Resistance often means they are engaging in the decision-making process and seeking clarity before making a commitment.

A company that raises concerns, challenges pricing, or asks tough questions is demonstrating interest. The real sales conversation begins when resistance appears – it means they are actively considering the investment.

Our role is to:

1. Acknowledge and welcome their concerns.
2. Understand the reason behind the hesitation.
3. Provide clarity, confidence, and reassurance.

### Understanding the Types of Resistance in Organizations

Resistance can come from different levels of decision-makers in an organization. It’s important to identify whether it’s:

* + **Budget-related** – The company is concerned about financial investment.
  + **Relevance-related** – They don’t fully see how it applies to their needs.
  + **Approval-related** – They need internal buy-in from leadership or HR.

Common Forms of Resistance & How to Approach Them:



*“We need to consult with the leadership team.”*

*“We need to think about it.”*

*“It’s too expensive.”*

They may need internal buy-in or a higher-level decision- maker to approve it.

They may lack confidence in the decision, or this may be a polite way of saying no because they don’t fully see the value.

They recognize the value but are unsure if they can justify the cost.

Offer to provide a short business case or summary for internal discussions.

Ask, *“Would it be helpful if I joined your next leadership discussion to address any questions firsthand?*”

Identify who the key decision-makers are and how they evaluate solutions.

Ask, *“What exactly do you need to think about? Is there something that’s unclear?”*

Ensure they understand the real value of what we’re offering – help them connect it to their needs.

Ask, *“If it were up to you to decide, do you think this program/workshop would be beneficial?”*

Based on their response, determine if it’s a true hesitation or a lack of perceived value.

Reframe the investment: *“I understand budget constraints. Let’s explore how we can align this with your priorities – whether that’s a phased approach, a pilot program, or flexible payment options.”*

Shift the focus: *“Let’s put the budget aside for a moment – do you believe this solution will truly work for your organization?”*

This helps determine if the real issue is cost or if they don’t fully see the impact yet.

*“We already have training programs in place.”*



They don’t yet see the differentiation between their current programs and what you offer.

Highlight how this approach enhances existing initiatives rather than replaces them.

Provide case studies or success stories of similar organizations that integrated **Points of You®**.

Ask, *“How do you currently measure the success of your programs? Would it be valuable to explore new ways to enhance them?”*

*“We’re shifting priorities right now.”*

The organization may be dealing with internal changes and unsure if this is the right time.

Keep the conversation open: *“I completely understand. When would be a better time to revisit this conversation?”*

Offer support: *“From experience, major shifts can bring challenges. We’ve helped organizations in similar transitions – would it be helpful to explore how we can support your teams during this time?”*

This approach positions us as a partner, not just a service provider.

# Recording

### What NOT to Do When Facing Resistance

1. Panic or become defensive – Resistance is normal and part of the process.
2. Argue or push too hard – Instead, listen and adapt.
3. Dismiss concerns – Every question is a sign of interest and deserves a thoughtful response.

### What TO Do When Facing Resistance

1. Stay calm and lean back. Don’t rush to fix it – let them express their concerns fully.
2. Listen deeply. Ask clarifying questions to understand their real concerns.
3. Show empathy. Acknowledge their hesitation and align with their perspective.
4. Clarify if the resistance is real or just hesitation. Sometimes, concerns are simply a need for reassurance rather than a real barrier.
5. Reflect back what you hear. “I hear that you're concerned about the timing – let's talk about what would make this work for you.”
6. Provide a relevant answer or solution. Adapt based on what they need.
7. Go for closing again. If resistance is addressed, ask: “If we could find a way to align this with your needs, would you be open to moving forward?”

### How Many Times Should You Address Resistance?

It’s common for organizations to raise concerns multiple times before making a final decision. A good rule is:

* + Overcome resistance at least three times before considering it a hard “no.”
  + If resistance continues, agree to revisit at a later date while keeping the relationship warm.

### Closing Techniques for Organizations

1. Agree on the principle.

*“We both agree that leadership development is important – now it’s just about finding the right approach.”*

1. If… then… structure.

*“If we can create a solution that fits within your budget, would you be open to moving forward?”*

1. Use success stories.

*“Other organizations we’ve worked with had similar concerns, and now they’re seeing great results after implementing this.”*

1. Show confidence.

*“I trust our approach enough to say – trust me, this will bring real impact.*”

### Final Thoughts – Shifting from Resistance to Opportunity

Resistance is not a rejection – it’s part of the natural process of making a thoughtful decision.

The goal is not just to overcome objections but to guide the organization toward clarity – whether that means moving forward now, later, or simply staying connected for future opportunities.

Below you can see a demo example of the Marketing Meeting conducted by Yaron during the BTC Session with one of our participants:

# Follow-Up

The Follow-Up stage is where we turn interest into action and relationships into long-term partnerships. It’s not just about closing deals – it’s about nurturing connections, building trust, and staying top of mind, even if the client isn’t ready right now.

The follow-up process has two key tracks:

#### Closing the deal

For clients who showed strong interest and want to move forward.

#### Nurturing relationships

For clients who said “not now” but may be interested in the future.

Let’s break down how to handle both situations effectively.

### Closing the Deal – Turning Interest into Commitment

A client makes a decision not just based on the offer, but based on the relationship and trust they have in us. They need to believe that:

* + We walk the talk and can deliver what we promise.
  + We are professionals they can rely on.
  + The investment is worth it for their organization.

To strengthen the relationship after the Marketing Meeting, we must:

#### Step 1: Immediate Follow-Up – Strengthening the Connection

* + Send a thank-you email or WhatsApp message within 24-48 hours.
  + Acknowledge the conversation, their insights, and the potential of working together.
  + Express excitement about the possibilities and confirm you will follow up with an official offer.

Example Follow-Up Message (WhatsApp or Email)

*"Hi [Name], I really enjoyed our conversation today – thank you for sharing your insights! I see great potential in how we can work together, and I’m excited to explore the next steps. I’ll be sending you a summary of our discussion along with an offer shortly. Looking forward to your thoughts!"*

#### Step 2: Sending the Official Offer

The proposal should summarize the key takeaways from the meeting and clearly outline the next steps. The Proposal Should Include:

* + Reaffirm the client’s challenge – What they shared as their needs.
  + The proposed solution – Whether it’s a workshop, professional training, or a customized toolkit.
  + The value proposition – How Points of You® can solve their challenge.
  + Pricing & options – Always start slightly higher to leave room for negotiation.

#### Tip:

After sending the proposal via email, follow up with a WhatsApp message to make sure they’ve received it.

*"Hi [Name], I’ve just sent you the proposal – looking forward to hearing your thoughts!"*

#### Step 3: Handling Multiple Decision-Makers

Sometimes, the person we spoke with is not the final decision-maker. They might need internal buy-in from leadership or approval from procurement. Deals often stall here if we don’t support them in this process.

#### Offer to join their internal discussions:

*"Would it help if I joined a meeting with your leadership team to present the approach firsthand?"*

#### Provide an internal summary deck:

Prepare a one-pager summarizing key points for internal decision-makers.

#### Ask about their decision process:

*"Who else should be involved in this discussion to make it happen?"*

This ensures the deal keeps moving and doesn’t get lost in internal approvals.

#### Step 4: Creating Urgency Without Pressure

Some clients want to move forward but don’t have a clear timeline – and without urgency, the deal can lose momentum.

#### Use limited-time incentives:

*"If we finalize by [date], we can offer an additional training session for your managers at no extra cost."*

#### Align with internal events:

*"Would it make sense to schedule this alongside your next leadership retreat or annual strategy session?"*

#### Position it as a strategic priority:

*"From our experience, organizations that act now see better results because they implement insights while they’re fresh."*

This helps prevent delays while ensuring the client feels in control of their decision-making process.

#### Step 5: Handling Negotiations & Closing the Deal

Not every client says yes immediately. It’s important to:

* + Understand what they need to say yes.
  + Ask the right questions to move toward a decision.
  + Be flexible in structuring the first step.

Example Follow-Up Questions for Closing the Deal:

*“What do you need to move forward?” “What would make this a clear yes for you?”*

*“Would a pilot program help your team experience the impact first?”*

**Tip:** If there’s resistance, offer a small entry point – even a short session – to get a foot in the door.

### Nurturing Relationships – Keeping the Door Open

Some clients say "not now", but that doesn’t mean "never." The goal is to stay on their radar without being pushy.

#### Structured Follow-up: How Often to Reach Out?

Many deals stall not because of lack of interest, but because follow-ups are inconsistent. Suggested Follow-Up Timeline:

* + Immediately after the meeting – Thank-you email + WhatsApp.
  + Within 3-5 days – Send the proposal.
  + After 7-10 days – If no response, a polite check-in: “Just checking if you had a chance to review the proposal. Happy to answer any questions!”
  + After 3 weeks – If still no response, reposition: “I understand things get busy! Would it make sense to revisit this next month?”
  + Every 3-6 months for nurturing contacts – Share relevant insights, webinar invites, or success stories to stay in touch.

A structured follow-up plan ensures no opportunities are lost due to inactivity.

#### Stay in Touch Strategically

* + Send occasional check-ins – A short message to see how they’re doing.
  + Invite them to webinars or events – Keep them engaged with valuable content.
  + Share relevant updates – If something aligns with their interests, send it their way.

Example Follow-Up Message for a “Not Now” Client

*"Hi [Name], I wanted to check in and see how things are going on your end. No pressure at all – just wanted to keep in touch. I also wanted to invite you to [event/webinar] that I think you’d find valuable. Let me know if you’d like more details!"*

#### Case Studies & Social Proof in Follow-Ups

Some clients need extra confidence before saying yes.

#### Share client success stories:

*"A similar company implemented this and saw [specific results]."*

#### Use credibility markers:

*"This approach is used by companies like Google, Intel, and NASA."*

#### Offer a reference call:

*"Would you like to speak with another organization that has used this program?"*

This reassures the client that they are making a well-informed decision.

#### Your Case Study & Referral List

Take a moment to write down real examples that you can share with potential clients. Having these ready will make follow-ups smoother and more effective.

What case studies or success stories do you have? (Write down key client examples and results.)

Key client examples and results:

Do you have a referral contact who can share their experience?

(List any happy clients who might be willing to speak with new prospects.)

Happy clients who might be willing to speak with new prospects:

Which industries or companies align with the client you’re following up with? (Identify relevant examples that match the prospect’s field.)

Relevant examples that match the prospect’s field:

# Points of You® Brand Guidelines

What key messages or stats will you use to build credibility?

(Summarize key insights, testimonials, or numbers that demonstrate impact.)

Key insights, testimonials, or numbers that demonstrate impact:

#### Avoid Wasting Resources on “Maybe” Clients

Be aware of false hope. Some clients don’t want to say no, but they also won’t commit. This creates a situation where we keep following up with no clear outcome.

* + Get clear answers – A clear "no" is better than an endless "maybe."
  + Don’t waste resources on fantasy deals – If a client consistently delays, it’s best to redirect efforts elsewhere.
  + If they’re not ready now, move them to the nurturing track.

How to Politely Push for Clarity:

*"I completely understand if the timing isn’t right now. Just so I can plan on my end – would you say this is something to revisit in a few months, or is it not the right fit at all?"*

A clear no allows you to move on and focus on other clients.

### Key Takeaways

* + Follow up quickly after the marketing meeting – don’t let interest fade.
  + The client buys into YOU first, then the offer – build trust.
  + Send a strong proposal that aligns with their needs.
  + Negotiate smartly and offer smaller entry points if needed.
  + If they say “not now,” keep the relationship warm without being pushy.
  + Avoid getting stuck in false "maybes" – get clear answers.

### Introduction: The Importance of Branding & Guidelines

As a **Points of You Certified Business Trainer**, you are an official representative of our brand. Your role comes with both opportunities and responsibilities. This chapter provides clear instructions on what you can and cannot do while using **Points of You** materials, branding, and methodology.

Maintaining brand consistency is essential to ensuring credibility, professionalism, and recognition in the business world. While you have creative flexibility in delivering workshops, there are specific branding rules that must be followed.

**Note:** In this document, the term “workshops” refers to both workshops and trainings, unless otherwise specified.

Please keep in mind that this is a living document. As we grow together, it will evolve. With your feedback and real-world examples, we will continue to refine these guidelines for even greater clarity.

If at any time you are unsure about branding guidelines, please reach out to us at [support@points-of-you.com](mailto:support@points-of-you.com), and together we will find a solution.

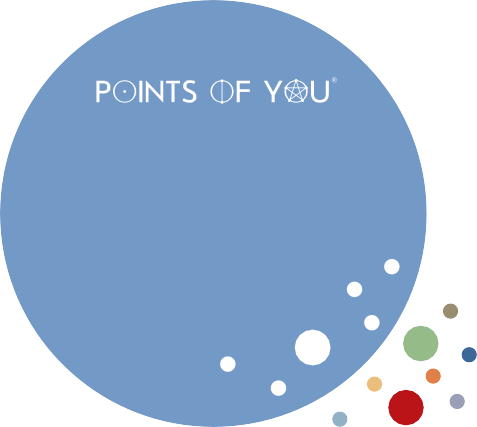
### What You CAN Do as a Points of You Certified Business Trainer

Once certified, you are allowed to:

* + **Facilitate Official Points of You Workshops & Trainings**
    - You can lead workshops detailed in the certification booklet (See Section: Official Workshops & Trainings).
    - These are the only workshops you can call Official **Points of You** Workshops or Training.
  + **Create Your Own Workshops Using Points of You Methodology**
    - You can design custom workshops using **Points of You** tools and methodology.
    - You must clearly title them as: “[Workshop Name] using **Points of You** tools and method”.
    - You can use our methodology but cannot claim your workshops are part of the official **Points of You** program.
  + **Teach Teams & Managers**
    - You can introduce **Points of You** tools to organizations, teams, and managers.
    - You may facilitate Train the Trainer (TTT) modules 1-3 as detailed in your certification.
    - You cannot teach other facilitators under you to facilitate the Official Workshops or TTT modules.
  + **Use Points of You Certification in Your Professional Branding**
    - You can add your certification to your resume, LinkedIn, and email signature.
    - You may introduce yourself as a **Points of You Certified Business Trainer**.
  + **Use the Official Points of You Presentation for Official Workshops**
    - You will use the pre-designed presentation template to promote the Official **Points of You**

Workshops

* + - You can add your content, but you cannot alter its branding or design elements.
  + **Translate Marketing Materials**
    - You can translate official marketing materials into your own language.
    - The meaning and branding must remain intact.
  + **Utilize Provided Brand Assets**
    - You will receive PowerPoint templates, digital business cards, Zoom backgrounds, and social media templates to maintain brand consistency.
    - These materials are for your use as a Certified Trainer only.



**Certified Business Trainer**

### What to remember as a Points of You Certified Trainer

Please pay attention that you are not entitled to:

* + **Modify the Points of You Business Trainer Logo**
    - You must use the logo as provided without any modifications.
    - No additional elements, colors, or effects can be added.
    - You cannot incorporate the logo into your own graphics, designs, or marketing materials unless explicitly permitted.
  + **Use Points of You Branding in Unrelated Workshops**
    - When using only a **Points of You** process in your workshop, you must credit the source by stating it originates from **Points of You**.
    - Your independent training materials cannot include the **Points of You** logo or branded materials, except for Official Postcards, Toolkit Photos - giving the attribution to **Points of You**
  + **Certify Other Trainers**
    - You cannot authorize or certify other facilitators under your name.
    - Certification is only granted through the official **Points of You** training process.
  + **Use Your Own Presentation Templates with the Points of You Logo**
    - If you create your own PowerPoint slides, you cannot add the **Points of You** logo.
    - The **Points of You** branding can only be used on the provided official templates.
    - You may use the **Points of You Certified Business Trainer** logo in your own presentations solely to showcase your certification title, but not to imply that the entire workshop is officially affiliated with **Points of You**, unless it meets the criteria of an Official Workshop.
  + **Claim Certification Without Completing the Full Process**
    - If you have not fully completed the certification process, you cannot claim to be a **Points of You Certified Business Trainer**.
    - You may state that you have been trained in **Points of You** tools, but without the official certification title.
  + **How to Present Your Certification Properly**
    - You may state that you are a **Points of You Certified Business Trainer**.
    - You cannot present yourself as **Points of You**, nor imply that you are an employee, owner, or official representative of the company.
    - Your certification acknowledges your expertise in the methodology, but it does not grant the right to act on behalf of the company beyond your certified role.
  + **Share or Modify Official Materials**
    - You cannot alter, redesign, or distribute **Points of You** materials beyond your personal translations.
    - They must retain the original design, look and feel, and must use the fonts specified in the Brand Book. Postcards cannot be redesigned, resold, or repurposed beyond their original intent.
    - Presentation open files are for your personal use only and may only be used for translation, marketing, selling, and facilitating official **Points of You** workshops. They must retain the original design, branding, and format.
  + **Use Points of You for Commercial Licensing**
    - You cannot sell or distribute any **Points of You** materials without approval.
    - Branding, methodology, and tools are for use within your certified role only.

### Official Points of You Workshops and Trainings

As a certified trainer, you can only refer to the following workshops as Official **Points of You** Workshops:

* + **Click & Connect**
  + **Culture Compass**
  + [**Team Fusion**](#_bookmark73)

As a certified trainer, you can only refer to the following trainings as Official **Points of You** Trainings

* + [**Speak Up - Train the Trainer (TTT) Modules 1, 2 & 3**](#_bookmark73)

Rules for Official Workshops:

* + These workshops follow a structured methodology and branding.
  + You can adapt the process to fit an organization’s needs, but at least 80% of the workshop must follow the official structure.
  + No other tools or external methodologies may be included in these workshops.
  + You may market these workshops as official **Points of You** experiences.
  + If a workshop does not meet these criteria, it cannot be called an **Official Points of You Workshop** and should instead be described as a custom workshop using **Points of You** tools and method.



[**Team Fusion**](#_bookmark80)

### Final Notes & Compliance

Key Reminders:

* + Stick to the official branding and materials provided.
  + Use the brand’s voice and messaging as outlined in the guidelines.
  + Represent the brand professionally and ethically at all times.
  + If unsure about branding usage, ask before acting.

Violating these branding rules may result in a review of your certification status. We trust our trainers to act in alignment with the brand, but to maintain the integrity of **Points of You**, we may need to take appropriate steps if significant branding misuse occurs.

If you have questions regarding branding, assets, or compliance, please reach out to [support@points-of-you.com](mailto:support@points-of-you.com).

Thank you for being a part of the **Points of You** family! Let’s make an impact together.





[**Click & Connect**](#_bookmark74)



[**The Culture Compass**](#_bookmark75)

[**Train the Trainer**](#_bookmark76)

[**www.points-of-you.com**](http://www.points-of-you.com/)

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