

PREVIEW GUIDE



The Accountability Toolkit

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CRM Learning's Accountability Toolkit

No matter what your current business conditions are, one thing is certain: we are all working in a highly competitive environment where we can lose business to someone down the street or around the world. One missed opportunity can have a significant effect on both current and future success.

What does that mean for each employee at every level of our organization? It means that we all need to be accountable – to our customers, to our owners, and to the person at the next desk or workstation. We need to take ownership of our tasks, commit to doing them right and on time, and make sure to help our co-workers succeed at their own tasks.

We hear the term “accountability” often. But what does accountability look like? What does it sound like?

How do we know accountability when we see it?

CRM Learning's Accountability Toolkit helps you take on this timely learning challenge. While the implementation of accountability varies with every organization, personal responsibility and certain professional practices are common to success at any level. These key practices and skills are reflected in the **Accountability Toolkit** content.

The Toolkit:

- Breaks down the larger and sometimes abstract concept of accountability into behaviors that are more easily recognized and managed.
- Provides concrete examples of accountable (and less accountable!) behaviors.
- Speaks to supervisory and management needs as well as those of your general employees.
- Demonstrates techniques that maintain and elevate accountability to become a goal and habit every day.

The **Toolkit** provides a flexible set of materials that can help you build awareness and skills in accountable workplace interactions, and professionalism in responding to your customers.

How to Use The Accountability Toolkit

Step 1: Clarify the session purpose.

- *Do you have a changing mix of employees - new employees and veteran employees?* Use the **Toolkit** to ensure everyone is “on the same page” and receives the same training.
- *Have you observed a pattern of errors or missteps that need to be addressed?* Use the **Toolkit** to get your team moving in the right direction again.
- *Do you want to increase your team’s level of expertise in handling more difficult problems or customer service challenges?* Use the **Toolkit** to get them started with a more intense focus on workplace accountability.

Step 2: Locate and review clips.

The Summary Table (page 6) lists the **Toolkit** video segments, organized by main topic area.

As a one-time preparation step, review the entire DVD to learn what’s available and what’s possible, based on the clips provided. Total viewing time is only 56 minutes. Use the Summary Table (page 6) to make note of segments to apply to both your initial project and possible future activities.

If you’re pressed for time, simply review the categories to select those that seem appropriate for your current project. Since the clips are all about accountability, your project may benefit from using clips from more than one category.

Step 3: Plan your session.

- View the segments you’ve selected and review the discussion questions.
- Sequence your selected clips in the most appropriate order.
- As time permits, add take-away exercises to deepen learner’s experience with the content. The scenarios have direct workplace applicability, so you can build your own exercises around the content and questions.

Step 4

Conduct your session!

Step 5

Follow up. At your next staff meeting or lunch and learn, discuss the concepts you’ve covered in previous sessions to reinforce the training. The short, engaging stories presented in the clips are memorable. Your group will easily be able to recall them and refer back to their learning points.

Summary Table

Use this Summary Table to choose **Accountability Toolkit** segments for your training program. Segments are listed in 9 main categories.

About the table

Clip	Clip name/number
Description	Clip description
Run Time	Length of the video segment
Page	Where to find the discussion questions for the clip in this Leader's Guide

Category: Take Ownership & Keep Commitments

Clip	Description	Run Time	Page
1	During meetings, suggestions are often couched in we shoulds, we coulds and we wills. In this scene, we see these “we’s” followed up by the team leader asking for personal responsibility for specific tasks from the team members.	1:34	12
2	‘Do what you say you’re going to do’ is a basic tenet of accountability. In this scene, we see how one person’s failure to keep a commitment can ripple through a whole department or project.	:17	13
3	This scene shows how a group of librarians moves from discussion to strategizing, by taking ownership and setting specific, measurable goals.	:55	13
4	Real commitment and task ownership require the ability to see beyond our own job description due to events, conditions and changing needs. In this scene, one employee refuses to help another with a minor task because it’s “not her job.”	:21	14

Category: Be Proactive

Clip	Description	Run Time	Page
1	Accountable employees take responsibility for their own development rather than waiting to be asked. In this scene, an employee’s offer to assist with an analysis provides multiple accountability wins.	1:23	15
2	In this scene, a college recruiter takes on an enrollment challenge with commitment and energy. She understands the consequences of non-action and does not wait for others to determine the task or strategy to achieve it.	1:14	15
3	Anticipating and responding to others’ needs is being proactive. When leaders are facing pressures, it becomes everyone’s responsibility to anticipate their needs and provide support. In this scene, we see how two police officers’ initiative increases the prospects for success.	2:19	16

COMMUNICATE WITH CLARITY & SET MEASURABLE GOALS

Getting to the right result requires clear agreements and understanding of expectations and instructions. Accountability for results begins with clear directions, and places responsibility on both parties for clarification.

Clip 1

When assigning a task to a team member, the best way to increase your chances of success are to give clear directions, get the employee's buy-in, and confirm any commitments that are made.

1. What was wrong with Carl's first attempt? What did he NOT do? What were Aaron's chances of success?
2. On his second try, how did Carl make things more specific? Why is it even important to be specific when making assignments?
3. Carl described the consequences of the continuing parts problem. How will this information help Aaron complete his investigation?
4. When making an agreement with someone about a task, which points do you think should be worked out ahead of time (for example, the deadline, the goal of the task, etc.)?



Clip 2

Giving clear instructions to someone makes all the difference in getting the right results, on time. When giving or receiving instructions, responsibility rests with both people. The person giving directions has the responsibility to be clear. The person on the receiving end has the responsibility to ask questions and not proceed until unclear points have been resolved.



In this scene, manager Lynn fails to communicate with clarity about a website revision.

1. "Just make it look better" does not answer the designer's key questions: "What are your goals? What needs to change?" What does this short exchange tell you about both the supervisor and the designer?
2. Much of delegation involves clarity. Discuss the following statement: "Being unclear is a way of avoiding your own responsibility for a project." Do you agree or disagree?
3. If someone were to tell you to "spend some time, but not too much time" on a project, how would you know how much time to spend? Develop three follow up questions to respond to this unclear instruction.

Clip 3

Coaching a co-worker on a new skill is the perfect time to communicate with clarity. Getting the right results depends on thorough preparation and being sure you deliver a clear message that is received by the person you are coaching.

In this scene, an experienced press operator coaches a newer employee on the manufacture of a basic component.



1. How are your organization's procedures "taught" to new employees? Are these methods formal, or left to less formal means? How can you ensure these procedures are taught in a uniform manner?
2. How clear was Hector when he taught the new procedure to Arnold? What attitudes were reinforced in their coaching session?
3. Why did Hector ask Arnold about the component and how Arnold would fabricate it BEFORE the coaching session began?
4. An accountable communicator makes sure they're being clear AND that the other person understands and can ask questions. How did Hector ensure that Arnold wasn't confused?
5. How important was it for Arnold to try the procedure with Hector watching? How does that approach improve communication?

Clip 4

When supervisors delegate an assignment, they share accountability for the results with the person they entrust it to. When requirements, constraints, questions and needs are anticipated and discussed upfront, the employee has a far greater chance of success. Both parties benefit.

In this scene, Maggie communicates with great detail about what she expects of Chris, and sets measurable goals for him to achieve.



1. How do you think Chris felt at the end of this meeting with Maggie? Could Maggie have been any clearer about the task? Do you think Chris has any doubts about what to do, his authority, or his timeline?
2. During this short conversation, the supervisor asks Chris a number of questions. Can you recall one or two of the questions or suggestions you liked....ones that typically don't come up in delegation discussions you may have experienced?

3. When you communicate with co-workers about things that need to be done, do you go into as much detail as Maggie did with Chris? What type of assignments lend themselves to this level of clarity? When is it OK to discuss a task in less detail?
4. Discussion Questions for Supervisors: In what ways did the supervisor demonstrate strong support for Chris? What do supervisors fear about delegating important assignments to their teams, even when they know their team members are capable?

Clip 5

When you ask someone to complete a project for you – especially one that has a clear deadline – it's important to make sure all of the requirements are clearly communicated at the outset. Otherwise, your chances of success are extremely slim.



1. Lauren thought she had given Jeff all the information he needed to do the job on time. What went wrong? What did she miss?
2. What was Jeff's responsibility? What should he have asked or confirmed?
3. Are the requirements for clear communication different when you have a firm and important deadline like an awards show than when you're just completing a normal day-to-day assignment?
4. What would an ideal discussion and agreement between Lauren and Jeff sound like? Script or act one out.

Materials Included with *The Accountability Toolkit*

This Toolkit contains 38 unique video clips that fall within 9 categories of personal responsibility and accountability. The clips are diverse in setting - many take place in a generic work environment, some occur in a manufacturing or hospitality environment and others feature healthcare or education workers. The clips are provided on DVD and CD-Rom so that you can play them right off the DVD or use the .mpgs on the CD-Rom to embed them into a PowerPoint presentation.

The 9 categories covered are:

- Take Ownership and Keep Commitments
- Be Proactive
- Communicate With Clarity and Set Measurable Goals
- Be Ethical
- Be a Problem Solver
- Serve Customers Professionally
- Don't Be Afraid to Speak Up
- Accept Feedback and Learn From Mistakes
- Supervising and Managing an Accountable Workforce

- ◆ The **DVD** is chaptered by category and each chapter contains the associated video clips, ranging in running time between 20 seconds and 3½ minutes. The video clips play without narration so a trainer can use them to highlight many different behaviors and make varied points to a training audience. The clips are chosen to help demonstrate what it looks like when people hold themselves, each other, and the organization accountable for keeping commitments and achieving results.
- ◆ The **CD-ROM** contains the video clips in .mpg format for importing into a PowerPoint Presentation. This allows a trainer to customize their presentation and use the video clips to enhance their organization's unique needs around teaching aspects of accountability.
- ◆ The **Leader's Guide** contains discussion questions for each video clip that will help stimulate further discussion and learning. The Guide also includes reference tables that help you select clips by skill points and a bibliography of the CRM Learning videos the clips were taken from.

Program Information and Pricing

Purchase Price: \$695.00

Rental Price: N/A

Preview Price: Free

Running Time: 38 video clips totaling 56 minutes

Materials included with purchase: DVD with chaptered video clips, CD-ROM with chaptered video clips in .mpg format, printed Leader's Guide

Quantity Pricing Discounts

(multiple copies)

2 copies	10% off
3-5 copies	15% off
6-10 copies	20% off
11-15 copies	(call for quote)

Industry discounts may also apply; call your Sales Consultant for more information.

(contents, pricing & discounts subject to change without notice)

