

*Entelechy's Newsletter for Trainers, Managers, HR Professionals and Others
Responsible for the Performance of Others*

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MANAGING UPWARD

(Tip: Copy this section and send it to your managers and team leaders.)

In challenging times, sometimes your boss's behavior becomes erratic. She may overmanage or undermanage you and your work. She may lose sight of all the things you are working on. You may not be sure what your boss's priorities are; they change daily.

The costs associated with this business malady are many including: missed deadlines and opportunities, working on unimportant tasks, avoidance, frustration, and the appearance of incompetence, stress, and burnout.

What can you do? You have three options:

Option #1: Get in Front

Take time to understand your boss's:

- Goals: What are his aspirations? How can you help him achieve them?
- Problems: What common problems prevent your boss from being more effective? Are any of your boss's problems your strengths? Can you take responsibility for meetings, communication, planning, follow-up, etc?

- World: Describe the world from your boss's perspective. Who are the players?
- Pressures: What pressures are placed on your boss? How might these pressures affect him? How might they affect priorities? How might they affect your job?
- Boss: What kind of a boss does your boss work for? How might this affect your boss?

Proactively approach your boss with a way you can help solve one of his or her problems.

Option #2: Get in Back

Recognize that your boss is in his position because of past successes and demonstrated competence.

Check your attitude. Are you supportive? Or do you complain?

Check your ego. Do you really have a difficult/incompetent boss? Or does your boss have difficult/incompetent employees?

Show support and encouragement.

Be specific in your positive reinforcement.

Always provide constructive feedback in person and in private.

Recognize that your relationship with your current boss is critical to your future success.

Option #3: Get Alongside

Understand and work with your boss's style:

- Give the "doer" boss results and don't waste time.
- Support the "speaker" boss's intuition and need for recognition; provide assurance.
- Accommodate the "listener" boss's need to talk things out before getting to business.

- Present the “thinker” boss with logic and detail.

Recognize that your relationship with your boss is a relationship of mutual dependence by two human beings with strengths and weaknesses. Get to know your boss’s and get to know yours.

If your boss comes to you with a crisis, remain calm and collect pertinent information: what is really wanted? By whom? By when? How will it be used?

Communicate what you are doing, especially information that may impact your boss (customer problems, project slippage, etc.) Your boss should NEVER be caught by surprise resulting from your failure to communicate.

When raising problems, come with alternative solutions and your recommendation already identified.

Always be honest and dependable.

Be the employee that you would want your employees to be. Model the behavior you would expect from your employees.

This information comes from *Time Mastery for Managers*, a module in Entelechy’s *High Performance Management* training program. If you want more information on this skill and others from our *High Performance Management* training program, please visit our website at www.unlockit.com.

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DEVELOPING TRAINING BASED ON CONTENT TYPES - PRINCIPLES

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This is the fourth of six installments that focus on developing effective training based on content types. The model, developed by Dr. M. David Merrill at the University of Utah, is especially effective for blended learning since it helps distinguish content that may be more effective for self-paced training (i.e., WBT, CBT, MBT) and instructor-led or mentored training.

In this instructional design model, there are five primary content types: Facts, concepts, processes, procedures, and principles. Each of these content types can be taught at two

levels: at the Remember level and at the Apply Level (except for Facts which only can be taught at the Remember Level). For example, you can DESCRIBE how to handle an angry customer (Remember Level) or you can DEMONSTRATE techniques for handling an angry customer in a role play (Apply Level).

We'll focus on principles in this installment.

Definition of Principles

Principles are guidelines or criteria that can direct you in similar situations. Principles help us communicate effectively, solve problems efficiently, relate to customers, sell, and perform effectively in many other activities.

Unlike procedures, there are no automatic or mandatory steps to follow in the situation. Each situation varies from other situations in some fashion. In fact, trying to follow a lock-step, mechanical procedure may get you into trouble with situations that require you to apply principles.

To be sure, there are some situations that have a more defined set of phases to run through in order to be effective. Skills such as problem solving a customer's billing issue on the phone are fairly well defined, are fairly easy to train, and are called near-transfer principles. Skills such as general problem solving may be less defined, more difficult to train, and are called far-transfer principles. Both involve problem-solving principles, but one is job – and even task – specific (near-transfer) while the other is broader in scope and more encompassing (far-transfer).

While near-transfer tasks are easier to train, with greater probability of success, the employee is limited to performing the tasks as taught. Far-transfer tasks are more difficult to train and the probability of success is lower. But once the guidelines are acquired, the employee is able to apply the skills to a variety of job-related contexts.

Identifying the principles that best support optimal job performance is a key challenge. See Entelechy's *Approach to Performance Consulting* eGuide (<http://unlockit.com/eguide-HPT-PC-EG.htm>) for over 50 pages of information, tips, and techniques that will help you.

Examples of Principles

The following are examples of principles:

- Probing/Questioning (Sales): Uses open/closed ended questions to identify/clarify customer's business goals/problems/needs. Uses questioning techniques to direct the call, demonstrate attention, and gain information and insight.
- Handling Objections (Sales): Maintains presence and demonstrated empathy. Acknowledges the concern and uses questions to clarify the concern. Addresses objection appropriately. Uses checkback questions to check for agreement.
- Professional Team Presence (Sales Presentation): Supportive to other team members. Defers questions to other team members appropriately. Uses discretion in offering help to fellow team members. Well prepared and obviously rehearsed.
- Effective Feedback (Employee Development/Coaching): Provide feedback that is balanced, objective, specific, and supportive (BOSS).

How to Teach Principles

Principles should be trained at the application level of performance. This means that trainees must practice successful implementation of guidelines in a variety of job-related situations often presented as case studies.

To teach principles, you need to provide the relevant guidelines. Varied context examples illustrate successful application of the principles to diverse situations. Non-examples can be used to illustrate the differences between successful and unsuccessful application of the principles.

Analogies are especially powerful in training of principles. To work, the analogy must be familiar to the students and its critical elements must link meaningfully to the principle. "Handling an angry customer is like handling an egg." is more familiar to more people than "Handling an angry customer is like tuning a performance automobile."

Far-transfer training that involves application of social skills, such as supervisory or sales training, is best taught in a classroom setting where video scenarios and role-playing can provide realistic examples and practice with feedback.

Learning objectives should begin with the application-oriented verbs such as: demonstrate, assess, criticize, evaluate, judge, position, demonstrate. Avoid remember-oriented verbs such as: explain, describe, and identify.

Learning activities should include demonstrations with feedback, role plays, simulations, analogies, and plays.

The suggested learning/teaching sequence is as follows:

1. State the principle. Provide a statement describing the principle and any guidelines that flow from the principle.
2. Provide varied context examples to illustrate the principle being applied. Illustrate the application of the principle in typical work-related situations.
3. Provide examples where the principle wasn't applied and the resulting consequences.
4. Provide analogies to build off of prior knowledge.
5. Demonstrate the principle in a scenario.
6. Provide practice exercises/role plays. Design practice exercises that will require students to apply the principles, not just recall them. Use at least two practice sessions: the first one encourages the learner to evaluate sample performance; the second session requires the learner to apply the principles taught.
7. Provide feedback.

How to Assess Learning

To evaluate principle learning, measure the participant's proficiency in meeting the skills criteria in context. Use role plays and a skills performance assessment sheet to determine proficiency. This evaluation is best done by skilled raters/evaluators using behavioral criteria. It is important to use behavioral checklists (checklists that list behaviors that illustrate the principle in action) and that the raters/evaluators are well trained in recognizing these behaviors in action.

In upcoming issues of *The Key*, we'll continue stepping through the two remaining content types and explore definitions, best uses, related objectives, best ways to assess, suggested learning activities, and recommended learning/teaching sequences.

This information comes from *High Impact Training*, a module in Entelechy's *High Performance Training* program. Much of the general information is provided free of charge at <http://unlockit.com/improve.htm>. If you want more detailed information on this skill and others from our *High Performance Training* program, please visit our website at www.unlockit.com or contact me directly at <mailto:ttraut@unlockit.com>.

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LOOK FOR IT! DESIGN AND DEVELOPMENT SHORTCUTS EGUIDE
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Want to save hundreds of hours designing and developing training without sacrificing instructional quality?

Entelechy's newest eGuide, *Practical Design and Development Tips*, provides not only a comprehensive overview of the industry's most used instructional design process – ADDIE (Analysis, Design, Development, Implementation, Evaluation) – it also contains over 100 shortcuts and tips that help you deviate from that process to reduce training design and development time.

These tips come from years of design and development experience – from Entelechy's experts as well as from training experts throughout the world.

More information will be coming shortly. You will receive an announcement next week regarding the availability of this “must have” guide.

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Send this email to your friends and colleagues who may be involved in training and the performance of others and could benefit from FREE performance tips, tools, and techniques.

Entelechy will not sell, rent, or otherwise provide anyone else your membership information for any reason. Period.

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