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Introduction

Performance-Based Training

Pinnacle Performance Company provides individuals—from introverts to polished speakers—with the tools and techniques needed to become more influential communicators. By applying our innovative, 3-step process, we show you how focusing on your message's objective and delivery will allow you to achieve specific reactions, captivate your audience and communicate like a true leader.

The Pinnacle Method
3-Step Process for Influential Communication

1. **Analyze** your audience
2. **Understand** the reactions/changes you want your message to produce
3. **Modify** your delivery to achieve those reactions

Curriculum Modules
This workbook contains the following modules:

- First Impressions
- Active Listening
- Overcoming Stage Fright
- Projecting a Confident Presence
- Vocal Dynamics
- Gestures and Movement
- Intention and Objective
- Effective Storytelling
- Impromptu Speaking
- Controlling your Audience / Q&A
- Master Presentations
- Practical Simulations
- Utilizing Visual Aids
- Adult Learning Principles & instructional style
- Being Assertive

- Building Rapport (Trainers)
- Building Rapport (Social)
- Building Relationships
- Co-Facilitation & Team Teaching
- Communicating Change Effectively
- Delivering Effective Feedback
- Effective Media Communication
- Effective Negotiating
- Effective Telephone Communication
- Excellence In Customer Service
- Executive Presence
- Facilitating Effective Simulations & Role-Plays
- Facilitation: Running Effective Meetings
- Managing Difficult Conversations
- Stakeholder Analysis
- Virtual Communication

Pinnacle Communication Matrix
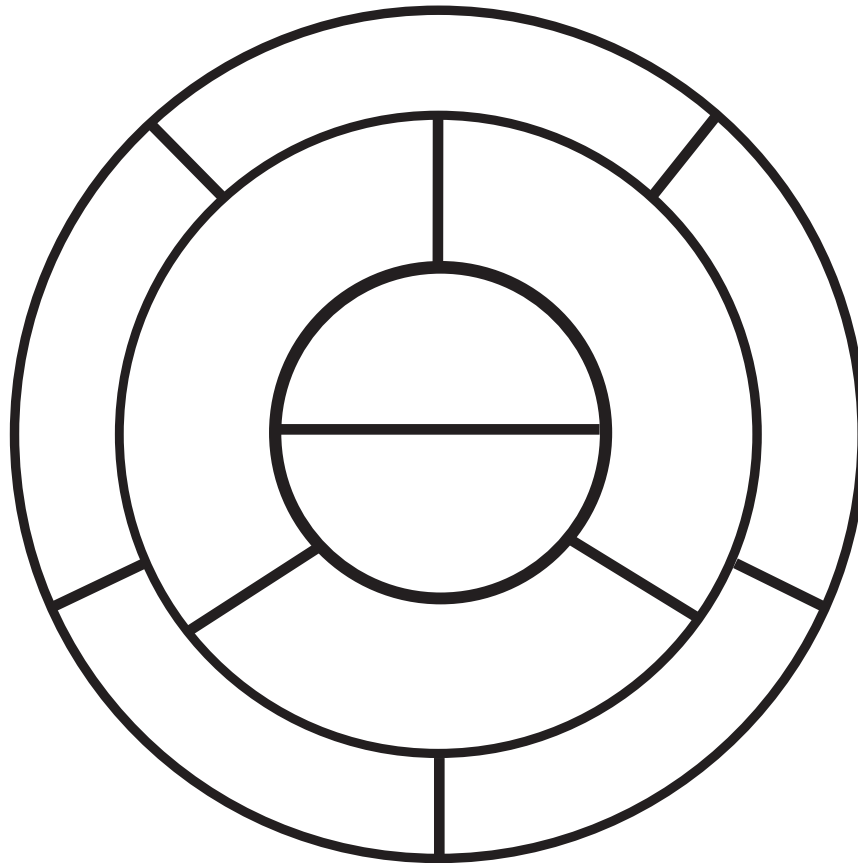
The road to effective communication begins with the concepts of intention and objective. Once a specific objective has been chosen and an intention activated, they will inform all aspects of your speech or presentation and will enable you to deliver your message with clarity and confidence.

Communication—the human connection—is the key to personal and career success.
                                        —Paul J. Meyer

Snapshot Profile

My current comfort level speaking in front of a group is:

1   2   3   4   5   6   7   8   9   10

not comfortable   *very comfortable*

The audience with which I generally communicate consists of:

- ☐ peers
- ☐ employees
- ☐ customers/clients
- ☐ media
- ☐ board members

- ☐ stakeholders
- ☐ senior leadership
- ☐ community
- ☐ students
- ☐ other

My strengths as a presenter/communicator are:

_____

_____

_____

Areas of development for me are:

_____

_____

_____

Notes

First Impressions

All glory comes from daring to begin.

—Eugene Ware

Opening with Impact

The moment characters in a play step on-stage, an audience begins to make judgments about them based on what is seen and heard—the way they move, the way they speak and the way they interact with other characters. The same holds true for someone presenting in a professional environment. Never underestimate the power of a strong first impression.

As the old saying goes: first impressions last. The moment your communication begins, the clock is ticking and perceptions are being established, sometimes by the dozens. Remember: it is difficult, if not impossible, to overcome a bad first impression; and in business, most never get the chance.

EXERCISE: Personal Introduction

Participant observations:

According to experts, how long does it take to make a first impression?

fact

Snap Judgements

Friendly	Unfriendly
Calm	Nervous
Engaging	Dull
Passionate	Dispassionate
Concise	Long-winded
Prepared	Unprepared
Confident	Insecure
Relaxed	Tense
Articulate	Rambling
Pleasant	Unpleasant
Approachable	Aloof
Well-groomed	Disheveled
Energetic	Lethargic
Aware	Unaware
Professional	Unprofessional
Open	Closed
Genuine	Phony
Patient	Impatient
Grounded	Fidgety

fact
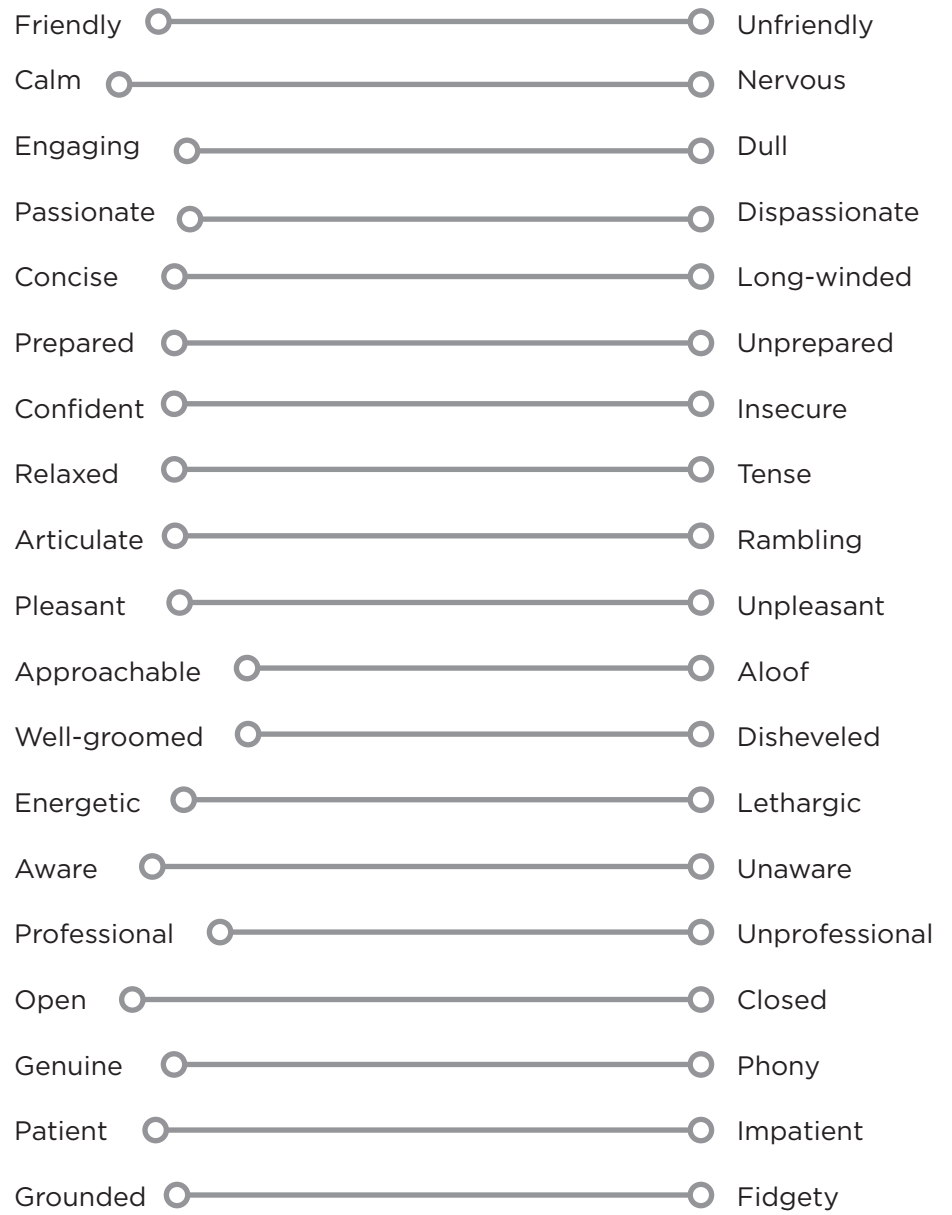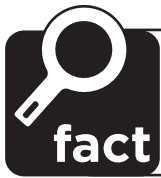
According to experts, which gender is generally more expressive with its communication: men or women?

Five major areas of nonverbal behavior

▶ **Eye Contact**

Good, steady eye contact helps facilitate the flow of communication between a speaker and their audience. It also signals an interest in others. Furthermore, eye contact with an audience increases a speaker's credibility and allows a speaker to monitor visual feedback.

▶ **Facial Expressions/Smiling**

Your facial mask can be used to help communicate your points. You should use a wide range of facial expressions. Smiling is a powerful tool that transmits friendliness and warmth to your audience. Therefore, if you smile frequently you will be perceived as more likable, friendly, and approachable. Smiling is often contagious and your audience will react favorably.

▶ **Gestures**

If you fail to gesture while speaking you may be perceived as boring, stiff or unanimated. A lively and animated speaking style captures an audience's attention, makes your material more interesting, facilitates learning and provides a bit of entertainment. Avoid gesturing below the waist.

▶ **Posture and Body Orientation**

You communicate numerous messages by the way you walk, talk, stand and sit. Standing erect, but not rigid, and leaning slightly forward communicates to your audience that you are approachable, receptive and friendly. Speaking with your back turned or looking at the floor or ceiling should be avoided; it communicates disinterest to your audience.

▶ **Spatiality**

How near or far you are from your audience can send a message as well. Can you move around the space during your presentation? If so, it may communicate that you are comfortable. If you stand behind a lectern for the entire presentation, it may communicate the opposite. Also, cultural norms dictate a certain distance between speaker and audience.

The Three Pillars

FACE

- Consistent eye contact
- Varied facial expressions
- Smile
- Engage eyebrows

BASE

- Proper Posture
- Effective & appropriate gestures
- Purposeful movement
- Feet planted when still

PACE

- Slow down & vary your speaking rate
- Breathe
- Eliminate verbal viruses
- Use pauses effectively

Universal Expressions

According to psychologist Paul Ekman, there are seven facial expressions used in all cultures. How many can you name?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

fact

According to experts, how many facial expressions is the human face capable of making?

Active Listening

> *We have two ears and one mouth so we can listen twice as much as we speak.*
>
> —Epictetus

As human beings, we spend a great deal of our time each day communicating with others—expressing feelings, sharing thoughts and providing information; but the sending of these messages is only half of the communication equation. The other half involves the ability of the message recipient to accurately interpret and understand the information being provided. This is done through active listening.

All communication is a two-way street between a speaker and their audience. Active listening is the foundation of effective communication and a way for an audience to take in information and respond to a speaker. It can allow for and improve mutual understanding between two parties.

fact

According to research, _____ % of our waking time is spent in communication and _____ % in listening-related activities.

Active listening is not a passive activity but an active one, requiring both energy and effort. In fact, the Chinese character for the word *listening* includes not just the symbols for ears but also the symbols for the eyes and the heart.

聽

EAR

YOU

EYES

UNDIVIDED ATTENTION

HEART

? What is the difference between *hearing* and *listening*?

Hearing

_____
_____

Listening

_____
_____
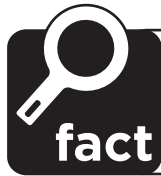
fact According to research, the average person retains about _____ % of what he/she hears.

? What are three common distractions that hinder effective listening?

1. _____
2. _____
3. _____

Common bad listening habits:

1. Interrupting the speaker before he has completed his thought

2. Multi-tasking while listening

3. Communicating disinterest with your body language

4. Listening only with the intent to respond

5. Not maintaining eye contact with the speaker

6. Calling the topic dull or uninteresting

7. Faking attention

Different types of listening

▶ **Comprehensive Listening.** With this type of listening the focus is to hear and understand what a speaker is specifically saying. The goal with comprehensive listening is to absorb and retain as much information as possible.

Please list an example where you have utilized comprehensive listening:

_____

▶ **Sympathetic Listening.** With this type of listening you are simply there to listen and take in the information from the person who is speaking, letting him speak and share his thoughts, opinions or feelings about a topic or subject. The goal with sympathetic listening is to serve as a sounding board, showing that you are sympathetic or empathetic to the words being spoken, as well as the feelings of the person doing the speaking.

Please list an example where you have utilized sympathetic listening:

_____

▶ **Critical Listening.** This type of listening is used by an audience to determine if they agree with the presenter's words and if the message and information being given sound credible. The goal with critical listening is to make judgments about the content, as well as the presenter, based almost entirely on what is heard.

Please list an example where you have utilized critical listening:

_____

▶ **Selective Listening**. This type of listening is used when there are numerous, simultaneous aural messages and the listener only focuses on the one most important to him at the time. The goal with selective listening is to zone out any unnecessary sounds or noise so that you can focus on the information or message that you specifically hope to hear and comprehend.

Please list an example where you have utilized selective listening:

_____

Seven tips for active listening

1. Avoid distractions

2. Ask questions

3. Take notes

4. Maintain eye contact

5. Use non-verbal communication

6. Keep an open mind

7. Focus on speaker's main idea
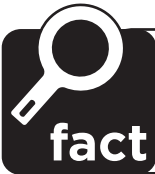
fact The average adult attention span was _____ minutes a decade ago and is _____ minutes today.

Utilizing the Pattern Interrupt

Think about how the energy in the room drops when a group returns from lunch and proceeds to slip into a food coma. Or how the energy flags with an audience the closer you get to the end of the day. The most effective way to combat this is to create a pattern interrupt (or ''change-up'')—something you do or say that is designed to break behavior patterns or habits that can lull your audience into a state of complacency.

Examples of pattern interrupts:

_____ _____

_____ _____

_____ _____

_____ _____

_____ _____

Overcoming Stage Fright

> *He who overcomes his fears will truly be free.*
> —Aristotle

Stage fright, also known as speech anxiety or _____, is the fear or nervousness associated with actual or anticipated communication with others.

fact According to *The Book of Lists,* people reported that speaking in public is what they fear most, even more than death.

List three reasons why a person might suffer from stage fright or speech anxiety.

1. _____
2. _____
3. _____

Nearly everyone has experienced some form of stage fright or speech anxiety at one time or another. The symptoms of speech anxiety take many forms and can show up without warning.

Common symptoms of speech anxiety:

1. Monotone
2. Dry mouth
3. Rambling speech
4. Increased pace
5. Flushed face
6. Nervous laughter/smiling
7. Shallow breathing
8. Loss of concentration
9. Increased heart rate
10. Increased muscle tension
11. Ineffective gestures
12. Stammering speech

? Aristotle defined courage not as the absence of fear, but as just the right balance between _____ and _____ .

Positive vs. Negative Stress

The concept of stress in a biological context was first investigated by endocrinologist Hans Selye in the 1930s. Through his research, Selye created a model that divided stress into two different types:

▶ _____ (positive stress)

▶ _____ (negative stress)

As a communicator, you can move from negative stress to positive stress via the following:

_____

_____

_____

Tips to Help Combat Speech Anxiety:

1. **Practice, practice, practice.** The best method to combat stage fright or speech anxiety is to become extremely familiar with your speech or presentation material. This eliminates the fear that you are going to forget your words. Always complete the three phases of effective preparation utilized by professional actors:

    Phase One: Read Through

    Phase Two: Stumble Through

    Phase Three: Dress Rehearsal

2. **Visualize success.** Cognitive nervousness and negative thoughts can interfere with your speech or presentation. Use creative visualization to center yourself by imagining circumstances or an environment where you feel confident, powerful and relaxed.

3. **Focus on your message and the benefit.** Take the focus off you standing there, alone, in front of a group, and put your focus back on what you are there to accomplish and the information that you are there to present.

4. **Warm up properly.** It is important that you properly warm up both your body and your voice before giving a speech or presentation. Physical activities such as jogging, walking or swimming are also good ways to shake off nervous jitters.

5. **Focus on breath**. Locate your core breathing to help center yourself and release any unwanted tension. Using core breathing during your speech will help to calm you and keep your presentation on track.

6. **Create a ritual**. Develop a day-of strategy that is familiar and constant. This will help you relax and feel in control before any speech or presentation.

7. **Find a friendly face**. As you take the stage and make initial eye contact with your audience, seek out a friendly face. Look for someone giving you positive nonverbal feedback. If nervousness or anxiety start to creep back into your presentation, direct your speech to them.

8. **Commit to the moment**. Once your speech or presentation begins, focus on delivering it to the best of your ability. Don't give up and don't telegraph to your audience (verbally or non verbally) that you think you are doing a poor job. This is your moment to shine—enjoy it.

> *If you hear a voice within you say "you cannot paint,"*
> *then by all means paint, and that voice will be silenced.*
>
> —Vincent Van Gogh

Core Breathing

Life is breath and breath is life. By using your breath properly, you are able to give yourself the gift of vitality, energy, focus and relaxation. When was the last time you actually had to think about your breathing? Breathing is something that comes so naturally we rarely have to consider it, but it is vital. Every cell in your body is affected by the breaths you take. By breathing properly and slowly, the body is able to relax and prepare for optimal functioning.

When it comes to communicating a message to others, proper breathing is utilized in the following ways:

1. _____

2. _____

fact
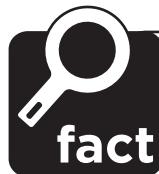
The average person's rate of breath is _____ times a minute; however, the optimal rate is _____.

EXERCISE: Finding Your Core Breath

1. Begin by relaxing your body and making sure your posture is straight.

2. Place your hand on your stomach, just below the navel.

3. Inhale gently through your nose for a count of five. Imagine your belly is a balloon, filling with air.

4. Hold the breath for a count of five.

5. Exhale through your mouth for a count of five while gently pressing on the stomach. Imagine your belly is a balloon being emptied of air.

6. Repeat the entire process from the beginning, this time adding in an audible sigh or vocalization with each exhale.

Projecting a Confident Presence

> *A great leader's courage to fulfill his vision comes from passion, not position.*
>
> —John Maxwell

According to the landmark study by Professor Albert Mehrabian, someone's initial perception of another person's communication breaks down three ways:

Verbal *(what we say)*   _____ %

Vocal *(how we sound)*   _____ %

Visual *(how we appear)*   _____ %

Posture

The way you hold your body is called your *posture*. As we discussed in earlier units, what your audience sees when you walk on-stage has a large impact on their overall impression of you as a speaker. Therefore, it is essential that you become aware of what your body language communicates to an audience. Does it enhance or detract from your message?

Maintaining proper posture will allow you to begin your speech or presentation from an open, neutral position. Proper posture can also help to reduce the possibility of injury and can actually make you stronger. By aligning your joints properly, muscles are able to activate and more easily perform their specific functions or movements.

When presenting or speaking, a speaker should begin from a relaxed, neutral and open position. We will call this your **Home Base Position**.

> *Posture reflects the attitude of life.*
> —Kyle Yamashiro

EXERCISE: Finding Your Home Base Position

To experience what a strong home base position feels like, follow these steps:

1. Stand with your feet shoulder-width apart and your weight evenly distributed.

2. Make sure your knees are unlocked.

3. Center and lock your pelvis to avoid shifting and swaying.

4. Let your arms, hands, and fingers relax by your sides.

5. Hold your chest open and elevated.

6. Keep your shoulders relaxed.

7. Keep your chin parallel to the ground.

8. Focus your eyes forward.

In what areas of your body do you tend to hold tension?

1. _____

2. _____

3. _____

A sound mind in a sound body is a short but full description of a happy state in this world.

—John Locke

As a speaker, your body and your voice are your instruments, much the same way a cello is an instrument for the cellist. Employing a thorough and consistent warm-up is critical for a speaker to be able to deliver a successful speech or presentation. A proper warm-up will increase the supply of blood and oxygen to the muscles, increase coordination and release any unwanted muscle tension in the body.

EXERCISE: Warming up Your Instrument

Shortly before going in front of your audience, take five minutes to loosen and warm-up your body.

1. **Neck**: Let your head fall forward and stretch the neck muscles. Next, rotate your left ear to your left shoulder and your right ear to your right shoulder.

2. **Eyes**: Alternate from a squinting (little eyes) to wide-eyed (big eyes).

3. **Face**: Alternate between your biggest expression (surprise) to your smallest expression (sour) to engage the muscles of the face.

4. **Tongue**: Stretch your tongue to your nose, your chin, and your cheeks.

5. **Lips**: Blow air through your lips to make a motorboat sound.

6. **Jaw**: Mimic chewing a very large piece of bubble gum to stretch the jaw muscles.

7. **Shoulders**: Roll shoulders in a circular motion. Then reverse the direction. Shrug and release.

8. **Arms**: Extend your arms and rotate them in a circular motion. Reverse.

9. **Wrists**: Rotate your wrists in a circular motion. Reverse.

10. **Fingers**: As if your fingers are dripping with water, vigorously shake them dry.

11. **Back**: Mimic the motion of hugging a tree to stretch out the back muscles.

12. **Chest**: Mimic the motion of crushing an orange between your shoulder blades to stretch out your chest.

13. **Legs**: Shake out any tension in your legs. Follow with deep knee bends.

14. **Ankles**: Standing on one foot, rotate your opposite ankle in a circular motion. Repeat on the other foot.

> *Presence allows experience.*
> —Patsy Rodenburg

The Three Circles of Energy

The way you communicate with others affects how people perceive you and how effectively you are able to convey your message. Acting teacher and voice coach Patsy Rodenburg divided human energy into three basic circles:

FIRST CIRCLE

SECOND CIRCLE

THIRD CIRCLE

Self and Withdrawal

Energy of Connection

Bluff and Force
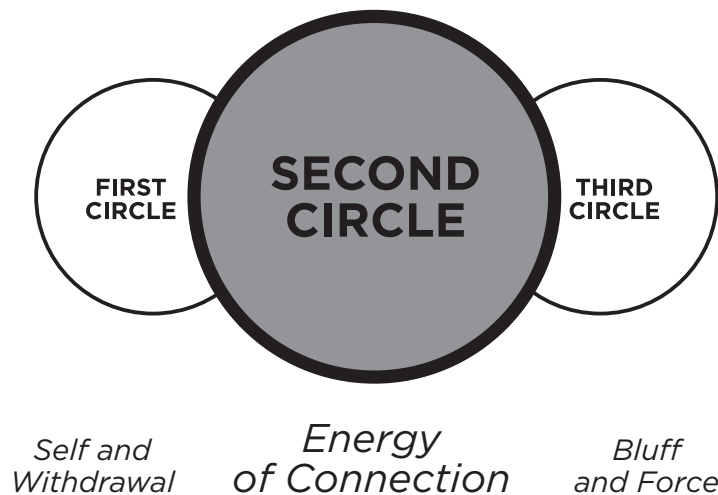
FIRST CIRCLE: Self and Withdrawal (energy moving inwards)

The first circle of energy is generally self-focused, more about taking than giving. First circle energy closes you off in a bubble so you appear disengaged, the energy moving inward, making your message impossible to mutually engage in conversation and demonstrate positive presence.

First Circle Characteristics:

- Shallow breathing
- Limited or no movement
- Limited or absent gestures
- Ineffective eye contact

- Limited facial expressions
- Visible lack of energy/passion
- Tense body posture
- Monotone and low volume

THIRD CIRCLE

THIRD CIRCLE: Bluff and Force (energy moving outwards)

The third circle of energy is generally more passionate or enthusiastic but isn't always effective. This energy is outward facing, simply blasted at an audience. Energy is moving outwards and you don't receive anything back. Unable to listen to others around you, the focus is on yourself.

Third Circle Characteristics:

- Gestures that are too broad
- Tense body posture
- Loud or unnecessary volume
- Shallow breathing

- Facial expressions that are too big
- Excess or nervous energy in body
- General, unspecific movement
- Ineffective eye contact

SECOND CIRCLE

SECOND CIRCLE: Energy of Connection (energy moves in and out)

The second circle of energy is the ideal circle to utilize when communicating with others. You are present, alert, and available to others. Second circle energy is focused and passionate, effortless and efficient. You hear and are heard. You notice details about others and acknowledge their feelings.

Second Circle Characteristics:

- Facial expressions support intention
- Expansive and appropriate gestures
- Eye contact is consistent, not constant
- Breath is controlled and supports voice

- Movement is purposeful
- Voice is free of monotone
- Voice is clearly audible
- Body posture is tension-free

?

Which circle of energy is utilized when someone is described as the following?

- *Timid*
- *Impatient*
- *Committed*

- *Obnoxious*
- *Open*
- *Distant*

- *Insecure*
- *Friendly*
- *Arrogant*

Presenting While Seated

While most formal presentations take place with a speaker standing, some meetings or presentations, because of space constraints or audience size, occur in less formal settings such as boardrooms, conference rooms, or offices.

Below are some tips to remember when presenting while seated:

1. **Keep your energy up.** When presenting while seated, it is easy to let all of your energy drain into your chair instead of focusing it outward toward the person you are addressing.

2. **Watch your posture.** Don't slump or sag in your chair. This may make you appear overly casual or too relaxed. Even when presenting while seated, it is important to utilize a strong Home Base Position. Keep your spine straight (but not stiff) to communicate that you are present and alert.

3. **Modulate gestures; don't eliminate them.** Continue to use expressive gestures. Also, since your audience is closer to you, your gestures can be smaller in size.

4. **Connect through eye contact.** Keep your eyes up and try not to look down at the table while you are speaking. Make sure you share your eye contact with the entire group, connecting with every person at the table, including the people sitting on either side of you.

5. **Breathe.** Since presenting around a table is a more intimate setting than a formal presentation, every facial expression or emotion that registers will be seen and interpreted by your audience. Because of this, it is important you stay relaxed and project a confident presence at all times. Utilizing core breathing will help you do that.

6. **Plant your feet.** Because your audience is seated so closely, keep your feet planted firmly on the floor to ground yourself. This will help limit extraneous movement such as shifting and fidgeting that could make you appear less than confident.

7. **Keep your hands above the table.** Keep your hands on the table—either folded or near each other—when you are not using them for gesturing. Be careful not to fidget with objects such as rings, pens or paper clips as this can be distracting to an audience.

Vocal Dynamics

> *Words mean more than what is set down on paper. It takes the human voice to infuse them with deeper meaning.*
>
> —Maya Angelou

Voice is the tool by which all activities involving speech are performed, whether during public speaking, acting, business speaking or simple conversation. We use it to inform, persuade and connect with other people. Your voice is the key to delivering your words with intention.

EXERCISE: Warming up the Voice

STEP 1: Begin by focusing on your core breath, inhaling for a count of five and exhaling for a count of five.

STEP 2: Repeat the breathing process, this time allowing the sound of a moan to be released during your exhalation, connecting the breath to the voice.

STEP 3: Starting at the center of your range, make the "ah" sound and gently cascade from the lowest pitch of your voice to the highest pitch and back to the lowest again, engaging the entire register.

STEP 4: Next, warm up the four articulators (lips, jaw, tongue, soft palate) by repeating the following phrases aloud, enunciating for crisp and clear diction:

Mumsy made me mash my mutton (lips)

Twenty tentacles tickling Ted (tongue)

Charlie chews his chocolate shoes (jaw)

Ricky's sticky yucky duckies (soft palate)

Five Qualities of the Human Voice

These five qualities are: volume, pitch, inflection, pace, and articulation.

1. **VOLUME**: A speaker must be able to properly adjust the volume of his voice depending on the audience and setting. Play to the back row, not the front row.

2. **PITCH**: A speaker's pitch should be natural and pleasing. Variety in pitch is essential when speaking or presenting. It is the key to speaking with intention.

EXERCISE: Pitch for Meaning

The exact same words often have different meanings depending on the pitch of your voice used when speaking. Using the word "okay," vary your pitch to match the expressions below:

- *I understand.*
- *Fantastic!*
- *Do you understand?*

- *I'm very disappointed.*
- *Enough already!*
- *I think you are mistaken.*

EXERCISE: Eliminating Monotone

To practice varying your pitch, read the excerpt below as if you are reading a fairy tale to a small child, exploring the music of your voice.

> *Once upon a time, in a far-off village, there lived a little country girl, the prettiest creature who was ever seen. Her mother was excessively fond of her; and her grandmother doted on her still more. This good woman had a little red riding hood made for her. It suited the girl so extremely well that everyone in the village came to calling her Little Red Riding Hood.*

> *There is no index of character so sure as the voice.*
> —Benjamin Disraeli

3. **INFLECTION**: A speaker can use vocal inflection in the following ways:

   Upward inflection—this form of inflection takes the voice up at the end of a word or phrase. It can be used to express doubt, friendliness, surprise and to request information.

   Downward inflection—this form of inflection takes the pitch of the voice down at the end of a word or phrase. It can be used to express certainty, command, defiance and when giving facts or information.

How would inflection be used with the following phrases?
   "Hello?"
   "It would be a pleasure doing business with you."
   "My rate is $300/hour."
   "Does that figure sound acceptable to you?"
   "I am currently vice-president of sales and marketing."

4. **PACE**: A speaker should utilize changes in pace to help keep an audience engaged and interested. Think of your speech like a roller coaster. We love roller coasters because they go slow one moment and fast the next—always moving. Vary the pace at which you deliver your speech to give it the feel of a vocal journey.

fact
While most people think at a speed of approximately _____ words per minute, the optimal rate for speaking is _____ words per minute.

EXERCISE: Utilizing Pace

To practice slowing your pace, read the following paragraph slowly and aloud, taking a 2-second pause after each period:

Thank you. Thank you very much. Thank you and good evening. My name is Alex Jarrett. The agenda for this meeting has been identified, but unlike most business presentations, the presenter hasn't been provided with a script. As a matter of fact, I have been permitted to choose my own words and discuss my own ideas regarding the choice that we face in the next few weeks. This is a big moment for us. A big moment for our company. The decisions we make today will reverberate within these walls not for months, but for years and decades to come.

Silence may be as variously shaded as speech.
—Edith Wharton

Power of the Pause

When it comes to pauses, small is not the same as trivial. Use moments of silence for impact. A pause communicates to an audience that you are in charge and are setting the pace and direction of the communication. A pause will help keep you grounded and will create a connection between the voice and the body.

There are three different types of pauses you can use in a communication context:

1. _____ These are moments of silence that are dictated by your material or visual aid, allowing your audience to read or absorb information.

2. _____ In these instances, you can use silence to evoke or provoke an emotional response from your audience, perhaps pausing for effect to highlight a specific thought or draw attention to a fact or figure.

3. _____ These are times during your communication where you need to stop speaking so you can take a breath or a sip of water.

5. **ARTICULATION:** A speaker uses articulation to connect the separate sound units to help form words and phrases. By using your articulators effectively, a speaker will avoid sloppy speech, mumbling and dropping the ends of words or phrases.

There are four movable articulators:

1. **Lips**   Sounds formed: m, p, b, w, v, f
                     Warm-up: *Mumsy made me mash my mutton.*

2. **Jaw**   The jaw is a moveable articulator and changes the
                     size of the vocal tract to help with clarity.
                     Warm-up: *Charlie chews his chocolate shoes.*

3. **Tongue**   Sounds formed: s, z, d, t, th, l, sh, r
                     Warm-up: *Twenty tentacles tickling Ted.*

4. **Soft palate**   Sounds formed: k, g, n, ng
                     Warm-up: *Ricky's sticky yucky duckies.*

Tongue Twister warm-ups:

1. *The skunk thunk the stump stunk*   8. *Rubber baby buggy bumpers*
2. *Good blood, bad blood*   9. *The lips, the teeth, the tip of the tongue*
3. *BeBoBa bubble bath*   10. *Bobby Babcock's bagpipes*
4. *Red leather, yellow leather*   11. *I slit a sheet, a sheet I slit, upon a slitted sheet I sit*
5. *Ba Da Ga Da, Ba Da Ga Da*   12. *Fresh fried fish, fish fried fresh*
6. *Unique New York*   13. *A proper cup of coffee in a proper coffee cup*
7. *Shave a cedar shingle thin*   14. *The thirty thorny thistles thawed throughout*

All I have is a voice.
—W.H. Auden

Notes

Gestures and Movement

> *A gesture, like a word, must have something to say and should say it well.*
> —Arthur Lessac

Gestures

Gestures are an important part of your overall visual picture and are used to assist in the communication of the words and ideas in your presentation.

There are five basic types of gestures:

1. **Conventional gestures** have widely-understood meanings that have been determined and agreed upon by a specific community or culture.

2. **Descriptive gestures** are used to clarify or illustrate your words by indicating size, shape, direction or function.

3. **Emphatic gestures** emphasize a point by underscoring the emotion behind the words being spoken.

4. **Prompting gestures** are used to evoke a desired response from your audience.

5. **Coded gestures** are created by pre-established agreement between a group or individuals.

Ineffective Gestures are gestures that are unnatural, stiff, planned, lazy or fidgety and often communicate nervousness, lack of confidence and insecurity about yourself and your topic. Examples include:

- Finger pointing
- Hands behind your back
- Hands in pockets
- Fig leaf
- Playing with a prop
- T-Rex arms
- Speaking before planting
- Gestures below the waist

Effective Gestures should be meaningful and appropriate to the content of your speech. These gestures should help to paint a picture of, share your emotion toward or emphasize specific points of your message. Effective gestures will support the intention you are trying to convey with your words.

Effective gestures should:

- Be varied
- Be spontaneous
- Be specific

- Be motivated by your content
- Be appropriate in size (in relation to your audience)
- Be expansive, not constrictive

EXERCISE: Spontaneous Gestures

Movement

Movement, if used properly, can help to reinforce your verbal message and add variety to your speech or presentation. Incorporating some movement is especially important if you are using a lectern. In this instance, it is easy to become trapped behind or blocked by the lectern and separated from your audience.

Movement during a presentation should be direct and smooth. If you choose to move, you must have a purpose for doing so. Movement is especially useful for transitions or to indicate that you are now moving on to a new part of your speech.

fact
Research shows that humans exhibit at least _____ distinct styles of walking.

EXERCISE: Taking the Stage

Suit the action to the word, the word to the action.
—Shakespeare

Intention and Objective

> *It is not good enough for things to be planned—
> they still have to be done; for an intention to become
> a reality, energy has to be launched into operation.*
>
> —Walt Kelly

? Why is intention important to you as a communicator?

Actors use the concepts of intention and objective in every aspect of their performance, breaking down each moment of each scene. "What do you want from your partner in this scene?" a director will ask in rehearsal. Intention is an actor's secret weapon and the same is true for a presenter or speaker. The dictionary describes intention as "an aim that guides an action." To be able to identify your intention, you must first figure out what you want from your audience - this is called your objective.

Objective _____

Intention _____

An intention should be strong and positive—a one-word verb you can activate to inform all aspects of your communication. Whether you are presenting a new product to a potential client or laying out the new safety procedures to a group of miners, you must have a strong intention behind your words. This will help you accomplish your objective. A strong intention must also be connected to a desired result that you want to achieve with your audience; think of your objective as a call to action.

> ***I want to (intention) my audience
> so that my audience will (objective).***

> *Our intention creates our reality.*
> —Wayne Dyer

EXERCISE: Identifying Intention and Objective

If you are the Safety Manager in a mine and you have gathered your team of miners to implement the new safety procedures, your intention and objective could possibly be defined in the following way:

I want to_____ my audience about the tragic consequences of not following these procedures so that my audience will _____.

If you are the marketing executive rolling out a new brand of energy drink to a group of grocery store executives, your intention and objective could possibly be defined in the following way:

I want to_____ my audience about the potential of this delicious new drink so that my audience will _____ _____.

If you are a sales manager instructing your team on utilizing a new software program, your intention and objective could possibly be defined in the following way:

I want to_____ my audience about the capabilities of this new program so that my audience will _____ _____.

The Rhetorical Triangle

Aristotle wrote extensively about the art of influence and identified three basic appeals (or means of persuasion) that a speaker could use to persuade or influence others. These became known as Aristotle's Rhetorical Triangle:

ETHOS
*honesty
and sincerity*

LOGOS
*credibility and
believability*

PATHOS
*passion
and emotion*
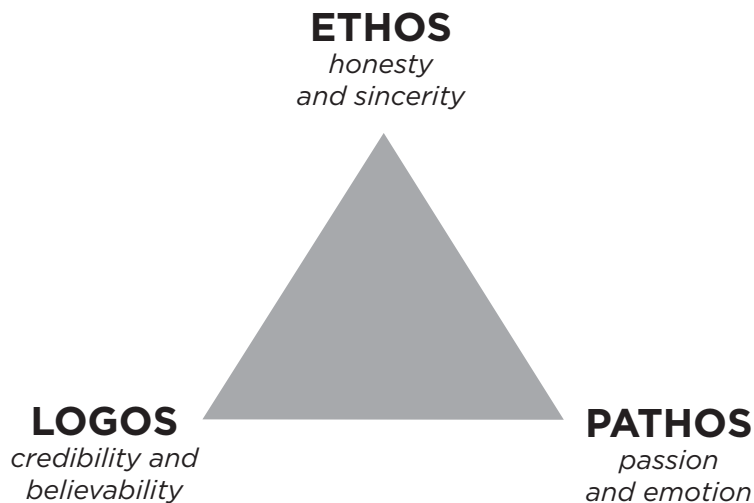
- **Ethos** involves an ethical appeal that speaks to the sincerity and trustworthiness of the person speaking.

- **Pathos** is an appeal to the passions and emotions of an audience.

- **Logos** is the appeal to logic; it goes to the relevance and accuracy of the actual words being spoken by someone.

EXERCISE: Luck of the Draw

Greet	Excite	Frighten	Confuse
Persuade	Seduce	Entertain	Calm
Challenge	Reprimand	Instruct	Flatter
Apologize	Commend	Involve	Intimidate
Empower	Mock	Warn	Silence

> *In whatever position you find yourself, determine first your objective.*
>
> —Ferdinand Foch

To what type of audience do you normally present?

_____

What is your objective when presenting to this audience?

_____

What intention would be most effective to achieve that goal?

_____

Mirror Theory

In most cases, an audience will mirror back to a speaker or presenter exactly what he is giving off from the stage. The scientific term for this behavior is _____ ; in the Pinnacle Method, we call this the Mirror Theory. If a speaker is scattered and unfocused or bored and disengaged, his audience may reflect back those qualities in the way they take in the speech or presentation. With the concept of the Mirror Theory, it is important to communicate your intention to an audience with passion and conviction. Enthusiasm and excitement are contagious. So is apathy.

EXERCISE: Intention Battle

Objective _____

Intention _____

Topic _____

Effective Storytelling

Great stories happen to those who can tell them.
—Ira Glass

Stories are powerful communication tools and can be used to motivate and inspire others. In the corporate environment, leaders and executives need to be able to utilize the power of storytelling to persuade their peers and communicate their ideas more effectively. Good stories can entertain, instruct, engage and enrich.

fact
According to experts, an audience is _____ times more likely to remember a fact when included as part of a story.

Seven tips for effective storytelling:

1. **Only tell stories you like telling**. Chances are that if you like telling the story, we will like hearing it.

2. **Start strong.** Good, effective stories lead off with a surprise, a mystery or a challenge. Take us on a journey.

3. **Use descriptive words.** When listening to a good story we like sensory descriptions of how things looked, smelled, felt, sounded, etc.

4. **Generate emotion.** Identify and utilize the appropriate intentions required so you a make your audience members feel a specific way.

5. **Play with pace and pauses.** By using pacing and silence, you can create drama and build the suspense of your story.

6. **Utilize the element of surprise.** Withhold certain information until the very last moment that you need to reveal it.

7. **Stick the ending.** End the story solidly and tie it up with a nice moral or message for the audience to take away.

Story Structure

As you begin to outline your individual story, it is helpful to understand the distinctive elements that must be in place to create a compelling and dramatic narrative. This is called *dramatic structure*. First developed by Gustav Freytag, a German dramatist and novelist, the concept of dramatic structure concluded that for a story to be solid and compelling, it had to contain six distinct elements.

1. _____ This is the start of the story containing the introduction of the setting, characters, and conflict, as well as any background information needed to understand the plot.

2. _____ This is the initial event that sparks the action of the story and sends the plot moving forward, without which there would be no story.

3. _____ Here the conflict of the story is activated and the wheels are set in motion. The plot starts to build as forces clash in opposition.

4. _____ This is the highest point of tension in any story. It could also be a turning point where everything suddenly changes.

5. _____ After the climax has been reached, this element starts to tie up loose ends as the story begins to wind down.

6. _____ As the story reaches its conclusion, the main conflict gets resolved and a final outcome is reached.

EXERCISE: Effective Storytelling

Notes

Impromptu Speaking

> *Sometimes you just have to take the leap and build your wings on the way down.*
>
> —Kobi Yamada

Improvisation is a valuable tool for an actor. An actor improvising a scene must trust his or her own instincts at all times. Improvisation is also useful in its focus on concentration. In a corporate setting, it is valuable to be able to think on your feet and trust your instincts—to improvise.

Positioning Statement _____

_____

_____

EXERCISE: Positioning Statement

An effective positioning statement must answer the following questions:

1. _____

2. _____

3. _____

When delivering a positioning statement, what is your intention and objective?

_____

EXERCISE: Out of the Box

Mastering Impromptu Speaking

Most communication in a corporate setting happens with little or no time to gather thoughts, much less put together notes or an outline. With impromptu speaking you have to speak in the moment, right here and right now. Despite the fact that we all engage in it every day, it is specifically this type of communication that makes people the most anxious. The fear of misspeaking or drawing a blank makes us nervous.

Follow these simple rules when speaking in the moment:

1. **Project confidence.** Since your audience can only judge you by what they see and hear, use a solid posture and good eye contact to project a confident and relaxed presence.

2. **Pause before you start.** In general, when responding to a question, you have approximately one or two seconds to formulate your answer. Those one to two seconds can make the difference between answering effectively or not, so use them wisely—but above all, use them.

3. **Slow down.** When speaking without time to prepare, pace is your best friend. Slow down the rate of your words so you can control them and shape your message. Once words are spoken, you can't take them back.

4. **Choose your words carefully.** In the one or two seconds before you open your mouth, choose three mental bullet points to serve as a roadmap for you. This will help you structure your message.

5. **Say less.** The second you begin speaking, you are providing evidence by which a listener will judge you. Avoid rambling. When you do speak, remember that less is more, or as Shakespeare said, ''Brevity is the soul of wit.''

> *Be sincere; be brief; be seated.*
> —Franklin D. Roosevelt

Controlling Your Audience/Q&A

> *Make sure you have finished speaking before your audience has finished listening.*
>
> —Dorothy Sarnoff

Controlling Your Audience

As a presenter or facilitator, you are responsible for the flow and feel of your presentation or meeting. Hostile audience members, personality clashes and inattentive participants can all threaten to derail your presentation and the successful delivery of your message.

Below are some tips on how to effectively control an audience:

1. Set specific ground rules at the outset; shut off cell phones and email.

2. Establish and stick to an agenda to keep the presentation on track.

3. Stay attuned to all verbal or nonverbal cues from audience members.

4. Treat all ideas and questions respectfully.

5. Ask questions of audience members to keep them engaged.

6. Use specific illustrations or anecdotes to show relevance.

7. Use volume, eye contact, spatiality and intention to stay in control.

8. Call a time-out if ground rules are not being followed.

9. Finish within the allotted time you have been given to speak.

10. Build in breaks when necessary to give participants a chance to refresh.

According to research, after _____ minutes an audience's ability to retain information diminishes significantly.

fact

Handling the Question and Answer

Whether handling questions during your presentation or afterward in a question and answer session, the way you handle your audience during this interaction is every bit as important as the way you delivered your actual speech or presentation.

Below are some tips on how to conduct a successful Q&A:

1. Utilize the **Relevancy Tree** to control the flow of your presentation.

2. Make sure the entire audience has heard the question and repeat it if necessary.

3. Take a moment to prepare your answer before answering. Never begin your answer with a verbal virus.

4. Ask for clarification if the question is not clear to you.

5. If you don't know the answer to a particular question, be honest and say so. Offer to research the answer or suggest a resource where the answer could be found.

6. If a questioner is hostile or challenging, remain cool and in control and answer carefully.

7. Have questions ready and answers prepared in case no questions are asked.

8. Engage full audience with your answer and not just the questioner.

9. Utilize a checkback (verbal or nonverbal) to confirm the question has been answered sufficiently.

A correct answer is like an affectionate kiss.
—Johann Wolfgang von Goethe

Relevancy Tree

> *Expect the best, plan for the worst, and prepare to be surprised.*
>
> —Denis Waitley

Handling Difficult Questions

Nearly every person working in a corporate environment has, at one point or another, had to handle a difficult question. This type of communication is reactive, in that you have not had time to prepare your answers ahead of time and are simply reacting in the moment. These questions can come from superiors, team members or clients and can arise during a one-on-one communication or in front of a large group.

Handling a question and answer session is a form of impromptu speaking. Unless you know what questions are going to be asked ahead of time, you have to be ready for anything that might come at you from an audience. This means anticipating challenges, skepticism, resistance or push back to the particular plan or strategy you are presenting.

Write down some of the difficult questions you encounter in your present role:

1. _____

2. _____

3. _____

4 _____

5. _____

When confronted with a challenging or confrontational question from the audience, the way you handle yourself while answering is equally as important as the answer itself. If passions or emotions are running high during a question and answer session, it is important that you remain calm and in control. Be respectful of the questioner, even if the person's question seems to be loaded or includes an embedded statement or accusation. If possible, use the questioner's name as you begin your answer.

It's not the situation...it's your reaction to the situation.

—Robert Conklin

Tips when handling difficult questions

1. **Maintain a confident presence.** Utilize a strong home base position and neutral facial expressions to appear solid and steady.

2. **Reflect and answer carefully.** Take a pause before speaking and carefully consider what you are about to say. Remember: once the words come out, you can't put them back in.

3. **Defer the answer until later**. Don't be afraid to ask for time to research a question that may be out of scope or would require you to investigate more fully.

4. **Deflect to an expert.** If you get stuck and there is another person in the meeting or presentation who would be able to answer the question more effectively, feel free to engage him and solicit his expertise.

5. **Repeat the question back.** If you need a second to gather your thoughts before answering, you can repeat the question back to the person asking it. Use this technique sparingly, to avoid the appearance of simply stalling whenever you are asked a tough question.

6. **Answer the question with a question.** This can be effective as it will generate discussion and it immediately engages the questioner and allows you to glean more information about his thoughts and feelings regarding the topic.

7. **Present the question to the audience and facilitate a discussion.** Before answering the question, throw it out to the group to answer. This keeps your audience engaged and involved.

8. **Answer succinctly.** Keep your answers short. Period. The longer you speak or the more detail you go into, the more likely it will be that you misspeak, ramble or say something you wish you had not said.

9. **Rephrase hostile questions in neutral terms.** If you feel a question is too emotional in the way it is phrased or includes an embedded statement, rephrase it in a way that takes some of the heat off of it. Choose words that are more neutral and less negative, accusatory or demanding.

> *A sudden bold and unexpected question doth many times surprise a man and lay him open.*
>
> —Francis Bacon

Connector Statements
Eliminating verbal viruses

Often we feel blind sided or thrown off when confronted by a difficult question, and this is when verbal viruses (such as "ahs" and "ums") sneak into our communication. These verbal viruses can create a perception of us as uncertain or unsure, causing us to lose credibility with an audience.

Below are some opening phrases that you can use when beginning your answer to a difficult question. Familiarize yourself with them. They will allow you to stay calm and in control. They will also help you appear more empathetic to your audience and more credible in your delivery overall.

- I appreciate your question...

- I've asked myself that same question before...

- It's interesting that you bring this up...

- This is a topic that's very important to me...

- I can certainly relate to your concern about...

- I'm glad you asked that question. Let's discuss this...

- You've raised a very interesting point here...

- Frankly, this is not the first time I've been asked this question...

- I've given this a lot of thought...

- I can certainly understand why you would ask that question...

EXERCISE: Murder Board

Practical Simulations

> *Speak clearly, if you speak at all;*
> *carve every word before you let it fall.*
>
> —Oliver Wendell Holmes

Creating solid material takes time and effort. By putting in the necessary time and carefully constructing your content with an eye toward your overall objective, you not only demonstrate a respect and appreciation for your audience, you also give yourself a launching pad from which to begin preparing.

Audience Analysis

1. My audience for this presentation will consist of: _____
   _____
   _____

2. The size of my audience for this presentation will be: _____

3. The demographics (age, gender, educational background, etc.) of my audience are: _____
   _____
   _____

4. My audience's familiarity with this content/topic: _____
   _____
   _____

5. My audience's feelings about this content/topic are: _____
   _____
   _____

5. My audience's goals/expectations for this presentation are: _____
   _____
   _____

Presentation Structure

Pre-Presentation

- Audience Analysis
- Core Theme/Headline
- Objective & Intention

Opening

- Master Introduction
- Agenda
- Ground Rules/Housekeeping

Body

Main Topic #1
Key Point
Sub-point · Sub-point · Sub-point

Main Topic #2
Key Point
Sub-point · Sub-point · Sub-point

Main Topic #3
Key Point
Sub-point · Sub-point · Sub-point

Closing

- Q&A
- Master Closing
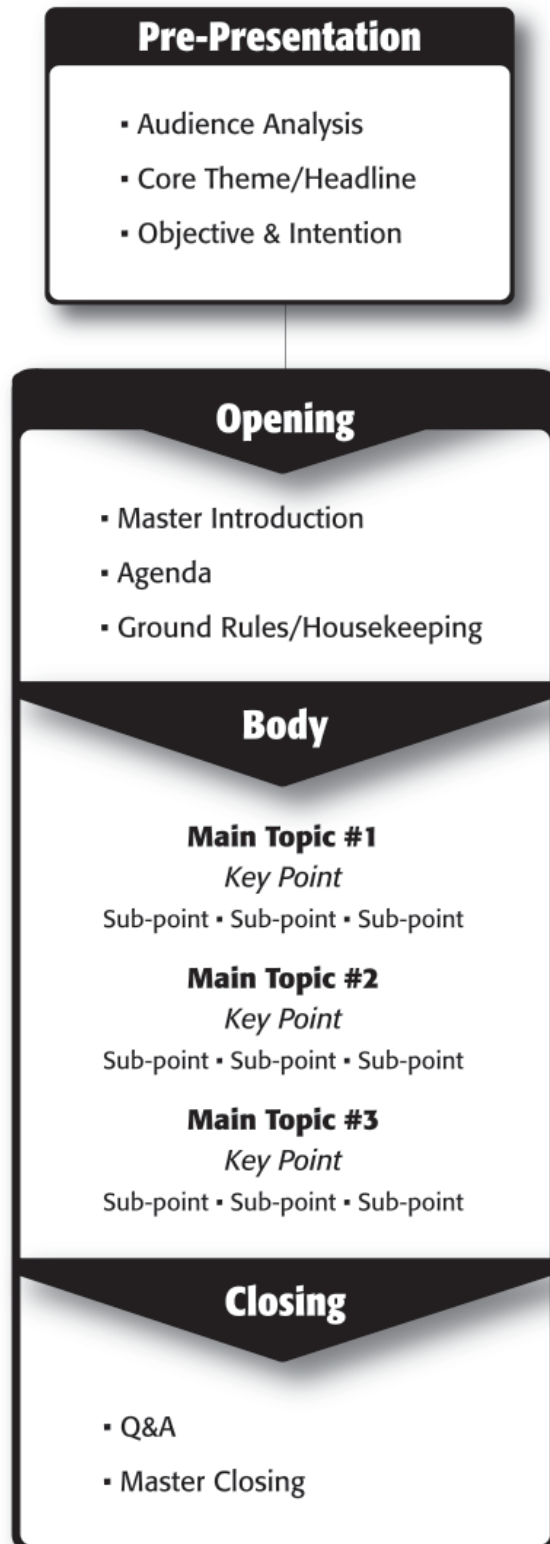
> *If they're with you at the takeoff,*
> *they'll be with you at the landing.*
> —Lyndon B. Johnson

Master Introduction

The purpose of your Master Introduction is to establish the core theme of your message in a way that engages the audience and compels them to listen to you. It should also establish you as a credible messenger and summarize your main points in a way that is clear and consistent from start to finish. The five points that need to be established in an effective Master Introduction are:

5 Keys to a Master Introduction
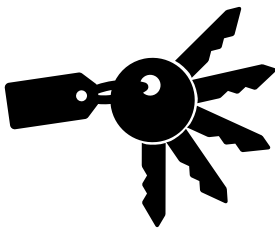
1. Name/Role/Credibility

2. Hook or Attention Grabber

3. Reason we are here

4. Benefit to audience

5. Goal at the end of meeting or presentation

1. What is/are your name/role/credentials? _____
   _____

2. What is your hook or attention grabber? _____
   _____

3. What is the reason you are here? _____
   _____

4. What is the benefit to the audience? _____
   _____

5. What is your goal at the end of the meeting? _____
   _____

Establishing Credibility

If your audience is not aware of your qualifications or experience, you may want to establish them at the beginning of your presentation Also, if appropriate, include mention of any pertinent degrees, awards, accomplishments, education, experiences, titles or affiliations that might help establish your credibility with the subject at hand. Don't assume your audience already knows your previous background and history.

Establishing a Hook

After initially greeting your audience, it is important to create a memorable opening for your communication, something that will grab attention. As a speaker, you need to capture your audience's attention right from the start. Find a hook. If you don't capture their attention right away, you run the risk of losing them for the rest of your presentation.

Some effective ways to create a hook:

1. Discuss a current event
2. Recount a relevant story
3. Make a provocative statement
4. Share an impressive statistic

5. Recite a famous quote
6. Ask a thought-provoking question
7. Utilize an interesting visual aid
8. Reference a previous speaker

Example of an effective Master Introduction

Thirty-eight NASCAR events over the course of ten months in any given year. Forty-seven million fans. That's a lot, right? Now double that. Ninety-four million—that's how many country music fans are out there. My name is Chris Epperly and for the past ten years, I have had the privilege of creating strategic partnerships with many American brands, bringing these brands to the Country Music Association. So why are we here? I am here to tell you about our core assets at the CMA and why you should be involved in the things we have to offer. What's the benefit to you? Well, that's easy: I want to increase your brand awareness. I want to enlighten people as to why your brand is so unique and why the consumer should consider using it. The goal for this presentation is pretty simple: I want to provide you with a unique partnership opportunity with CMA as a whole and then, once we've become partners, I want to drive consumer traffic to your business.

EXERCISE: Master Introduction

> *The audience only pays attention as long as you know where you are going.*
>
> —Philip Crosby

Mastering Your Transitions

One of the most common reasons that presentations or meetings fail to achieve their desired outcome is that the facilitator or presenter does not have clear and specific transitions; this is usually a result of inadequate preparation. Consequently, everything just blends together in one long blur of data. Without seamless transitions, your message will likely seem choppy or disjointed. Transitions should be clear, smooth, and logical, effortlessly moving your audience from one point or topic to the next.

Here are some examples of nonverbal transitions that can be used effectively:

- Movement
- A change in facial expression
- Silence or dramatic pause
- A change in pace
- Variance in pitch

- A change in body posture
- Use of a prop
- Adjustment in volume
- A new visual aid
- A change in speaker(s)

Master Closing

Just as your Master Introduction framed your message at the outset, you need a Master Closing to revisit those points and reframe the message for your listeners. Below are the five points that should be included with your Master Closing.

5 Keys to a Master Closing
1. Summary of main points
2. Review of benefit to audience
3. Re-introduce the goal and/or ask for action
4. Closing hook
5. Thank you to audience
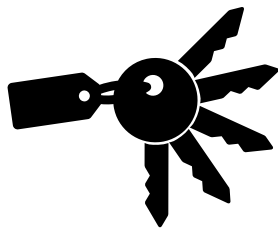
1. Outline summary of main points? _____
   _____

2. What is your benefit to your audience? _____
   _____

3. What is your goal? What action will you ask for? _____
   _____

4. What is your closing hook or challenge? _____
   _____

5. How will you thank your audience? _____
   _____

Everything has to come to an end, sometime.
—L. Frank Baum

Example of an effective Master Closing

So I've provided quite a bit of detail today about the CMA and all of the exciting assets we could make available to you if you chose us as a strategic partner. If you do decide to align yourself with all that the CMA has to offer, I am confident that we will be able to increase your brand awareness and, ultimately, drive consumer insight, showing people exactly why your brand is so unique. To put it plainly: it will increase your business. The goal I laid out at the top of this presentation was to provide you with a unique partnership opportunity. I've detailed why I believe a partnership with the CMA would drive consumer traffic to your business. The ball is in your court now. As Henry Ford once said, ''Coming together is a beginning; keeping together is progress; working together is success.'' Thank you very much for your time. I look forward to your decision.

EXERCISE: Master Closing

Don't raise your voice, improve your argument.
—Desmond Tutu

Presenting to Senior Leadership

There are certain challenges you may experience when communicating or presenting to senior leadership. Often, high-level executives have limited time and tunnel vision, thus making them particularly difficult audiences.

Here are five tips to remember when dealing with senior leaders:

1. **Don't be afraid to let them know what you want upfront.** If you are delivering a presentation to request more resources, you can expect they will want to know how much you are requesting. You may have been planning to provide that information at the end of your meeting, but try asking them for what you want (and how much) at the beginning. This will ensure the rest of the time they are focused on your justification as to why it is a great investment and not how much it will cost.

2. **Know your audience and the personalities involved.** Different executives have different personalities. Be aware of the types you are dealing with so you know the best way to move forward through your presentation.

3. **Stay within your area of expertise and be prepared**. Don't stray too far from the material you have prepared. Stay on track. And definitely don't begin speaking about a topic that you don't know well. Don't fake it. Offer to do some further research and let them know you will be happy to share the findings once you do.

4. **Offer choices and alternatives—accept responsibility.** While developing your material, put together various options for the executives to consider. Give them choices. Own your presentation and the information included within it. If an error is discovered, own that too and accept responsibility and assure the group that the mistake will be fixed.

5. **Be flexible with your presentation or message.** When dealing with top brass, often a new topic may arise that may supersede the topic that you are speaking about currently. It's up to you to stay nimble as a presenter and be able to shift quickly and effortlessly to a different area or a different topic to accommodate the executive's request.

Gaining Commitment from Senior Leadership

1. **Tout the benefits.** Don't be shy about providing details about how your program or plan could have a positive effect on productivity or the bottom line for the senior leader.

2. **Uncover needs.** Spend as much time as necessary gathering information. This will help you identify and qualify the needs of the leader: past buying patterns, previous decisions that were made and present pain points.

3. **Utilize open-ended questions.** Instead of asking, "Do you think our team might benefit from this investment?" phrase it in a way that will solicit more than a simple yes or no answer. A better way to ask that question might be, "In what ways can you see this investment benefitting our team?"

4. **Listen actively.** This means listening with your eyes as well as your ears. Listen not only to what the senior leader is saying but also to the way she is saying it. Keep your eyes and ears open to signals coming from the other party and adjust your communication as necessary.

5. **Don't oversell.** Senior leaders do not like to feel that they are being "sold" to, so be careful about going overboard with your pitch or proposal. Avoid the hard sell at all costs. Be sincere, be factual and be brief.

6. **Use trial closes.** As you feel the process getting closer to commitment, float a trial close to the senior leader to test the waters and your assumptions about the process to this point. Trial closes could be questions such as, "Does this request for more funding seem reasonable to you?" or "Do you think this is something we will be able to initiate in the next two weeks?"

7. **Bring the passion.** Senior leaders are drawn to others who are passionate and excited so make sure your body language and voice communicate this intention when it comes to your proposal. Be sincere, be engaged and be present in your presentation or meeting.

8. **Ask for a commitment.** If you don't ask, you don't get. Don't be afraid to ask for the funding or push for buy-in once you've earned the right to do so.

> *In order to succeed, we must first believe we can.*
> —Nikos Kazantzakis

Framing Your Master Presentation

Participants will engage in a simulated communication scenario relevant to their needs and environment using all of the building blocks and techniques covered in the training.

1. What is the topic or message you are communicating? _____

   _____

2. Who is your audience? _____

   _____

3. What challenges could you face with this audience or material? _____

   _____

4. What is the objective that will be achieved if your message is delivered successfully? _____

   _____

5. What intention(s) will you utilize in order to achieve the objective? _____

   _____

   > *I want to _____ my audience so that my audience will _____.*

   Intention options:

Challenge	*Excite*	*Motivate*
Reassure	*Involve*	*Empower*
Persuade	*Caution*	*Entertain*

Utilizing Visual Aids

It's a visual world and people respond to visuals.
—Joe Sacco

Visual aids can be used to enhance your message by illustrating specific points using graphs, charts, diagrams or bullet points. Examples of different visual aids include digital presentations, flip charts, video, handouts and white boards. If used correctly, visual aids can add impact and interest to your presentation and can help an audience better retain the information you are providing.

Tips when using visual aids:

1. **Decide what type of visual aid would be most effective.** Choosing the wrong visual aid can hinder the success of your presentation.

2. **Limit the number of visual aids.** Remember: less is more. Use only visual aids that are absolutely necessary to illuminate your points.

3. **Master your transitions.** How smoothly you move from one visual aid or topic to the next can greatly enhance the effectiveness of your presentation.

4. **Talk to the audience, not the visual aid**. Try to avoid speaking with your back to the audience as much as possible. Avoid reading your material or visual aids word for word.

5. **Be prepared to present without your visual aids.** Technical problems can derail or destroy a good presentation, so be ready for anything. Bring along a hard copy of your presentation in case your equipment malfunctions.

6. **Double-check your equipment.** Before your presentation begins, inspect your equipment to make sure you have everything you need and it is all in working order.

7. **Do a dress rehearsal.** Practice your entire presentation with the actual equipment and visual aids you will be using on the day. Videotape and analyze playback.

Digital Presentation Guidelines

1. **Decide on a theme and be consistent.** Make sure you clearly understand the goal and intention for your presentation and the mood you want to create with your audience.

2. **Follow the Statute of Six.** The Statute of Six is a good guideline to utilize when building your slides: no more than six words per bullet, no more than six bullets per image and no more than six word slides in a row. If your audience cannot understand your slide in six seconds or less, it probably contains too much information.

3. **Pick a color scheme and stick to it.** You can often choose the color scheme for your slides based on your company's corporate colors. If you are including your company's logo in your template, choose colors that are compatible or complementary.

4. **Choose a font that is easy to read**. As a general rule, sans serif fonts are easier to read on a slide. Try to utilize text that is at least 28 or 32 point size, with titles being 36 to 44 point size.

5. **Avoid using all CAPS and italics.** Unless you are indicating a quote, or that something should be shouted, steer clear of italics and all CAPS.

6. **Use bold only for emphasis.** Utilize bold fonts sparingly and only to visually call attention to a particular word or phrase on a slide that you want to highlight.

7. **Make sure the words are legible against the background.** Keep your backgrounds simple and avoid patterns. Choose backgrounds that will be a clear contrast to the colors of the text.

8. **Limit the use of animation and transitions.** Use one slide transition style between slides, to maintain consistency.

> *When people read PowerPoint presentations to me, my head explodes.*
>
> —Roger Ebert

Digital Presentation Examples

Effective use of visual	Ineffective use of visual
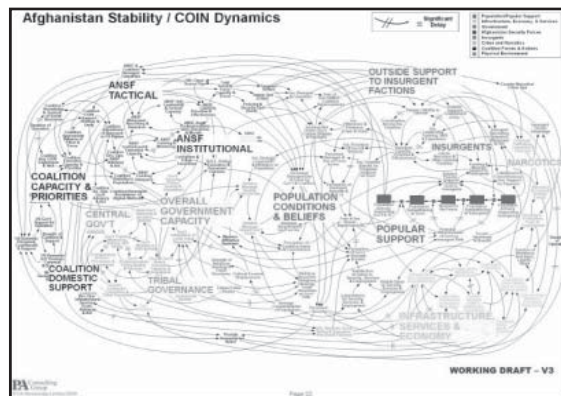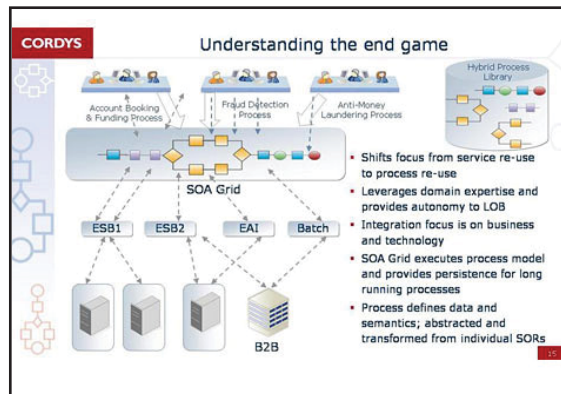
Notes

Adult Learning Principles & Instructional Style

> *I never teach my pupils; I only attempt to provide the conditions in which they can learn.*
>
> —Albert Einstein

Part of being an effective instructor involves understanding how adults learn. Although adult learning is a relatively new field of study, it is just as important to understand as traditional education and carries potential for greater success. Compared to children and teens, adults learn in different ways, so teachers must actively involve adult participants in the learning process.

Adult learners prefer:

1. To be self-directed during learning scenarios

2. Clear learning goals that align with their own agendas

3. Relevant learning experiences that are transferable to their work

4. Examples and scenarios that are practical and job-related

5. To be shown respect and are turned off by condescending language

6. To actively participate in learning rather than passively observe

7. To feel in control and have a say in the learning process

8. Learning to be logical and build upon what they already know

9. To come to their own conclusions, as opposed to simply being told something

10. To have their time respected and utilized productively

? The reason most adults enter any learning experience is to create _____ .

For adult learners, a class or training often leads to a change in their skills, behavior, knowledge level, or even in their overall attitudes about things. Compared to children, the major differences between adult learners and children involve the degree of motivation, the amount of previous experience, the level of engagement, and how the learning is applied.

Malcolm Knowles, an American educator, pioneered the field of adult learning and identified four critical elements of learning that must be addressed to ensure that participants gain the most from their learning experience:

1. **Motivation.** If the participant does not recognize the need for the information, the instructor's effort to assist the participant will be unsuccessful.

2. **Reinforcement.** Reinforcement is a very necessary part of the teaching/learning process; through it, instructors encourage correct modes of behavior and performance.

3. **Retention.** Students must retain information from a class or training in order to benefit from the learning. The instructors' jobs are not finished until they have assisted the learners in retaining the information. The instructor is to assist learners in retaining the information in the course. An instructor who provides examples and scenarios that are practical and job-related will enable learners to retain the information.

4. **Transference.** Transfer of learning is the result of training—the ability to use the information taught in the course but in a new setting.

Each adult brings to the learning experience preconceived thoughts and feelings that will be influenced by each of these factors, as well as personal experiences and biases that will affect her learning. Assessing the level of these traits and the readiness to learn should be done each time a teaching experience is being planned.

> *All the world is a laboratory to the inquiring mind.*
> —Martin H. Fischer

Andragogy vs. Pedagogy

Andragogy—the study of adult learning—differs from pedagogy, which is the more traditional teaching model typically used to instruct students in school. Because most of us have more familiarity with the pedagogical model, we tend to lapse into this teaching style. However, andragogy is more appropriate for the professional learning environment.

Here are some distinctions for each:

Andragogy	Pedagogy
Learners are called "participants" or "learners."	Learners are called "students."
Independent learning style.	Dependent learning style. Objectives are predetermined and inflexible.
Objectives are flexible.	
It is assumed that the learners have experience to contribute.	It is assumed that the learners are inexperienced and/or uninformed.
Active training methods are used.	Passive training methods, such as lecture, are used.
Learners influence timing and pace.	Trainer controls timing and pace.
Participant involvement is vital.	Participants contribute little to the experience.
Learning is real-life problem centered.	Learning is content-centered.
Participants are seen as primary resources for ideas and examples.	Trainer is seen as the primary resource who provides ideas and examples.

We now accept the fact that learning is a lifelong process of keeping abreast of change. And the most pressing task is to teach people how to learn.
—Peter Drucker

Instructional Strategies for Job Aid

There are a variety of instructional strategies available. The first table below provides you with a list of industry standard instructional strategies. This is for reference only. On the next table you will see only the most used instructional strategies in KBS-Audit.

Instructional Strategy	Definition
Active Experimentation	Participants carry out surveys, perform tests or experiments, or conduct site visits.
Case Study	A written or oral account of a situation is given to the trainees. Either individually or groups, the trainees are asked to analyze the case and present recommendations.
Collaborative Learning	Participants work together in groups to teach each other new material and produce group documents or projects, which may include group and individual assessment.
Computer Based Training	The participant receives instruction, responds and receives feedback via interaction with a computer.
Course Handouts	Reading materials for distribution to the participants to support the selected presentation and distribution methods.
Debates	Participants are asked to take sides of an issue and argue them based upon factual data and personal experience. The debate may require participants to argue against their own point of view.
Demonstration	Participants view a real or life-like example of the skill or procedure to be learned. The demonstration may be live with an instructor or through videos or videoconferencing.

Instructional Strategy	Definition
Dialogue	A group explores complex issues from many points of view without selecting one "correct" position. The participants are not asked to debate the topic, to win an argument or to make decisions. They are expected to listen to everyone's opinions, to suspend their own assumptions and to reflect on the meanings that are held. Dialogues are meant to develop a broader perspective and deeper understanding of complex phenomena.
Discussion	This method involves the free exchange of ideas and feelings among learners, the instructor or both. It is useful in assessing knowledge, skills and attitude of a group of participants, stimulating rapport with participants and obtaining feedback from participants about a topic or idea.
Drill and Practice	This method is used for skill building with feedback built in to correct errors. The participant does practical exercises to increase fluency in a new skill or to refresh an existing one.
Facilitated Discussion	During and after the presentation, participants or instructors ask questions to help learners internalize and understand the content more completely. This type of interaction also helps to confirm that the participants understood the instructor.
Fishbowl	A modification of the discussion in which a large group is divided into two smaller groups. The "inner" circle discusses an issue or does an exercise while the "outer" circle observes and then offers observations or feedback.

Instructional Strategy	Definition
Game	An exercise in which competition or cooperation (or both) are used to practice principles learned previously. It is usually intended to be fun.
Independent Learning	Participants select topics and formats that they want to study and can use a wide variety of technologies or methods to learn.
Instruments	Participants fill out questionnaires, checklists, etc. to gain insight about themselves or explore a topic.
Interviews	Participants seek information about the topic from resources or people outside of the course.
Job Aid	Many forms of aids can be given to the participants to assist them in doing their jobs. These include worksheets, checklists, samples, flow-charts, procedural guides, glossaries, diagrams, decision tables, manuals, etc.
Journal	Participants keep a systematic record of reflections, course processes or activities to put memories and thoughts on paper or computer to refer to later and witness the process of learning.
Lecture	The instructor delivers a prepared script on a certain topic, resulting in one-way communication without immediate response or interaction from participants.

Instructional Strategy	Definition
Lecturette	A very brief oral presentation usually requiring only a few minutes—an attempt to overcome some of the weaknesses of formal lectures. These are usually interspersed throughout a course.
Mentoring	Participants are paired with people who are more experienced. The mentor teaches and supports the participant in understanding the organizational culture, the environment and the skills needed to perform a job, complete a project or achieve a positive outcome in a specific situation.
Mini Case	A modification of the case study in which a brief situation is described to the trainees who discuss how the case should be handled. Characterized by only key facts being presented and by brevity in discussion. Often used to give examples of situations and procedures.
Modeling	This method relies on representations of depth and solidity in objects and models. It is a way to bring the representation of a product into a course. Models are usually three-dimensional representations of real objects and can be assembled and modified.
Peer Presentation	A participant presents information to the other learners in the course or training session.

Instructional Strategy	Definition
Practice Excercise - Written or Computer Based	Participants are given an assignment to practice performing the task. Can be used for any type of task.
Presentation	The instructor presents information to the learners through various means, resulting in one-way communication without immediate response or interaction from learners.
Problem Solving	A real or fictitious situation is presented as a problem or issue, and the learners must work to solve it, either individually or as a team, using the knowledge and skills previously obtained in the course. Problem solving can occur through interaction with content via cases scenarios where learners have to troubleshoot a customer service issue or situation.
Programmed Instruction	A self-instruction method in which participants work through materials at their own pace, making responses and receiving feedback on their work. Can be done in many formats and media.
Quizzes	Instructors pose questions, which require written or spoken responses from the individual or group for evaluation purposes.
Reports	Participants write reports to link together the major concepts of the course, module or knowledge object in a cohesive, clear document, which can be used to assess understanding and learning.

Instructional Strategy	Definition
Software Applications	Computer applications can serve as assistant instructors. Some applications are designed to present material, provide instructional activities or situations, conduct quizzes, interact with learners, evaluate learner responses, provide feedback and determine follow-up activities.
Seminar	A participatory method in which participants are expected to have good background in the topic and work together as equals. Often starts with a leader giving a brief presentation and then acting as a resources person while the trainees are responsible for directing their own efforts.
Simulations	Participants work through "what if?" scenarios to practice formulating hypotheses and examining outcomes. Dynamic, interactive, task-driven exercises enable learners to experience a concept through learning-by-doing.
Small Group Discussions	Participants work together in groups of three to five for a variety of purposes: developing social skills, conversing about the topics and developing ideas together.
Study Guide	Materials that provide a map for the participants to follow in learning a subject. It can include many types of activities and materials, and can be used individually or in groups.

Instructional Strategy	Definition
Tutorials	A tutor or a computer presents content, poses a question or problem, requests a student's response, analyzes the response, supports appropriate feedback and provides practice until learners demonstrate a predetermined level of competency.
Teamwork, Cooperative Learning Groups	Small groups of participants work together in an online environment or through audio or videoconferencing to achieve a common goal or complete a common project while learning social skills and how to work in a group. Participants apply problem solving skills and critical thinking to the project and learn from each other as they work.
Website Development	A text-based environment can be used for learning about something, organizing thoughts, learning a process, presenting facts, concepts or definitions, identifying procedures and processes and addressing principles or guidelines on the World Wide Web.
Workshop	A highly participative session that puts greater emphasis on participant application than on presentation by the leader. Trainees work to produce a product or solve a problem with guidance from a leader.

KBS-Audit Most Used Strategies

The table below contains the preferred standard instructional strategies used at KBS-Audit. Please refer to the table below to select the best strategy and associated time frame when designing a course.

Instructional Strategy	Use	Length
Case Study	When new ideas/concepts are best learned through meaningful scenarios.	20 mins to several hours
Demonstration	When learners need to see how their new skill or knowledge is best used.	20 to 30 minutes per task
Facilitated Discussion	During and after the presentation, participants or instructors ask questions to help learners internalize and understand the content more completely. This type of interaction also helps to confirm that the participants understood the instructor.	10 to 20 minutes
Game	When the subject is best learned and retained by having fun. May also be used to energize a dry, tedious subject.	5 to 45 minutes
Group Discussion	When sharing a real-life scenario is relevant to the learning experience. Also used when emphasizing application of a new skill.	5 to 15 minutes
Independent Learning	When the subject is pertinent only to the individual. May also be good for a group of people who don't know each other well enough to share their thoughts.	5 to 20 minutes
Lecture/Presentation	The instructor presents information to the learners through various means, resulting in one-way communication without immediate response or interaction from learners.	5 to 20 minutes

Instructional Strategy	Use	Length
Practice Exercise - Written or Computer Based	Participants are given an assignment to practice performing the task. Can be used for any type of task.	5 to 15 mins
Problem Solving	When learners need to apply new knowledge, skills and abilities to a problem situation.	15 mins to several hours
Role Play	When the learning needs to be demonstrated in a face to face setting. When the participants need to show how to use new skills in a safe setting prior to returning to work.	5 to 15 mins per scenario
Simulations	Participants work through "what if?" scenarios to practice formulating hypotheses and examining outcomes. Dynamic, interactive, task-driven exercises enable learners to experience a concept through learning-by-doing.	10 to 45 mins
Surveys/Tests/Quizzes	To evaluate knowledge, skills and abilities to show how well the learner understood the content. Quizzes also help energize a group and get them re-engaged after lunch or a long lecture period.	5 to 15 min

Being Assertive

> *If passion drives you, let reason hold the reins.*
>
> —Benjamin Franklin

Being assertive is a style of communication that allows a person to confidently and directly express his feelings or opinions about a specific topic or situation. Being assertive dictates that you take charge of your own behavior and offers many benefits. One of the most valuable is it prevents others from taking advantage of you. By communicating assertively you show that you are not afraid to express your thoughts, feelings and ideas without equivocation. Being assertive can create more honest relationships and will build self-confidence that, in turn, will help you earn respect from those around you.

Benefits of being assertive:

1. Earn respect

2. Develop trust

3. Foster relationships

4. Establish credibility

5. Manage conflict

6. Control stress

7. Increase confidence

8. Build self-esteem

? According to a recent survey, which gender is four times more likely to initiate a negotiation?

Passive ASSERTIVE Aggressive

There are three styles of communication that we all use at various times during our daily lives: a passive style, an assertive style and an aggressive style. In almost all situations the assertive style is the most effective and yields the best results.

Characteristics of a PASSIVE communicator

- Rarely asks questions

- Never challenges the ideas of others

- Doesn't contribute ideas

- Spends the majority of the time listening

- Low volume when speaking

- Happy with others taking credit

- Constrictive gestures and body language

- Lack of direct or sustained eye contact

Characteristics of an ASSERTIVE communicator

- Asks questions when appropriate

- Not afraid to challenge the ideas of others

- Feels comfortable contributing ideas

- Listens actively

- Facial expressions are open and support intention

- Uses appropriate volume when speaking

- Active gestures and body language

- Direct eye contact

- Listens effectively to others

Characteristics of an AGGRESSIVE communicator

- Inflexible when collaborating

- Constantly interrupts others

- Tends to dominate discussion

- Tense or negative facial expressions

- Violates personal space

- Doesn't listen to others

- Loud volume when speaking

- Intimidating gestures and body language

- Direct and sustained eye contact

Are You Assertive?

Consider your own personal style as a communicator. Which style of communication do you generally utilize? Think about the last time you had to deliver feedback or give an opinion to a co-worker or friend. How do you think you were perceived? Would people categorize you as patient or impatient? What about you as a negotiator? Do you usually get what you want, or are you more likely to give in or compromise? Do you voice your opinions or remain silent in meetings? When people pile extra work on you do you say yes even when your plate is full? Are you quick to judge or condemn others? Are people in your life more likely to engage with you or avoid talking to you altogether?

Based on the information above, try to honestly assess your overall skills as a communicator and place yourself on the continuum above when communicating with your boss, your client, your spouse, etc. Where do you think others would place you on the continuum?

While we all use the various styles of communication in our daily interactions with others, the goal is to be assertive in your overall communication. Why? Assertiveness allows for a more open and honest exchange of information in which all parties, opinions and views are being heard and respected. It is very challenging to spend time or do business with someone who communicates entirely from one side of the spectrum.

Ten tips to show assertiveness

1. **Use "I" statements.** To truly show assertiveness, it is helpful to use "I" statements as much as possible. "I disagree," sounds less accusatory than "You're wrong." By using "I" statements, you are very clearly making your thoughts, feelings and opinions known to others.

2. **Speak up.** People cannot be expected to read your mind. If you have ideas or opinions that you feel should be seriously considered, share them If you want something, ask for it. If you need assistance, make a request. This means using your voice effectively to command attention so that you can clearly articulate your points.

3. **Challenge respectfully.** If you have a strong and differing opinion about something that is being discussed, raise those concerns openly. State your objections unequivocally and explain the reasons why you disagree. Make your point or state your request confidently, without apology or vacillation.

4. **Learn to say "no".** If a request is not feasible or realistic, it is perfectly acceptable to say "no." Acknowledge the person making the request and give a brief and truthful explanation as to why you are refusing. If it is possible to find a compromise or fulfill the request under different circumstances, share those options or offer alternatives to the person making the request.

5. **Be firm, not rigid.** Be open to the ideas of others and listen actively, but be firm in your response. Be willing to defend your idea or push for your request. Be empathetic but don't give in too easily or without clearly defending your position.

6. **Get comfortable with conflict.** A certain amount of creative conflict can be healthy when brainstorming or trying to reach a consensus as a group. Challenge others if you feel you have better ideas or options to contribute. This does not mean being disagreeable just for the sake of disagreeing. Play devil's advocate; ask questions and explore ideas from all angles.

7. **Leverage your body language.** As with everything else, your physical cues must support your intention. If your intention is to persuade or excite, your facial expressions and body language must clearly communicate this. An assertive intention must be supported by an assertive delivery. Use appropriate gestures to express your passion for the ideas or positions you are putting forward.

8. **Look others in the eye.** You can't be assertive if you don't make eye contact with the people you are talking to. By looking them in the eye and holding their gaze, you will signal that you are serious and committed to the ideas you are putting forward.

9. **Listen actively.** Assertive communication means listening closely to what is being communicated so that you can respond appropriately. Don't prejudge or make assumptions about what the other people will say; let them complete their thoughts before offering your opinions or ideas.

10. **Own your message.** When putting forth ideas you believe in, it is important that you support those ideas and defend them when challenged or questioned by others. Don't signal a lack of confidence, either verbally or nonverbally, and don't undermine your stance out of fear that others may disagree with you.

Avoiding Passive Word Choices

When projecting confidence and being assertive with communication, words matter. When possible, try to avoid passive or "wishy-washy" words and phrases, such as the ones listed below. These words can often weaken an argument or make a speaker seem less than committed to a particular point or assertion.

- "I think"
- "I would like"
- "I want"
- "Sort of"
- "Really"
- "I'm pretty sure"

- "Maybe"
- "I hope"
- "Wish"
- "Fairly"
- "Partially"
- "Somewhat"

EXERCISE: Being Assertive

Building Rapport

> *The most important single ingredient in the formula of success is knowing how to get along with people.*
>
> —Theodore Roosevelt

The same set of communication skills in body language and vocal quality that is integral when presenting material or facilitating a training session is just as important, if not more so, when communicating socially (often before, during and after your presentation or meeting). Effective social communication is an excellent way to build or strengthen the relationship between you and your audience or listeners. Keep in mind that these relationships, like all other types of relationships, need to be established, developed and maintained.

? Why is it important to continue to engage your participants before and after the session and even during breaks?

Connect Early

Remember, the moment your audience walks through the door, they are making judgments and perceptions about you based on what you say and how you say it. That's why it is essential that you arrive early for your engagement so that you can greet your audience and introduce yourself as they arrive. Smile, shake their hands and learn their names.

Traits that make a person more likeable to others:

1. Empathy

2. Sincerity

3. Trustworthiness

4. Curiosity

5. Active Listening

fact

According to experts, _____ judgments are made about a person within the first 7 seconds of them meeting someone.

Checklist for building rapport

Below are areas to remember when meeting participants prior to your training or presentation:

1. **Proper greeting.** Stop what you are doing and approach the participants when they first arrive. Smile and introduce yourself. Shake hands while maintaining good eye contact. In many circumstances, a proper greeting is your calling card and your first impression with each participant in your training.

2. **Learn and use their names.** People generally like to hear their name spoken, so learn everyone's name early and use it. By sprinkling it in your conversation at various points, it will help draw them in. Also, by repeating their name, it will help you remember it.

3. **Icebreaker.** An effective icebreaker eases the transition from the initial greeting or introduction into a conversation. Look for 'safe' or non-threatening topics to get things started, such as shared experiences, where you each live or grew up, how you traveled to the training location, etc. Avoid talking too much about yourself and avoid asking overly personal questions about the other person early on.

4. **Mirror body language and eye eontact.** Try to mirror back the speaking pace and body language you are observing from the participant. Remember to maintain eye contact with the person, especially when they are speaking or answering a question. Give them your full focus and attention to show you are engaged and interested.

5. **Find common ground.** Use personal or shared experiences to connect with your participants. Stories, anecdotes or examples from your life can help you engage your listeners and assist them in retaining information. Asking open-ended questions of participants and listening to their answers will help reveal information about their attitudes and feelings.

6. **Show empathy.** Demonstrate to the other person (both verbally and nonverbally) that you hear them and understand their feelings or concerns. Be genuine and non-judgmental when participants have a different or opposing point of view or opinion.

7.   **Acknowledge resistance.** Be conscious of the verbal and nonverbal cues coming from your audience. Monitor their behavior and interest level to gauge interest and adjust your intention accordingly. If they suddenly seem skeptical, switch gears to reassure them. If their focus seems to wander and you seem to be losing them, use a pattern interrupt to re-engage or simply take a break to refresh and re-energize.

8.   **Listen actively.** Over the course of your training or workshop, you will learn a lot about your participants by simply being present and listening. You will glean information from your participants that will help you further tailor your training, making the learning experience richer and more valuable for all involved.

9.   **Stay positive.** Deliver a training you would want to attend yourself. Enjoy it. Show your personality. If you are comfortable with humor and can include some, do it. Be passionate and excited about the information or knowledge you are sharing and clearly make participants aware of the positive benefits it will provide.

10. **Show concern for their learning.** Try to stay open and approachable throughout your training or workshop by emphasizing the benefits for the participants. Answer questions fully and completely. Stop frequently to ask questions of participants, solicit their feedback and confirm understanding.

Effective icebreaker topics or questions:

1.   _____

2.   _____

3.   _____

4.   _____

5.   _____

Ineffective icebreaker topics or questions:

1. _____

2. _____

3. _____

4. _____

5. _____

Building Rapport

The most important single ingredient in the formula of success is knowing how to get along with people.

—Theodore Roosevelt

The same set of communication skills in body language and vocal quality that is integral when presenting material or facilitating a training session is just as important, if not more so, when communicating socially (often before, during and after your presentation or meeting). Effective social communication is an excellent way to build or strengthen the relationship between you and your audience or listeners. Keep in mind that these relationships, like all other types of relationships, need to be established, developed and maintained.

> **?** Why is it important to continue to engage your participants before and after the session and even during breaks?

Connect Early

Remember, the moment your audience walks through the door, they are making judgments and perceptions about you based on what you say and how you say it. That's why it is essential that you arrive early for your engagement so that you can greet your audience and introduce yourself as they arrive. Smile, shake their hands and learn their names. Thank them for coming.

Traits that make a person more likeable to others:

1. Empathy

2. Sincerity

3. Trustworthiness

4. Curiosity

5. Active Listening

fact

According to experts, _____ judgments are made about a person within the first 7 seconds of them meeting someone.

Checklist for building rapport

Below are areas to remember when meeting participants prior to your training or presentation:

1. **Proper greeting.** Stand (if seated) and approach the person you are meeting and smile. Shake hands while maintaining good eye contact. In many circumstances, a proper greeting is your calling card and your first impression.

2. **Use their name.** People generally love to hear their name spoken, so learn the person's name and use it. By sprinkling it in the conversation at various points, you will help draw them in. Also, by repeating their name, it will help you remember it.

3. **Icebreaker.** An effective icebreaker eases the transition from the greeting into the conversation. If you know anything about the person you are meeting, asking him about those things can act as a good icebreaker and serve as an excellent springboard. Be sure to write down and remember important family names or items of interest after your meeting to use as a future icebreaker.

4. **Body language/eye contact.** If you are relaxed, smiling and gesturing naturally, the other person is also more likely to mirror this behavior back to you. Remember to maintain eye contact with the person, especially when they are speaking or answering a question. If your eyes are looking somewhere else or wandering, you will be perceived as distracted or disinterested in what is being said.

5. **Vocal quality.** Make sure you speak clearly and articulately so the other person can understand you. In a bar or crowded restaurant, you may need to adjust your volume and pace. And watch your inflections. Remember, downward inflection exhibits confidence and certainty while upward inflection shows doubt and shyness.

6. **Lead the Conversation.** Don't interrogate. Remember, you are building a relationship. That involves both individuals learning more about each other. Don't be afraid to insert interesting information about yourself when appropriate. But be careful not to interrupt. If you don't know what to talk about, steer the conversation to a common interest that you will both be comfortable conversing about.

7. **Focus on the other person.** When communicating socially, successful interactions often require suspending your own wants and ego. Let the other person speak; be comfortable simply letting them be the focus of attention. Ask open-ended questions to allow them the opportunity to speak.

8. **Active listening.** Be engaged. Over the course of the conversation, you will learn a lot about the other person. Try to remember the important facts or items you take away from the meeting. Write them down in a notebook, address book or contact management system. They will provide great icebreakers for your next meeting.

9. **Be yourself.** We spoke in earlier modules about your "personal stamp." It is important that the real "you" shows up in the social meeting as well. Smile and be sincere. Show your personality. If you are comfortable with humor and can include some, do it. You will be much more engaging if you don't pretend to be someone else.

10. **Closing.** Stand, shake hands, smile, make eye contact and use the person's name, just like in your greeting. Your last impression now supersedes your first impression. Thank them for their time and tell the other party you look forward to your next meeting. If appropriate, "ask for action" on any outstanding items or next steps that are business-related.

Conversation topics for social communication

When meeting participants for the first time, you often don't know what to talk about. If you are leading the conversation, it is your job to steer it to something you both share an interest in.

If the conversation starts to drop or grind to a halt, here are some general topics you can usually use to jumpstart things:

1. _____

2. _____

3. _____

4. _____

5. _____

There are certain questions and topics in every culture that are generally off-limits and best to avoid, such as:

1. _____

2. _____

3. _____

4. _____

5. _____

Building Relationships

The most important single ingredient in the formula of success is knowing how to get along with people.

—Theodore Roosevelt

The same set of communication skills in body language and vocal quality that is integral when presenting material or facilitating a training session is just as important, if not more so, when communicating socially (often before, during and after your presentation or meeting). Effective social communication is an excellent way to build or strengthen the relationships between you and your audience or listeners.

fact

According to experts, _____ judgments are made about a person within the first 7 seconds of them meeting someone.

Whether meeting a client, a peer, your boss or anyone else in a social setting, effective communication is the only way to build or strengthen that relationship. Business relationships, like all other types of relationships, need to be established, developed and maintained.

In business, many social gatherings act as a means to further the next steps for a business transaction. However, before you can ask for action, you have to earn the right to do so by building on and strengthening your relationship. If the client wants to talk business over drinks, great, but let him bring it up.

?

Why is it important to continue to engage your participants before and after the session and even during breaks?

Everyone wants to be perceived by other people as an interesting and engaging person, full of charm and wit. People who are more likeable and charismatic can easily attract others who want to be around them or even be like them. But not all people are blessed with equal communication skills when it comes to social situations involving business associates. Certain individuals have personalities that blossom once they leave the structured environment of the office, while others become more withdrawn, almost wilting or fading away altogether.

Checklist for building rapport

Below are the areas to stay focused on when meeting a business associate in a social setting:

1. **Proper greeting.** Stand (if seated) and approach the person you are meeting and smile. Shake hands while maintaining good eye contact. In many circumstances, a proper greeting is your calling card and your first impression.

2. **Use their name.** People generally love to hear their name spoken, so learn the person's name and use it. By sprinkling it in the conversation at various points, you will help draw them in. Also, by repeating their name, it will help you remember it.

3. **Icebreaker.** An effective icebreaker eases the transition from the greeting into the conversation. If you know anything about the person you are meeting, asking him about those things can act as a good icebreaker and serve as an excellent springboard. Be sure to write down and remember important family names or items of interest after your meeting to use as a future icebreaker.

4. **Body language/eye contact.** If you are relaxed, smiling and gesturing naturally, the other person is more likely to mirror this behavior back to you. Remember to maintain eye contact with the person, especially when they are speaking or answering a question. If your eyes are looking somewhere else or wandering, you will be perceived as distracted or disinterested in what is being said.

5. **Vocal quality.** Make sure you speak clearly and articulately so the other person can understand you. In a bar or crowded restaurant, you may need to adjust your volume and pace. And watch your inflections. Remember, downward inflection exhibits confidence and certainty while upward inflection shows doubt and shyness.

6. **Lead the conversation.** Don't interrogate. Remember, you are building a relationship. That involves both individuals learning more about each other. Don't be afraid to insert interesting information about yourself when appropriate. But be careful not to interrupt. If you don't know what to talk about, steer the conversation to a common interest that you will both be comfortable talking about.

7. **Focus on the other person.** When communicating socially, successful interactions often require suspending your own wants and ego. Let the other person speak; be comfortable simply letting them be the focus of attention. Ask open-ended questions to allow them the opportunity to speak.

8. **Active listening.** Be engaged. Over the course of the conversation, you will learn a lot about the other person. Try to remember the important facts or items you take away from the meeting. Write them down in a notebook, address book or contact management system. They will provide great icebreakers for your next meeting.

9. **Be yourself.** We spoke in earlier modules about your "personal stamp." It is important that the real "you" shows up in the social meeting as well. Smile and be sincere. Show your personality. If you are comfortable with humor and can include some, do it. You will be much more engaging if you don't pretend to be someone else.

10. **Closing.** Stand, shake hands, smile, make eye contact and use the person's name, just like in your greeting. Your last impression now supersedes your first impression. Thank them for their time and tell the other party you look forward to your next meeting. If appropriate, ask for action on any outstanding items or next steps that are business related.

Conversation topics for social communication

When meeting someone for the first time, you often don't know what to talk about. If you are leading the conversation, it is your job to steer it to something you both share an interest in.

If the conversation starts to sag or grind to a halt, here are some general topics you can usually use to jumpstart things:

1. _____

2. _____

3. _____

There are certain questions and topics in every culture that are generally off-limits and best to avoid, such as:

1. _____

2. _____

3. _____

EXERCISE: Initial Meeting

Co-Facilitation And Team Teaching

> *Great teamwork is the only way we create the breakthroughs that define our careers.*
>
> —Pat Riley

Tips When Co-Facilitating

Please refer to the Guidelines: Differences Between Applying Pinnacle Methods as Presenters and National Instructors on page 49 for specific differences between co-facilitation as a presenter and as a National Instructor.

While most facilitators facilitate by themselves, others are frequently required to facilitate trainings with a partner, such as a peer, team member or co-worker.

Co-facilitation can present some exciting advantages for an audience, but also offers some distinct challenges. A good facilitator must be able to both facilitate and co-facilitate, depending on the material and circumstances of the session. National instructors are expected to be good co-facilitators.

One advantage to co-facilitation is that it introduces audiences to different communication styles, depending on which facilitators have been partnered. Another advantage to co-facilitation is that the task of delivering information and controlling an audience is shared. That said, there are various challenges that must be addressed when facilitating with a partner. Failure to properly address these challenges can result in one or both of the facilitators appearing disorganized, adversarial or unprepared.

Five pitfalls when co-facilitating:

1. _____

2. _____

3. _____

4. _____

5. _____

Here are some tips when facilitating with a partner:

1. **Prepare together.** Take time to properly prepare with your co-facilitator for the upcoming session. Avoid co-facilitating with a stranger. Decide on codes or signals for time management purposes in order to keep the session on track.

2. **Clarify roles.** Decide ahead of time which person will lead, capture ideas on a flip chart, control the slides, take questions, etc. This will avoid awkward moments of suddenly having to decide these things in front of an audience.

3. **Choose a leader.** Even when two or more people are co-facilitating, it is helpful to choose one person to serve as the leader of the session. The leader can be decided by the person's specific status within the organization, by someone volunteering or simply by choosing randomly. Co-instructors will choose among themselves who will teach what module. The other instructor will assist in activity and classroom management.

4. **Take turns.** Try to share the stage as much as possible. Divide the session or presentation into equal sections, but be careful not to switch back and forth between speakers too frequently, as this will make it more difficult for you to connect with your audience.

5. **Assist when not facilitating.** When you are not facilitating, assist your co-facilitator by taking on other responsibilities such as capturing ideas on a whiteboard, distributing handouts or working the projector.

6. **Support your partner.** Avoid publicly disagreeing with your co-facilitator. If you have a concern, wait until a break to address it with them and do it privately. Try not to interrupt, if possible.

7. **Work your transitions.** Transitions from one facilitator to the next should be smooth and seamless so as not to lose the momentum and flow of the session. Practice your cues and transitions (what actors call "tops and tails") ahead of time.

8. **Decide how to handle questions.** Anticipate questions that might arise during the session and decide which facilitator will handle them. Discuss and agree upon your answers ahead of time. If either facilitator has experience or expertise with a specific topic or area, that is the person who should field those questions.

9. **Stay engaged, even when not speaking.** It is important for co-facilitators to stay connected to each other during a session or meeting. Use active listening and check in often with each other. Focus on your co-facilitator even when you are not speaking so as not to distract your audience or steal focus.

10. **Sync your energy levels.** Try to match the energy level of your co-facilitator with regard to volume, pace and gestures.

Communicating Change Effectively

> *You don't drown by falling in the water;*
> *you drown by staying there.*
>
> —Edwin Louis Cole

Change is never easy, yet it is something people deal with in nearly every aspect of their lives. Change can be scary, as it often pulls us out of our comfort zone into new and uncertain territories. In the corporate world, change is necessary for a company or organization to grow and thrive. Companies that resist change or are too late in implementing it often risk their very survival in the process.

fact — According to experts, _____ judgments are made about a person within the first 7 seconds of them meeting someone.

Organizational change can be a very complex process with many moving parts. It is never simple and it doesn't occur overnight. But the process of creating a strategic plan for implementing change is key to long-term success for actual implementation of the changes within the organization. Because not all companies are the same and not all employees deal with change in the same way, different kinds of change require different strategies to gain employee acceptance and engagement.

Some examples of changes that can occur in an organization

1. _____

2. _____

3. _____

4. _____

5. _____

As stated earlier, not all companies are the same. Along those same lines, it can be said that not all change is the same either. Different change often requires different strategies and plans to get buy-in from the various stakeholders involved. Resistance to a new program or plan can severely hinder an organization's ability to move forward and grow.

The three most common types of change:

1. **Developmental change.** With this type of change, the processes that currently exist are slowly and continually improved over time without any drastic and dramatic difference in the way the organization operates. Examples of developmental change might include upgrading of computer systems, utilizing new and improved software, changing vendors, etc. This type of change usually causes little stress to employees if communication has been clear throughout process.

2. **Transitional change.** This type of change is a little more intrusive than developmental change and involves a company replacing or eliminating an existing process and replacing it with one that is completely new. Examples of transitional change might include a corporate reorganization, merger, or the addition of a new product line. The success of transitional change often rests on how smoothly and efficiently the transitional phase goes for all involved. Without constant and clear communication on the part of leadership, employees can feel anxious or uncertain about their jobs and even the future of the company itself.

3. **Transformational change**. This is the most dramatic and sweeping type of change that can happen within a company. With transformational change, a company decides to change its basic underlying strategy and process, often based on a change in supply and demand, lack of revenue, growing competition or the emergence of new technologies in the field. In order to stay competitive in the marketplace, they choose to make radical changes to the way they have previously done business. Transformational change is usually enacted over time and can involve both developmental and transitional change.

Three keys needed to effect organizational change

1. High level of support

2. Support is effectively communicated throughout the organization

3. People are given all the tools and authority needed to implement change

The Change Curve

The Change Curve is a behavioral model of group and individual reactions to the process of change within an organization. The Change Curve is an adaptation of Elisabeth Kübler-Ross's theory that seeks to explain how people deal with catastrophic personal loss and grief.
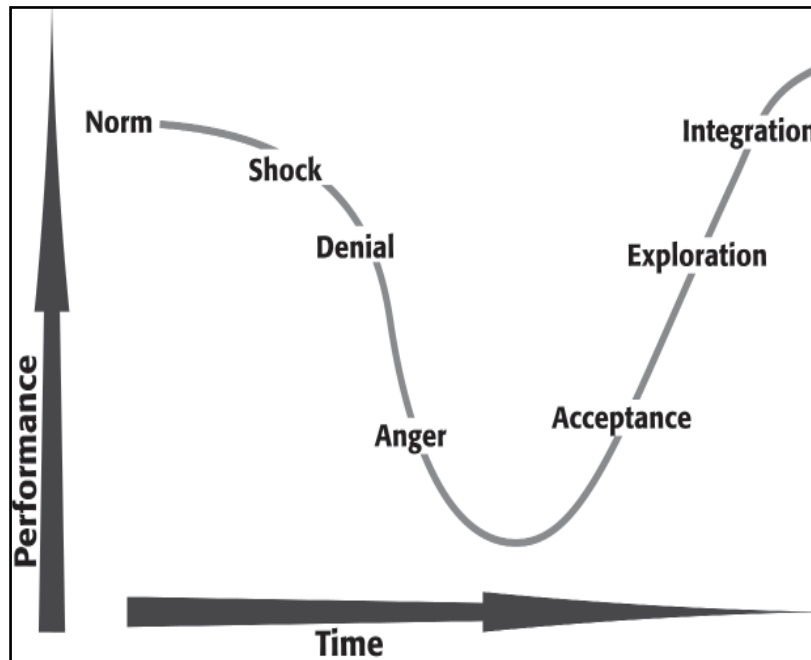
Angles of the Curve:

- **Norm.** In this stage, everything is normal with employees going about their routine until the announcement of change happens. Suddenly their world is turned upside down.

- **Shock.** After the announcement, people may feel blindsided and freeze up. They may worry and feel anxious about their future and the lack of information coming from leadership. Fear of the unknown may take over and they may be afraid of making a mistake under the new programs or plans.

- **Denial.** People don't want to believe it is happening. They miss the feeling of comfort with the familiar and worry that they will not easily adjust to change. They may feel the security and future is being threatened.

- **Anger.** Now people have begun to accept the changes as actually happening but are angry about them. Conflict can arise with finger pointing and blaming. Individuals may start to divide people and rally others against change in a last ditch effort to defeat it or minimize it.

- **Acceptance.** Reluctantly, people began to accept the change is happening and there is nothing they can do to stop it. This manifests itself in low energy and it often shows up in their work, via lackluster performance. They feel like they want to give up and may appear unmotivated and depressed.

- **Exploration.** Gallows humor is common as the changes begin to be implemented. People reluctantly begin to experiment with the new changes and policies.

- **Integration.** People have finally accepted and committed to the changes and get back to work. They eventually decide to be involved and make the best of it. Integration returns to the norm.

fact
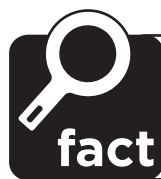
According to experts, _____ % of all restructuring fails not because of strategy, but because of the human dimension.

Managing Reactions to Change

The communicator's task in any change process is managing the curve by helping people adjust and enthusiastically support change as quickly as possible. This requires a communication strategy for each angle of the curve.

Determine what specific intentions might be utilized when communicating with your team at each of the specific angles of the curve and what strategy might be pursued.

- Norm _____

- Shock _____

- Denial _____

- Anger _____

- Acceptance _____

- Exploration _____

- Integration _____

Utilizing Storytelling Effectively

Applying the use of storytelling in a business setting can be highly effective in helping a team or organization deal with change. Stories, anecdotes and illustrations can serve as excellent springboards in business to communicate new strategies, structures, identities and goals.

Here are some questions to consider when choosing a story to include in your speech or presentation:

- Where does the story take place?

- When does the story take place?

- Who is the story about?

- What happens in the story and in what order?

- How does the story pertain to your subject matter?

- How long will it take to tell the story?

- Is this story appropriate for your audience?

A story is a fact wrapped in emotion that compels us to take an action.
—Richard Maxwell

Common mistakes made when managing change:

1. Not communicating strategy clearly

2. Not appreciating that people have different reactions to change

3. Not treating transformation as a mental and emotional process

4. Being less than candid with team members during change process

5. Not setting the stage for change in an appropriate way

6. Improper system or framework to sustain the changes

7. Not establishing the new strategies into the company's culture

8. Lack of vision and foresight from leadership

9. Not involving people at all levels in the change management

10. Not implementing the change quickly yet thoughtful

Change is good. You go first.
–Scott Adams

EXERCISE: Leading Your Team Through Change

Delivering Effective Feedback

> *Criticism may not be agreeable, but it is necessary. It fulfills the same function as pain in the human body. It calls attention to an unhealthy state of things.*
>
> —Winston Churchill

Anyone who manages people, leads a team or runs a business understands the importance of delivering feedback to others. Feedback, when delivered effectively, can positively change behavior. In all instances, providing feedback (whether it is positive or negative) is always done to accomplish the same goal: to change behavior and improve performance. .

fact

A recent study found that _____ was the number one reason people gave for leaving their jobs.

How bosses interact with their employees can have a significant effect on the happiness level they have with their job. The ability to provide honest, constructive opinions about another person's performance is another skill that is essential to being an effective communicator. Being able to clearly and concisely deliver feedback to members of a team is an essential skill needed for effective employee development.

?

Please detail a recent instance where you had to provide feedback or criticism to an employee or team member.

Providing Negative Feedback

No one likes to deliver bad news. It is an uncomfortable situation for both the sender and the receiver of the message. Delivering difficult news and offering constructive criticism is something that effective communicators must be comfortable doing. Whether informing a team member she is being terminated, delivering a negative financial statement or explaining why an employee will not be getting a raise, delivering this type of information in a meaningful and compassionate way will help make this challenging communication easier for all parties involved.

Here are some tips to consider when providing feedback:

1. **State feedback in clear and asbolute terms.** Be very clear with the criticism or feedback so there is no confusion or opportunity for your message to be misinterpreted or misconstrued. Let the other person know that your points are not up for debate. They are facts that need to be addressed and that is why you are there.

2. **Address only the feedback at hand.** Resist the urge to lump other issues or concerns into the same conversation. Stick to the points you are there to discuss and only those. If the other person starts to bring up unrelated topics, steer the conversation back to the business at hand.

3. **Keep feedback professional and not personal.** Make the feedback or criticism about the person's performance or abilities and not about his personality or character. This will remove the emotional aspect from the conversation.

4. **Ensure feedback is timely.** Don't wait until it is too late to provide criticism. Try to deliver feedback so that the other person has a sufficient amount of time to improve upon the areas being discussed.

5. **Maintain consistent eye contact.** You can't be assertive without making eye contact with the other person. The information you are providing him may be hard to hear. Have the courtesy to look him in the eyes while you are providing it.

6. **Monitor body language.** Keep an eye on the other person's body language for any intention cues that show how he is feeling about the information you have just delivered. Remember, a person's face and body are billboards giving off dozens of specific messages. Make sure you are reading them the information covered.

7. **Anticipate comments and questions.** After hearing criticism or feedback, people will often have questions and comments regarding the information that has just been shared. Be prepared and open for that. Once you have delivered the feedback, allow the other person to share his thoughts and ask questions about what he has just heard. Don't interrupt until he has completed his thought, otherwise you run the risk of appearing defensive.

8. **Use examples and anecdotes to show relevance.** If possible, use stories or anecdotes from your past experiences to show empathy and help describe a path forward. Personal stories are even better, if there is a core theme that relates to the person's current situation.

9. **Offer support and guidance.** End your communication by offering help or guidance to the person. If there is a possible path forward, help put together a plan for improvement. Remember, you are creating a final impression in the eyes of the other person. He is looking to you, so be assertive. Control the moment to ensure the perception you are creating in that person will elicit the reaction you seek.

The Sandwich Technique

For those who are uncomfortable providing criticism or delivering difficult news, it can be helpful to utilize a three-step process called the "sandwich technique" to assist you in the delivery of this type of information.

Positive Statement

Criticism/Challenge

Positive Statement

By "sandwiching" your critical feedback between two positive statements, you soften the blow for your listeners and provide a useful structure for the message itself. However, if you do choose to use positive statements before and after your feedback or criticism, be sincere about what you are saying; after all, your credibility depends on your veracity. Keep the positive remarks short. Be direct and resist spending too much time on small talk before getting to the challenge or criticism.

EXERCISE: Delivering Feedback

Effective Media Communication

The words you speak become the house you live in.

—Hafez

Media training has increasingly become an essential staple for executives striving to hone and refine their corporate communication skills. As a leader, you represent your company or product every time you look into a camera, clip on a microphone or sit down in front of a reporter.

The main difference between delivering a prepared presentation and interviewing with the media is one thing: control. When you craft a presentation you choose what points will be covered and in what order. When you are talking to the media, the interviewer is often steering the conversation. Therefore, you must ensure your specific message is put forward while responding to the questions being asked.

? Why is it important to communicate well when speaking with the media?

Before you speak with the media, ask yourself the following questions:

1. Why were you chosen to do this interview?

2. Who is the intended audience for this interview?

3. What three points do you want your audience to remember?

4. What is your overall intention and objective?

5. What are the consequences resulting from the success or failure of this interview?

? Name a recent media incident where the speaker or person being interviewed performed poorly as a communicator.

10 mistakes people make when talking to the media

1. **Lack of preparation.** Like everything else, the more prepared you are before the interview, the better you are likely to do. Practice with a partner by doing a mock interview.

2. **Unclear or fuzzy message.** Memorize your three key points and rehearse until you can deliver them flawlessly.

3. **Looking at the camera and not the interviewer.** While appearing on television, speak to your interviewer and don't look into the camera. Don't let your eyes wander around the studio. Stay focused on your interviewer. Don't forget to blink and don't blink too much.

4. **Appearing nervous.** Make sure you use breathing and creative visualization to stay relaxed during your interview. Speak slowly and clearly as speaking too fast is a sign of nervousness.

5. **Lack of intention.** Identify the intention you are using for this interview and decide what you want to leave in the minds of your audience. Do you want your audience to be excited, reassured, empowered, etc.?

6. **Answering with, "No comment."** Refusing to answer a question directly can make you seem evasive. Even if questioned about a topic you are not allowed to discuss, you should give a partial answer by leading with connector phrases. Examples include: "What I can tell you at this point…" or "Some aspects of this are still being worked out, but…"

7. **Using too much jargon.** Unless you know everyone reading your interview is an expert on the topic you are discussing, be careful to keep the terminology you use appropriate to a wide and general audience.

8. **Forgetting to smile.** Always smile at the beginning of your interview and at the end as well. If there are opportunities during the interview to lighten the mood with humor or a positive example, don't be afraid to do that. A smile transmits friendliness and openness and can win over an audience, especially when you are on camera.

9. **Giving long-winded answers.** Try to keep your answers tight and succinct, no longer than 30-60 seconds, with no verbal viruses. Whenever possible, say less.

10. **Being evasive or defensive with your answers**. Even if your interviewer blindsides you with a "gotcha" type question, stay calm and relaxed and answer carefully. Give specific answers.

Creating A Bridge

When confronted by a difficult question that you are unprepared for or unwilling to answer, it is helpful to utilize a technique called bridging to stay in control of your message and maintain your credibility. To effectively "bridge" between topics, you can employ the following phrase

"I can't speak to **(topic you don't want to discuss)**,
but what I can tell you is **(info about topic you do want to discuss).**"

Creating a bridge shifts the focus away from a topic you do not want to talk about and toward one that you are more comfortable discussing. Use a bridge when a question involves a topic or subject that is out of scope or something you are not prepared or not at liberty to discuss.

10 tips for successful media appearances

1. **Practice and prepare.** Take the time to practice in a mock interview scenario with a team member so you are ready for the interview. Give the partner a list of difficult questions you may be asked. Videotape your practice sessions and watch and analyze your performance.

2. **Watch body language.** Everything you do with your face and body will communicate messages to your audience. When on television, facial expressions and gestures can be smaller than when you stand in front of a live audience. Smile.

3. **Hydrate.** Avoid caffeine if possible as your interview nears. Drink plenty of water. Take water with you and have it nearby during your interview.

4. **Answer carefully.** Speak at a reasonable pace to avoid misspeaking. Take a breath before answering and never start an answer with a verbal virus.

5. **Hone your message.** Remember the message you are trying to convey and the intention behind your words. Prepare your take-away points and make sure you cover them clearly.

6. **Dress for success.** Clothing will also contribute to the impact of your interview. Try to avoid clothes with lots of designs or patterns and outfits with too much white (especially on-camera).

7. **Warm up properly.** Before your interview, make sure you warm up your voice and body. Exercise the morning of your interview to get over nervous jitters.

8. **Apply your personal stamp.** Remember to highlight your personality. Smile! Relax and just be yourself during the interview.

9. **Solicit feedback afterward.** Once the interview is over, debrief with a partner or business associate who can give you feedback about what went well for you and what can be improved in future interviews.

10. **Stay Flexible.** You never know exactly what your interviewer will ask, so be alert and utilize active listening. Be ready for anything.

Tips when appearing on television

1. If you are near a camera, assume it is on and recording everything.

2. If you wear anything distracting on TV, people will often only remember that.

3. Don't lean back in your chair; it can make you look short and fat.

4. Sit up but don't sit perfectly straight; this can make you appear less rigid and tense.

5. Lean forward 15 degrees into the camera; you'll appear more confident.

6. Keep moving your head, even when you are simply listening.

7. Move your body a little; this will make you animated.

8. Don't be afraid to gesture with your hands.

9. Avoid quick, jerky movements, as these can be distracting.

10. Utilize facial expressions and make sure you smile early and often.

> *A sudden, bold, and unexpected question doth many times surprise a man and lay him open.*
> —Francis Bacon

Effective Negotiating

> *If you can't go around it, over it, or through it, you had better negotiate with it.*
> —Ashleigh Brilliant

A negotiation is a dialogue intended to resolve disputes, define an alternative course of action, or bargain for individual or collective advantage. Most of us negotiate all of the time, in nearly every aspect of our lives—with peers, bosses, family and friends. Effective negotiation involves many important elements: experience, knowledge, preparation and relationships. When negotiating, each party wants to feel valued, heard and understood.

Tools for Effective Negotiating:

Logic
Emotion
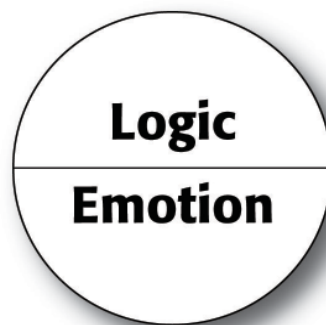
Ten common negotiating mistakes:

1. Lack of preparation

2. Weak grasp of specifics

3. Lack of empathy

4. Failure to connect with the other party

5. Not being assertive

6. Poor listening

7. Playing hardball from the start

8. Letting ego get in the way

9. Inflexibility

10. Not asking the right questions

Five Steps to an Effective Negotiation

1.   **Gather information and set goals.** Start by getting all of the substantive information you need for a successful negotiation. Determine long-term vs. short-term goals and decide what information to disclose and not to disclose.

2.   **Maximize your leverage.** Try to identify the level of desire for each party as well as the level of need. Know when to walk away and when to double down. Strike while the iron is hot.

3.   **Employ fair and objective criteria.** Research and then employ professional or industry standards and precedent in the negotiation to help bolster your position.

4.   **Build an offer/concession strategy.** Decide how aggressive you want to be and decide whether or not to make the first offer. Understand what you are willing to give up to get a deal. Also, know your timing pattern and the psychological expectations involved for both parties.

5.   **Control the agenda.** Take the time to prepare an agenda and use that agenda to negotiate from, while also staying flexible. Manage time and be aware of all internal or eternal deadlines that will affect the agenda.

Conflict management during negotiations

If a conflict arises during a negotiation, it is important for both parties to be able to work through the tension and keep the communication productive and forward-moving.

Researchers have identified five different ways that individuals manage conflict:

1. _____

2. _____

3. _____

4. _____

5. _____

Four Styles of Influence

The Four Styles of Influence is a communication model that allows you to modify your delivery and behaviour to increase personal effectiveness.

The Four Styles of Influence use both push and pull behaviours. Successful influencing requires a balance of all four styles. The key to being effective in any influencing scenario is how you utilise each approach within the content and context of the situation. First, analyse your audience and understand the objective of the communication, then identify the influential style required and modify your delivery. When modifying the delivery, explore all three elements of communication to ensure your delivery is congruent.

Verbal (what we say)
Vocal   (how we sound)
Visual (how we appear)

Asserting & Persuarding

This style requires change from your audience; in action, behaviour or thought process. A push behaviour should not be confused with being 'pushy'. Push behaviours allow you to achieve your objective through an influential style that has positive reactions.

Attracting & Bridging

his style is not a passive or weak form of influence. This influential style, used in the right context, allows a sense of ownership and power to the audience, as you move towards your objective.
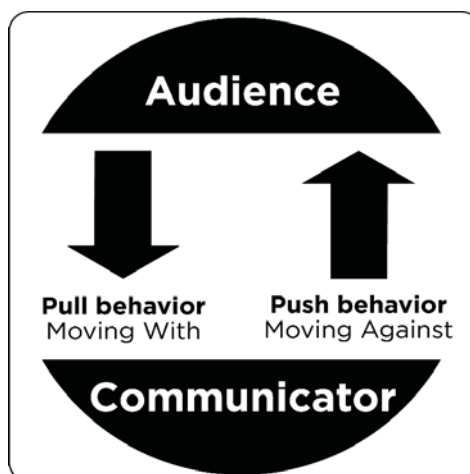
ASSERTING

Descriptor: States expectations, evaluates, and uses incentives and pressures.

Outlooks: Confronting, personal, tough, direct, intense, energetic and evaluative.

Verbal: 'I need to get this done', 'I need to talk to you now', Please send me these details immediately', 'When we agree on this project deadline'.

Vocal: Short direct sentences. Limited pauses. Strong articulation. Can interrupt others.

Visual: Uses hands to emphasise key words. Strong direct gestures. Lots of eye contact. Grounded home-base.

Context: Promotes business/personal exchange and negotiates an agreement.

PERSUADING

Descriptor: Reasons, recommends, suggests and proposes.

Outlooks: Logical, factual, sensible, articulate, structured, confident and precise.

Verbal: 'We've done some research', 'Here's the data supporting this', 'The logical conclusion is', 'The analysis shows'.

Vocal: Calm, even and consistent. Nothing dramatic or exaggerated. Sign posts each next action/statement. Measured and considered.

Visual: Hands are used only to support key words and statements; act as signposts. Consistent eye contact and strong home base. Effective use of smile.

Context: Actively involved in discussion/ arguments focused on ideas, plans and proposals.

ATTRACTING

Descriptor: Shares vision and interests, finds common ground and works together.

Outlooks: Emotional, cohesive, colourful, optimistic, idealistic, energetic, enthusiastic and positive.

Verbal: 'Imagine how this could be', 'Paint me a picture of how you see this working', 'With your experience we can', 'I know from working with you', 'If we join forces we can'.

Vocal: Flexible use of pause and pace to create engagement. Strong use of pitch flexibility.

Visual: Doesn't look down. Great use of smile. Open body language. Gestures are emphatic and descriptive.

Context: Inspires/motivates others to see their side, to follow, or work together towards objective.

BRIDGING

Descriptor: Involves, listens and discloses.

Outlooks: Understanding, flexible, warm, open, exploring, empathising, guiding and trusting.

Verbal: 'How should we proceed?' 'I certainly see your point of view', 'What other solutions would be acceptable to you', 'Help me understand your analysis'.

Vocal: Great use of pause. No interruptions. Slower delivery than either asserting or attracting styles. Effective tone and energy to the voice.

Visual: Open body language to demonstrate active listening. Head tilted to one side demonstrating listening mode.

Context: Understands the situation from both sides, providing opportunity for others to influence you, in order to meet your own objective.

"BATNA" - Best Alternative to a Negotiated Agreement

BATNA is a concept developed by Roger Fisher and William Ury. It is one's preferred course of action if a deal cannot be reached. Knowing your BATNA means knowing what you will do or what will happen if you fail to reach an agreement. You should never enter into a negotiation without knowing your BATNA. You should also identify the other side's BATNA.

"ZOPA" - Zone of Possible Agreement

ZOPA is the area in which a deal will satisfy all parties. (An example would be a home buyer who is willing to pay up to $300,000 for a house and a seller who is willing to consider an offer that is at least $275,000.)

Ten ways to turn an adversary into a colleague:

1. Establish emotional connections

2. Listen actively; don't interrupt

3. Utilize storytelling or appropriate anecdotes

4. Remain flexible and open

5. Find merit in the other party's thoughts and feelings

6. Reduce personal distance

7. Seek common ground

8. Don't focus exclusively on win/lose

9. Use direct eye contact

10. Brainstorm creative questions

? According to researchers, who is four times more likely to initiate a negotiation, men or women?

Mastering the actual negotiation

1. **Prepare thoroughly.** With any negotiation, proper research is a must. Try to learn as much as you can about the person, company and marketplace involved in the negotiation. Make sure you are organized with your facts, figures and data and remember to bring all needed documents on the day.

2. **Be well adjusted and alert.** Make sure you get plenty of sleep the night before your negotiation and try to eat a light breakfast. This will help you stay alert and focused. Try to avoid excessive amounts of caffeine and dairy the day of a negotiation.

3. **Create a strong first impression.** The minute you walk through the door, lots of judgments are being made about you. Smile, shake hands and use the other party's name during your greeting. Also, dress for success.

4. **Stay flexible and anticipate compromise**. You should assume that you will have to offer some concessions and map out what those might be ahead of time. Be open to various creative solutions that may arise.

5. **Understand your BATNA (Best Alternative to a Negotiated Agreement).** Clearly anticipate and weigh the choices available to all involved if the parties cannot come to an agreement.

6. **Choose your words carefully.** Words have power so be aware of how the other party may react to what you say. Avoid loaded words and phrases that could be negatively perceived by the other party. Ask questions that are open-ended to help gather facts and information.

7. **Listen actively.** Try to listen carefully to everything the other party is saying (or not saying). Try to interpret the "words beneath the words" being spoken. Avoid interrupting or hogging the spotlight.

8. **Monitor body language.** Remember, everything you do with your body communicates something. Therefore every headshake, eye roll and sigh is being seen and interpreted by the other party. Stay attuned to all nonverbal communication from the other party as well. In general, keep hands away from your face, neck and hair.

9. **Summarize.** Take time to summarize all that has been accomplished or agreed upon so far in the negotiation process. Even during an impasse or conflict, this will remind both parties that some progress has been made up to now.

EXERCISE: Simulated Negotiations

Effective Telephone Communication

> *The telephone is a good way to talk to people without having to offer them a drink.*
>
> —Fran Lebowitz

Effective communication skills are an essential key to success in the corporate world, and the telephone is a service tool that impacts your bottom line. When doing business over the phone, your voice not only represents you, it also represents your company, your team and your message. By utilizing proper business telephone etiquette, you help to create a positive first impression with your client or customer.

Telephone communication takes various forms; it can be a casual conversation between friends or a more formal part of a business presentation. It is important to remember that effective telephone communication begins before you even pick up the phone. Thinking about what message you want to convey, what intentions you will employ, and how you propose to get your information across are all part of effective telephone communication.

POSITIVE aspects of telephone communication

1. _____

2. _____

3. _____

NEGATIVE aspects of telephone communication

1. _____

2. _____

3. _____

fact

According to the U.N. Telecom Agency, there are approximately _____ mobile phone subscribers in the world.

In the corporate environment, the telephone can be used to:

- Sell a product or service
- Place orders
- Pay bills
- Share ideas
- Handle complaints
- Clarify situations
- Promote ideas or programs
- Provide customer support
- Make travel arrangements
- Discuss issues

Conference Calls

Conference calls are an increasingly popular form of business communication as they conveniently and economically connect remote parties, both internally and outside of a given company. Teleconferencing brings people together at a fraction of the cost of travel and meeting facilities. Conference calls are often used in conjunction with web conferences, where presentations or documents are shared online.

Preparing for effective conference calls:

1. **Establish an agenda.** Establish a clear agenda for the meeting ahead of time. Make sure that all points you want to discuss are included and the appropriate amount of time has been allotted to accomplish that.

2. **Decide on meeting duration.** Determine how long it will take to cover the various points in the agenda, also leaving time for questions and discussion as well.

3. **Identify who should attend.** Make sure you only invite people that absolutely need to attend. This will help you avoid making people feel their time is being wasted. Keep the participant count as small as possible. Remember, the larger the group, the harder it will be to manage.

4. **Give all participants instructions to access the meeting.** This means sending out such things as dial in numbers and pass-codes ahead of time to avoid technical glitches.

5. **Distribute the agenda.** Send out a clear agenda and all pertinent supporting material to meeting participants prior to your virtual meeting. Also, it is helpful to send out reminders as the meeting date gets closer.

6. **Test your equipment.** Acquaint yourself with the tools that you will be using to help you control and enhance your meeting. The more tools you will be using, the more time you need to spend practicing with them.

7. **Set goals for the meeting.** Make sure you have clearly identified and communicated the purpose of the meeting as well as the goals and objectives you hope to achieve.

8. **Assign a note taker and a timekeeper.** Choose a person to watch the clock for you to ensure that your meeting stays on time and on track. Also, have someone take notes to capture information and document all decisions that are being made.

9. **Take into account time zones when scheduling your meeting.** Be conscious of the various locations and time zones of each person attending the meeting and choose the start and stop times for your meeting accordingly.

10. **Make arrangements to videotape or audiotape the meeting.** By recording the meeting, you can easily make it available to any team members who could not attend in real time.

> **fact** According to a recent study, the average person spends _____ on hold during a given year.

Five main barriers to effective telephone communication:

1. Multi-tasking during the call

2. Poor preparation

3. No clear objective or agenda

4. Lack of engagement

5. Technical obstacles or limitations

Preparing for effective conference calls:

1. **Prepare carefully.** Begin by organizing your thoughts. Why are you making the call and what objective do you hope to accomplish? Think through what you want to say before making the call. It is often helpful to write some clear notes or bullet points of the main points you want to cover to serve as a guide for you. In addition, write down the names of the people you will be speaking to, lest you forget them mid-call.

2. **Monitor your body language.** Even though the caller cannot see you, your posture and body language still influence your communication. Sit upright to avoid constricting your voice and smile even though you are not seen. Also, feel free to move about the room to provide some energy to your vocal delivery. If possible, try to create a positive image in the listener's mind of you looking interested.

3. **Speak clearly.** It is easy for your listeners to miss what you have said if they can't understand you. Try to take your time and speak in a measured, friendly tone of voice. Avoid monotone so as not to bore your audience or communicate disinterest and be careful to articulate clearly to avoid mumbling. Keep volume at a conversational level, as much as possible.

4. **Listen actively.** Put your focus on what the other person is saying. Concentrate on the speaker; it will allow you to answer questions more effectively. Try not to interrupt others and take your time before answering. Doing so will allow you to better gauge what the listener is asking and better formulate your response.

5. **Define your objective and intention.** Stay focused on your agenda and the business at hand. This may mean limiting social conversation and small talk to stay on track. Keep your objective in mind and adjust your delivery and intention cues to accomplish this.

6. **Pace yourself.** Take a deep breath before picking up your telephone to make a call. Slow down your speaking rate so you can be understood clearly. This will make you appear more relaxed and at ease during the conversation. Speaking too fast automatically creates barriers and confusion for those on the other end of the call.

7. **Choose your words carefully.** Utilize a Master Introduction to clearly state who you are and the purpose of your call. Be precise with your words; make your points short, polite and to the point; whenever possible, say less.

8. **Confirm understanding.** Because telephone communication limits your ability to read the body language of the other participants, it is essential that you frequently use checkbacks with those on the call to ensure your message is getting through and there are no questions.

9. **Give full attention to the call.** Avoid the temptation to multi-task during the call. Focus on the telephone conversation itself. Because your sense of sight is not being fully utilized, your attention can wander. Combat this by removing distractions from your desk. Ask others not to interrupt you while you are on the call.

10. **Manage your time.** It is both possible and essential to utilize the phone in a time-efficient way. Assign someone on the call to keep you on track by making you aware of how much time remains. Always end the call on time. Doing so provides an example to others about how an effective conference call should be run.

Excellence In Customer Service

A sale is not something you pursue; it is something that happens to you while you are immersed in serving the customer.

-Unknown

Customer service is the ability of an organization to constantly and consistently exceed the customer's expectations. Simply put, it is the way in which an organization deals with its customers. Customer service is most evident in sales and after-sales service, but should inform all aspects of a transaction. Good customer service is the result of putting the customer first.

Providing outstanding customer service is one of the most rewarding challenges facing an organization. Exceptional organizations that provide outstanding customer service will experience numerous benefits: increased customer satisfaction, higher revenues, repeat and referral customer traffic, less employee turnover and increased profits.

A company may attempt to differentiate itself from its competition through the provision of better customer service. The consistent delivery of superior service requires the careful design and execution of a whole system of activities that includes people, technology and processes.

fact

On average, _____% of customer defection takes place because customers feel they were treated poorly.

Common customer service mistakes

1. Not apologizing for mistakes you have made

2. Avoiding eye contact

3. Not following through on commitments

4. Not asking for feedback and input

5. Not articulating questions

6. Losing your cool

7. Communicating disinterest with your body language

8. Being elusive or too general with answers and solutions

> *Although your customers won't love you if you give bad service, your competitors will.*
> -Kate Zabriskie

Tips for effective customer service

1. **Communicate with a strong intention.** Always be professional, approachable, and accountable.

2. **Anticipate customer needs.** Understand your customers' perspectives and try to anticipate what problems or needs they may encounter so you can be prepared to handle their concerns efficiently and empathetically.

3. **Respond immediately.** Customers need to be heard and addressed as soon as possible to ensure situations are mediated effectively.

4. **Listen actively.** Listen to understand, not to respond. It is important for customers to know you are truly listening.

5. **Honor your commitments.** Provide clear, realistic expectations of what you can do and when. Don't over-promise and under-deliver.

6. **Empathize.** Think as if you were "in the customer's shoes" to understand his/her point of view.

7. **Check in.** Where necessary, keep the customer updated REGULARLY along the way, seeking feedback for improvement and assurance that the customer is satisfied.

> *Your most unhappy customers are your greatest source of learning.*
>
> -Bill Gates

Customer Service Super Quiz

1. Customers are more easily satisfied if their expectations are effectively managed. (True/False)

2. In responding to a frustrated customer's question, it's a good idea to immediately offer a solution. (True/False)

3. Most upset customers will calm down if you offer a sincere apology. (True/False)

4. If a customer becomes abusive and begins to raise the volume of his voice, it is important to match that volume and intensity to assert yourself. (True/False)

5. The customer is always right. (True/False)

6. When you answer a call and the customer really needs to resolve the issue with another department, it's your responsibility to make sure the customer reaches someone who can help. (True/False)

7. When dealing with an angry customer face to face, making no eye contact and looking away will feel better for you and the customer. (True/False)

8. When dealing with an abusive customer on the phone, it's important to hang up right away. (True/False)

9. The employees who are the most knowledgeable are always rated most helpful and customer-friendly by the customer. (True/False)

10. Customers with complaints or gripes have nothing to offer but negativity and it is best to finish with them as quickly as possible. (True/False)

11. Customers trust you more if they have problems with your product or service and receive speedy resolution than if they have no problems with your product at all. (True/False)

12. The most credible advertising is a satisfied customer. (True/False)

EXERCISE: Courtesy Under Fire

Executive Presence

> *A leader is one who knows the way, goes the way, and shows the way.*
>
> -John Maxwell

The ability to project confidence and gravitas to an audience or listener involves the trait known as "executive presence." Though there are many aspects of a person's communication that contribute to creating this "wow" factor in the eyes of an audience, the idea of "presence" is often highly intuitive and difficult to pin down — a combination of many factors such as magnetism, knowledge, passion, speaking skills, assertiveness, etc.

We all know someone who displays the traits associated with executive presence — that person who engages an audience, displays poise under pressure or inspires others to take action. Communicating with executive presence has many benefits. It can help you build relationships, facilitate change or simply create your personal "brand" — that impression that comes to mind when people see or hear of you.

List three public figures that exhibit executive presence:

1. _____

2. _____

3. _____

fact According to a recent survey, _____% of executives said that presence enables a person to get ahead in business.

The Eight Elements of Executive Presence

1. **Confidence.** A relaxed and comfortable communication style contributes greatly to projecting executive presence. If your speech and demeanor convey confidence, that is how you will be perceived by an audience or listener.

2. **Substance.** A person's vocabulary and the words they choose when speaking are important. Be knowledgeable and prepared. Sounding uneducated or uncertain can negatively impact others' perceptions of you.

3. **Dress.** Inappropriate or unkempt attire can undercut credibility in the eyes of an audience. Know your audience and dress appropriately.

4. **Body language.** Standing tall and not slumping, using expansive gestures and a firm handshake, and utilizing direct eye contact all contribute to the perception of executive presence.

5. **Vocal dynamics.** By eliminating monotone and verbal viruses and ensuring you speak with strong volume and clear articulation, you can create an executive vocal presence.

6. **Receptivity.** Being open to the ideas or opinions of others and listening actively can contribute to a confident presence. Often undervalued, accessibility and listening are leadership skills.

7. **Manners/Etiquette.** A basic grasp of manners and etiquette can not only create a positive lasting impression with an associate or listener, it can also help you build rapport and relationships.

8. **Authenticity.** Executive presence means being sincere and authentic. It also means communicating passion about your subject or message. These factors will help you create a "personal brand" that can impact an audience.

> *Presence is the beginning and ending of all good and powerful communication.*
> —Patsy Rodenburg

*Don't raise your voice,
improve your argument.*
—Desmond Tutu

Presenting to Senior Leadership

There are certain challenges you may experience when communicating or presenting to senior leadership. Often, high-level executives have limited time and tunnel vision, thus making them particularly difficult audiences.

Here are five tips to remember when dealing with senior leaders:

1. **Don't be afraid to let them know what you want upfront.** If you are delivering a presentation to request more resources, you can expect they will want to know how much you are requesting. You may have been planning to provide that information at the end of your meeting, but try asking them for what you want (and how much) at the beginning. This will ensure the rest of the time they are focused on your justification as to why it is a great investment and not how much it will cost.

2. **Know your audience and the personalities involved.** Different executives have different personalities. Be aware of the types you are dealing with so you know the best way to move forward through your presentation.

3. **Stay within your area of expertise and be prepared**. Don't stray too far from the material you have prepared. Stay on track. And definitely don't begin speaking about a topic that you don't know well. Don't fake it. Offer to do some further research and let them know you will be happy to share the findings once you do.

4. **Offer choices and alternatives—accept responsibility.** While developing your material, put together various options for the executives to consider. Give them choices. Own your presentation and the information included within it. If an error is discovered, own that too and accept responsibility and assure the group that the mistake will be fixed.

5. **Be flexible with your presentation or message.** When dealing with top brass, often a new topic may arise that may supersede the topic that you are speaking about currently. It's up to you to stay nimble as a presenter and be able to shift quickly and effortlessly to a different area or topic to accommodate the executive's request.

Gaining Commitment from Senior Leadership

1. **Tout the benefits.** Don't be shy about providing details about how your program or plan could have a positive effect on productivity or the bottom line for the senior leader.

2. **Uncover needs.** Spend as much time as necessary gathering information. This will help you identify and qualify the needs of the leader: past buying patterns, previous decisions that were made and present pain points.

3. **Utilize open-ended questions.** Instead of asking, "Do you think our team might benefit from this investment?" phrase it in a way that will solicit more than a simple yes or no answer. A better way to ask that question might be, "In what ways can you see this investment benefitting our team?"

4. **Listen actively.** This means listening with your eyes as well as your ears. Listen not only to what the senior leader is saying but also to the way she is saying it. Keep your eyes and ears open to signals coming from the other party and adjust your communication as necessary.

5. **Don't oversell.** Senior leaders do not like to feel that they are being "sold" to, so be careful about going overboard with your pitch or proposal. Avoid the hard sell at all costs. Be sincere, be factual and be brief.

6. **Use trial closes.** As you feel the process getting closer to commitment, float a trial close to the senior leader to test the waters and your assumptions about the process to this point. Trial closes could be questions such as, "Does this request for more funding seem reasonable to you?" or "Do you think this is something we will be able to initiate in the next two weeks?"

7. **Bring the passion.** Senior leaders are drawn to others who are passionate and excited so make sure your body language and voice communicate this intention when it comes to your proposal. Be sincere, be engaged and be present in your presentation or meeting.

8. **Ask for a commitment.** If you don't ask, you don't get. Don't be afraid to ask for the funding or push for buy-in once you've earned the right to do so.

> *In order to succeed, we must first believe we can.*
> —Nikos Kazantzakis

Facilitating Effective Situations & Role-Plays

> *We are what we repeatedly do. Excellence, then, is not an act, but a habit.*
>
> —Aristotle

An effective training method to use when facilitating team learning is role-playing, where learners take on the role profiles of specific characters or organizations in a simulated setting. Role-playing allows participants to play out relevant scenarios and improve their decision making abilities and interpersonal skills in a safe, risk-free environment. These types of relevant simulations utilize real world scenarios that enable participants to sharpen listening skills, manage conflict, analyze potential problems, develop teamwork and overcome objections in a low stress atmosphere.

By simulating relevant work scenarios, learners use these exercises to build confidence, work at problem solving and develop camaraderie with other participants. But simulated exercises and role-plays are only effective if executed properly. This requires specific set up, careful managing and thorough debriefing by the instructor or facilitator running the simulation.

To get the most out of your simulation or role-play, follow these guidelines:

1. **Create a safe environment.** When setting up a simulation, it is your responsibility as facilitator to establish a relaxed and supportive atmosphere so participants feel comfortable taking risks and challenging themselves by stepping outside of their individual comfort zones.

2. **Make simulations relevant.** To get the most benefit from a simulation, make sure you that you are simulating a relevant situation for the participants in the exercise. If possible, do the exercise at the person's work desk, on a phone, or in a setting that is closest to the real thing.

3. **Keep simulations short.** It doesn't take a lot of time for learning to take place during a simulation, so once you feel a point has been made or audience members have observed enough, feel free to stop the exercise and begin a discussion. In most cases, simulations don't need to last longer than 5-7 minutes.

4. **Clearly set the context.** Before any simulation begins, make sure that the 5 Ws (who, what, when, where and why) of the specific scenario are established so all participants are on the same page and in agreement. Also, when partnering participants, make sure you do so strategically, taking into account each person's experience, role and knowledge to maximize learning.

5. **Stress active listening.** Like actors improvising a scene, it is important to emphasize the importance of actively listening for each participant in a simulation. Learners in an exercise should only respond to what is being said or offered in the moment. Make sure participants are being present in each "scene" and are not preplanning answers or responses.

6. **Pinpoint intention and objective.** Have participants clearly identify any intentions and objectives that they are pursuing in their simulations. By understanding their specific wants or needs—and how they are going to achieve them—the simulation will go more smoothly and be more effective.

7. **Encourage specificity.** When setting up a simulation, the more specific the details of scenario and circumstances are, the more beneficial the exercise will be for participants. Help participants avoid vague requests or general details. For example, instead of a participant saying she is going to simulate an angry customer, encourage her to be more specific, perhaps citing the reason the customer is angry and what details led to this moment and these feelings.

8. **Require commitment to the simulation.** Before the simulation begins, encourage participants to stay in the "scene" until the facilitator ends the simulation. Learners should not stop to comment on what is happening in the moment; they should be in the moment. There will be time to debrief once the exercise is complete. Encourage participants to avoid saying "no" simply to say no. Make them be specific in their challenges or objections.

9. "**Live coach" if necessary.** If rules are not being followed or the simulation is not achieving its objective, feel free to stop the exercise and offer coaching or tips to get it back on track. Keep the live coaching short and specific so as not to ruin the momentum of the exercise itself.

10. **Debrief properly.** Once the simulation is over, it is important to take a few moments to debrief and discuss what worked and what didn't. It is often helpful to use a flip chart to capture comments and reactions from both the participants themselves as well as the audience members who observed the exercise from the outside.

Facilitation: Running Effective Meetings

If you had to identify, in one word, the reason why the human race has not achieved, and never will achieve its full potential, that word would be "meetings."

—Dave Barry

EXERCISE: Kicking Off A Meeting

The Art of Facilitation

The process of conceiving and executing a successful meeting involves the deliberate act of planning and preparing for the meeting ahead of time. Facilitation is the act of guiding that meeting process so that the participants all become actively involved and the meeting itself stays on course. Meetings should have a forward flow to them that allow participants to express themselves and have a sense of their own power within the organization.

Meetings should be organized so that people feel their time is not being wasted. Most workers have busy workdays and resent their time being misused by a disorganized or unnecessary meeting. If a meeting is efficient and informative, it can help build morale and positive attitudes within a team or department.

The three keys to an effective meeting

1. _____

2. _____

3. _____

fact According to the National Statistics Council, during an average meeting, _____% of the meeting time is unproductive, spent discussing non-agenda items.

Ten meeting pitfalls:

1. Lack of preparation
2. Poor attendance
3. Side conversations
4. Disruptive behaviors
5. Power struggles within group
6. Personality clashes
7. Lack of commitment
8. Fatigue
9. Lack of involvement
10. Inflexibility

Three basic types of meetings:

1. **Problem-Solving.** The objective with this type of meeting is to state an issue, get background and feedback, broaden the range of solutions, narrow down the alternatives and gain consensus as to the best course of action.

2. **Brainstorming.** The objective with this type of meeting is to gather ideas about a specific topic. Cast a wide net, even including the wildest ideas, without judging. Generate as many ideas as possible and build on those already mentioned.

3. **Informative.** The objective with this type of meeting is to provide and receive information about a specific topic or issue. Make sure that all information that needs to be covered in the meeting is indeed covered.

fact According to the landmark study by Professor Albert Mehrabian, someone's initial perception of another person's communication breaks down three ways:

- **Verbal** (what we say) _____%
- **Vocal** (how we sound) _____%
- **Visual** (how we appear) _____%

Tips When Co-Facilitating

While most presenters facilitate by themselves, others are frequently required to facilitate meetings or presentations with a partner, such as a peer, team member or co-worker. Co-facilitation can present some exciting advantages for an audience, but also offers some distinct challenges. A good facilitator must be able to both facilitate and co-facilitate, depending on the material and circumstances of the session.

One advantage to co-facilitation is that it introduces audiences to different communication styles, depending on which facilitators have been partnered. Another advantage is the task of delivering information and controlling an audience is shared between two presenters.

Here are some tips when facilitating with a partner:

1. **Prepare together.** Take time to properly prepare with your co-facilitator for the upcoming session. Avoid co-facilitating with a stranger. Decide on codes or signals for time management purposes in order to keep the session on track.

2. **Clarify roles.** Decide ahead of time which person will lead, capture ideas on a flip chart, control the slides, take questions, etc. This will avoid awkward moments of suddenly having to decide these things in front of an audience.

3. **Choose a leader.** Even when two or more people are co-facilitating, it is helpful to choose one person to serve as the leader of the session. The leader can be decided by the person's specific status within the organization, by someone volunteering or simply by choosing randomly.

4. **Take turns.** Try to share the stage as much as possible. Divide the session or presentation into equal sections, but be careful not to switch back and forth between speakers too frequently, as this will make it more difficult for you to connect with your audience.

5. **Assist when not facilitating.** When you are not facilitating, assist your co-facilitator by taking on other responsibilities such as capturing ideas on a whiteboard, distributing handouts or working the projector.

6. **Support your partner.** Avoid publicly disagreeing with your co-facilitator. If you have a concern, wait until a break to address it with them and do it privately. Try not to interrupt, if possible.

7. **Work your transitions.** Transitions from one facilitator to the next should be smooth and seamless so as not to lose the momentum and flow of the session. Practice your cues and transitions (what actors call "tops and tails") ahead of time.

8. **Decide how to handle questions.** Anticipate questions that might arise during the session and decide which facilitator will handle them. Discuss and agree upon your answers ahead of time. If either facilitator has experience or expertise with a specific topic or area, that is the person who should field those questions.

9. **Stay engaged, even when not speaking.** It is important for co-facilitators to stay connected to each other during a session or meeting. Use active listening and check in often with each other. Focus on your co-facilitator even when you are not speaking so as not to distract your audience or steal focus.

10. **Sync your energy levels.** Try to match the energy level of your co-facilitator with regard to volume, pace and gestures.

Three Different Types of Behavior Within Groups

1. **Functional behavior -** Maintains or enhances group effectiveness and increases the likelihood the group will achieve its goal or objective.

     Examples might include: _____

2. **Dysfunctional behavior -** Reduces group effectiveness and decreases the likelihood the group will achieve its goal or objective.

     Examples might include: _____

3. **Counteractive behavior -** Enhances the group's effectiveness by negating negative behavior.

     Examples might include: _____

Group behavior refers to a combination of individual behaviors within a group that have meaning at a group level. When facilitators observe behavior in a group, they must look for levels of meaningful behavior—meaningful in that it either contributes or detracts from group effectiveness.

fact

An _____ is any statement, question or nonverbal behavior made by a facilitator that is designed to help the group.

An effective facilitator relies on observable behavior as much as possible and relies on inferences only when absolutely necessary. **Facilitators intervene in the group process to help it become more effective.** Facilitators should intervene when members of the group act inconsistently with the ground rules they have agreed to follow.

The skilled facilitator must be aware of individual behavior and decide whether it contributes to, detracts from or redirects the group toward effectiveness. The facilitator should have a model for effective groups that she uses for diagnosis and intervention, utilizing the diagram and process below.

CONFLICT/RESOLUTION CHAIN

$$1 \to 2 \to 3 \to 4 \to 5$$

EXERCISE: Conflict Resolution

Communication For Groups

Communication involves the exchanging of information in a way that conveys meaning. Members' comments will generally build upon, compete with or be unrelated to others. Typically, members with higher status in the group are more likely to interrupt those with lower status.

Conflict management within a group

The way in which a group manages conflict will affect its ability to solve problems, be creative, and move forward to accommodate the different interests and demands placed upon the group.

Resarchers have identified five different ways that individuals manage conflict:

1. _____

2. _____

3. _____

4. _____

5. _____

Conflict scenarios

Using the information discussed previously, examine the following conflict scenarios. Try to understand the specific conflicts that have arisen within the group and lay out what potential consequences might occur if the conflicts are not resolved. Then decide which of the choices listed above would be most appropriate to effectively manage each.

1. Your interior design company has decided to rebrand, starting with a redesign of the corporate logo. You soon discover that your two graphic designers have passionate and conflicting feelings about how the new logo should look.

   What is the conflict? _____

   *What are the consequences if this conflict remains unresolved?*_____

   _____

   What is the best way to manage this conflict? _____

   _____

2. The exasperated head of your party planning committee approaches you with complaints about the consistently rude and unprofessional behavior exhibited by the food vendor the company has hired for the past three years.

    What is the conflict? _____

    *What are the consequences if this conflict remains uuresolved?*_____

    _____

    What is the best way to manage this conflict? _____

    _____

3. Your sales manager, who is scheduled to speak the following day at the annual sales kick off, suddenly informs you that his son in another state has been rushed to the hospital after suffering back injuries in a car accident.

    What is the conflict? _____

    *What are the consequences if this conflict remains unresolved?*_____

    _____

    What is the best way to manage this conflict? _____

    _____

4. During a particularly busy work week, and with deadlines looming, you realize you are going to need your already exhausted and irritable team to continue to work on their project through the weekend.

    What is the conflict? _____

    *What are the consequences if this conflict remains unresolved?*_____

    _____

    What is the best way to manage this conflict? _____

    _____

5. As a project manager, you sense that a long-time employee on your team appears threatened by the ideas and input coming from a recent hire.

    What is the conflict? _____

    *What are the consequences if this conflict remains unresolved?*_____

    _____

    What is the best way to manage this conflict? _____

    _____

> *Communication works fine for those who work at it.*
> —John Powell

EXERCISE: Facilitator's Challenge

As a facilitator, how would you handle the following scenarios?

1. A member of the group asks a question that seems to include an embedded statement (e.g. "Bill, do you really think that the marketing department can turn that around in two weeks?").

2. The topic of conversation seems to switch without the group agreeing to do so, or someone in the group says, "This is a little off topic but…"

3. A member of the group makes a point that is rather vague, scattered or confusing.

4. One or more members of the group have been silent for an extended period of time.

5. One member interrupts another member who is in the middle of a thought.

6. A member takes a cheap shot or makes a sarcastic statement about another member or his idea.

7. One member has difficulty putting his thoughts into words and finally gives up, saying, "Nevermind. I don't know how to say it."

8. The facilitator has been unable to get the group's attention because several conversations are happening simultaneously.

Three Keys to Effective Meetings

KEY ONE: Pre-Meeting Preparation

Efficient and effective meetings don't just happen. They take lots of preparation and planning. Going back to the Three Keys we spoke about earlier, preparation is vital for success in facilitating a productive meeting. The preparation portion of successful facilitation is certainly the most time consuming.

Facilitators should know what problems the group faces, the solutions they have tried, and how each of the individuals has contributed to the problem or helped to reduce it. This involves building trust between facilitator and the group so that the facilitator does not take advantage of disclosures and instead proceeds with empathy and support.

Questions for pre-meeting facilitation:

- What is the duration set aside for meeting?

- What objective does the group hope to accomplish?

- What problems is the group experiencing?

- What are the consequences if these problems are not resolved?

- What is the root cause of the problem?

- What has been done to try and resolve the problems up to now?

- What is the history of the group?

Things to consider when preparing

1. **Objective.** When planning a meeting it is essential that you define what your goals and objectives are. What do you hope to accomplish? What is your intention? This will also help define whether or not you have been successful once the meeting is over.

2. **Audience.** Decide whom needs to attend this particular meeting and what their specific roles will be.

3. **Site.** The designated meeting site is also a crucial decision that can play directly into the success or failure of a meeting. Ask yourself if the space you have chosen will meet the requirements for the participants involved. Is the location easily accessible to people or is it out of the way? Is the equipment provided at the site adequate for the meeting?

4. **Timing.** Make sure that the date and time you have chosen for the meeting works for the participants attending. Be sure to allot enough time so you are able to get through all of the material you hope to discuss.

5. **Facilitator.** Decide ahead of time who will be running the meeting. This is important to help keep things moving and on track.

6. **Agenda.** It is helpful to establish a clear agenda before the meeting takes place to help keep things flowing. It also can serve as a roadmap to make sure everyone remains on the same page.

7. **Room Set-Up.** Try to get into the actual meeting room ahead of the actual meeting. Arrange the chairs and tables in the most useful way possible so that everyone can see the facilitator and visual aids. Also, make sure seating distinguishes participants from non-participants.

8. **Roles.** Often it is helpful to assign different roles to people in the meeting. Who will be presenting? Who will be a timekeeper? Who will take notes?

9. **Turnout.** Poor attendance can torpedo a promising meeting at the very last moment. It is not enough to simply invite people and hope that they show up. Reminders are essential as you get closer to the actual meeting day and time. Calls, emails, written reminders and public announcements are all good ways to make sure turnout is maximized. Keep track of the percentage of people who actually show up to help calculate future turnout.

10. **Materials**. You should prepare the necessary materials for the meeting and be ready to distribute.

KEY TWO: The Actual Meeting

Now that all of the preparation has been done, it's showtime! Meetings are a vital part of doing business and can make or break an organization. Meetings should be informative, forward moving and efficient. And above all, they should be enjoyable!

Some tips for successful meeting facilitation:

1. **Start the meeting promptly**. This means starting no later than ten minutes after the official start time.

2. **Greet attendees.** Introduce yourself if necessary and welcome everyone to the meeting. If there are people who are new or unknown to the group, take the opportunity to introduce them.

3. **Establish agenda.** Lay out the agenda for the day so people have an idea what to expect from the meeting.

4. **Set ground rules.** Set up an agreement with attendees so that rules are established from the outset.

5. **Encourage participation.** It is important that you create an open, comfortable environment for people right off the bat. This will encourage everyone to participate.

6. **Stay on track.** Try to keep the meeting moving forward by sticking to the agenda you established at the start of the meeting. Always end on time.

7. **Seek action.** Meetings should not generally be held to simply discuss and educate. Try to define specific "calls to action" for attendees so they can be held accountable Get confirmation that they can and will deliver.

8. **Bring closure.** If possible, bring closure to a particular subject or issue before moving on to a new one. Most groups will spend much more time discussing an item than is actually necessary.

9. **Stay flexible.** As a facilitator you must remain alert and nimble as meetings can shift focus on a dime. If an issue arises that you sense must be addressed right away, be prepared to alter your agenda to accommodate it.

10. **Closing.** As you draw the meeting to a close, it is helpful to review what has been covered, what decisions have been made and what commitments are still outstanding. Thank the attendees for attending. Always end the meeting on time or slightly early.

Kicking Off a Meeting

1. Make introductions

2. Check for expectations and concerns

3. Agree on agenda/time allocation

4. Agree on process and ground rules

5. Define roles

Ending a Meeting

1. Summarize decisions made

2. Review plans for action

3. Schedule next meeting

4. Tie up any loose ends

5. Do a self-critique (divide flip chart in half)

KEY THREE: Post-Meeting Follow-Up

Once a meeting is finished, there is still one last piece of the puzzle that must be addressed: the follow-up. It is essential that a meeting follow-up takes place as soon as possible after the completion of the meeting. This will help avoid things falling through the cracks with the passage of too much time.

Tips for good meeting follow-up:

1. Make sure accurate and thorough notes were taken.
2. Thank anyone who helped to make the meeting a success.
3. Check your agenda to make sure you covered all the info.
4. Provide meeting notes to anyone who wanted to attend but could not.
5. Privately seek feedback from any attendees who might be willing to provide it.
6. Decide on a date for a follow-up meeting to gauge progress.

Action planning

An action plan is a series of steps for continuous improvement or practice that will help move you towards a specific goal or objective. An effective action plan should include the following steps:

Step 1: **Define the objective.** This means having a clear goal and purpose for the plan, including any pertinent tasks that must be completed for success.

Step 2: **Identify critical success factors.** These are the steps or tasks that must go right if you are to succeed, including deadlines, measures or results sought.

Step 3: **Delegate tasks.** Once you see the entire project from beginning to end, look at each task in greater detail and assign tasks to specific individuals for accountability.

Step 4: **Track and assess progress.** It is not only important to regularly assess progress for an action plan, it is also essential to decide how you will respond to the results of these assessments.

EXERCISE: Facilitating a Problem-Solving Meeting

EXERCISE: Facilitating a Brainstorming Meeting

(SAMPLE AGENDA)

Acme thanks BellStar for hosting today's meeting.

Acme Enterprises' Customer Development Center, located in Orlando, FL, has developed, strategized, and organized a contact center that in less than two years has started generating over $8.5 million in revenue per day, serving more than 500,000 inside sales accounts, and handling more than 125,000 inbound service calls per week.

Facilitator:	Jennifer Drew
Recorder:	Janet Van Dyne
Date/Time:	6/22/14
A/V:	Digital Presentation
Location:	Deluxe Hotel, Las Vegas
Distribution:	Managers, VP's, and Associates

June 22, 2014

8:30 a.m. **Registrations and early networking**

9:00 a.m. **Welcome and opening remarks**
Introduction of guests and visitors:
  • Robert da Costa, ABC Corp.
  • Hal Jordan, YYZ, Inc.
  • Alan Scott, Big Biz Enterprise

9:15 a.m **Overview of Acme Enterprises operations and initiatives**
Sam Wilson, Director of Operations: Overview of operations and sharing various initiatives implemented to reduce turnover.

10:00 a.m. **Presentation from our meeting sponsor**
Jim Hammond, Black Star: Emerging Workforce – The Great Divide: The Employer-Worker Disconnect

10:45 a.m. **Roundtable discussions**
Planners Inc. – Hiring the right person, Coaching/Training, Employer/Employee Surveys

11:30 a.m. **Tour of Acme Enterprises contact center**

Noon **Wrap-up and closing**

EVALUATION FOR FACILITATORS

✓ Was this particular meeting successful?

✓ If so, what made the meeting successful?

✓ What did the facilitator do that helped make the meeting successful?

✓ Did the facilitator help keep the meeting on track?

✓ Did the facilitator set an agenda at the outset?

✓ Did the facilitator have a good opening for the meeting?

✓ Did the facilitator close the meeting properly?

✓ Did the facilitator involve the entire group in the meeting?

✓ Did the facilitator seem at ease and in control of the meeting?

✓ What could have made the meeting even more successful?

Managing Difficult Conversations

> *Communication has to start with telling the truth, even when it's painful.*
>
> —Lee Iacocca

Whether the topic is a client putting your business up for bid, the termination of a current employee, or the lack of a raise, an assertive yet compassionate delivery will help make challenging communication easier for all parties. This is not to say such conversations can ever be made easy—especially since strong emotions will be involved.

Here are some guidelines to manage difficult conversations effectively:

1. **Be direct.** Don't make the mistake of spending too much time on small talk before delivering your difficult news. Otherwise it will look like you are stalling or afraid to address the subject at hand.

2. **Provide context.** People will want to know who made the decision, why it was made, and what led to it. Take the time to clearly explain the details so there is no confusion as to its cause.

3. **Time it right.** Many people make it harder than necessary to deliver difficult news because they wait too long to do it. If you screwed up, admit it. If your calculations were off, own up to it. Don't delay the inevitable and don't dole out bad news in drips and drabs. Be honest and forthcoming. People will more readily accept bad news if the messenger is upfront and candid.

4. **Don't make assumptions**. You can't know how an employee or client will handle bad news. People are different and the ways they process challenges are different as well. Consider the personalities involved as well as the various reactions they could have, stay open during the conversation, and listen actively.

5. **Be prepared for questions.** Before you deliver the difficult news, take some time to anticipate what questions might be asked. Why did you do it that way? How could you let this happen? Whose fault is this? These are all questions that are likely to arise. Think about how you will handle each of these questions ahead of time.

6. **Don't minimize the event.** Try to understand the emotions someone is experiencing as a result of hearing the news you have just given them. Because they are reading your body language as you deliver it, be careful not to appear too casual or flippant.

7. **Show empathy.** If this news were being delivered to you, what reaction would you have? What emotions would you be feeling? Considering these questions will give rise to empathy, and your listener may pick up on it. Be conscious of what your voice and body language might be conveying and make sure they support your intention at all times.

8. **Do it in person.** While it is sometimes easier to simply compose an e-mail and deliver bad news to an employee electronically, this is not an effective way to handle this type of communication. Being assertive means sitting down with the person face-to-face to share the news and discuss the situation.

9. **Don't let emotions get in the way.** It is important that you remain calm and collected during the delivery of difficult news, even if the other person becomes angry or emotional. Resist the urge to strike back or be insulting. Simply present the facts in a clear and honest way. This will help strip the exchange of emotional heat.

10. **Apologize.** If you have made a mistake that has caused the problem being discussed, own it. Take responsibility. Offer a sincere apology and assure the other party that a problem such as this will not happen again. Detail specifically how you are going to correct the situation or what steps you are going take to prevent it from occurring in the future.

The motive power that puts ideas in operation and gives them determinate existence is the passion of man.

—Georg Wilhelm Friedrich Hegel

Stakeholder Analysis

> *Good fortune is what happens when opportunity meets with planning.*
>
> —Thomas Alva Edison

Defining the Stakeholder

Stakeholders are people, groups, or institutions with a vested interest in the success of a specific program or project. These are the people whose support or cooperation you will need in order for the project to be successful. Stakeholders will provide important input and information during the development of the project and can often be a barrier to the successful execution of your goals and vision.

Not all stakeholders are created equal, so it is important for you to identify your stakeholders early in the process. Also, try to accurately gauge the level of influence each stakeholder will have in the decision-making process. The more powerful or influential the stakeholder is, the more support or opposition they will be able to assert as the project moves forward.

Types of stakeholders include:

1. **Primary stakeholders:** These are the individuals or groups that will ultimately be affected, either positively or negatively, by an organization's actions.

2. **Secondary stakeholders:** These are the individuals or groups that will be indirectly affected by an organization's actions.

3. **Key stakeholders:** These are the individuals that will have significant influence upon the direction of a program or organization. Key stakeholders can also belong to one of the first two groups, but their involvement and feedback often carry more weight and influence.

Please identify specific stakeholders with which you currently interact in your present role:

Primary:

1. _____

2. _____

Secondary:

1. _____

2. _____

Key:

1. _____

2. _____

Stakeholder Analysis

Once you have identified the various stakeholders involved in a project or program, it is important to conduct a stakeholder analysis for each. This information will help you better understand the expectations of each particular stakeholder, as well as pinpointing what success would mean for them.

Name _____

Organization (internal or external) _____

Role on the project _____

Level of interest _____

Level of influence _____

Unique facts or information _____

Individual expectations _____

Ways to manage these expectations _____

Their goals or success criteria _____

Your goals or success criteria _____

Your intention or intentions _____

Virtual Communication

A computer lets you make more mistakes faster than any invention in human history – with the possible exceptions of handguns and tequila.

—Mitch Radcliffe

Virtual communication such as conference calls or videoconferencing can be highly effective tools to utilize in business to help a distributed team communicate and work more effectively together. With team members often scattered across various locations, sometimes in different countries, virtual communication can often be the cheapest and simplest way to bring the various players in a group together.

? What type of virtual communication do you utilize during an average day at your job?

When conducting a meeting, demonstration, training or any other communication in a virtual environment, there are certain constraints that accompany web and telephone connections that may make delivering an effective presentation more challenging. Without opportunities for face-to-face interactions between people, it can often take longer for the members of a team to build trust. The success and effectiveness of virtual teams depend on a variety of factors: the type of project being developed, the specific people involved and how the team itself is managed.

As you begin to plan your virtual communication, make sure that you prepare properly. This will increase the likelihood that your meeting will be successful and you will achieve the results you hoped to accomplish.

fact According to a recent study, during an average meeting, _____ % of the meeting time is unproductive, spent discussing non-agenda items.

Pre-Meeting Preparation
(Video Conference or Conference Call):

1.   **Establish an agenda.** Establish a clear agenda for the meeting ahead of time. Make sure that all points you want to discuss are included and the appropriate amount of time has been allotted to accomplish that.

2.   **Decide on meeting duration.** Determine how long it will take to cover the various points in the agenda, also leaving time for questions and discussion as well.

3.   **Identify who should attend.** Make sure you only invite people that absolutely need to attend. This will help you avoid making people feel that their time is being wasted. Keep the participant count as small as possible. Remember, the larger the group, the harder it will be to manage.

4.   **Give all participants instructions to access the meeting.** This means sending out such things as dial in numbers and pass-codes ahead of time to avoid technical glitches.

5.   **Distribute the agenda.** Send out a clear agenda and all pertinent supporting material to meeting participants prior to your virtual meeting. Also, it is helpful to send out reminders as the meeting date gets closer.

6.   **Test your equipment.** Acquaint yourself with the tools that you will be using to help you control and enhance your meeting. The more tools you will be using, the more time you need to spend practicing with them.

7.   **Set goals for the meeting.** Make sure you have clearly identified and communicated the purpose of the meeting as well as the goals and objectives you hope to achieve.

8.   **Assign a note taker and a timekeeper.** Choose a person to watch the clock for you to ensure that your meeting stays on time and on track. Also, have someone take notes to capture information and document all decisions that are being made.

9.   **Take into account time zones when scheduling your meeting.** Be conscious of the various locations and time zones of each person attending the meeting and choose the start and stop times for your meeting accordingly.

10.   **Make arrangements to videotape or audiotape the meeting.** By recording the meeting, you can easily make it available to any team members who could not attend in real time.

Conference Calls

The conference call can be an excellent tool in business for remote work. There are many benefits to conference calls, such as low cost and easy set-up. However, before you schedule a conference call, make sure it truly is the most appropriate communication tool for your specific purpose. If your goals can be accomplished with a simple e-mail or a smaller face-to-face meeting, a conference call may not be necessary.

Tips for running effective conference calls:

1. **Choose someone to lead the call.** Every meeting needs a leader, so identify the person who will serve as facilitator for the meeting. Assign specific roles and responsibilities if more than one person will be presenting information during the call.

2. **Stick to your agenda.** Make sure that time is not wasted during the call discussing non-agenda items. Stick to the points and topics that you are there to discuss.

3. **Limit background noise.** Make sure that participants are calling from a quiet space and limiting multi-tasking during the call. Encourage everyone to utilize the mute button when they are not speaking.

4. **Establish protocol.** Identify who will be presenting information during the meeting and also who will be leading the call. Cover any housekeeping rules right at the start. Ask that only one person speak at a time so that all participants can be heard.

5. **Introduce participants.** At the beginning of the meeting, the person leading the call should introduce everyone in attendance, both by name and by role.

6. **Solicit and encourage participation.** Set the expectation at the start of the call that feedback is welcome and the asking of questions is encouraged. Strive to make the meeting a dialogue and not a monologue.

7. **Leave time for questions.** Make sure you leave enough time toward the end of the call to answer any pertinent questions that may have come up as a result of the information covered.

8. **Ask participants to identify themselves by name.** Since it is not always easy to identify each person by voice when there are many participants on a conference call, encourage people to state their names before speaking.

9. **Determine next steps.** Conference calls, like any other meeting, cannot be productive and successful unless decisions are made and action items are identified.

10. **Assign action items.** Once action items have been identified, it is important to assign tasks to specific people. This makes participants responsible for these and accountable if they do not get done.

Video Conferencing

Videoconferencing is a telecommunication technology that allows individuals or groups in various locations to interact simultaneously via video and audio transmissions. This video-based technology has become an increasingly popular form of business communication, allowing companies to conveniently operate at the same time, from anywhere on the globe.

Tips for effective video conferencing:

1. **Test your equipment ahead of time.** As with any other technology, it is important to familiarize yourself with all equipment that will be utilized during the meeting.

2. **Speak slowly and clearly.** When speaking on video, it is important to utilize clear articulation and good volume to make sure that the other parties can hear you. Take your time when speaking and check in frequently with participants to make sure you are being understood.

3. **Dress for success.** Dress as you would for any other meeting. Avoid clothing that is too bright or has busy patterns that may be distracting on camera.

4. **Speak directly into the camera.** By looking at the camera, you will appear as if you are speaking directly to the team members watching you on video.

5. **Have a contingency plan.** Technology can be unpredictable so make sure you have a back-up plan if things go wrong with your video equipment or Internet connection. Make hard copies of your slides so you are ready to present without them.

6. **Limit movement.** Try to stay as stationary as possible during your videoconference. Utilize gestures, facial expressions and vocal variety to keep your audience engaged and interested.

7. **Don't leave the room unless absolutely necessary.** Try to stay focused on your meeting agenda and avoid leaving the room until the meeting is completed. This will help you avoid "dead air" and losing the attention of the participants as they wait for you to return and the meeting to resume.

8. **Try not to interrupt or speak over people.** While you don't want to let individuals monopolize the meeting time or speak for long periods, you also want to be careful not to cut people off or interrupt them, unless they are being consistently long-winded or hogging the spotlight.

9. **When not speaking into a microphone, turn it off.** This will help to limit feedback or echoing that can be distracting to an audience. Also, microphones can pick up even the smallest sounds (such as the rustling of papers) so be aware of what sounds are getting picked up and heard by your audience.

10. **Use proper framing.** Make sure that the web camera is capturing you at an appropriate angle so that you can be properly seen. Leave at least 10% headroom in the frame to avoid crowding and make sure your background appears neutral and presentable. Upward lighting is best; try to avoid window glare.

EXERCISE: Virtual Meetings

Checklist for Physical and Vocal Warm-up

- ✓ Drop Over
- ✓ Neck Stretch
- ✓ Big Face/Little Face
- ✓ Big Chew or Jaw Drop
- ✓ Horse Blow/Raspberry
- ✓ Shoulder Rolls
- ✓ Arm Circles
- ✓ Wrist Circles
- ✓ Air Piano (fingers)
- ✓ Crush the Orange (chest)
- ✓ Hug a Tree (back)
- ✓ Trunk Twists
- ✓ Leg Shakeouts
- ✓ Ankle Circles
- ✓ Resonator Roll-Up
- ✓ *Mumsy Made Me Mash My Mutton* (lips)
- ✓ *Charlie Chews His Chocolate Shoes* (jaw)
- ✓ *Twenty Tentacles Tickling Ted* (tongue)
- ✓ *Icky Sticky Yucky Duckies* (soft palate)
- ✓ First 30 Seconds of Presentation
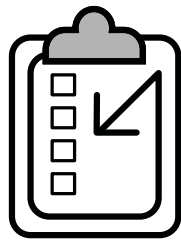
50-Point Speaker Assessment Form

First Impressions

1.	Speaker plants before speaking	Always	Usually	Sometimes	Rarely	Never
2.	Speaker uses an agenda	Always	Usually	Sometimes	Rarely	Never
3.	Speaker sets ground rules	Always	Usually	Sometimes	Rarely	Never
4.	Speaker engages the audience from the beginning	Always	Usually	Sometimes	Rarely	Never
5.	Speaker seems calm	Always	Usually	Sometimes	Rarely	Never
6.	Speaker seems confident	Always	Usually	Sometimes	Rarely	Never
7.	Speaker seems credible	Always	Usually	Sometimes	Rarely	Never

Body Language

8.	Speaker smiles early and often	Always	Usually	Sometimes	Rarely	Never
9.	Speaker makes good eye contact with entire audience	Always	Usually	Sometimes	Rarely	Never
10.	Speaker has active facial expressions	Always	Usually	Sometimes	Rarely	Never
11.	Speaker utilizes a strong Home Base Position	Always	Usually	Sometimes	Rarely	Never
12.	Speaker avoids unnecessary movement	Always	Usually	Sometimes	Rarely	Never
13.	Speaker makes positive use of spatiality	Always	Usually	Sometimes	Rarely	Never
14.	Speaker's body appears free of tension and pacifiers	Always	Usually	Sometimes	Rarely	Never

Vocal Dynamics

15.	Speaker's volume is appropriate for the setting	Always	Usually	Sometimes	Rarely	Never
16.	Speaker varies pitch and avoids monotone	Always	Usually	Sometimes	Rarely	Never
17.	Speaker's inflections support his message	Always	Usually	Sometimes	Rarely	Never
18.	Speaker's pace is appropriate	Always	Usually	Sometimes	Rarely	Never
19.	Speaker is articulate (good diction)	Always	Usually	Sometimes	Rarely	Never
20.	Speaker avoids verbal viruses	Always	Usually	Sometimes	Rarely	Never
21.	Speaker does not stammer over words	Always	Usually	Sometimes	Rarely	Never
22.	Speaker transitions from point to point smoothly	Always	Usually	Sometimes	Rarely	Never

Gestures

23.	Speaker's gestures seem connected to his material	Always	Usually	Sometimes	Rarely	Never
24.	Speaker refrains from using ineffective gestures	Always	Usually	Sometimes	Rarely	Never
25.	Speaker's gestures use a wide area of gesturing space	Always	Usually	Sometimes	Rarely	Never
26.	Speaker seems to know what to do with his hands	Always	Usually	Sometimes	Rarely	Never
27.	Speaker uses gestures that are specific and direct	Always	Usually	Sometimes	Rarely	Never

Intention and Objective

28.	Speaker's intention and objective are clear	Always	Usually	Sometimes	Rarely	Never
29.	Speaker's body language supports his intention	Always	Usually	Sometimes	Rarely	Never
30.	Speaker's vocal delivery supports his intention	Always	Usually	Sometimes	Rarely	Never
31.	Speaker seems passionate about his material	Always	Usually	Sometimes	Rarely	Never
32.	Speaker's message and delivery are congruent	Always	Usually	Sometimes	Rarely	Never
33.	Speaker keeps entire audience engaged	Always	Usually	Sometimes	Rarely	Never
34.	Speaker utilizes storytelling to illustrate a point	Always	Usually	Sometimes	Rarely	Never

Handling Q&A/Controlling the Audience

35.	Speaker listens actively to those asking questions	Always	Usually	Sometimes	Rarely	Never
36.	Speaker refrains from interrupting questioners	Always	Usually	Sometimes	Rarely	Never
37.	Speaker makes sure questions are heard by all	Always	Usually	Sometimes	Rarely	Never
38.	Speaker keeps presentation on track	Always	Usually	Sometimes	Rarely	Never
39.	Speaker answers questions satisfactorily	Always	Usually	Sometimes	Rarely	Never
40.	Speaker seems calm and in control during Q&A	Always	Usually	Sometimes	Rarely	Never
41.	Speaker involves entire audience during Q&A	Always	Usually	Sometimes	Rarely	Never
42.	Speaker handles challenges effectively	Always	Usually	Sometimes	Rarely	Never
43.	Speaker utilizes Parking Lots effectively	Always	Usually	Sometimes	Rarely	Never
44.	Speaker reads nonverbal cues of audience	Always	Usually	Sometimes	Rarely	Never

The Presentation

45.	Speaker displays a strong grasp of content	Always	Usually	Sometimes	Rarely	Never
46.	Speaker utilizes pattern interrupts	Always	Usually	Sometimes	Rarely	Never
47.	Speaker utilizes spotlights	Always	Usually	Sometimes	Rarely	Never
48.	Speaker utilizes signposts	Always	Usually	Sometimes	Rarely	Never
49.	Speaker uses visual aids effectively	Always	Usually	Sometimes	Rarely	Never
50.	Speaker constantly reinforces key points	Always	Usually	Sometimes	Rarely	Never

Participant Feedback Questionnaire

YOUR NAME (optional):_____

Please take a moment to complete this brief questionnaire. Your feedback will help us in our efforts to continually improve our services and training. (Please select one response for each answer.)

1. **TRAINING QUALITY**

   Please rate the overall quality of the training you received. ☐ Excellent ☐ Good ☐ Fair ☐ Poor

2. **COURSE**

   Please rate your level of agreement with the following statements about the course.

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
a. The skills and knowledge I learned will enable me to improve my job performance.	5	4	3	2	1
b. The subject matter was presented in a clear, understandable manner.	5	4	3	2	1
c. The course materials were helpful and easy to understand.	5	4	3	2	1
d. The course met or exceeded my expectations.	5	4	3	2	1
e. I would recommend this course to others.	5	4	3	2	1

3. **TRAINER**

   Please rate your level of agreement with the following statements about the trainer.

a. Trainer was prepared for each session.	5	4	3	2	1
b. Trainer was knowledgeable about the subject matter.	5	4	3	2	1
c. The trainer effectively responded to questions/concerns.	5	4	3	2	1
d. Trainer encouraged participation.	5	4	3	2	1
e. The trainer was engaging and kept my attention.	5	4	3	2	1

4. In your opinion, what are the strengths of this course?

5. In your opinion, how could we improve this training?

6. May we use your comments in our client testimonials? ☐ Yes ☐ No

   If yes, please provide your name and title as you would like it to appear:

   Name/Title: _____

THANK YOU!

🦻 Active Listening Quiz

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

11. _____

12. _____

13. _____

14. _____

15. _____

Post-Training Retention Support

In order to truly grow and retain what you've learned you need to implement and practice your new skills. To assist in these endeavors, Pinnacle offers a variety of retention support tools to ensure you maximize your newly developed techniques.

▶ **The Buddy System & Training Manual**

The back of this training manual contains retention tools, including a self-assessment. Combine this with the "Buddy System" to have others observe, critique and report on your communication skills progress. You may partner up with someone from your Pinnacle workshop (to maximize your newly discovered Pinnacle vocabulary), or even with someone who has never been through a Pinnacle training session.

▶ **The Green Room: Pinnacle's Private Customer Portal**

All participants receive private access to the Green Room. Your personal account offers many resources to help you hone and retain the skills you have learned.

Library: Within 48 hours of your workshop you will receive an email invitation containing your login and password. You will have access to the Library for one year from the date of your workshop.

The library contains:

- A large collection of 60 Second Quick Tip videos
- An array of exercises to do on your own
- Many more tools, tips and resources to use in follow-up activities and day-to-day engagements

Personal Video Access: If provided, you will receive an email when your videos have been loaded into your personal Portal account. This will arrive shortly after your initial Portal invitation. You will have access to your videos for 30 days from the date of your workshop. Pinnacle encourages you to:

- View and download your personal workshop videos
- Review and analyze the videos to continue to sharpen your tools
- Practice what you learned and use the videos to remind you of where you started

▶ Monthly Email Refresher

As a participant in a Pinnacle Workshop, you will be eligible to receive our monthly email refresher. This email contains additional tips and techniques for use as you further your education and refine your new skills.

▶ Virtual Coach

Pinnacle's online tool, the Virtual Coach weds the convenience of modern technology with our innovative approach to communication in an online resource for presentation and communication skills coaching.

▶ *The Pin Drop Principle*
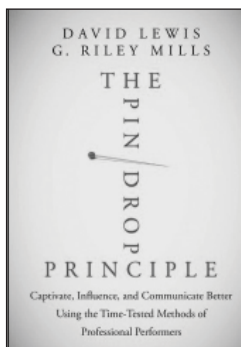
Written by Pinnacle's co-founders, The *Pin Drop Principle* is a step-by-step master class for anyone wishing to become a more confident and credible communicator and an accessible resource for anyone who routinely needs to present ideas to large or small groups, convey feedback effectively, conduct difficult conversations, and persuade others.

Glossary

Acting As If: A technique used in acting or life that takes advantage of your natural mental and emotional responses to posture and behavior to impose a feeling of confidence or security.

Belly Button Rule: A term coined by author Janine Driver stating that the direction a person's belly button faces can reflect their attitude and reveal their emotional state.

Benefit: Something advantageous or positive that an audience will achieve or receive as a result of hearing your message.

Body Language: Nonverbal communication such as gestures, postures, and facial expressions that help support a person's intention.

Congruence: The state in which all aspects of voice and body language perfectly support a communicator's intention.

Core Breathing: The low belly breath used by actors and singers for maximum support; also called diaphragmatic breathing.

Engagement: A connection with an audience that finds them in a willing state of attentiveness during your communication.

Gesture: Any movement of the hand, arm, body, head, or face that communicates a specific idea, opinion, or emotion.

Home Base Position: The relaxed, open body position that serves as a communicator's physical neutral when not moving or gesturing. Inflection: The specific pitch in the voice (up or down) used at the end of a word or phrase.

Intention: An aim that guides action, informing all aspects of a person's physical and vocal delivery.

Intention Cues: Any aspect of a person's vocal or physical communication that conveys meaning to an audience or listener.

Mirror Theory: The idea that people pick up on whatever emotion or intention a speaker projects and both feel and project back that emotion; see also, isopraxism.

Monotone: A succession of sounds or words without change in pitch.

Nonverbal Communication: Any aspects of communication: aside from the actual words spoken: that send messages or convey meaning to a listener.

Objective: A goal you hope to accomplish with your communication.

Pace: The rate, based on words per minute spoken, at which a person speaks.

Pacifier: Any nervous behavior or activity displayed by a speaker that communicates discomfort or nervousness.

Pattern Interrupt: Any action or behavior that breaks a pattern in an effort to maintain the attention of an audience.

Personal Stamp: The uniqueness and individuality a speaker or actor brings to a presentation or performance.

Posture: The position of a person's body when standing or sitting.

Spatiality: The way in which a speaker uses space, movement, and distance when communicating a message to others.

Stone-Face Syndrome: A condition whereby a speaker's facial expressions communicate virtually nothing, usually a result of nervousness or anxiety.

Torso Tell: A concept that the direction your torso is facing signals interest and intent.

Upspeak: The tendency to make your voice rise at the end of sentences so that statements sound like questions.

Verbal Virus: Verbal fillers (such as ah, um, or I mean) that show up in speech and communicate uncertainty to an audience or listener.
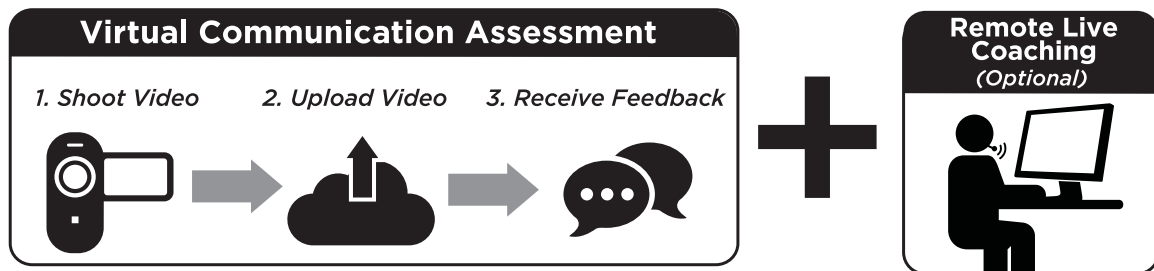
Vocal Dynamics: The ways in which you use the various qualities of the voice (pitch, tone, resonation, inflection, articulation, volume, and pace).

Pinnacle's Virtual Coach weds the convenience of modern technology with our innovative approach to communication in an online resource for presentation and communication skills coaching.

Pinnacle Master Instructors evaluate an uploaded video for individual communication skills, presence, and ability to engage and influence any audience with any message. They diagnose areas for improvement and provide comprehensive, written feedback with specific exercises to strengthen effectiveness. Users can also receive live remote coaching.

How does Virtual Coach Work?

Three easy steps:

Virtual Communication Assessment
1. Shoot Video 2. Upload Video 3. Receive Feedback

Remote Live Coaching *(Optional)*

▶ **Assessment**
Virtual Coach can be used as an assessment tool to recognize high potential employees, future leaders and new candidates. Employers can identify potential based on a comprehensive evaluation of communication skills and executive presence.

▶ **Development**
Participants will improve the effectiveness of their meetings, presentations, elevator pitches, keynote speeches, difficult conversations and more through action planning, video exercises and live coaching.

▶ **Blended Learning**
Budget and time are short for everyone these days. Virtual Coach gives everyone a jump start, reducing the time necessary for an on-site workshop.

▶ **Retention Support**
Workshop alumni can receive online video analysis and live remote coaching to sustain their in-class education. Virtual Coach provides tools for progressive skill development and an effective action plan for continued success.

For more information or to schedule a virtual coaching session, contact us at: 773-572-8616 or vcoach@pinper.com
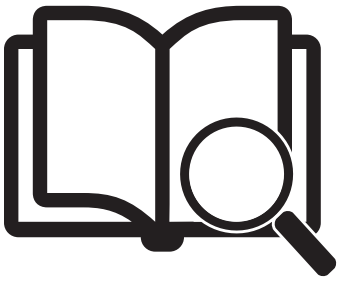
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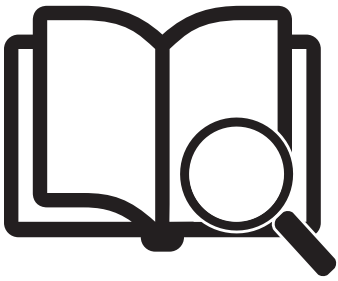
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Communicating Across Cultures

> *Culture is the widening of the mind and of the spirit.*
>
> —Jawaharlal Nehru

Effective communication is fundamental in the corporate environment, because business is a collaborative activity—goods are purchased, deals are negotiated, and issues are discussed. Effectively communicating with people of different cultures is especially challenging because cultures provide people with different and specific ways of thinking and interpreting the world around them.

? What is culture and how does it relate to business?

Culture is a set of shared values that a group of people holds, affecting how it thinks and acts. It also affects how the group sees things: whether they view something as right or wrong, normal or strange.

Communication styles vary enormously around the world, and these differences can contribute to a large variety of business styles. The same words can mean different things to people from different cultures, even when they are speaking the same language. When the languages are different, and translation has to be used to communicate, the potential for misunderstandings is even larger. Articulation and speaking rates can often have an impact on the ease of understanding between a speaker and their audience.

fact There are roughly _____ spoken languages in the world today, with the most popular language being _____.

> **fact** According to experts, only _____% of the 750-800 million people who speak English learned it as a first language.

Below are tips for those who communicate frequently with non-native English speakers, and for non-native English speakers who are required to present information in a second language.

Tips for native English speakers

1. **Slow down your speaking pace.** Slowing your speaking rate will make it easier for your audience to follow your message.

2. **Avoid slang and idiomatic expressions.** Slang or expressions such as "spill the beans" or "cut the waffle" don't translate across every culture, so be aware of the words you choose.

3. **Clearly announce topics and topic changes.** Providing a "headline" so your audience knows the subject about to be discussed will ensure everyone's attention is synchronized.

4. **Articulate your words clearly.** Put simply, use crisp and clear diction so you can be understood.

5. **Restate main points frequently.** Repetition is always helpful for your audience to be able to easily follow and understand your main points.

6. **Use simple and clear language.** Try not to use overly complicated or technical jargon that might be a challenge for non-native speakers to understand.

7. **Face your listener and don't cover your mouth when speaking.** Your audience can use the visual element of your lips moving to help them listen and follow you.

8. **Check in frequently to confirm understanding.** Utilize skill checks and checkbacks to ensure comprehension among your audience members.

9. **Keep sentences short.** Avoid long, complicated sentences that will be hard for a listener to follow.

10. **Be patient.** Keep in mind how challenging it is for a non-native speaker to listen and translate your words in the blink of an eye.

Tips for non-native English speakers

1. **Allow people to suggest words to communicate more quickly.** If there is someone on the call or in the meeting that can assist with clarifying vocabulary or translating a word or phrase, let them assist.

2. **Listen actively.** Avoid distractions and focus on the speaker's main idea.

3. **If you do not understand a word, ask them to repeat it or write it down.** The only way a speaker will know if his words are being understood (or not) is for you to offer honest feedback.

4. **Participate actively in discussions.** The more practice you get speaking and engaging with English-speakers, the easier it will become.

5. **When speaking, say less.** Whenever speaking in a second language, keep your answers and message as concise as possible.

6. **Choose your words carefully.** Make sure you have chosen the right words before you speak them. Once they are out, you own them.

7. **Articulate your words clearly.** If an audience can't understand a non-native speaker, it is often not because of vocabulary or word choice, but instead because of enunciation not being clear.

8. **Keep a dictionary handy for reference.** If you are unsure of a term or word being used, take a moment to refer to your dictionary so you are clear on the meaning before proceeding.

9. **Slow your speaking rate.** By slowing your speaking rate, it will not only help you have a better grasp of vocabulary, it will also allow your audience to more easily follow your thoughts and message.

10. **Take notes and review them later.** Notetaking will help reinforce the information you learned previously to make the points stick.

Iceberg Model of Culture

Anthropologist Edward T. Hall developed the theory that culture is like an iceberg, and we can only see a small portion of it that is visible above the water. The true mass that forms the majority of the iceberg, however, is below the surface and not visible.

Try to imagine you are standing on an iceberg that represents you and your culture and you are going to merge with another team, who is standing on another iceberg that represents their culture. Think of what each of you would see looking across at the other.

Hall suggested there are two parts to culture: internal and external. He believed that only a small portion of the external culture is above water and visible in the behaviours of a society. The larger portion, internal culture, is hidden beneath the surface in the beliefs, values, and thought patterns of a society.

Food • Music

Language • Visual Arts

Festivals • Performing Arts • Literature

Holiday Customs • Flags • Games • Dress

Nature of Friendship • Values • Notions of Beauty

Religious Beliefs • Body Language • Norms • Etiquette

Rules • Learning Styles • Expectations • Gender Roles

Attitudes towards Social Status • Leadership Styles

Notions of "Self" • Perceptions • Attitudes towards

Age • Notions of Modesty • Thought Processes

Views on Raising Children • Concept of

Fairness • Importance of Space

Approaches to Problem Solving

Notions of Cleanliness

Importance of Time

Assumptions

Spencer-Oatey Onion Analogy

Various studies informed by theories of cultural comparisons were done by Helen Spencer-Oatey. She found that culture is generally viewed as a mixture of factors and underlying human behaviors and interactions. Spencer-Oatey visualized these factors by means of cultural layers, much like an onion. The layers are explained as follows:
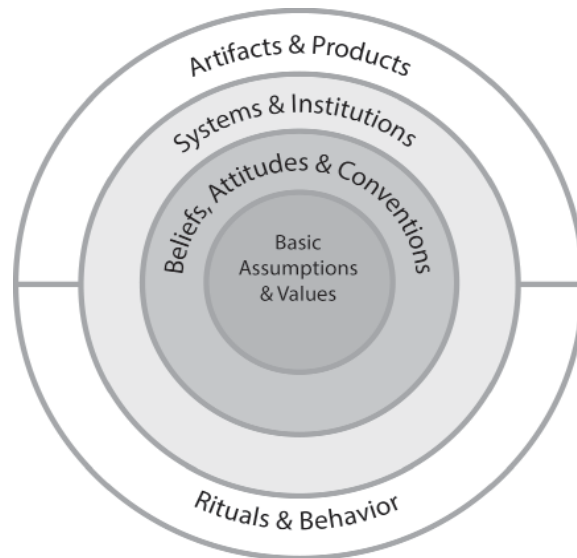
Layer	Visibility	Examples
Artifacts and Products	Most explicit	• Food • Clothing • Architecture • Art • Language
Rituals and Behaviour	Most explicit	• Gestures • Ways of greeting • Ceremonies
Systems and Institutions	Less explicit	• Education • Government • Law and order • Health care • Family life
Beliefs, Attitudes & Conventions	More implicit	• Religious and moral beliefs • Attitudes towards other groups • Concepts of manners and behavior

Basic Assumptions and Values	Most implicit (core)	• Power differences among group members
		• Importance of respecting tradition
		• The importance of conforming to social expectations and norms
		• The right to pursue personal pleasures and interest

In today's global business environment, the key to success with cross-cultural communication is developing an understanding of and respect for the differences between various cultures. This means you must be culturally literate—able to communicate in a way that effectively gets a message across to all parties involved, while not excluding or offending anyone due to unintended cultural misunderstandings.

? What are the consequences of lacking cultural awareness when conducting business internationally?

Below are some examples of past cross-cultural business blunders:

• An American oil rig supervisor in Indonesia shouted at an employee to take a boat to shore. Since it is bad form to berate an Indonesian in public, a mob of outraged workers chased the supervisor with axes.

• Global internet search engine Bing experienced a slight problem after they launched in China, because "Bing" in Mandarin sounds like "illness."

• An advertisement released by Mountain Bell to promote its telephone services in Saudi Arabia in the 1980s failed miserably. Advertisements illustrated an executive talking on the phone with his feet propped up on the desk, and showed the soles of his shoes – an act that is considered extremely offensive in the Arab culture.

• Pepsodent tried to sell its toothpaste in southeast Asia by emphasizing that it "whitens your teeth." They found out that the local natives chew betel nuts to blacken their teeth, something they find attractive.

• An aftershave for men marketed in the Middle East in the 1970s, depicted a pastoral scene featuring a man and his dog. However, the product dramatically failed in Islamic countries, where dogs are considered unclean.

Understanding High Context vs. Low Context Cultures

Probably the single most useful concept for understanding cultural differences in business communication is Edward T. Hall's distinction of low-context and high-context cultures. Understanding whether your international colleagues are high context or low context will help you adapt your communication style and build stronger relationships. While every group has a little of both contexts, the distinctions are useful to understand where cultural differences reside and how differing cultural points of view arise.

High context communication

In a high context communication cultures (Mediterranean, Slav, Central European, Latin American, African, Arab, Asian, Indian) the listener must combine messages portrayed by the speaker's verbal communication and nonverbal behaviors to get the full meaning of the message. In this style of communication emphasis is placed on understanding without direct verbal communication. High context communicators expect the listener to read between the lines. Words are not as important as context, which includes tone of voice, facial expression, gestures, posture, and status.

Traits of a high context culture:

- Communication is more indirect and less explicit

- Face-to-face interactions are preferred for nonverbal communication

- Strong boundaries with clearly defined roles of authority

- Long-lasting relationships are important

- Developing trust is essential to business interactions

- Knowledge is situational and relational

- Shorter, simpler contracts

Tips for communicating with a high context speaker:

- Employ keen listening and observation skills

- Understand that nonverbal behaviors are as important as actual words

- Encourage elaboration on ideas

- Ask for explanations of opinions

- Carefully build and maintain relationships

- Avoid overly personal questions

- Expect and anticipate indirect communication

Low context communication

In low context communication cultures (the United States and most of northern Europe) the meaning of messages is in the verbal communication and emphasis is placed on explicit messages. Low context communicators use words that express the full extent of the intended meaning. Nonverbal and subtle behaviors are not considered as heavily when interpreting the message. Direct communication is preferred and respected. People who are low-context communicators value logic, facts, and straightforwardness.

Traits of a low-context culture:

- Messages are explicit and specific

- Rule oriented: people play by clearly defined external rules

- Knowledge and information are accessible to all

- Interpersonal relationships can be intense but short term

- Decisions and activities are action oriented

- Longer and more detailed contracts

Tips for communicating with a low context speaker:

- Recognize that nonverbal behaviors do not play as great a factor with intended meanings

- Don't rely on subtle clues - focus on the literal meaning of the words spoken

- Use direct and specific communication

- Show interest by asking questions of the other person

- Stick to agreed upon rules or standards

Low context cultures include:
- The United States
- Canada
- Germany
- Switzerland
- England
- Austria
- The Netherlands
- Australia
- New Zealand
- Israel
- Scandinavia

High context cultures include:
- Most African countries
- Brazil
- China
- Russia
- Saudi Arabia
- The United Arab Emirates
- Mexico
- Spain
- India
- Italy
- Japan

Cultural Barriers to Effective Communication

According to communication specialist Stella Ting-Toomey, there are three distinct ways in which culture interferes with effective communication and cross-cultural understanding:

1. **Cognitive constraints –** these involve worldviews and the backdrop in which a group understands and interprets information.

2. **Behavior constraints –** these affect how people of a specific culture behave verbally and nonverbally with the people around them.

3. **Emotional constraints –** these involve the level of emotion exhibited by different cultures in various situations or scenarios.

When communicating across cultures, awareness is key. Each one of the above constraints can lead to communication problems if one is not careful and observant. If a person is not aware of the potential for such problems, they are even more likely to fall victim to them.

EXERCISE: Communicating Across Cultures

Please discuss the following scenarios and how high or low context influenced each:

Scenario #1

Susan and Erica had been working together as teachers in Istanbul, Turkey. After being in Turkey for a few months they decided to explore more of the country. As they got further into the countryside and away from Istanbul, they started to feel hostility toward them. On one occasion they stopped at a small coffee house in a village and found themselves the center of attention. They felt shaken by the numerous stares. Susan and Erica could not understand the difference in attitude between people in Istanbul and those in the countryside.

Scenario #2

A U.S. software manufacturer decided to explore the possibility of entering the Japanese market. They arranged a meeting with a major Japanese firm to discuss a joint venture. Representatives of each firm met up in New York City. Following the initial introductions, the men sat down at opposite sides of the table. After offering their Japanese guests a drink, the U.S. representatives proceeded to take off their jackets and roll up their sleeves to begin business discussions. The meeting was unsuccessful and the joint venture never took place. What cultural faux pas did the Americans commit?

Scenario #3

Michael is a British trainer working with a team of software engineers in Bangalore, India. On the first day of training, his instruction was to begin at 9:30am. At 9:30am, Michael was ready, but only four of his eight participants had arrived. Another 30 minutes passed and gradually the other team members arrived. When Michael asked why they had come late, the participants smiled and shrugged, citing the rains and traffic as the cause of their tardiness and delay.

Scenario #4

Sam Walker had worked hard to become the top sales representative of his burgeoning travel company. When the company received an invitation from a Brazilian firm to present a proposal to them, Sam was chosen to fly to Sau Paulo. Excited, Sam had set up an appointment to make his presentation the afternoon he arrived. Upon arrival, he was met by his host contact who told him the presentation was postponed for two days to give Sam a chance to rest and see the sights. Sam insisted he was fit and ready for the presentation and pressed to have it that afternoon. Eventually it was moved back to the original slot, but Sam noticed that none of the executives at the meeting seemed engaged. At the end of the meeting the chief contact suggested they all meet again in two days. Why did Sam get this reaction?

Scenario #5

Linda James had been assigned to the Paris office of his marketing company. Having studied French in college she welcomed the opportunity. Upon arriving at the new office, Linda looked forward to meeting her new colleagues and getting to know them. While waiting for a meeting to begin she decided to initiate some conversation with another member of the staff. She introduced herself and inquired as to whether the man was married and had children. The co-worker became distant and unapproachable. Why?

Culture is the intersection of people and life itself. It's how we deal with life, love, death, birth, disappointment.

- Wendell Pierce

Leadership Communication

> *You don't lead by pointing and telling people some place to go. You lead by going to that place and making a case.*
>
> —Ken Kesey

Effective leadership is essential for organizations to succeed and thrive. We can all name a good leader or someone who possesses and displays strong leadership traits. Leadership is essential for a team or organization to move forward toward common goals, but the word has many definitions. A leader is someone who influences and inspires others and effectively drives them toward new visions or outcomes. A leader could be a CEO or a new hire. Anyone who leads a team or individuals forward toward mutual success is a leader.

Name three public figures whom you consider to be effective leaders:

1. _____

2. _____

3. _____

As you think about these figures, try to understand why you chose them. What traits or talents did they exhibit that made you think of them as leaders? Was it their accomplishments, their actions, their communication style? A leader might lead through official authority and power, or they may lead through inspiration, persuasion, and personal connections.

Leadership is: _____

_____

Principles of Leadership

1. **Treating team members as individuals.** Every team member approaches every task with a unique set of expectations, concerns, and experiences. Stay connected with your team members at all times by asking questions and soliciting feedback.

2. **Being technically proficient.** Take the time to thoroughly train and become skilled in your given profession, then continue to learn and practice so you are able to competently execute your job duties.

3. **Developing the potential of others.** Make sure to recognize the unique talents and abilities of every member of your team and work to empower them so they are able to grow and excel.

4. **Making sound and timely decisions.** Try to make your decisions based on facts rather than emotions or assumptions. Set goals and honor timelines to make sure that you are adhering to a plan.

5. **Developing a coherent team and strategy.** To engage your employees or team members you must create a coherent strategic narrative for the organization or project. Clearly set expectations that reaffirm or adhere to the company's vision and values.

6. **Motivating others to follow or take action.** This is a key to successful leadership. Work to gain the trust and respect of your team by being an honest and open leader with your behavior and actions.

7. **Clearly communicating information and vision.** A team cannot align behind a vision or follow a specific process if it has not been clearly explained or instituted. Set goals, processes, and expectations clearly to avoid confusion, frustration, or low morale.

8. **Leading effectively by example.** If you're in a leadership position, then you know you have a responsibility to your team to serve as a model for them to emulate. A large part of that involves leading them with your own actions.

9. **Seeking and accepting responsibility.** By acknowledging and owning up to errors or mistakes you have made, you will set the tone within your organization for others to emulate. Be accountable and others will be inclined and inspired to do the same.

10. **Knowing personal strengths and limitations.** As a leader, self-awareness is key. You must be able to understand how you are perceived by others within your organization, as well as what your specific strengths and weakness are.

fact According to experts, _____ % of business leaders say it's important to have a mentor.

No two leaders are exactly the same, nor do all leaders possess and exhibit the same set of skills or competencies. There is no definitive list of traits required to be a perfect leader, but most leaders will exhibit similar traits that make them stand out in the eyes of others.

Ten Traits of an Effective Leader

(Please rate yourself on a scale from 1 to 10 on each trait.)

1. _____	1	2	3	4	5	6	7	8	9	10
2. _____	1	2	3	4	5	6	7	8	9	10
3. _____	1	2	3	4	5	6	7	8	9	10
4. _____	1	2	3	4	5	6	7	8	9	10
5. _____	1	2	3	4	5	6	7	8	9	10
6. _____	1	2	3	4	5	6	7	8	9	10
7. _____	1	2	3	4	5	6	7	8	9	10
8. _____	1	2	3	4	5	6	7	8	9	10
9. _____	1	2	3	4	5	6	7	8	9	10
10. _____	1	2	3	4	5	6	7	8	9	10

Nearly all men can stand adversity, but if you want to test a man's character, give him power.

—Abraham Lincoln

Leadership and Power

Power is about influence and authority. In essence, when we use power we're utilizing our authority to get something we want or need. Leaders are often in a position of power or influence within an organization. While a leader may hold power, the way he or she wields that power within an organization can differ depending on the leader and the situation.

Below are the five types of power a leader may possess:

1. **Coercive power** is based upon a person's ability to bestow rewards or punishments, in the form of job assignments, schedules, pay, or benefits, to others.

2. **Network power** is based upon who someone knows, or, more importantly, who they can influence, such as other powerful people within the organization.

3. **Expert power** comes from a person's expertise, knowledge, or experience on a given topic or in a given field.

4. **Informational power** can derive from someone who possesses or has access to valuable or important information that others may not know.

5. **Positional power** comes from the position a person holds, such as their title and job responsibilities.

> Which types of power, if any, do you personally possess in your current role?

> **fact** _____ % of the average executive's time is spent responding to crises or problems.

Five Styles of Leadership

The way someone in the corporate environment provides feedback and direction, implements plans, and manages and motivates people is called leadership style. There are many different leadership styles that can be exhibited by individuals in various fields. A leader will often employ different leadership styles, depending on the individual and the situation in which they are involved.

Five most common leadership styles:

1. **Autocratic leaders** know exactly what they want done, who is to do it, and when it should be completed. They often make decisions without consulting their team members. This can be effective when decisions need to be made quickly but can be detrimental to morale. It can also lead to high levels of absenteeism and employee turnover within an organization.

2. **Democratic leaders** often make the final decision, but they also encourage and include employees and stakeholders in the decision-making process. The democratic style can be a positive and motivational experience because team members feel they are contributing. However, because everyone is included in making decisions, it can often require more time to get things done.

3. **Delegative leaders** (sometimes called *laissez faire leadership*) give employees freedom with regard to how they do their work and how they meet their deadlines. This autonomy often results in high job satisfaction, but can be ineffective or even detrimental if team members do not manage their time well or lack the skills or self-motivation needed to handle their responsibilities effectively.

4. **Transactional leaders** operate via a style that is based primarily on a system of rewards and punishments for job performance. Often leading "by the book," this type of leader is generally more concerned with following existing rules than with making changes to the organization or its processes.

5. **Tranformational leaders** are often brought in when it is necessary to completely change or shift the culture or direction of an organization. This type of leader is usually charismatic and will challenge or inspire team members by creating a sense of excitement and engagement within an organization.

? Which type of leadership style (or styles) do you most frequently exhibit?

Leadership Assessment Test

(Scoring: 1 = Do well, 2 = Do somewhat well, 3 = Don't do well)

Instructions: Please read each statement carefully then rate yourself in terms of how well you think you possess the attribute or perform the leadership skill by circling the number that best reflects your view.

1. I articulate my company's vision and purpose to others.	1	2	3
2. I inspire others to excel and strive to improve.	1	2	3
3. I take a stand for my values.	1	2	3
4. I encourage and nurture others.	1	2	3
5. I deal with issues and concerns promptly.	1	2	3
6. I challenge others to make ethical choices.	1	2	3
7. I make tough decisions regardless of approval or rejection.	1	2	3
8. I actively involve others in all change processes.	1	2	3
9. I encourage interaction and collaboration amongst my team members.	1	2	3
10. I identify and seek to tap people's potential.	1	2	3
11. I solicit input from diverse team members with various perspectives.	1	2	3
12. I motivate others to embrace change.	1	2	3
13. I listen actively to others and am open to their ideas.	1	2	3
14. I lead by setting a positive example.	1	2	3
15. I reward performance and provide constructive feedback.	1	2	3
16. I work effectively with others who are different from me.	1	2	3
17. I leverage networks of people to resource and strengthen my tasks.	1	2	3
18. I manage time effectively and rarely miss deadlines.	1	2	3
19. I follow through on the promises and commitments that I make.	1	2	3
20. I am open to making significant changes in my behavior or processes when necessary.	1	2	3

Face, Base, and Pace

> *A great leader's courage to fulfill his vision comes from passion, not position.*
>
> —John Maxwell

According to the landmark study by Professor Albert Mehrabian, someone's initial perception of another person's communication breaks down three ways:

Verbal *(what we say)*	_____ %
Vocal *(how we sound)*	_____ %
Visual *(how we appear)*	_____ %

Posture

The way you hold your body is called your *posture*. As we discussed in earlier units, what your audience sees when you walk on-stage has a large impact on their overall impression of you. It is essential that you become aware of what your body language communicates to an audience. Does it enhance or detract from your message?

Maintaining proper posture will allow you to begin your speech or presentation from an open, neutral position. Proper posture can also help to reduce the possibility of injury and can actually make you stronger. By aligning your joints properly, muscles are able to activate and more easily perform their specific functions or movements.

When presenting or speaking, a speaker should begin from a relaxed, neutral, and open position. We will call this your **Home Base Position**.

> *Posture reflects the attitude of life.*
> —Kyle Yamashiro

EXERCISE: Finding Your Home Base Position

To experience what a strong Home Base Position feels like, follow these steps:

1. Stand with your feet shoulder-width apart and your weight evenly distributed.

2. Make sure your knees are unlocked.

3. Center and lock your pelvis to avoid shifting and swaying.

4. Let your arms, hands, and fingers relax by your sides.

5. Hold your chest open and elevated.

6. Keep your shoulders relaxed.

7. Keep your chin parallel to the ground.

8. Focus your eyes forward.

In what areas of your body do you tend to hold tension?

1. _____

2. _____

3. _____

> *A sound mind in a sound body is a short but full description of a happy state in this world.*
>
> —John Locke

Your body and voice are your instruments, much the same way a cello is an instrument for the cellist. Employing a thorough and consistent warm-up is critical for to delivering a successful speech or presentation. A proper warm-up increases the supply of blood and oxygen to the muscles, enhances coordination and releases unwanted muscle tension in the body.

EXERCISE: Warming Up Your Instrument

In the moments before going in front of your audience, take five minutes to loosen and warm-up your body.

1. **Neck**: Let your head fall forward and stretch the neck muscles. Next, rotate your left ear to your left shoulder and your right ear to your right shoulder.

2. **Eyes**: Alternate from a squinting (little eyes) to wide-eyed (big eyes).

3. **Face**: Alternate between your biggest expression (surprise) to your smallest expression (sour) to engage the muscles of the face.

4. **Tongue**: Stretch your tongue to your nose, your chin, and your cheeks.

5. **Lips**: Blow air through your lips to make a motorboat sound.

6. **Jaw**: Mimic chewing a very large piece of bubble gum to stretch the jaw muscles.

7. **Shoulders**: Roll shoulders in a circular motion. Then reverse the direction. Shrug and release.

8. **Arms**: Extend your arms and rotate them in a circular motion. Reverse.

9. **Wrists**: Rotate your wrists in a circular motion. Reverse.

10. **Fingers**: As if your fingers are dripping with water, vigorously shake them dry.

11. **Back**: Mimic the motion of hugging a tree to stretch out the back muscles.

12. **Chest**: Mimic the motion of crushing an orange between your shoulder blades to stretch out your chest.

13. **Legs**: Shake out any tension in your legs. Follow with deep knee bends.

14. **Ankles**: Standing on one foot, rotate your opposite ankle in a circular motion. Repeat on the other foot.
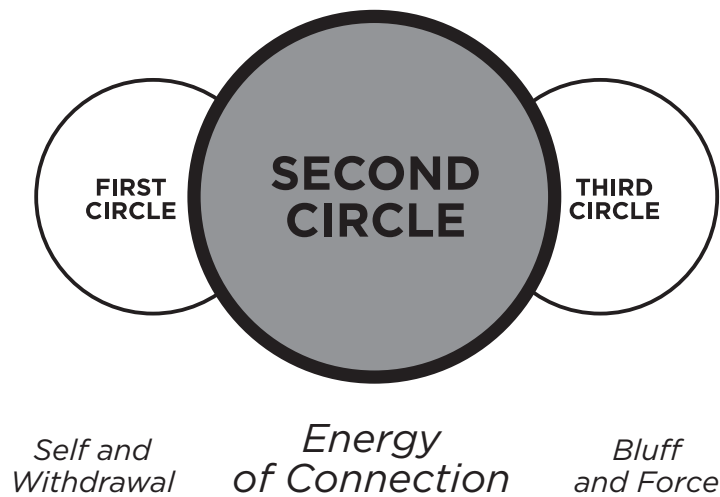
> *Presence allows experience.*
> —Patsy Rodenburg

The Three Circles of Energy

The way you communicate with others affects how people perceive you and how effectively you convey your message. Acting teacher and voice coach Patsy Rodenburg divided human energy into three basic circles:

| FIRST CIRCLE | SECOND CIRCLE | THIRD CIRCLE |

Self and Withdrawal — *Energy of Connection* — *Bluff and Force*

FIRST CIRCLE: Self and Withdrawal (energy moving inwards)

The first circle of energy is generally self-focused, more about taking than giving. First circle energy closes you off in a bubble so you appear disengaged, the energy moving inward, making it impossible to mutually engage in conversation and demonstrate positive presence.

First Circle Characteristics:

- Shallow breathing
- Limited or no movement
- Limited or absent gestures
- Ineffective eye contact

- Limited facial expressions
- Visible lack of energy/passion
- Tense body posture
- Monotone and low volume

THIRD CIRCLE

THIRD CIRCLE: Bluff and Force (energy moving outwards)

The third circle of energy is generally more passionate or enthusiastic but isn't always effective. This energy is outward facing, simply blasted at an audience. Energy is moving outwards without receiving anything in return. Unable to listen to others around you, the focus is on yourself.

Third Circle Characteristics:

- Gestures that are too broad
- Tense body posture
- Loud or unnecessary volume
- Shallow breathing

- Facial expressions that are too big
- Excess or nervous energy in body
- General, unspecific movement
- Ineffective eye contact

SECOND CIRCLE

SECOND CIRCLE: Energy of Connection (energy moves in and out)

The second circle of energy is the ideal circle to utilize when communicating with others. You are present, alert, and available. Second circle energy is focused and passionate, effortless and efficient. You hear and are heard. You notice details about others and acknowledge their feelings.

Second Circle Characteristics:

- Facial expressions support intention
- Expansive and appropriate gestures
- Eye contact is consistent, not constant
- Breath is controlled and supports voice

- Movement is purposeful
- Voice is free of monotone
- Voice is clearly audible
- Body posture is tension-free

? Which circle of energy is utilized when someone is described as the following?

- *Timid*
- *Impatient*
- *Committed*

- *Obnoxious*
- *Open*
- *Distant*

- *Insecure*
- *Friendly*
- *Arrogant*

Presenting While Seated

While most formal presentations take place with a speaker standing, some, because of space constraints or audience size, occur in less formal settings such as boardrooms, conference rooms, or offices.

Below are some tips to remember when presenting while seated:

1. **Keep your energy up.** When presenting while seated, it is easy to let all of your energy drain into your chair instead of focusing it outward toward the person you are addressing.

2. **Watch your posture.** Don't slump or sag in your chair. This may make you appear overly casual or too relaxed. Even when presenting while seated, it is important to utilize a strong Home Base Position. Keep your spine straight (but not stiff) to communicate that you are present and alert.

3. **Modulate gestures; don't eliminate them.** Continue to use expressive gestures. Since your audience is closer to you, your gestures can be smaller in size.

4. **Connect through eye contact.** Keep your eyes up and try not to look down at the table while you are speaking. Make sure you share your eye contact with the entire group, connecting with every person at the table, including the people sitting on either side of you.

5. **Breathe.** Since presenting around a table is a more intimate than a formal presentation, every facial expression or emotion that registers will be seen and interpreted by your audience. Because of this, it is important you stay relaxed and project a confident presence at all times. Utilizing core breathing will help you do that.

6. **Plant your feet.** Because your audience is seated so closely, keep your feet planted firmly on the floor to ground yourself. This will help limit extraneous movement that could make you appear less than confident.

7. **Keep your hands above the table.** Keep your hands on the table—either folded or near each other—when you are not using them for gesturing. Be careful not to fidget with objects such as rings, pens, or paper clips as this can be distracting.

Vocal Dynamics

Voice is the tool by which all activities involving speech are performed, whether during public speaking, acting, business speaking, or simple conversation. We use it to inform, persuade, and connect with other people. Your voice is the key to delivering your words with intention.

EXERCISE: Warming up the Voice

STEP 1: Begin by focusing on your core breath, inhaling for a count of five and exhaling for a count of five.

STEP 2: Repeat the breathing process, this time allowing the sound of a moan to be released during your exhalation, connecting the breath to the voice.

STEP 3: Starting at the center of your range, make the "ah" sound and gently cascade from the lowest pitch of your voice to the highest pitch and back to the lowest again, engaging the entire register.

STEP 4: Warm up the four articulators (lips, jaw, tongue, soft palate) by repeating the following phrases aloud, enunciating for crisp and clear diction:

>*Mumsy made me mash my mutton (lips)*
>*Twenty tentacles tickling Ted (tongue)*
>*Charlie chews his chocolate shoes (jaw)*
>*Ricky's sticky yucky duckies (soft palate)*

Words mean more than what is set down on paper. It takes the human voice to infuse them with deeper meaning.

—Maya Angelou

Five Qualities of the Human Voice

These five qualities are: volume, pitch, inflection, pace, and articulation.

1. **VOLUME**: A speaker must be able to properly adjust the volume of his voice depending on the audience and setting. Play to the back row, not the front row.

2. **PITCH**: A speaker's pitch should be natural and pleasing. Variety in pitch is essential. It is the key to speaking with intention.

EXERCISE: Pitch for Meaning

The exact same words often have different meanings depending on the pitch of your voice used when speaking. Using the word "okay," vary your pitch to match the expressions below:

- *I understand.*
- *Fantastic!*
- *Do you understand?*

- *I'm very disappointed.*
- *Enough already!*
- *I think you are mistaken.*

EXERCISE: Eliminating Monotone

To practice varying your pitch, read the excerpt below as if you are reading a fairy tale to a small child, exploring the music of your voice.

> *Once upon a time, in a far-off village, there lived a little country girl, the prettiest creature who was ever seen. Her mother was excessively fond of her, and her grandmother doted on her still more. This good woman had a little red riding hood made for her. It suited the girl so extremely well that everyone in the village came to calling her Little Red Riding Hood.*

There is no index of character so sure as the voice.
—Benjamin Disraeli

3. **INFLECTION**: A speaker can use vocal inflection in the following ways:

   Upward inflection—this takes the voice up at the end of a word or phrase. It can be used to express doubt, friendliness, surprise, and to request information.

   Downward inflection—this takes the pitch of the voice down at the end of a word or phrase. It can be used to express certainty, command, defiance, and when giving facts or information.

   How would inflection be used with the following phrases?
   "Hello?"
   "It would be a pleasure doing business with you."
   "My rate is $300/hour."
   "Does that figure sound acceptable to you?"
   "I am currently vice-president of sales and marketing."

4. **PACE**: A speaker should utilize changes in pace to help keep an audience engaged and interested. Think of your speech like a roller coaster. We love roller coasters because they go slow one moment and fast the next—always moving. Vary the pace at which you deliver your speech to give it the feel of a vocal journey.

   fact While most people think at a speed of approximately _____ words per minute, the optimal rate for speaking is _____ words per minute.

EXERCISE: Utilizing Pace

To practice slowing your pace, read the following paragraph slowly and aloud, taking a two-second pause after each period:

Thank you. Thank you very much. Thank you and good evening. My name is Alex Jarrett. The agenda for this meeting has been identified, but unlike most business presentations, the presenter hasn't been provided with a script. As a matter of fact, I have been permitted to choose my own words and discuss my own ideas regarding the choice that we face in the next few weeks. This is a big moment for us. A big moment for our company. The decisions we make today will reverberate within these walls not for months, but for years and decades to come.

Silence may be as variously shaded as speech.
—Edith Wharton

Power of the Pause

When it comes to pauses, small is not the same as trivial. Use moments of silence for impact. A pause communicates to an audience that you are in charge and are setting the pace and direction of the communication. A pause will help keep you grounded and will create a connection between the voice and the body.

There are three different types of pauses you can use in a communication context:

1.   _____ These are moments of silence that are dictated by your material or visual aid, allowing your audience to read or absorb information.

2.   _____ In these instances, you can use silence to evoke or provoke an emotional response from your audience, perhaps pausing for effect to highlight a specific thought or draw attention to a fact or figure.

3.   _____ These are times during your communication where you need to stop speaking so you can take a breath or a sip of water.

5. **ARTICULATION:** A speaker uses articulation to connect the separate sound units to help form words and phrases. By using your articulators effectively, a speaker will avoid sloppy speech, mumbling, and dropping the ends of words or phrases.

There are four movable articulators:

1. **Lips**   Sounds formed: m, p, b, w, v, f
                     Warm-up: *Mumsy made me mash my mutton.*

2. **Jaw**   The jaw is a moveable articulator and changes the
                     size of the vocal tract to help with clarity.
                     Warm-up: *Charlie chews his chocolate shoes.*

3. **Tongue**   Sounds formed: s, z, d, t, th, l, sh, r
                     Warm-up: *Twenty tentacles tickling Ted.*

4. **Soft palate**   Sounds formed: k, g, n, ng
                     Warm-up: *Ricky's sticky yucky duckies*.

Tongue Twister warm-ups:

1. *The skunk thunk the stump stunk*
2. *Good blood, bad blood*
3. *BeBoBa bubble bath*
4. *Red leather, yellow leather*
5. *Ba Da Ga Da, Ba Da Ga Da*
6. *Unique New York*
7. *Shave a cedar shingle thin*
8. *Rubber baby buggy bumpers*
9. *The lips, the teeth, the tip of the tongue*
10. *Bobby Babcock's bagpipes*
11. *I slit a sheet, a sheet I slit, upon a slitted sheet I sit*
12. *Fresh fried fish, fish fried fresh*
13. *A proper cup of coffee in a proper coffee cup*
14. *The thirty thorny thistles thawed throughout*

All I have is a voice.
—W.H. Auden

Gestures

Gestures are an important part of your overall visual picture and are used to assist in the communication of your words and ideas.

There are five basic types of gestures:

1. **Conventional gestures** have widely-understood meanings that have been determined and agreed upon by a specific community or culture.

2. **Descriptive gestures** are used to clarify or illustrate your words by indicating size, shape, direction, or function.

3. **Emphatic gestures** emphasize a point by underscoring the emotion behind the words being spoken.

4. **Prompting gestures** are used to evoke a desired response from your audience.

5. **Coded gestures** are created by pre-established agreement between a group or individuals.

Ineffective Gestures are gestures that are unnatural, stiff, planned, lazy, or fidgety and often communicate nervousness, lack of confidence and insecurity about yourself and your topic. Examples include:

- Finger pointing
- Hands behind your back
- Hands in pockets
- Fig leaf
- Playing with a prop
- T-Rex arms
- Speaking before planting
- Gestures below the waist

Effective Gestures should be meaningful and appropriate to your content. These gestures should help to paint a picture of, share your emotion toward, or emphasize specific points of your message. Effective gestures will support the intention you are trying to convey.

Effective gestures should:

- Be varied
- Be spontaneous
- Be specific
- Be motivated by your content
- Be expansive, not constrictive
- Be appropriate in size

EXERCISE: Spontaneous Gestures

Movement

Movement can help reinforce your verbal message and add variety to your speech or presentation. Incorporating some movement is especially important if you are using a lectern. In this instance, it is easy to become trapped behind or blocked by the lectern and separated from your audience.

Movement during a presentation should be direct and smooth. If you choose to move, you must have a purpose for doing so. Movement is especially useful for transitions.

fact Research shows that humans exhibit at least _____ distinct styles of walking.

EXERCISE: Taking the Stage

Suit the action to the word, the word to the action.
—Shakespeare

The Art of Effective Interviewing

> *All glory comes from daring to begin.*
>
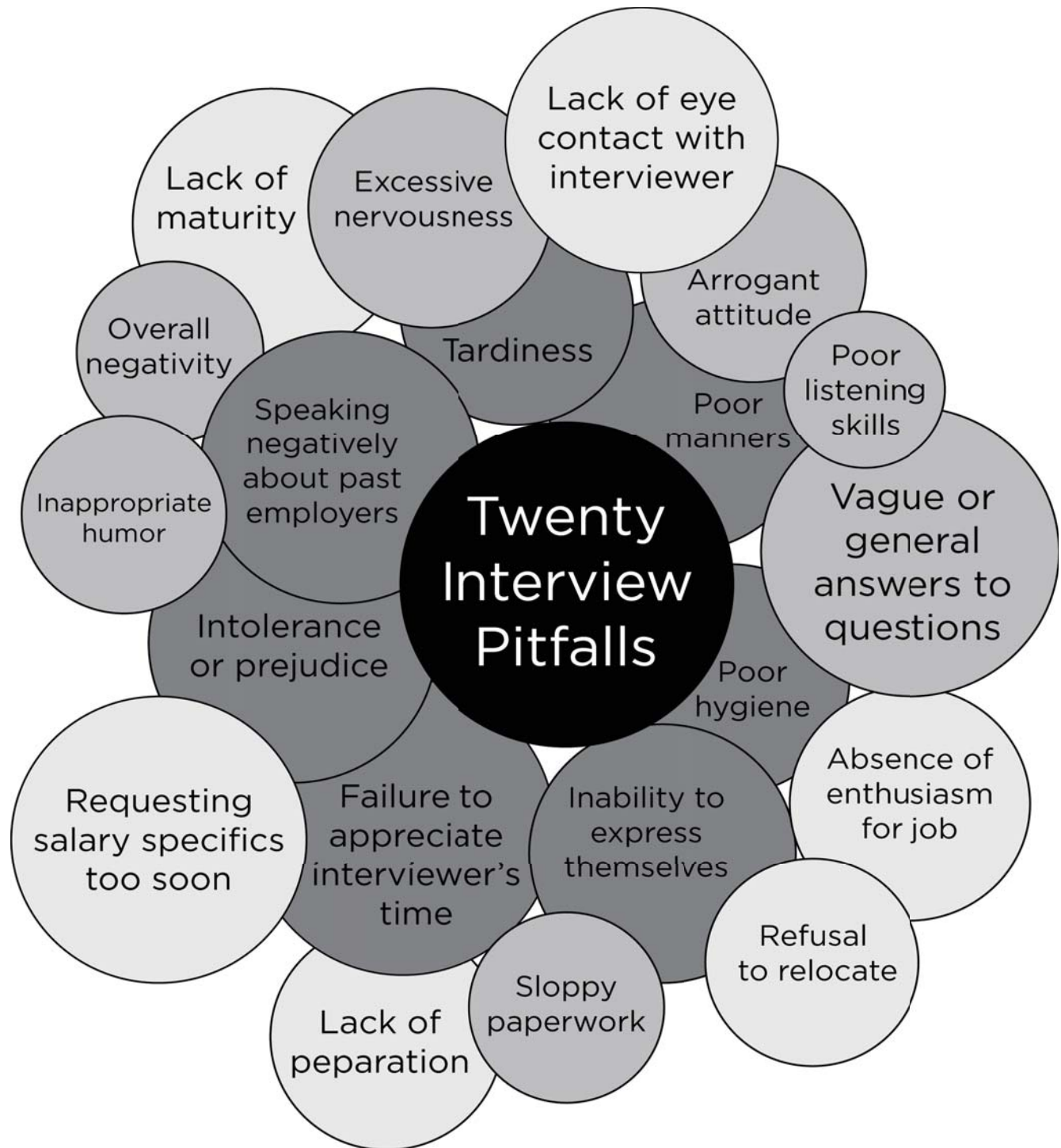> —Eugene Ware

EXERCISE: Personal Introduction

The Art of Effective Interviewing

Interviewing for a job is something almost every person will have to do in their lifetime. For many people it can be an intimidating and frustrating process. But it need not be. The job interview is an excellent opportunity for you to present yourself to a potential employer and make a strong and positive impression in a very short amount of time. We've all heard the old cliche "First impressions last." Like most cliches, this one holds more than a grain of truth.

Over the course of this training, we will break down the job interview process and arm you with the tools needed to put your best foot forward, both with telephone interviewing and interviews that happen face-to-face. By utilizing the building blocks in this workbook, you will be able to avoid the common mistakes people make while interviewing and also create an impressive and memorable first impression with your potential employer.

The Three Keys to a Successful Job Interview

1. _____

2. _____

3. _____

Twenty Interview Pitfalls

- Lack of eye contact with interviewer
- Lack of maturity
- Excessive nervousness
- Overall negativity
- Arrogant attitude
- Tardiness
- Poor listening skills
- Speaking negatively about past employers
- Poor manners
- Inappropriate humor
- Vague or general answers to questions
- Intolerance or prejudice
- Poor hygiene
- Requesting salary specifics too soon
- Failure to appreciate interviewer's time
- Inability to express themselves
- Absence of enthusiasm for job
- Refusal to relocate
- Lack of peparation
- Sloppy paperwork

> *Clothes make the man. Naked people have little or no influence on society.*
>
> —Mark Twain

Dressing for Success

The way you dress for a job interview can also have a definite effect on your interviewer. While you are researching your potential employer, try to find out what type of culture it promotes in the workplace. Different types of jobs may require different types of dress. For example, you would dress differently for a job interview at a tattoo parlor than you would for one at a prestigious law firm. For an interview, you want to dress in clothing that indicates you are ready to go to work there today.

Here are some basic guidelines when dressing for an interview:

For Men and Women

- All clothes should be clean and pressed
- Clean, well-groomed hair
- No candy or gum
- Clean, trimmed fingernails
- Clean, polished shoes
- Minimal cologne or perfume
- Empty pockets to avoid jingling
- Avoid flashy clothes that will be distracting

For Men

- Two-piece business suit (dark blue or gray)
- Necktie with a conservative pattern
- Dark socks
- Keep jewelry to a minimum

For Women

- Always wear a suit or jacket (or sheath dress with a jacket)
- Avoid extremely high heels or platforms; no open toed shoes
- Choose a conservative nail color if polishing nails
- Be subtle with lipstick and overall make-up
- Not more than one set of earrings
- Clean, conservative hoisery (near skin tone is best)
- Keep jewelry to a minimum

EXERCISE: Handling Interview Questions

In an interview, how would you handle the following questions?

1.   Tell me a little bit about yourself.

2.   What are your future goals? Where do you see yourself in 5 years?

3.   What would your previous co-workers say about you?

4.   What have you done to improve your knowledge in the last year?

5.   Why do you want to work for this organization?

6.   What is your philosophy towards work?

7.   Explain why you would be an asset to this organization.

8.   What is your greatest strength?

9.   Tell me about a problem you had with a supervisor.

10.   Tell me about your ability to work under pressure.

Phone Interviews

Phone interviews have become a common tool for search committees and employers when hiring new employees. They are often the first step in the process after receiving a candidate's resume or interest letter. A phone interview is usually used to screen potential candidates and whittle down the list of applicants to save time and resources. A good phone interview can result in you getting a face-to-face interview and possibly even getting the actual job itself!

10 tips when interviewing over the phone:

1. **Prepare your environment.** Make sure you are in a quiet room with no distractions or noises that could make it hard for you to be heard clearly.

2. **Use a good phone.** Make sure the phone you are using is clear. If your cell phone frequently drops calls, make arrangements to use a different phone for the interview. Disable call waiting.

3. **Dress for success.** Even though you are only speaking on the phone, it can be helpful to dress as if you are doing the interview face-to-face.

4. **Have your notes and resume handy.** Keep things like your resume, the job announcement and the name of your interviewer nearby to reference, if needed.

5. **Don't forget to breathe.** Take a breath before dialing and breathe before each answer. This will help keep you relaxed during the interview.

6. **Smile when you dial.** A person can hear in your voice whether or not you are smiling, so it is helpful to keep a mirror handy when you do your interview to make sure you are keeping it bright and pleasant.

7. **Introduce yourself.** Practice a short and energetic introduction beforehand. When the interview begins, introduce yourself clearly and directly. It is fine to engage in some "small talk" at the start as you would if you were speaking to the person face-to-face.

8. **Watch your posture.** The way you hold your body during an interview can often be reflected in your voice. If seated, make sure you maintain a good, straight posture. Stand, if possible.

9. **Speak clearly.** Watch the pace at which you speak during the interview. Don't speak too quickly. Clearly articulate your words. Maintain a nice volume so you can be heard.

10. **Listen actively.** Concentrate on what your interviewer is asking and respond accordingly. Don't interrupt. Keep your answers succinct and specific; avoid rambling or losing your train of thought.

Three Keys to an Effective Job Interview

KEY ONE: Pre-Interview Preparation

One of the main reasons people dread interviewing for a job is that they have not taken the proper steps or done the proper homework for the interview ahead of time. Because of this, on the day of the interview, they find themselves nervous, rushed or disorganized, scrambling at the last minute to pull it all together. If you properly prepare for your interview, you can enjoy the experience and relax, knowing that your preparation has all been done ahead of time.

Many times during an interview, your potential employer will ask you if you have any questions about the company or the specific position. By asking thoughtful and intelligent questions, you can present yourself as a serious candidate who has taken the time to think about the job beforehand. Below are some questions you might want to consider asking, if the opportunity arises.

Questions to ask during an interview

- What are the three strengths/skills vital to this position?
- What are some of the department's ongoing and anticipated projects?
- What challenging aspects would I face with this job?
- How does this company evaluate and promote its employees?
- Can you describe the work environment at this company?
- Is this a new or replacement position?
- What industry trends do you foresee that might affect this company?
- What qualities are you looking for in your new hires?
- Is there any other information I can provide to assist in your decision making process?

Questions to avoid during an interview (based on actual interviews)

- How soon can I take my first vacation?
- Will I have to work overtime?
- How do I avoid getting bored at this job?
- Are the people who work here cool or what?
- Can I use your phone? I have to call my ride.
- Why do you think I am the right person for this job?

> *Practice doesn't make perfect; only perfect practice makes perfect.*
> —Vince Lombardi

Things to do before your interview

1. **Research company.** Try to learn as much as you can about your potential employer. Resources include the Internet, trade publications, newspapers and current employees.

2. **Prepare documents.** Bring a professional-looking resume, your portfolio or any other material you might need on the day of the interview. Bring extra copies in case your original gets stained or torn.

3. **Plan your arrival.** Locate the address of your interview ahead of time and decide how long it will take you to reach your destination. Do a dry run the night before and leave early on the actual day of the interview to give you adequate time to reach the interview.

4. **Prepare questions.** Think of thoughtful questions related to the position you are interviewing for and the industry itself. Be ready to ask these question if the opportunity arises.

5. **Practice answers.** Familiarize yourself with all of the frequent questions asked during interviews and practice your answers so that they come easily to you.

6. **Dress rehearsal.** Before your interview do a mock interview with a friend, roommate or spouse. Videotape your practice sessions.

7. **Analyze playback.** Watch your videotaped interview practice session and write down your initial impressions. What do you like and what do you not like? Analyze which questions gave you difficulty and practice them again until you are comfortable.

8. **Eat breakfast.** Don't skip breakfast. Eat something so you are not distracted by hunger on the day. Drink water to stay hydrated and avoid dry mouth.

9. **Do a warm up.** On the morning of your interview, do some exercises or go for a walk to shake off any game day jitters. Utilize 5-Minute Warm Up beforehand.

10. **Think positively.** You've done the preparation, so enjoy the fruits of your labor. Look at the interview as a chance to sell yourself to the potential employer. Relax and enjoy it!

KEY TWO: The Actual Interview

Now that all of the preparation has been done, it's showtime! Interviews are an excellent way for you to showcase yourself to a potential employer. This is your chance to sell yourself, your skills and your experience.

1. **Arrive early.** It is best to allow plenty of time to arrive at your interview location. Give yourself some extra time so that you can comfortably deal with unexpected surprises like traffic or detours. Never arrive late for a job interview. Arrive a few minutes early (no more than 15) and give yourself some time to relax before the actual interview.

2. **Proper greeting.** Stand (if seated) and approach the person you are meeting and smile. Shake their hand while maintaining good eye contact and call them by their name. Your handshake should be firm, avoiding either the dreaded "dead fish" or the "bone crusher". You may want to start by mentioning something positive or complimentary, like the drive, the weather, their office, etc.

3. **Body language.** As we have established earlier, your body language tells your interviewer even more about you than your words. If you are relaxed, smiling and gesturing naturally, your interviewer is also more likely to be relaxed. Don't be frozen or stiff; don't be afraid to be expressive (even when seated).

4. **Eye contact.** Remember to maintain eye contact with your interviewer, especially when they are speaking or answering a question. If your eyes are looking somewhere else or wandering, you will be perceived as distracted or disinterested in what is being said.

5. **Vocal quality.** Make sure you speak clearly and articulately so that your interviewer can understand you. Slow down your pace to show that you are relaxed. Also, remember, downward inflection exhibits confidence and certainty while upward inflection shows doubt and shyness.

6. **Remember your intenion.** You are there to sell yourself and land this job, so it is essential that you engage and excite your potential employer. Keep your energy up and don't be afraid to clearly state (humbly) why you are the best candidate for this position. Make your case and have fun!

7. **Sincerity.** People can smell insincerity a mile away. Make sure you answer your interviewer's questions honestly and with as much detail as possible. Be specific if you are asked for a particular example. Keep your answers clear and concise and avoid rambling.

8. **Active listening.** Be engaged! Make sure you are present in the interview and listening to everything that the interviewer is asking. Remember what has already been discussed in the interview and refer back to it, if helpful.

9.   **Be yourself.** This interview is about you so make sure you put your personal stamp on it. It is important that the real "you" shows up for the interview as well. Smile. Show your personality. If you are comfortable with humor and can include some, do it. You will be much more engaging if you don't pretend to be someone you are not. Don't change your personality—highlight it.

10. **Closing.** Stand, shake hands, smile, make eye contact and use your interviewer's name, just like in your greeting. Your last impression now supercedes your first impression. Thank your interviewer for their time and tell them you look forward to hearing from them.

KEY THREE: Post-Interview Follow-Up

Once an interview is finished, there is still one last piece of the puzzle that must be addressed: the follow-up. It is essential that you follow-up with your interviewer after this initial meeting. This will help to keep you fresh in their mind and will assist in continuing to establish that positive impression.

It is always a good idea to send a thank-you letter to the person who interviewed you. It reinforces your interest in the position and shows your potential employer that you are thoughtful, courteous and professional. If possible, mention any notable topic or tidbit that you discussed during the meeting. This will help solidify you in their memory.

If your interviewer requests any additional information or materials, send them as soon as possible. Many employers look to fill positions quickly and not sending the requested material right away could result in someone else getting the job.

Tips for a good thank you letter

1.   Make it look professional

2.   Type or write the letter by hand

3.   Send an e-mail in conjunction with the letter, if appropriate

4.   Restate the position you are applying for

5.   Mention a notable topic or item of discussion from your interview

6.   Keep the letter short - one page maximum

7.   Send it within 24 hours after the interview

8.   Mention the names of any other people you met during the interview

9.   Thank the interviewer again for their time and consideration

> *Communication works fine for those who work at it.*
> —John Powell

(SAMPLE THANK YOU LETTER)

423 Lake Mist Drive
Cornelius, NC 82345
555-234-7665

Mr. Nathaniel Summers
Worthington Industries
2345 N. Hamilton Street
Minneaplois, MN 55923

Dear Mr. Summers,

Thank you for taking the time to discuss the graphic designer position at Worthington Industries with me. After meeting with you and observing the company's operations, I am further convinced that my background and skills coincide well with your needs.

I really appreciate the time that you took to acquaint me with the company. It is quite obvious to me now why Worthington Industries retains its employees for so long and has such a positive reputation within the industry. I feel I could learn a great deal from you and would certainly enjoy being a part of Worthington Industries.

In addition to my qualifications and experience, I will bring excellent work habits and judgment to this position. With the countless demands on your time and your busy schedule, I am sure that you require people who can be trusted to carry out their responsibilities with minimal supervision.

I look forward, Mr. Summers, to hearing from you concerning your hiring decision. Again, thank you for your time and consideration.

Sincerely,

Samuel Guthrie

EXERCISE: Simulated Interview (Phone)

EXERCISE: Simulated Interview (Face-to-Face)