

PREVIEW GUIDE



The Supervisor Toolkit

Table of Contents

Sample Pages from Leader's Guide.....pgs. 2-11

Toolkit Terms & Conditions and Usage.....pg. 12

Program Information and Pricing.....pg. 13



CRM Learning's Supervisor Toolkit

In today's dynamic business environment, supervisors have to deal with an ever-increasing range of situations, technologies, and legal requirements. Supervisors also have to manage and develop younger and more diverse work teams to meet their deadlines—with the highest quality work product possible.

Supervisors need tools to help them meet these challenges, and to develop the skills of their team members. While all supervisors realize that training is a key factor in meeting their work team goals, they don't always have the time or the tools to support their training objectives.

This **Supervisor Toolkit** will bring new flexibility in design, delivery and follow-through to your ongoing training efforts. The Toolkit includes more than 85 carefully selected segments from our best-selling video programs. These segments present both good and poor examples of supervisory skills and their application, providing a new type of training resource for supervisors, managers, and trainers.

Key topics illustrated in the segments are organized into eight categories, including:

- Planning and Delegating Tasks
- Building Trust and Respect
- Motivating/Positive Feedback
- Coaching and Training
- Handling Conflict
- Discipline/Constructive Feedback
- Performance Appraisals
- Hiring

Each video segment or segment pair in the **Toolkit** is accompanied by Discussion Questions, Activity Suggestions, and Follow-Up activities for managers and supervisors. By selecting segments and building discussion and activities around them, you can create a customized training program, long or short, to meet your specific needs or opportunities.

Use the **Toolkit** segments singly or in combination for staff meetings, self-study assignments, targeted training on supervisory issues, or as components in a series of sessions to improve supervisory skills throughout your organization.

The power of the **Toolkit** is the unlimited number of possible video and activity combinations available to you. Suggestions for a few of these combinations are noted in the Summary Tables in this Leader's Guide (see page 9).

Note: The practices and procedures demonstrated in the segments are subjective in nature. Actual application of the skills demonstrated will depend on both legal considerations and the internal procedures of your organization.

CRM makes no claims as to the applicability or appropriateness of any of the content or training designs in this Toolkit for specific training events or applications.

Toolkit Contents

The **Supervisor Toolkit** includes this Leader's Guide, a DVD, and three CD-ROMs.

This **Leader's Guide** helps you find appropriate segments for each training session you plan. Locate your desired main training topic in the Summary Table, select the segments to use, then refer to the Training Designs for ideas about questions and activities to accompany each selected video segment. Or make up your own questions and activities using the **Toolkit** segments as raw material.

The **DVD** and **CD-ROM** menu systems allow you to move quickly from one video segment or category to another, depending on the needs of your group, how you decide to structure your training session and on your available training time.

How to Use the **Supervisor Toolkit**

Step 1

Use of the **Toolkit** starts with defining your need for training.

- Have you been tasked with building your team, developing programs on coaching, planning, prioritizing, and delegating?
- Do you need to build supervisory skills in motivation, encouragement, giving positive feedback, building trust and showing respect?
- Are you concerned about your supervisory staff's skills with discipline and feedback, handling conflict and doing performance appraisals?

The **Toolkit** provides training components to meet these types of needs, with activities and discussion plans to help build participant understanding.

The **Supervisor Toolkit** Pre-Workshop Assessment (page 4) will help define the needs of your supervisory team. Ask your supervisors to fill out the Pre-Workshop Assessment before you begin. Then review their forms to help determine which topics to work on.

The Post-Workshop Assessment can be filled out by the participants after you have used the **Toolkit** to measure how your team's attitudes about their supervisory skills have changed (see Step 5).

Step 2

Review the Summary Table on page 9, which lists all of the **Toolkit** video segments by main topic area. Use the table to select one or more clips to meet your program's objectives.

The table includes a brief overview of each clip and the supervisory skills it illustrates, and suggestions for combining clips for longer training sessions. Each clip in a topic can be combined with other clips in that category. Suggestions are also provided for use of related clips in other categories.

Step 3

Turn to the Training Designs that begin on page 32. You'll find more information about each segment, including Key Points, Discussion Questions (with possible responses), in-class Activity Suggestions, and follow-up Back at Your Desk activities.

View the video segments you've selected and read through the suggested activities.

Step 4

Plan your session:

- Arrange the selected clips and activities in the most appropriate sequence.
- Modify the suggested discussion questions and activities to meet your objectives and the available training time.

Step 5

Conduct your session!

During the session, participants can use the **Supervisor Toolkit** Worksheet (page 6) to take notes and record their work on the Activities and Discussion Questions for each clip that you use.

After the session or sequence of sessions, ask the participants to fill out the Post-Workshop Assessment Form. They (or you) can then compare their results on the Post-Workshop Assessment to the areas of need identified on the Pre-Workshop Assessment Form completed before the training began (see Step 1). Use this comparison to help identify new topic areas to address with your supervisory team.

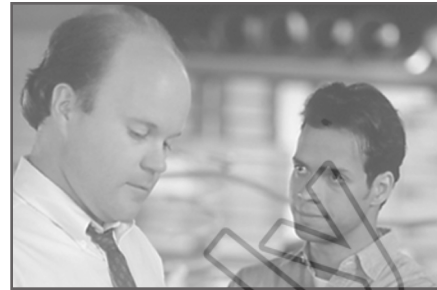
Clip #2: Take the Time to Explain

Length: :29

Consider using with these other segments:

Building Trust and Respect 8

Planning and Delegating 7



Introduction

When delegating assignments that involve a change of some kind, employees may need re-assurance and explanation. Even before the change is made, employees feel they are entitled to be a part of the discussion and feel insulted if they are not.

In this video segment, we watch as a pressured supervisor hurriedly issues new instructions to a team of workers on their next assignment. Team assignments are shifting. One team member appears disappointed, almost upset, and views his rotation as being cut from the team.

When he asks for an explanation, the supervisor comments rather crudely: “It’s not my job to provide motivation...It’s my job to keep all projects moving...If you’ve got a problem with that, it’s your problem...”

The exchange leaves the employee hurt, confused, and feeling insecure about his relationship with his boss.

Key Points to Draw from this Segment

- An assignment that represents change requires careful delegation, mindful of the concerns an employee might have.
- When hearing new plans, employees can be more sensitive to the non-verbal cues—positive or negative—coming from their supervisor. When minimal rationale is communicated, non-verbal information carries even more weight.

Discussion Questions

1. What parts of Supervisor Patrick’s comments might be true, and what parts are probably not true?

POSSIBLE RESPONSES: Basically, Patrick is correct. He could have used a friendlier tone of voice in making his comments, but:

Yes. It is his job to keep all projects moving.

Technically, it is not his job to provide motivation. Although helping his team stay motivated would make his job easier, he may not realize this.

Technically, it is Kenny’s problem if Kenny doesn’t like what his supervisor is doing, although it doesn’t help workplace rapport to have people unhappy with decisions.

Patrick might have spent a few minutes explaining to Team Six why rotation was necessary and what it means.

2. Was Kenny correct in saying that rotating without consulting team members was de-motivating?

POSSIBLE RESPONSES: Kenny seems to be a sensitive person; his emotional response to the action may be stronger than that of other team members. He probably does feel de-motivated—not with the new assignment, but by the fact that he has suddenly been separated from his team. The manner in which the change and the new instructions were communicated could have been improved; not quite as abrupt, included more explanation, etc.

3. How might Kenny's state of mind following this exchange affect his work on the project?

POSSIBLE RESPONSES: He is distracted. His questions and concerns have not been addressed. For whatever reasons, he is de-motivated and his work may be slower or he may make mistakes.

4. Are the supervisor's comments out of bounds?

POSSIBLE RESPONSES: Probably not, but he's moving toward the boundary. The words and the voice tone are not productive, particularly for Kenny. If Kenny and Patrick have worked together for a while, Patrick should know that Kenny may be a bit more sensitive than others.

Activity Suggestions

1. Draw two participants' names from a hat to play Patrick, and two others to play Kenny. Play the tape again. Have each of them give an improved rendition of the exchange between Patrick and Kenny.
 - Pair One uses the video's dialogue, changing only the tone of voice.
 - Pair Two creates a new dialogue that would be more effective.
2. Discuss for several minutes the effect of non-verbal behavior (tone of voice, posture, gestures, etc. on this short communication. Then discuss how a slightly extended communication can be used to address a subordinate's concerns.

Back at Your Desk

Chances are good that at one time or another, you've engaged in a communication similar to the one depicted in this segment.

1. If you were on the receiving end, how did you respond? Did the exchange influence your attitude and your work, even temporarily?
2. If you were on the "sending" side, did you have the sense that you didn't quite handle it well? How did you attempt to recover?
3. If you are currently feeling the effects of such a communication, how can you improve communication with the other individual?

Clip #7a/b: Fit the Training to the Trainee

Length: a - :24, b - :45



Introduction

In a technology-based workplace, teamwork often involves sharing knowledge and skills with peers and employees. Training someone to do a task in a new and different way—in this case, learning to use new software—is more than a verbal process. It's also about tuning in to the learner and listening to where they are coming from. We need to understand the learner's experience and concerns in order to effectively transfer the required knowledge and skills.

In this segment, we first see how team leader Wes' lack of sensitivity and poor listening skills in a training-coaching role frustrate Peg and set her up to fail. Later, after a nearly disastrous workstation order, we see that same supervisor change tactics, tune in, and create better results.

Key Points to Draw from this Segment

- When we think about the learning process, we tend to associate listening with the learner. However, in coaching, the coach must do more of the listening up front.
- Teaching a new skill is more than demonstrating a procedure. Success depends in large part on tuning in to the learner; their needs and what their previous experiences bring to the learning situation.
- Experts in procedures and technology are not automatically successful as coaches. Sometimes, they have their own learning curves in interpersonal skills.

Discussion Questions

1. What behaviors and conversation constitute “tuning in” to someone’s needs during the early stages of a coaching session?

POSSIBLE RESPONSES: In this example, acknowledging and demonstrating respect for what the learner already knows and has already accomplished would have been helpful. Listening and asking questions first, rather than jumping in with new information, would establish rapport between the coach and the learner. Coaches need to show learners how their existing skills and strengths can be applied to the new task.

2. Why would understanding someone’s past experience produce a better result, faster?

POSSIBLE RESPONSES: Learners must travel from the known to the unknown. Building on prior knowledge is the most effective way to help them along this path. This approach also demonstrates respect for their experience and reduces barriers between the coach and the learner.

Pre-Workshop Assessment

The following questions will help determine which supervisory skills you should focus on as you prepare to attend this workshop.

Please rate yourself on the skills listed below by checking one of the columns to the right of each statement.

	Needs Improvement	Acceptable	Very Good	Excellent
1. Understanding my role as a supervisor.				
2. Demonstrating trust and respect for those I supervise.				
3. Delegating tasks to team members in a clear and specific manner.				
4. Whenever possible, delegating assignments that motivate and develop team members.				
5. Developing team members' skills through coaching and feedback.				
6. Following through on coaching and delegated assignments with positive and corrective feedback.				
7. Facilitating problem-solving within the team.				
8. Making myself accessible to the team.				
9. Properly preparing for, and devoting my full attention during, a performance appraisal.				
10. Communicating important information that comes from my manager or above to the team.				
11. Following organizational policies and good Human Resources practices in hiring.				
12. Communicating my team's feedback and concerns to my manager.				
13. Making sure that I appraise my employees' performance on the standards and responsibilities in their job descriptions.				
14. Seeking and hiring employees whose skills meet specific team needs and will support the company in the long term.				
15. Disciplining team members when their behaviors require it.				
16. Following organizational policies and good Human Resources practices when completing disciplinary procedures.				
17. Recognizing and rewarding team members' efforts and accomplishments.				

Post-Workshop Assessment

The following questions will help determine how your confidence in your supervisory skills has changed after attending these Supervisory Skills workshops.

Please rate yourself on the skills listed below by checking one of the columns to the right of each statement.

	Needs Improvement	Acceptable	Very Good	Excellent
1. Understanding my role as a supervisor.				
2. Demonstrating trust and respect for those I supervise.				
3. Delegating tasks to team members in a clear and specific manner.				
4. Whenever possible, delegating assignments that motivate and develop team members.				
5. Developing team members' skills through coaching and feedback.				
6. Following through on coaching and delegated assignments with positive and corrective feedback.				
7. Facilitating problem-solving within the team.				
8. Making myself accessible to the team.				
9. Properly preparing for, and devoting my full attention during, a performance appraisal.				
10. Communicating important information that comes from my manager or above to the team.				
11. Following organizational policies and good Human Resources practices in hiring.				
12. Communicating my team's feedback and concerns to my manager.				
13. Making sure that I appraise my employees' performance on the standards and responsibilities in their job descriptions.				
14. Seeking and hiring employees whose skills meet specific team needs and will support the company in the long term.				
15. Disciplining team members when their behaviors require it.				
16. Following organizational policies and good Human Resources practices when completing disciplinary procedures.				
17. Recognizing and rewarding team members' efforts and accomplishments.				

Supervisor Toolkit Worksheet

Topic Area: _____

Clip: _____

Key Learning Points:

Positive Behaviors Observed:

Negative Behaviors Observed:

Activity and Discussion Notes:

My To-Dos after this Session:

Inserting Toolkit Video Clips into a PowerPoint Presentation

You may want to include video clips from the Toolkit in your own PowerPoint training presentations. Here's how to do it.

1. Insert a **Supervisor Toolkit** CD into the CD-Rom drive of your computer.
2. Open your PowerPoint presentation.
3. Display the slide on which you want to place the video clip, or insert a new slide by selecting **Insert** and **New Slide**.
4. Select **Insert** and **Movies and Sounds**. Then, choose **Movie from File**. When prompted (a **Look In** menu appears), select your CD drive to search (probably your D:/ drive). Click on the video clip you wish to insert (for example, Hiring3a.mpg), and click **OK**.
5. In some versions of PowerPoint, you will be prompted to choose whether or not to have the video to play automatically when the slide is selected. In other versions of PowerPoint, you will not have this choice. Instead, a small, black screen will automatically appear in the middle of your slide. **You must double-click the black box to run the video**; it will NOT automatically play. Re-size the black box (video screen) as desired by clicking and dragging the edges outward or inward.

IMPORTANT! Instructions for Saving Your PowerPoint Presentation

1. If you plan to run your PowerPoint presentation from the computer that you created it on, you may save your PowerPoint in the standard way (click **File**, **Save As**, etc.). You **MUST** have the Supervisor Toolkit CD in your CD drive while you are playing the PowerPoint presentation.

If you plan to run your PowerPoint presentation on any other computer (a laptop when traveling, for example), do **NOT** save your PowerPoint presentation in the standard way. Instead, use the **Pack and Go** feature under the **File** menu. The **Pack and Go** feature allows you to package your entire presentation to use on another computer. When you click **Pack and Go**, a Wizard will step you through the process of saving your presentation (you must 'pack' the video clips into the presentation or they will appear blank the next time you try to play them).

2. Make sure you choose **Include linked files** when prompted by the Wizard; this will gather the video files from the Supervisor Toolkit CD and place them in the directory where you've instructed the Wizard to save your PowerPoint file. We also recommend including the PowerPoint Viewer when prompted, in case the destination computer does not have PowerPoint installed.
3. Once you've packed your PowerPoint (.ppt) and saved it onto a Zip disk or CD, your presentation must be **UNPACKED** onto the destination computer. For instance, if you travel to a different city to deliver your presentation, you may decide to Pack and Go (save) your ppt to a CD-Rom. Once you arrive in your training room, you will need to "unpack" your CD onto that location's computer (or to your laptop).

TERMS & CONDITIONS AND USAGE FAQs

As with all CRM programs, the *Toolkit*, when purchased, is provided for long-term license purchase which means that the buyer receives the nonexclusive right to use the materials for training of their internal employees only. The license entitles buyer to unlimited non-theatrical use (to which no admission is charged) via optical projection, conventional video/DVD playback, or closed-circuit play within a single building. All other uses of the materials are prohibited unless special licensing agreements are made with CRM Learning. Purchasers may not rent, loan, alter, copy, transmit, recast or duplicate the materials—in whole or part—without CRM's prior written permission.

To review the complete *Toolkit* Licensing Agreement go to
<http://www.crmlearning.com/toolkitlicense/>

1) What does CRM Learning mean when it says I can use these clips in my custom training programs?

Many customers have told us that in the process of developing training programs specific to their organization, they frequently want to illustrate key learning points with video. Unfortunately, limited resources prevent them from producing their own video vignettes. The *Supervisor Toolkit* provides a library of high-quality video clips that you can access as you deliver various training courses within your organization. (They cannot, however, be incorporated into any training program that will be sold, rented, leased, sublicensed, loaned, transferred or assigned.)

2) By purchasing the *Toolkit*, do I have the right to use the clips in as many courses as I want, and can I deliver them any way I want?

Not exactly. You can use the clips an unlimited number of times in an unlimited number of courses offered by your organization **as long as** (1) the facilitator plays the clips directly off the *Supervisor Toolkit* DVD or CD-ROM that comes in the *Toolkit* package, and (2) you are training employees of your organization onsite and are displaying the clips via optical projection or over a TV monitor.

If you want to incorporate clips into CBT courses that will be taken by students at their desktop (either online or via individual CD-ROM) you will need to contact CRM Learning so that a licensing agreement can be negotiated. The pricing will depend on how many clips you want to license and how many students/sites will access the training.

3) Are there restrictions with regard to the Leader's Guide?

For your convenience, the Leader's Guide is provided in two formats—hard copy and pdf file on the CD-ROM. Because you may want to reference the Leader's Guide for suggestions when considering clips for various courses, we wanted to make it easy for you to do so. However, neither the hard copy nor the pdf can be reproduced, copied or modified in any way without the written permission of CRM Learning.

The Supervisor Toolkit Content and Background

Designed to provide facilitators with options never before offered through CRM Learning, the *Supervisor Toolkit* is a library of 90 short, high-quality video clips that can be used to enhance your organization's employee training courses. Because the clips illustrate basic supervision "do's and don'ts" in a variety of settings, they are applicable for all industries and can be incorporated into courses on leadership development and management/supervision.

The clips in the *Toolkit* cover 8 supervision skill categories:

- Hiring and Building Your Team
- Planning, Prioritizing and Delegating Tasks
- Coaching and Training
- Motivating and Giving Positive Feedback
- Building Trust and Showing Respect
- Handling Conflict
- Performance Appraisals
- Discipline and Giving Constructive Feedback

Materials Included with The Supervisor Toolkit

The program includes all the of the following materials:

- ◆ The **DVD** included in the *Supervisor Toolkit* includes approximately 90 clips with running times of anywhere from 20 seconds to 3 minutes. On the DVD, each clip/vignette is chaptered separately and can be viewed in two formats: with or without narration. In the narrated versions, brief comments are provided before each scene to give a general idea of what to look for in the vignette. In the non-narrated versions, the clips play without a narrated introduction.
- ◆ Three **CD-ROMs** contain .mpg files of all the clips, in addition to .pdfs of the Leader's Guide and the Licensing Agreement.
- ◆ The **Leader's Guide** provides 2 pages of discussion topics and questions for each of the 90 clips (see a sample on pages 3-4 of this brochure). The Guide also includes reference tables that help you select clips by topic area (see page 2 of this brochure).

Program Information and Pricing

Total Running Time: approx. 1hr, 20 min

Purchase Price: \$995.00 Rental: N/A
2 copies 10% off
3-5 copies 15% off

Industry discounts may apply. Call your Sales Consultant for more information.

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