

# PREVIEW GUIDE



## Accountability That Works!

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## INTRODUCTION

At every level of every organization, projects begin, tasks are assigned, efforts are made, and deadlines are met—or missed. Directions are given but employees don't understand them. Deliverables are promised but not delivered. Agreements are misunderstood or never made. It's not really anyone's fault—it's just part of how people fail to communicate in a specific and clear manner about the tasks they assign or accept.

CRM Learning's *Accountability That Works* provides a systematic way to overcome these organizational tendencies. By focusing on a 3-stage cycle of Accountability—Responsibility, Empowerment, and Accountability—tied together by clear agreements—your organization can begin to make significant progress in moving tasks forward. The workshop builds both staff and management ability to plan and complete tasks with significant benefits to both the organization and its employees.

This workshop has several unique characteristics that may affect the way you present it:

- People *want* to do good work that meets clear expectations. They will relate to this topic in a personal way, because it affects how they work and how their work is judged.
- Because this topic is central to how we do our work, participants will appreciate a chance to air their concerns and thoughts about accountability, and be eager for techniques and tools to help themselves meet the organization's needs.
- The workshop exercises combine individual work with opportunities to share general concerns and ideas with others.
- The workshop design can involve both management and staff. Your organization cannot truly adopt any model of accountability without understanding both sides of the issue.

Keeping tasks moving forward requires focus, practice, and constant effort. CRM Learning's *Accountability That Works* provides valuable perspective and tools to help that process along.

### HOW THIS WORKSHOP BUILDS COMMITMENT TO RESULTS

*Accountability That Works* is based on a fast-paced, engaging and impactful video that first shows how a lack of accountability harms an organization. It then presents a model for building accountability and demonstrates practical ways to implement the model in the workplace.

***The video and workshop content will:***

- Help session attendees identify the task and process problems that commonly occur in the workplace.
- Emphasize that tasks are not accomplished by the organization as a whole, but by individuals who accept responsibility, empower themselves to complete a task, and are willing to be held accountable for their results.
- Describe a set of practical skills to improve individual staff and manager's ability to define tasks and move them forward.
- Facilitate discussion around practical methods to improve accountability and results in your organization.

**WORKSHOP GOALS**

The activities in this workshop help participants develop skills in accepting responsibility, self-empowerment, and after-the-fact accountability.

The overall goals of the workshop are to:

1. Demonstrate the combined power of Responsibility, Empowerment, and Accountability in achieving successful project results and professional growth.
2. Provide tools to participants, both staff and management, to develop new skills for task management.
3. Help the organization implement procedures and habits that improve task focus and accountability.

Specific workshop objectives can be found on page 18 of this Leader's Guide, and are summarized on Slide 3 in the Presentation Outline.

**WHO SHOULD ATTEND?**

CRM Learning's *Accountability That Works* is designed for managers, supervisors and line staff in your organization. The scenes in the video are drawn from a variety of workplace situations:

- A factory floor
- A health care facility
- A software development firm

The workshop activities are designed for use with groups of employees only, mixed groups of managers and employees, or groups of managers only.

- Activities for staff-only or manager/staff mixed groups are included in this Leader's Guide and in the Participant's Workbook.
- A separate set of Activities for Managers is included on page 50 of this Leader's Guide.

Workshop material should be presented in a group setting where the responses of others can be shared. We recommend limiting the group to no more than 12–14 participants to promote active discussion of the workshop topics.

## WHEN TO USE THIS PROGRAM

As with any training activity, a clear purpose for using the program will encourage participation and follow-through. Use *Accountability That Works*:

- As one component of a management or staff development program.
- As part of a new product or service initiative.
- As part of your ongoing project management support.

## WORKSHOP AGENDA

With either training design, the recommended workshop agenda runs about 3.5 hours. Leaders are encouraged to add or remove activities from the overall plan to meet specific needs or time constraints.

### *Training Designs*

Two training designs are described below.

- The **One Time Through** design assumes that you will show the entire 23 minute video straight through, nonstop.
- The **Stop-n-Start** design assumes that you will stop the video after each of the three main segments to complete activities and discuss the concepts behind the *Accountability That Works* model.

**One Time Through Training Design — Outline**

| Workshop Segment   | Workbook Page | Duration in minutes |
|--|---------------|---------------------|
| <b>I. WORKSHOP INTRODUCTION</b>  |               |                     |
| A. Purpose, Objectives, Ground Rules, Logistics  | 1             | 8                   |
| B. <b>Icebreaker</b> (based on Activity #1)  | 2             | 8                   |
| C. <b>Activity #1: Case Study: What's Going On?</b><br>Questions and Discussion  | 2 - 3         | 15                  |
| D. <b>Video Presentation</b>   | 4             | 23                  |
| E. <b>Activity #2: Quick Assessment</b><br>Poll Assessment   | 5             | 1<br>7              |
| F. <b>Activity #3: Language of Accountability</b><br>Review the <i>Language of Accountability</i> Tool<br>Exercise on Word Choices | 6             | 15                  |
| G. <b>Optional Discussion</b> (related to accepting responsibility)  |               | 10                  |
| <b>II. RESPONSIBILITY</b>  |               | 15                  |
| A. <b>Activity #4: Aaron and Carl</b> —<br>Questions & Discussions<br>Short Exercise: Claiming Unassigned Tasks                    | 7             |                     |
| B. <b>Making Clear Agreements</b><br>Discuss Components of Clear Agreements<br>Review Agreement Template                           | 8             | 15                  |
| C. <b>Activity #5: Writing Clear Agreements</b><br>Debrief and Discussion: Managing Agreements                                     | 8-9           | 10                  |

| Workshop Segment  | Workbook Page | Duration in minutes |
|---|---------------|---------------------|
| D. <b>Optional Activity:</b> Clarifying a Current Agreement   | 16            | 10                  |
| <b>Suggested Break</b>  |               | 10                  |
| <b>III. EMPOWERMENT</b>   |               | 15                  |
| A. <b>Activity #6:</b> Carmen and Nancy —<br>Questions and Discussion<br>Discussion: Empowerment<br>Empowerment Steps on a Current Assignment | 10<br>10      | 15                  |
| B. <b>Activity #7 (Optional):</b> Overcoming Obstacles<br>Updating Agreements as an Empowerment Strategy                                      | 11            | 15<br>5             |
| <b>IV. ACCOUNTABILITY</b>   |               |                     |
| A. <b>Activity #8:</b> Charlene and Tony — Questions and Discussion   | 12            | 20                  |
| B. <b>Holding Others Accountable</b><br>Guidelines for Managers and Peers   | 13            | 15                  |
| C. <b>Activity #9:</b> Holding Others Accountable<br>Discussion: The Cycle of Accountability  | 14            | 15<br>10            |
| D. <b>Optional Activity:</b> Looking Back   | 15            | 8                   |
| <b>V. CLOSEWORKSHOP</b>   |               | 10                  |
| Discuss Applications for Template   | 16            |                     |
| Round Robin based on Self-Rating  | 5             |                     |
| <b>Total Estimated Time*</b>  |               | <b>217</b>          |

*\*Does not include Break or Optional Presentation time*

**PARTICIPANT INTRODUCTIONS: ICEBREAKER (8 MINUTES)**

Case Study One, *What's Going On?* has several applications:

- First, use the case study to set up the Participant Introductions and Icebreaker.
- Second, it will be used later in the workshop to explain some additional issues.



INSTRUCT participants to read the Case Study found on WORKBOOK PAGE 2, *What's Going On?*

ALLOW about a minute for this.

Then, ask participants to share their names, departments and a short (30 second) response to the following question:

*As Stanton's assistant hurriedly leaves the room to make four extra copies of your notes, what are your first comments to the managers seated at the conference table?*



To maintain the workshop schedule:

- Be clear that you are looking for short, succinct responses. Avoid extended discussions of the responses to this exercise. If a comment is particularly insightful or unusual, make a note on the whiteboard to return to it later for further discussion.
- Remind participants that for this exercise and all of the exercises and activities to follow, there are no correct or incorrect responses. In fact, many of the responses will be subjective and opinion-based.

## ACTIVITY 1

### CASE STUDY: WHAT'S GOING ON?

You've been a senior planner in the Planning department of your organization for the past three years. Stanton, one of the newer managers in your group, stops you in the hallway on a Friday afternoon, obviously on the way to another meeting. "I'm glad I ran into you!"

Now, you haven't worked with Stanton before. But you do know he has developed a reputation for creative thinking, and appears to be a rising star in the organization. You've observed him in several meetings and have admired his very informal style; quite a contrast to other managers in the group and a refreshing change.

Stanton asks if you wouldn't mind putting together a few notes on your ideas for the Alpha Project. "I'll be out of town next week. Can we get together first thing the following Monday morning, say, 9:00?" Stanton is ten feet past you before you can stammer, "Sure, I guess so."

You put together three pages of your own thoughts, based on observations and a small amount of data you've been able to gather from company records. "Not bad... pretty creative if I say so myself," you're thinking on the way to Stanton's office at slightly past the appointed time, Monday morning a week later.

Your word-processed notes include a few handwritten comments in the margins, added at the last minute... actually, at 9:05. You've also included a rough, handdrawn sketch resembling a process diagram. (It was very preliminary and you didn't want to send it through the Graphics department.)

As you are shown into Stanton's office, you're more than mildly surprised to see four other managers sitting at his conference table. They have extended their own weekly meeting with Stanton and are waiting—so it seems—to review your ideas. As you begin to "present" them, you pick up subtle signals that they are less than impressed with your efforts.

Stanton's assistant hurriedly leaves the room to make four extra copies of your notes.



## ACTIVITY 1: WHAT'S GOING ON?

Answer the following questions as if you are the senior planner who has been asked to prepare a few notes for Stanton's meeting.

|  |          |
|--|----------|
| How do you feel as you enter the room and are greeted by the group?                                  |          |
| What are your first comments to the managers seated at Stanton's conference table?                   |          |
| What was your mindset as you took on the project that contributed to the results you wound up with?  |          |
| Do you feel you carried out your assignment?   |          |
| What two things was Stanton expecting? How was he disappointed?                                      | 1)<br>2) |
| What two things do you wish Stanton had done differently?  | 1)<br>2) |
| What, if anything, would you do differently, given the same assignment — offered in the same manner? |          |

**ACTIVITY 1: WHAT HAPPENED? (15 MINUTES)****NOTE:**

The *What's Going On?* case study is designed to start discussion about the concepts of responsibility, empowerment and accountability, without relying too heavily on those terms or working with more precise definitions that will be provided later in the workshop.

The case study demonstrates judgment errors on both the manager's and the senior planner's part, including giving assignments "on-the-fly," and making assumptions about how a work product will be presented or used.

The discussion will give you a chance to gauge the participants' understanding and feelings about accountability prior to beginning the main portion of the workshop.

**SAY:**

*Refer back to the case study on WORKBOOK PAGE 2 and complete—on your own—the questions on WORKBOOK PAGE 3.*

*Answer the questions as if you are the senior planner who has been asked to prepare a few notes.*

Allow 6–7 minutes for this activity.

For each of the questions on WORKBOOK PAGE 3, ask one of the participants to share their responses.

After the introductions and responses, thank the participants for sharing and SAY:

*Workplace life is unpredictable. The demands and the opportunities are not always clearly defined.*

*This case demonstrates the “cost” of poor communication about a project.*

*The case raises questions about responsibility, empowerment, and accountability. What actions were expected? What part of the result could the senior planner have influenced? Who was accountable for the awkwardness and poor impression created at the Monday morning meeting?*

Connect the ideas to this workshop.

SAY:

*Today’s workshop focuses on our thinking or mindsets at the individual level. We’re looking at how we think about:*

- *Responsibility - how we accept assignments and challenges*
- *Empowerment - how we approach taking action to complete the task and solving problems, and*
- *Accountability - how we accept the results of our actions.*

*We make these personal choices at every stage of every project.*

*The ideas we’re discussing today apply to a full range of projects— from small assignments through major programs.*

## ***Introduce the Language of Accountability***



REFER to WORKBOOK PAGE 6, *The Language of Accountability*. Point out that the phrases listed on WORKBOOK PAGE 6 are typically heard at different project stages.

Allow participants a few minutes to review this page.

SAY:

*The first column lists words and attitudes that miss the mark, or in some manner demonstrate the attitude of a “victim” rather than the mindset of someone taking ownership and being accountable.*

*Words in the third column represent more of an “accountable” mindset.*

*The middle column notes the stage in a project where you might hear the words used.*

*Someone with a victim mindset (Column 1) might think and talk as if the job is someone else’s responsibility; that they are not capable; or that something else is keeping them from making progress; or that it’s someone else’s fault that things have turned out badly.*

*Using the right words helps propel us through the accountability cycle. Our word choices help us frame effective and workable agreements, maintain and build a sense of empowerment, and demonstrate our accountability.*

## ACTIVITY 3: THE LANGUAGE OF ACCOUNTABILITY

**Instructions:** Use the words in the chart for your partner conversation.

| 1   | 2   | 3  |
|---|---|--|
| Words you might hear...   | When you might hear them...                                   | Words with a more Accountable Mindset  |
| <b>Stage One: Responsibility</b>  |   |  |
| <ul style="list-style-type: none"> <li>• We should...</li> <li>• Someone should...</li> <li>• We could...</li> <li>• We ought to...</li> </ul>  | As a project starts, before someone takes ownership           | <ul style="list-style-type: none"> <li>• I can...</li> <li>• I will...</li> <li>• <b>I'll own it!</b></li> </ul>   |
| <i>Manager</i>  |   |  |
| <ul style="list-style-type: none"> <li>• I need someone to...</li> <li>• Does anyone want to...</li> </ul>  | As the manager looks for someone to take on a task            | Scott, I think your experience with XXX could be applied to this assignment. How about it?   |
| <b>Stage Two: Empowerment</b>   |   |  |
| <ul style="list-style-type: none"> <li>• I didn't know you wanted that</li> <li>• Yeah, but...</li> <li>• I've tried, but...</li> <li>• They won't cooperate</li> <li>• They aren't...</li> <li>• Isn't that someone else's job?</li> </ul> | As someone is running into barriers                           | <ul style="list-style-type: none"> <li>• I need to be more clear on that</li> <li>• I need to come up with another way to...</li> <li>• Can you help me strategize another way to...</li> <li>• I'll ask for their assistance</li> </ul> |
| <i>Manager</i>  |   |  |
| <ul style="list-style-type: none"> <li>• You should have asked me if you didn't know</li> <li>• You should have told me sooner</li> </ul>   | Late into a project that isn't going well                     | <ul style="list-style-type: none"> <li>• I could have anticipated...</li> <li>• Next time I will be sure to...</li> </ul>  |
| <b>Stage Three: Accountability</b>  |   |  |
| <ul style="list-style-type: none"> <li>• He/she should've...</li> <li>• We should've...</li> <li>• If they had...</li> <li>• But they didn't...</li> </ul>  | After the results are in; as someone explains what went wrong | <ul style="list-style-type: none"> <li>• I could have...</li> <li>• Next time I'll...</li> <li>• I understand how/why</li> <li>• I could have asked...</li> <li>• In the future, I will...</li> <li>• I've learned that...</li> </ul>    |
| <i>Manager</i>  |   |  |
| <ul style="list-style-type: none"> <li>• But you didn't...</li> <li>• You should have told me...</li> </ul>   |   | <ul style="list-style-type: none"> <li>• I could have asked...</li> <li>• In the future, I will...</li> <li>• Next time, we'll write it down!</li> </ul>   |

### **Introduce Partner Practice Activity**

ASK participants to work with a partner, and give the following instructions. There is no workbook page for this activity (other than page 6).

SAY:

*Work with a partner for this activity. This is a chance to practice using accountable language.*

*I'd like each of you to think about a recent or current project - perhaps one that is not going well or one that was less than completely successful. Have a conversation about the project with a partner.*

- *First, use the words and tone of voice that are reflected in Column 1 of the Language of Accountability chart on WORKBOOK PAGE 6 to discuss the project. Then, reframe your statements in a more accountable way, as listed in Column 3, while your partner listens.*
- *Then, you take a turn listening while your partner practices using both types of phrasing.*

*If one of you is a manager, use the manager's language listed in the chart for each stage.*

*Finally, share with your partner the differences you noticed between the two versions when you spoke the words out loud:*

- *What happens to your mindset with each version?*
- *Did you feel stronger or think differently using the second, more accountable phrasing?*

### **DISCUSS (10 minutes ) — OPTIONAL**

Discuss the following additional points as time permits:

*Is owning a task that can be accomplished individually the same as taking ownership of a task that involves others? What would be different about the two situations?*

## Materials Included With *Accountability That Works!*

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The workshop designed to accompany the video-based program is a flexible, yet comprehensive half-day training design. The workshop kit includes all the materials you'll need to run the program:

- ◆ The **chaptered DVD** of *Accountability That Works!* provide the theory and examples to illustrate the workshop topics. The fictional vignettes are provided two ways: nonstop, and stop-n-start. The DVD is closed-captioned.
- ◆ The **Leader's Guide** provides step-by-step instructions for introducing activities, leading discussions, and making transitions between the video, group discussions, and exercises. Two complete training designs are included: one for showing the video nonstop, and one for showing the video stop-n-start to allow for activities and discussions in between video segments. Both training designs offer optional activities and discussions to help you shorten or lengthen your workshop, as desired.
- ◆ A **PowerPoint® Presentation** can be used to highlight key discussion points and activity instructions during the training session.
- ◆ 4 **Booster Shots™** - brief PowerPoint shows (that launch and run automatically) to use for workshop follow-up and reinforcement. Each Booster Shot includes slides with key points from the video, and the facilitator should email 1 Booster Shot per week to all participants for 4 weeks after running the session. Regular Booster Shots will help everyone focus on and practice the skills to become accountable employees.
- ◆ The **Participant Workbook** contains the worksheets for the suggested exercises in the Leader's Guide. Also, the majority of the information contained in the PowerPoint slides is reproduced in the Participant Workbook so participants spend less time taking notes.

# Program Information and Pricing

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Purchase Price: \$995.00

Rental: N/A

Preview Price: Free

Running Time: 22 minutes

Materials included with purchase: chaptered DVD with nonstop and stop-n-go versions, Leader's Guide, PowerPoint® presentation and 4 follow-up Booster Shot™ emails, Participant Workbook.

## Quantity Pricing Discounts

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### Accountability That Works! Program

|              |          |
|--------------|----------|
| 2 copies     | 10% off  |
| 3-5 copies   | 15% off  |
| 6-10 copies  | 20% off  |
| 11-15 copies | 25 % off |

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

### **Participant Workbooks**

|         |                           |
|---------|---------------------------|
| 1-50    | \$14.95 each (list price) |
| 51-250  | \$13.46 each (10% off)    |
| 251-500 | \$12.71 each (15% off)    |
| 501+    | \$11.96 each (20% off)    |

(contents and pricing subject to change without notice)