# Instructors Guide

On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.
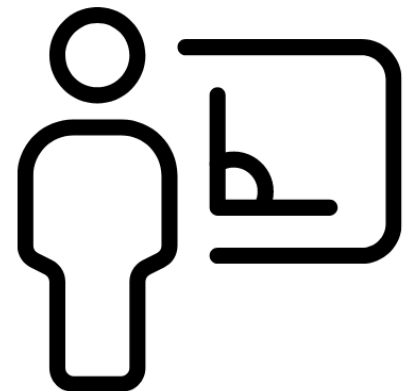
Module Two: Setting Expectations

First things first: your employees need to know what you expect of them in order to succeed. In this module, we will work through the four steps of setting expectations.

1. Define the requirements.
2. Identify opportunities for improvement and growth.
3. Discuss the requirements.
4. Put it all in writing.

Defining the Requirements

The first step is to define the requirements for the chosen task. In other words, what will success look like? You will want to develop your own set of criteria first, and then review it with the employee to get their valuable ideas and input.

Here are some questions to help you get started, focused around the five W's and the H.

- How does the task tie into organizational goals?

- Why are we doing this task?

- What are the key parts to the task?

- What steps will be involved?

- What should the end result look like?

- Who will the employee need to talk to?

- When should the employee report back?

This framework can be used for individual tasks, projects, and even expectations about the position itself.

Estimated Time	10 minutes
Topic Objective	To understand the first step in setting expectations.
Topic Summary	What will success look like?
Materials Required	None
Planning Checklist	Write out the five W's and the H on flip chart paper. • Who? • What? • Where? • When? • Why? • How?
Recommended Activity	Divide participants into pairs. Explain that there are two rounds to this activity. For Round One, participants will play the game 20 Questions, where one person chooses a person, place, or thing, and the other person must guess it by using only closed questions, such as, "Is it alive?" or, "Is it smaller than a microwave?" Play this round twice, so that each person gets to be the questioner and the answerer. Round Two is the same, except participants must use only questions that start with the five W's and the H. Discussion points: • Which round was more exciting? • Which round was more efficient and got the answer faster? • What can we take back to the workplace from this exercise?
Stories to Share	There were once four people named Everybody, Somebody, Anybody, and Nobody. There was an important job to be done and Everybody was sure that Somebody would do it. Anybody could have done it, but Nobody did it. Somebody got angry about that, because it was Everybody's job. Everybody thought Anybody could do it, but Nobody realized that Everybody wouldn't do it. It ended up that Everybody blamed Somebody

	when Nobody did what Anybody could have done.
Delivery Tips	If you have an uneven number of participants, pair up with a participant.
Review Questions	What are the five W's and the H?

Identifying Opportunities for Improvement and Growth
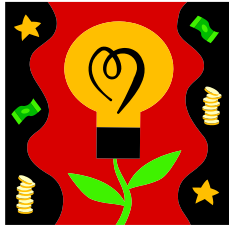
The best expectations are those that encourage the employee to grow and stretch. So, when setting expectations, you should explore all the possibilities and share them with your staff members.

Here is an example: Let's say you have some training tasks that you would love to delegate, but you're worried that the task would overwhelm anyone on your team. After all, many people aren't comfortable speaking in public.

However, during your expectations meeting, one of your senior staff members mentions that she is interested in learning more about training. This is the perfect opportunity to reduce your workload and to help your employee develop her skills, not to mention increase her job satisfaction. Everyone wins!

Likewise, your employee may have hopes and dreams but may be unwilling to share them for fear of being rejected, or for fear that they can't meet their own expectations. Your leadership and encouragement is essential to help your employees grow and develop. Encourage employees to try new things and provide them with the support they need. An action plan that gradually increases tasks and responsibilities is one way to do this.

Estimated Time	10 minutes
Topic Objective	To understand that expectations can include opportunities that you never imagined.
Topic Summary	When setting expectations, you should explore all the possibilities and share them with your staff members.
Materials Required	Action Plan
Planning Checklist	One Action Plan per participant
Recommended Activity	Have participants write at least one opportunity for themselves, their team, and/or their staff in the action plan.
Stories to Share	Many great inventions were not planned, including penicillin, chocolate chip

	cookies, Teflon, Post-It notes, and potato chips.
Delivery Tips	If action plans were handed out at the beginning of the workshop, transition into this activity should be fairly seamless.

Setting Verbal Expectations

Expectations can be verbal or written, depending on the situation. For informal expectation-setting meetings, such as a new, simple task, verbal expectations can suffice. To make sure you've covered all the bases, use the 5 W's and the H during your discussion.

- Who?

- What?

- When?

- Where?

- Why?

- How?

Estimated Time	10 minutes
Topic Objective	To understand how to deliver effective verbal expectations.
Topic Summary	For informal expectation-setting meetings, such as a new, simple task, verbal expectations can suffice.
Materials Required	Example tasks written on flip chart paper
Planning Checklist	To save time, write the list of example tasks listed below on flip chart paper.
Recommended Activity	Ask participants to identify an upcoming task. Then, partner them off and have them share their expectations verbally. If they cannot think of a task, they can use one of the following examples: • Writing a weekly status report • Designing a new widget • Delivering a presentation

	• Planning a conference • Making a satisfaction check call to an important customer
Delivery Tips	If there is time and volunteers, have participants role play their expectations in front of the class.

Putting Expectations in Writing

It's never a bad idea to write down your expectations. This document can be kept for your records, and it can be shared with the employee so they have something to refer to. You can use the following template for written expectations.

EMPLOYEE NAME:
EXPECTATION STATEMENT:
DATE:
WHAT ARE THE KEY PARTS TO THE TASK?
WHAT STEPS WILL BE INVOLVED?
WHAT SHOULD THE END RESULT LOOK LIKE?
WHO WILL THE EMPLOYEE NEED TO TALK TO?
WHEN SHOULD THE EMPLOYEE REPORT BACK?

Estimated Time	10 minutes
Topic Objective	To understand how to frame written expectations.

Topic Summary	Written expectations can be kept for your records, and it can be shared with the employee so they have something back to refer to.
Materials Required	Worksheet 1: Template for Written Expectations
Planning Checklist	One copy of Worksheet 2 per participant, if desired. (Students can also use the template in their Student Training Manual.)
Recommended Activity	Ask participants to use the template in their Student Training Manual, or you can provide a worksheet. Their task is to write out their verbal expectation from the previous exercise using the template.
Stories to Share	Your short term memory can hold only an average of seven items. (This is why most North American phone numbers are seven digits long.)
Delivery Tips	Participants can work in their pairs from the previous exercise.

Practical Illustration

Sara and Jorge were setting out a task for their newest employee in the Human Resource Management Department at their company. They were exhausted after a long day at work, and were struggling to come up with ideas for how to set out the task. Sara suggested they define the requirements for the task, and Jorge agreed. They asked: what the end result of the task should look like, when the employee should report back, and what the key parts of the task were. They compiled the answers to the questions and were happy when they could lay out the task and present it to the employee the next day.

Module Two: Review Questions

1.) The following is NOT a question you would ask when Defining Requirements for a task:

    a) What are the key parts of the task?
    b) What steps will be involved?
    c) Why are we doing this task?
    d) None of the above

    All are questions you would ask when defining requirements for tasks.

2.) The best expectations are those which:

    a) Bog employees down with work
    b) Encourage growth and development
    c) Encourage team work
    d) Are easy to fulfil

    The best expectations are those which encourage growth and development

3.) Leadership and encouragement is essential for:

    a) Employee development and growth
    b) Task delegation and retribution
    c) An action plan
    d) Both b and c

    Leadership and encouragement is essential for employee development and growth

4.) The following statement is TRUE:

    a) Expectations can be verbal
    b) Expectations can be written only
    c) Expectations can be both written and verbal
    d) Expectations should be written in silence

    Expectations can be both written and verbal.

5.) Which of these best fits the 5 W's and H?

    a) Who, What, Whether, When, Why and How
    b) Who, Whether, Why, When, Where and How
    c) Who, What, Why, When, Where and How
    d) All of the above

    W5 +H=Who, What, Why, When, Where and How

6.) When noting expectations you should:

    a) Write them down then throw the document away
    b) Keep the document on record
    c) Never put anything in writing for legal reasons
    d) None of the above

    When noting expectations you should keep the document on record.

7.) The following statement is FALSE:

    a) The first step is to define requirements for the task
    b) The third step is to discuss requirements for the task
    c) The fourth step is to talk to the employee about the task
    d) The second step is to identify opportunities for improvement and growth

    4. Put it all in writing.

8.) Which is NOT one of the four steps for Setting Expectations?

    a) Identifying Opportunities for Improvement and Growth
    b) Defining Requirements
    c) Setting Tasks
    d) Discussing the Requirements

    Setting tasks is not one of the four steps in setting expectations.

9.) The first step in Setting Expectations is:

    a) Identifying Opportunities for Improvement and Growth
    b) Defining Requirements
    c) Setting Tasks
    d) Discussing the Requirements

    1. Defining Requirements

10.) After you have developed a set of criteria you should:

    a) Review it with yourself
    b) Implement it straight away
    c) Review it with the employee in question
   d) Both b and c

    After you have developed a set of criteria you should review it with the employee in question.

PowerPoint Slides

Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide. PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.
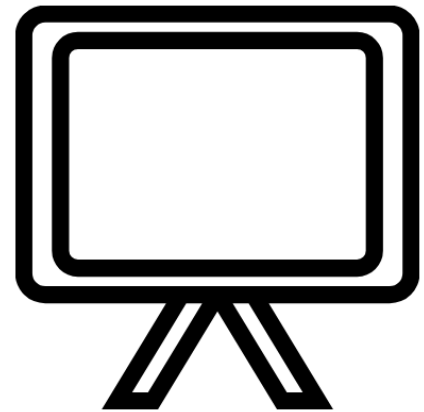
"

Management is nothing more than motivating other people.

Lee Iacocca

Setting Expectations

First things first: your employees need to know what you expect of them in order to succeed.

Defining the Requirements

- What should the end result look like?

- Who will the employee need to talk to?

- When should the employee report back?
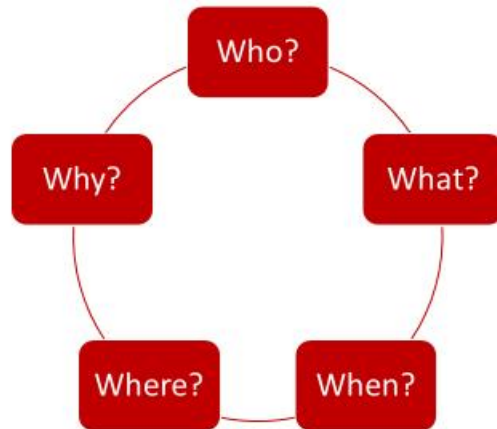
Identifying Opportunities for Improvement and Growth

The best expectations are those that encourage the employee to grow and stretch.

Setting Verbal Expectations

- Who?
- What?
- When?
- Where?
- Why?

Putting Expectations in Writing

It's never a bad idea to write down your expectations.

Practical Illustration

- Defining the Requirements
- Identifying Opportunities for Improvement and Growth
- Setting Verbal Expectations
- Putting Expectations in Writing

Module Two: Review Questions

1. The following is NOT a question you would ask when Defining Requirements for a task:

A. What are the key parts of the task?

B. What steps will be involved?

C. Why are we doing this task?

D. None of the above

Quick Reference Sheets

Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date. They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.

Supervising Others
Quick Reference Sheet

The Urgent-Important Matrix

The Urgent/Important Matrix

Urgent and Important
- Crisis
- Problems
- Deadlines

Important, But Not Urgent
- Opportunities
- Progress
- High value
- Long term

Urgent, But Not Important
- Maintenance
- Routine Tasks

Urgent, But Not Important
- Trivial

✓ This concept is said to be how former US President Dwight Eisenhower organized his tasks. It was brought into the mainstream by Stephen Covey.

✓ URGENT AND IMPORTANT: Activities in this area relate to dealing with critical issues as they arise and meeting significant commitments. *Perform these duties now.*

✓ IMPORTANT, BUT NOT URGENT: These success-oriented tasks are critical to achieving goals. *Plan to do these tasks next.*

✓ URGENT, BUT NOT IMPORTANT: These chores do not move you forward toward your own goals. Manage by delaying them, cutting them short, and rejecting requests from others. *Postpone these chores.*

✓ NOT URGENT AND NOT IMPORTANT: These trivial interruptions are just a distraction, and should be avoided if possible. However, be careful not to mislabel things like time with family and recreational activities as not important. *Avoid these distractions altogether.*

The SMART Way

➢ SPECIFIC: Often, creating a list of benefits from the accomplishment of the goal will give you a compelling reason to pursue that goal.

➢ MEASURABLE: It's crucial for goal achievement that goal setters are able to track their progress towards the goal.

➢ ACHIEVABLE: Setting big goals is great, but setting unrealistic goals will just de-motivate you. A good goal is one that challenges, but is not so unrealistic that the person has virtually no chance of accomplishing it.

➢ RELEVANT: Before you even set goals, it's a good idea to sit down and define your core values and your life and career purposes. These tools will help the person set goals that matter to them.

➢ TIMED: Without setting deadlines for goals, the goal setter will have no real compelling reason or motivation to start working on them. By setting a deadline, your subconscious mind begins to work on that goal, night and day, to bring you closer to achievement.

Types of Work Assignments

- **ORDERS**: These leave no room for guesswork, and they typically match the dictatorial approach. These should only be used for emergencies. Example: "Shut off that tap, now!"

- **REQUESTS**: These types of assignments leave the employee some room for interpretation. These are the work descriptions you will want to use most often. Example: "John, please turn off that water."

- **SUGGESTIONS**: These types of work assignments leave the most room for interpretation and should only be used if you don't care how the work gets done, or if it's a low priority task.

A Survival Guide for the New Supervisor

ASK THE RIGHT QUESTIONS OF THE RIGHT PEOPLE
This means that if you have a question about front-line activities, go to the frontline workers. Or, for questions about payroll, you would talk to human resources.

GO TO GEMBA
"Going to gemba" means going to the place where the action is happening. If you want to see how invoices are processed, go to the accounting department and watch the process yourself.

KEEP LEARNING!
Start small, but aim big. Set goals for yourself and keep working towards them. Training doesn't have to take place in the classroom. Try listening to your staff and colleagues, reading books and journals, and watching educational videos. All are excellent ways to learn more and keep improving yourself.

Methods of Work Assignment

THE DICTATORIAL APPROACH
- The easiest short-term work assignment method is to simply assign tasks to individuals.
- However, this generates the least job satisfaction and independence.
- This method should be used when a task needs to be completed urgently, or if it is a task that no one wants to take on.
- For best results, make sure that you explain the importance of the task and the rewards to the individual, the department, and the organization.

THE APPLE-PICKING APPROACH
- This method gives employees more freedom in choosing their tasks, although it does not emphasize team problem solving or collaboration.
- The basic idea is that the team member chooses a project that they would like to work on from a list of departmental tasks.
- This is a good method to use when there is a small group of tasks to be assigned, a very small group of employees, and not enough time for a meeting. In this case, make sure that the tasks are equal in value and workload.
- This method can also be used when the department has a list of low-priority "fillers" and an employee needs a short term project.
- Be careful when using this method if there are just as many tasks as people.

THE COLLABORATIVE APPROACH
- With this method, the team has a meeting to decide who completes which task.
- This method will enable you to get more out of your employees and to help them grow and develop.
- However, this method is not appropriate for a list of menial tasks, or if a task needs to be urgently completed.

It is most effective when used with a mature team (a team that has worked together for 6 months or more).

Handouts

Each course is provided with a wide range of worksheets. Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.
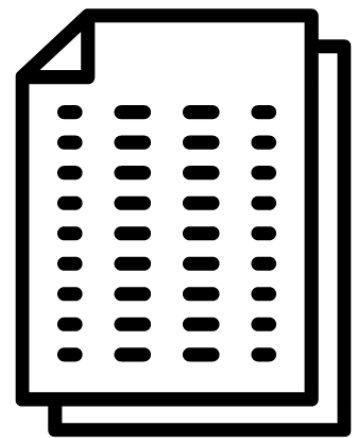
Sample Worksheet 1

Template for Written Expectations

EMPLOYEE NAME:
EXPECTATION STATEMENT:
DATE:
WHAT ARE THE KEY PARTS TO THE TASK?
WHAT STEPS WILL BE INVOLVED?
WHAT SHOULD THE END RESULT LOOK LIKE?
WHO WILL THE EMPLOYEE NEED TO TALK TO?
WHEN SHOULD THE EMPLOYEE REPORT BACK?

Icebreaker: A New Leader

PURPOSE

To help participants get acquainted and start talking to each other.

MATERIALS REQUIRED

1. Index cards

PREPARATION

Write the name of a different famous person on five or six index cards. Some examples: Madonna, Tiger Woods, Lance Armstrong, Nelson Mandela, Bill Gates, Angelina Jolie.

Divide participants into groups of four to six. Give each group one of the cards.

ACTIVITY

Tell participants that the president of their company (or the head of their department) has resigned and the position is now being taken over by the person on their index card. Ask each group to think of one characteristic of this person that will help him or her do well in this new role.

After a few minutes, ask the groups to report on what they decided.

Certificate of Completion

Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.
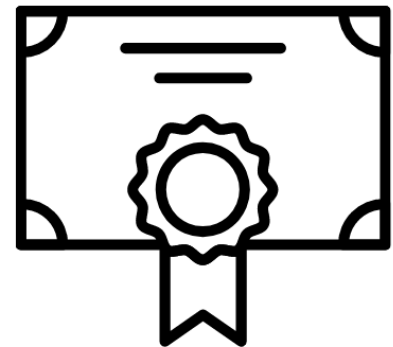
CERTIFICATE OF COMPLETION

[Name]

Has mastered the course

Supervising Others

Awarded this _____ day of _____ e _____, 20 _____

_____

Presenter Name and Title