SITUATIONAL TEAM LEADERSHIP

Facilitator Guide

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SITUATIONAL TEAM LEADERSHIP
FACILITATOR GUIDE

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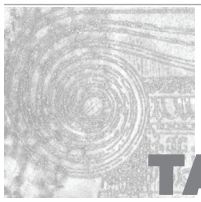

TABLE OF CONTENTS

Preface vii

TRAINING PREPARATION

Tools for Success 1
Facilitator Materials 4
Participant Materials 5
The Training Experience 6
Workshop Facilitation 7
One-Day Training Design 9
The Road Map 11

ACTIVITIES

Activity 0: Session Lead-in 1
Activity 1: Introduction 3
Activity 2: Materials Review 7
Activity 3: Team Challenges 11
Activity 4: Teamwork! Game Introduction 15
Activity 5: Collaboration and Teamwork 17
Activity 6: Obstacles to Success 23
Activity 7: The Team Performance Process 25
Activity 8: Teamwork! Game 2 33
Activity 9: Team Performance Process—Step 1 37
Activity 10: My Best Team 39
Activity 11: PERFORM 41
Activity 12: TPA Introduction 51
Activity 13: Team Performance Process Review 1 55
Activity 14: Team Dynamics Overview 57
Activity 15: Team Checkup Introduction 61
Activity 16: Teamwork! Game 3 63
Activity 17: Team Performance Process—Step 2 67
Activity 18: The Team Charter Overview 69
Activity 19: The Team Charter Elements 71
Activity 20: Work Team Mini-Charters 75
Activity 21: Benefits of a Charter 79
Activity 22: TPA 2 81
Activity 23: Team Performance Process Review 2 85

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Activity 24: Teamwork! Game 4....87
Activity 25: Team Performance Process—Step 3....91
Activity 26: Team Development Overview....93
Activity 27: Help Is on the Way! Card Sort (Option A)....97
Activity 28: Help Is on the Way! Presentation (Option B)....101
Activity 29: Team Development Presentation....111
Activity 30: Build the Team Development Model....117
Activity 31: Tech Talk....119
Activity 32: Team Diagnosis....127
Activity 33: Team Checkup 2....131
Activity 34: TPA 3....133
Activity 35: Team Performance Process Review 3....135
Activity 36: Teamwork! Game 5....137
Activity 37: Team Performance Process—Step 4....141
Activity 38: Team Leadership Overview....143
Activity 39: Build the Team Leadership Model (Option A)....151
Activity 40: Tech Talk Leadership (Option B)....153
Activity 41: DeKal Case Study....157
Activity 42: Team Leadership Review....167
Activity 43: TPA 4....173
Activity 44: Team Performance Process Review 4....175
Activity 45: Teamwork! Game 6....177
Activity 46: Team Performance Process—Step 5....181
Activity 47: Team Strategies Overview....183
Activity 48: Team Changes....187
Activity 49: TPA Action Planning....191
Activity 50: The STL Game (Option A)....193
Activity 51: Meet Me at the Fair! (Option B)....197
Activity 52: Tower Building (Option C)....203
Activity 53: Team Checkup 3....209
Activity 54: Teamwork! Game Awards....211
Activity 55: Closing....213

LESSON PLANS

Situational Team Leadership Lesson Plans....1
Activity 0: Session Lead-in....3
Activity 1: Introduction....5
Activity 2: Materials Review....7
Activity 3: Team Challenges....9
Activity 4: Teamwork! Game Introduction....11

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Activity 5: Collaboration and Teamwork 13
Activity 6: Obstacles to Success 15
Activity 7: The Team Performance Process 17
Activity 8: Teamwork! Game 2 19
Activity 9: Team Performance Process—Step 1 21
Activity 10: My Best Team 23
Activity 11: PERFORM 25
Activity 12: TPA Introduction 27
Activity 13: Team Performance Process Review 1 29
Activity 14: Team Dynamics Overview 31
Activity 15: Team Checkup Introduction 33
Activity 16: Teamwork! Game 3 35
Activity 17: Team Performance Process—Step 2 37
Activity 18: The Team Charter Overview 39
Activity 19: The Team Charter Elements 41
Activity 20: Work Team Mini-Charters 43
Activity 21: Benefits of a Charter 45
Activity 22: TPA 2 47
Activity 23: Team Performance Process Review 2 49
Activity 24: Teamwork! Game 4 51
Activity 25: Team Performance Process—Step 3 53
Activity 26: Team Development Overview 55
Activity 27: Help Is on the Way! Card Sort (Option A) 57
Activity 28: Help Is on the Way! Presentation (Option B) 59
Activity 29: Team Development Presentation 61
Activity 30: Build the Team Development Model 63
Activity 31: Tech Talk 65
Activity 32: Team Diagnosis 67
Activity 33: Team Checkup 2 69
Activity 34: TPA 3 71
Activity 35: Team Performance Process Review 3 73
Activity 36: Teamwork! Game 5 75
Activity 37: Team Performance Process—Step 4 77
Activity 38: Team Leadership Overview 79
Activity 39: Build the Team Leadership Model (Option A) 81
Activity 40: Tech Talk Leadership (Option B) 83
Activity 41: DeKal Case Study 85
Activity 42: Team Leadership Review 87
Activity 43: TPA 4 89
Activity 44: Team Performance Process Review 4 91

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Activity 45: Teamwork! Game 6....93
Activity 46: Team Performance Process—Step 5....95
Activity 47: Team Strategies Overview....97
Activity 48: Team Changes....99
Activity 49: TPA Action Planning....101
Activity 50: The STL Game (Option A)....103
Activity 51: Meet Me at the Fair! (Option B)....105
Activity 52: Tower Building (Option C)....107
Activity 53: Team Checkup 3....109
Activity 54: Teamwork! Game Awards....111
Activity 55: Closing....113

VISUAL AIDS

Visual Aid Introduction....1
Situational Team Leadership Visual Aids....3
Situational Team Leadership Flip Charts....25

PREWORK SAMPLES

Prework Samples....1
Think Teams!
Team Performance—An Interactive Introduction
Team Performance Assessment

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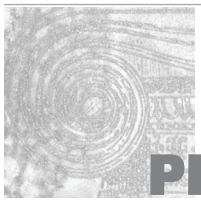

PREFACE

Welcome to Situational Team Leadership!

This real work program provides you with a practical approach drawn from research-based models that have stood the test of time. The workshop focuses on developing team leadership skills and simplifies the often complex nature of teams training.

You are here because you want to work with people in a team context. If you have been on a high performance team or have worked with teams over the years, you know that developing teams is both a science and an art. This facilitator guide will be an aid in the science part. You will bring the art.

The Team Performance Process, the backbone of Situational Team Leadership, provides a solid foundation to get you started on the journey to high performance teamwork. In addition, there are expanded stand-alone modules, assessments, and sustainability tools available in a build-to-suit format that will enable you to leverage the knowledge and skills you have gained from the Team Performance Process.

This workshop incorporates state-of-the-art experiential exercises based on adult learning theory with a best practices training design. Options are provided to accommodate individual facilitator style and needs. Each activity has been tried, tested, and used throughout the world in organizations representing almost every size and culture imaginable. This program, based on the Team Performance Process, represents the best of team processes to be found anywhere.

At the end of the training experience, team leaders will not only have acquired some incredible team development tools, they leave prepared to apply them with their own teams. This team program truly bridges the gap from learning to doing.

We have dedicated a great many years of our professional lives to researching and analyzing the nature of teams and the practices that make them great. This program represents the best of our thinking. We encourage you to embrace it, make it your own, and share it with others.

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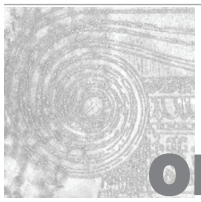

ONE-DAY TRAINING DESIGN

ONE-DAY WORKSHOP

ACTIVITY	TITLE	MINUTES	SCHEDULE
0	Session Lead-In	(5–10)	
1	Introduction	10	
2	Materials Review	5	
3	Team Challenges	20	
4	Teamwork! Game Introduction	8	
5	Collaboration and Teamwork	7	
6	Obstacles to Success	5	
7	The Team Performance Process	10	
	Break	10	
8	Teamwork! Game 2	5	
9	Team Performance Process—Step 1	2	
10	My Best Team	30	
11	PERFORM	10	
12	TPA Introduction	7	
13	Team Performance Process Review 1	1	
14	Team Dynamics Overview	5	
15	Team Checkup Introduction	5	
	Break	10	
16	Teamwork! Game 3	5	
17	Team Performance Process—Step 2	1	
18	The Team Charter Overview	3	
19	The Team Charter Elements	12	
20	Work Team Mini-Charters	25	
21	Benefits of a Charter	3	
22	TPA 2	5	
23	Team Performance Process Review 2	1	
	Lunch	45	

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ACTIVITY	TITLE	MINUTES	SCHEDULE
24	Teamwork! Game 4	5	
25	Team Performance Process—Step 3	1	
26	Team Development Overview	5	
27	Help Is on the Way! Card Sort (Option A)	10	
28	Help Is on the Way! Presentation (Option B)	(10)	
29	Team Development Presentation	6	
30	Build the Team Development Model	15	
31	Tech Talk	40	
32	Team Diagnosis	4	
33	Team Checkup 2	5	
34	TPA 3	3	
35	Team Performance Process Review 3	1	
	Break	10	
36	Teamwork! Game 5	5	
37	Team Performance Process—Step 4	1	
38	Team Leadership Overview	9	
39	Build the Team Leadership Model (Option A)	15	
40	Tech Talk Leadership (Option B)	(15)	
41	DeKal Case Study	25	
42	Team Leadership Review	6	
43	TPA 4	3	
44	Team Performance Process Review 4	1	
	Break	10	
45	Teamwork! Game 6	5	
46	Team Performance Process—Step 5	1	
47	Team Strategies Overview	4	
48	Team Changes	5	
49	TPA Action Planning	15	
50	The STL Game (Option A)	25	
51	Meet Me at the Fair! (Option B)	(35)	
52	Tower Building (Option C)	(35)	
53	Team Checkup 3	5	
54	Teamwork! Game Awards	5	
55	Closing	15	
	TOTAL TRAINING TIME	7 HOURS 05 MINUTES	

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ACTIVITY 1

INTRODUCTION

10 MINUTES

PURPOSE ♦♦♦

Participants are introduced to the purpose and outcomes of the Situational Team Leadership workshop.

REFERENCE •••

Provide a brief background about yourself, share a story, or display a visual aid that shows something about you or a relevant subject.

1. Introduce Workshop

LARGE GROUP 6 MIN.

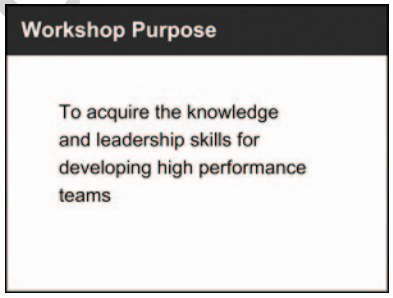
- Display visual aid 2—Welcome.

- Welcome participants to Situational Team Leadership.
- Introduce yourself.

2. Present Workshop Purpose

LARGE GROUP 1 MIN.

- Display visual aid 3—Workshop Purpose.



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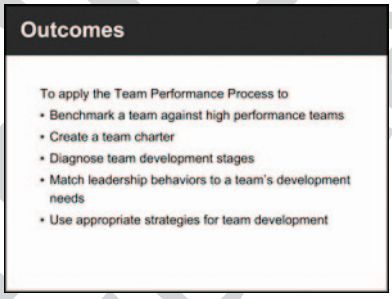
- Refer to workbook page 1—Situational Team Leadership.
- Make this remark ...

  This workshop will help you acquire the knowledge and leadership skills for developing high performance teams.

3. Present Outcomes

LARGE GROUP 1 MIN.

- Display visual aid 4—Outcomes.



- Make these remarks ...

  By the end of this workshop, you will be able to apply the Team Performance Process to:

  - *Benchmark a team against high performance teams*
  - *Create a team charter*
  - *Diagnose team development stages*
  - *Match leadership behaviors to a team's development needs*
  - *Use appropriate strategies for team development*

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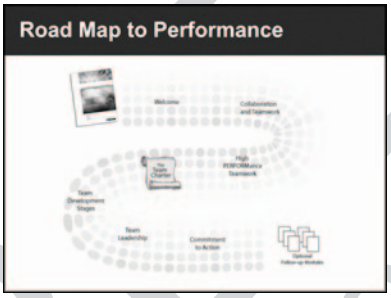
4. Review Road Map

LARGE GROUP 2 MIN.

- Display visual aid 5—Road Map to Performance.



- Refer to workbook page 2—Road Map to Performance.
- Make these remarks ...

  This road map is an overview of your path to high performance teamwork. It begins with the Team Performance Assessment (or TPA), which you completed prior to the session. As you can see, the TPA weaves throughout the major constructs of today's session and continues beyond this workshop.

- Provide relevant information regarding breaks, lunch, environment, or logistics.

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ACTIVITY 3

TEAM CHALLENGES

20 MINUTES

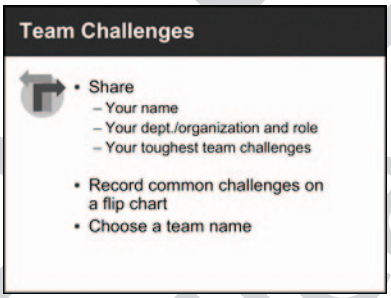
PURPOSE

Participants agree on common team challenges and a team name.

1. Set Up Team Challenges Activity

LARGE GROUP 1 MIN.

- Display visual aid 8—Team Challenges.



- Refer to workbook page 3—Team Challenges.
- Give these directions ...

When you filled out the Think Teams! worksheet as part of your prework, you were asked to identify your toughest team challenges. I'd like you to share your challenges in your group and begin by giving your name and your department or organization.

Then, determine the 4–5 most common challenges and record them on your flip chart.

Throughout today's session, you will be working as a team with the people at your table. So, your final task is to choose a name for your work team. To give you some ideas for a name, take a look at the strengths your team members recorded on the flip chart when you first came in.

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2. Discuss Team Challenges

WORK TEAMS 9 MIN.

3. Share Team Challenges

LARGE GROUP 8 MIN.

REFERENCE • • •
Redisplay visual aid 4—Outcomes if appropriate.

- Ask each team to share their common challenges and their team name.
- Capture team names to record on the Teamwork! Game scoring sheet.

4. Link Challenges to Session Outcomes

LARGE GROUP 2 MIN.

- Point out common challenges among work teams.
- Link challenges to specific outcomes to be covered in the session, such as ...
  - *Not enough time—Although this is not directly dealt with, the reason there's not enough time is that people are not clear about why they are a team and what they are supposed to be doing. If you haven't planned well in the beginning, it takes more time later on. The team charter, which we will be learning more about today, starts out by establishing the team's purpose and reason for being.*
  - *No clear roles—The team charter deals with clarity of roles.*

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- *No accountability—Accountability is often difficult because of the organizational structure; however, understanding what happens at different stages of development will enable you to help make the team more accountable for final outcomes.*
- *Lack of motivation of team members—An understanding of the stages teams go through will help you recognize when low motivation typically occurs and allows you to follow it up with leadership behaviors that address the problem.*
- *Conflict—Although we will not be learning a conflict management process today, an understanding of the Team Performance Process will enable you to defuse some conflicts before they begin.*
- *Personal agendas—Personal agendas often arise when people do not have a shared reason for working together. Gaining clarity around the team's purpose is addressed by the team charter.*

■ Link challenges not covered in the workshop with other resources, such as ...

- *Difficult personalities—Although not specifically addressed today, understanding the stages of team development can help you determine other isses that may appear to be personality conflicts.*

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Sometimes what seems like a difficult personality is simply a person expressing his or her own perceptions. A better understanding of individual differences and how they can actually be a benefit to the team is a critical factor in becoming a high performance team. The DISC and Myers-Briggs Type Indicator® can give you valuable insights about differences among team members.

- Make these remarks ...

  Our intent today is not to cover every single issue, but rather to give you a solid framework that you can build on as you go forward. We'll talk about some of the ways you can do this in the action planning activity.

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ACTIVITY 6

OBSTACLES TO SUCCESS

5 MINUTES

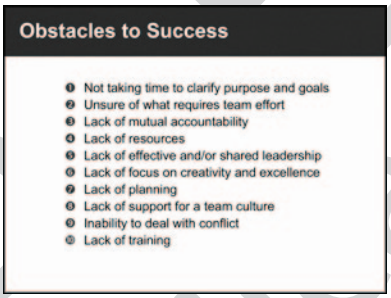
PURPOSE ♦♦♦

Participants are presented with the research on the obstacles to team success.

1. Review Obstacles to Success

LARGE GROUP 3 MIN.

- Display visual aid 16—Obstacles to Success.



- Refer to workbook page 4—Obstacles to Success.
- Point to the Team Challenges flip charts and make these remarks ...

  In the same way that teams have clearly recognized requirements for success, research has likewise identified the obstacles to team success. The team challenges that you listed match the research.

REFERENCE •••

The Team Challenges flip charts were created during Activity 2, step 1.

- Review the obstacles and link to the challenges on the flip charts ...
  - *Not taking time to clarify purpose and goals*
  - *Unsure of what requires team effort*
  - *Lack of mutual accountability*
  - *Lack of resources*
  - *Lack of effective and/or shared leadership*
  - *Lack of focus on creativity and excellence*
  - *Lack of planning*
  - *Lack of support for a team culture*
  - *Inability to deal with conflict*
  - *Lack of training*

REFERENCE •••

Link the obstacles as you address solutions to them throughout the workshop.

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2. Identify Top Three Obstacles

LARGE GROUP 2 MIN.

- Give these directions ...

  Check off the top three obstacles that apply to your team.

- Refer to the team challenges on the flip charts and make these remarks ...

  You can see from your own experience that there are many pitfalls that can keep a team from being successful. The good news is that this session will provide you with a framework that will help you directly address many of these obstacles.

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ACTIVITY 7

THE TEAM PERFORMANCE PROCESS

10 MINUTES

PURPOSE

Participants are introduced to a systematic process for increasing team effectiveness using several research-based models and strategies.

REFERENCE

Post the Team Performance Process poster.

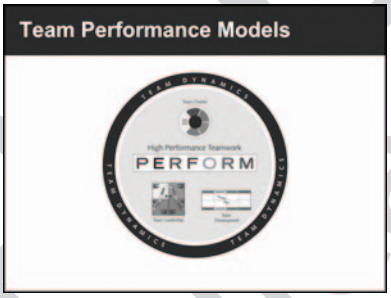
REFERENCE

Do a brief presentation on each of the models if participants have not read Team Performance—An Interactive Introduction, prior to the workshop.

1. Introduce Team Performance Models

LARGE GROUP 1 MIN.

- Display visual aid 17—Team Performance Models.



- Refer to handbook pages 5–6—The Team Performance Models.
- Point to the Team Performance Process poster and make these remarks ...

  The Team Performance Process was designed to bring together several models that grew out of the research on teams and integrate them into a systematic method for creating high performance teams.

  Let's talk about those models for just a few moments.

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ACTIVITY 9

TEAM PERFORMANCE PROCESS—STEP 1

2 MINUTES

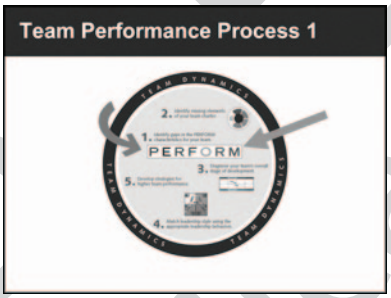
PURPOSE

Participants are introduced to step 1 of the Team Performance Process.

1. Introduce Step 1 of Team Performance Process

LARGE GROUP 2 MIN.

- Display visual aid 28—Team Performance Process 1.



- Refer to handbook page 9—PERFORM.
- Point to PERFORM on the Team Performance Process poster and make these remarks ...

  We're going to start by looking at the characteristics of a team that is functioning at its highest level, because step 1 in the Team Performance Process is to identify gaps in the PERFORM characteristics for your team.

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ACTIVITY 10

MY BEST TEAM

30 MINUTES

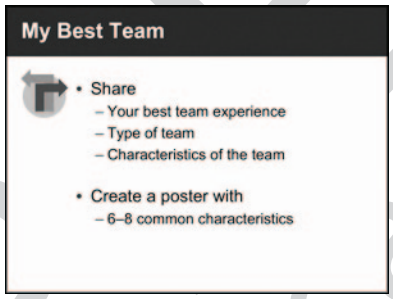
PURPOSE

Work teams identify characteristics of their best teams, which correlate with the research on high performance teams.

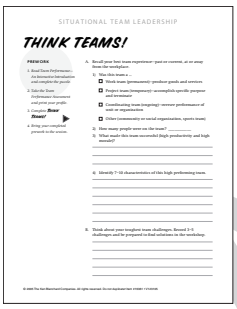
1. Set Up Best Team Activity

LARGE GROUP 2 MIN.

- Display visual aid 29—My Best Team.



- Refer to workbook page 5—My Best Team.



- Give these directions ...

Please refer to your prework—Think Teams!—and in your work teams, share an example of your best team experience—past or current, at or away from the workplace. Indicate the type and size of the team and what made the team successful. Then, compile a list of 6–8 of the most common characteristics that emerged from your stories.

And finally, create a poster, using words or pictures that represent these common characteristics.

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2. Conduct Best Team Activity

WORK TEAMS 15 MIN.

3. Set Up Gallery Walk

LARGE GROUP 1 MIN.

- Display visual aid 30—A High Performance Team.

- Give these directions ...

  We are now going to do a gallery walk and visit each of the posters you have created. A spokesperson for your work team will explain the characteristics and types and sizes of teams represented on your poster.

4. Conduct Gallery Walk

LARGE GROUP 12 MIN.

- Elicit and point out trends, similarities, and differences.
- Make remarks and ask questions, such as ...
  - *One characteristic that is on every team's poster is ...*
  - *What did you learn?*
  - *What does this mean?*
- Make these remarks ...

  We've just conducted a field study that validates 25 years of research on high performance teams. In other words, the characteristics that you identified match the official findings.

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ACTIVITY 11
PERFORM

10 MINUTES

PURPOSE ♦♦♦

Participants are presented with an overview of the PERFORM characteristics that define high performance teams.

REFERENCE •••

Visual aid 31 is a seven-part build. Add the description as you present each letter of the acronym.

REFERENCE •••

Link the PERFORM characteristics to the characteristics identified on the flip charts in the My Best Team activity.

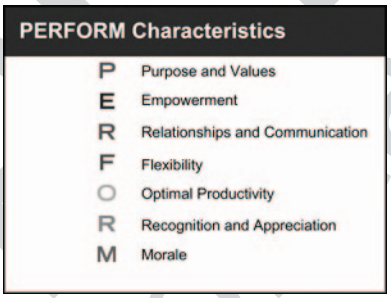
1. Introduce PERFORM

LARGE GROUP 2 MIN.

- Make this remark ...

  The Ken Blanchard Companies® has created an acronym to help you remember the characteristics that define a high performance team.

- Display visual aid 31—PERFORM Characteristics.



- Refer to handbook page 10—The PERFORM Model.
- Make these remarks ...

  It's called PERFORM:

  - *The P stands for Purpose and Values.*
  - *The E stands for Empowerment.*
  - *The R stands for Relationships and Communication.*
  - *The F stands for Flexibility.*
  - *The O stands for Optimal Productivity.*
  - *The R stands for Recognition and Appreciation.*
  - *The M stands for Morale.*

  We'll look at each of them in more detail.

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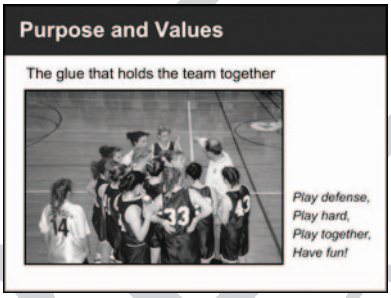
REFERENCE • • •

Review the descriptions of the PERFORM characteristics in more detail if participants have not read Team Performance—An Interactive Introduction.

2. Review Purpose and Values

LARGE GROUP 1 MIN.

- Display visual aid 32—Purpose and Values.



- Refer to handbook page 11—Purpose and Values.
- Make these remarks ...

  Purpose and values are the glue that holds the team together and form the foundation of a high performance team. Purpose and values mean:

  - *Commitment to a common purpose*
  - *Shared values and norms*
  - *Clear goals*
  - *Clear strategies*
  - *Clear roles*

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3. Review Empowerment

LARGE GROUP 1 MIN.

- Display visual aid 33—Empowerment.

- Refer to handbook page 12—Empowerment.
- Make these remarks ...

  Empowerment is a complex dynamic that defines the organizational support that must be in place to enable team members to effectively do their work. Empowerment means:

  - *Support for initiative, involvement, and creativity*
  - *Access to information*
  - *Clear decision making, authority, and accountability practices*
  - *Individual and team development*
  - *Commitment to team member growth and development*

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