Facilitator's Instructions

The Program

The IDP Leadership Program is BPW/USA's leadership development series. The program will assist people to succeed in meeting their goals for community action and change. The Individual Development CD includes the Facilitator's Manual, Participant's Guide, Power Point Presentations, and Leadership Guide.

The modules are:
Module 1: Get On Board: Historical perspective and current opportunities of BPW defining membership opportunities, objective, mission, vision, and legislative platform. You are encouraged to adapt this program to include your local, district/region, or state federation information.

Module 2: I'm not confused, I understand you! Understanding peers and employees behavioral and communication styles – managing for improved performance.

Module 3: If I were to ask you… Reviewing behavioral styles and learning to recruit the right person for the right program/task.

Module 4: Taming the tension tyrant. Learn how to create presentations

Module 5: Standing Up & Standing Out Learn to give oral presentations

Module 6: Define and Shine! Networking – A Skill for Life.

Module 7: It's All About You! You don't have to be a musician to blow your own horn! Interviewing tips and techniques.

Module 8: Meet Me in the Middle! Negotiating skills for the workplace and beyond.

Module 9: Best in Class Are you the leader you want to be? Developing leadership qualities that will help you rise to the top!

Module 10: Get Into It and Out of It! Running a meeting is parliamentary. Using parliamentary process can streamline any meeting and committee.

Module 11: There are fewer rules than you think! Business etiquette: standing out from the rest by understanding how to be the best!

Module 12: You have the right to write! Understand your advocacy role in your business and community.

Module 13: Reach for the Stars! Learn about governing values – what is important to you, how do you see the world, and what do you believe in? Develop your goals.

Module 14: Memories are made of this! Develop media relationships for your business or organization.

Plan to add additional two or more hours at the end of the program for 5-minute prepared presentations and evaluations of each.

Each module is designed to build upon information and knowledge learned in prior modules. For example, participants will learn how behavioral styles receive information before learning how to create presentations. Participants will learn to network, then interview, and then negotiate, etc.

Program Logistics:

Maximum number of participants: 15 - 20. A very large group will limit participation by everyone and make it difficult to cover all the material.

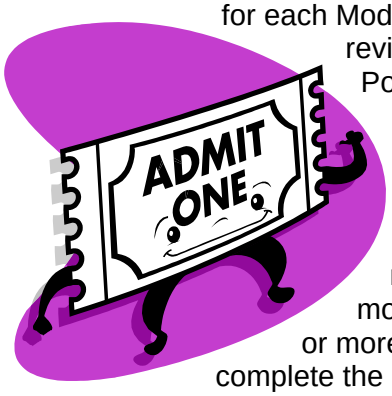
Time required for the program: The full program requires 14 hours training time (excluding lunch and breaks), and 1-2 hours for participant presentations, depending on the number you have participating. You will want to plan for 1-hour up to 1-hour and 15 minutes per module. Depending on the size of the group, you will have to plan for enough time for each participant to do a 2-minute impromptu speech following Module 5 or prior to Module 6. The 5-minute presentations may be scheduled for another time, possibly following the completion of the course.

> The ID Program does not <u>require</u> participants to compete at a local, state, or national level. Those who <u>choose</u> to compete are encouraged to do so. Additional information for the BPW/USA competition is included in the Planning Guidelines for the Individual Development Program, which can be downloaded from the BPW/USA website.

The ID Program may be presented in a weekend seminar (Friday evening, Saturday all day, and Sunday morning), or in multiple week formats of 1-3 hour sessions. If the group is at the maximum, you may need to add an additional 1-2 hours for the 5-minute presentations and evaluations.

Multi-week commitments are often difficult to make, but participants should be encouraged to plan for attendance. Inconsistent enrollment undermines program success.

Facilitators should arrive at least 30 minutes prior to the beginning of each module to set-up and start on time. Purpose and Outcomes are printed in the Facilitator's Guide for each Module. These should be posted (written on a flip chart) and reviewed at the beginning of each module if not using the PowerPoint.



Certificates of program completion are available and should be given to those who complete the program. If local organizations coordinate IDP training throughout the state, a module **punch card** (template on last page) may be used by participants to accumulate the 14 modules. For example, if a participant could not attend one or more modules, he/she could travel to another location to complete the missing modules. Upon completion of the 14 modules, the participant could present the punch card for verification and would receive a certificate. This will require coordination of ID Programs within the state.

Room set-up: Use a large, airy room with plenty of space for participants to move about. The interactive nature of the program requires adequate room to move. A U shaped set-up works best, with participants seated around the outside of the U, thereby allowing

everyone to face each other as they speak. It is recommended to have breakout circles of chairs in the same room (3 circles of 5, 6, or 7, depending on attendance) in the corners. Avoid a situation where people have to pick up and move their chairs into circles. This is very time-consuming and distracting.

A table for the facilitator's notes and handouts should be set up in front of the room. If using a U-shaped set-up, allow an open space so that you can walk inside the U. Leave room in the front for an easel and pad, whiteboard, power point projector and projection screen, etc.

Equipment needs:

A black or white board
Easel and large pad
Power Point projector/computer
Projection Screen/blank wall
Overhead projector (not required, but can be used)

Note: While this program is designed to utilize the technical aspects of audio-visual, you may not have [inexpensive] access to a power point projector and computer. Each module is self-contained within the corresponding PowerPoint. Each power point presentation may be printed in handout form or you may print the materials provided in the Participant Guide. Participants have in their workbooks all handouts and activities except the power point handouts.

Material needs: Large place cards with participant's names at each place will facilitate interaction. These can be made from large index cards, card stock, or paper (folded lengthwise three times (as you would fold a letter) to create a triangle tent. Nametags are also recommended, but remember that they are difficult to read at a distance.

Material needs for specific activities are indicated in the trainer's introduction to each exercise. Have these ready in advance to save time. These include:

Pens or pencils for participants to use
A roll of masking tape
Single sheets of paper for each participant
30-second time card, 2-minute time card
Stopwatch
Red, blue, and white poker chips (available at most discount stores)
1-1/2" 3-ring binders (one per participant)
Sample thank you cards

You should have certificates of completion ready to hand out at the conclusion of Module 14. Individual Development Program Graduate pins are available for purchase through Carlson Craft at http://www.bpw.cceasy.com/

Workbooks: Each participant should receive a copy of the IDP Participant's Guide. Each module is listed on the CD and can be printed in advance to give out as each module is presented. The guide contains an outline of everything to be covered and enables participants to:

Focus on issues rather than on note taking

Take active part in discussions
Leave with a complete reference packet for follow-up use.

The participant's guide contains:

Information about BPW/USA
Worksheets for each activity
Handout information sheets
Strategies and Tips
Suggested readings list
Program evaluation

The Facilitator's Manual

This facilitator's manual contains everything the participants have in their workbook and complete instructions for effectively delivering this training. As a facilitator, you are provided everything needed to deliver the Individual Development Program. For each participant activity and module, you have an introduction to that activity or handout. This introduction includes:

The Module Purpose and Outcomes
References used to create the module
The time allocated for that segment of the program
Instructions and answers for conducting the activity
The corresponding page in the participant's guide *inclusive* of facilitator notes

In addition, the Facilitator's Manual includes an appendix with the following:

Participant List (to be copied and sent to your state ID Chair)
Suggested topics for the Individual Development Representative presentations

The Program evaluation form (provided in all participants' guides) should be completed at the end of the program, and returned to the facilitator at that time. These program evaluation forms (or copies) should be sent to your state ID Chair with the Participant list.

Important tips for running the program:

It is critical that the program **start on time.** Stress this in publicity and communications with participants prior to the seminar. If it is necessary to start late (ex. Most participants have not arrived on time), that time will have to be made up from breaks and/or lunch time (ex. 45 minutes for lunch rather than 1 hour; 10 minutes for breaks rather than 15). Of course, you should also end on time.

The format of the ID Program is flexible. You may choose to do the entire program in a weekend format beginning on Friday evening (7-9), Saturday (8-noon; 1-5), and Sunday morning (8-noon or 9 -1). Build health breaks into your agenda. Providing lunch as part of the program or having participants bring brown bag lunches helps save precious time and keeps the group together to network.

You may choose to do a “semester-style” class of 1-hour for 14 weeks. If you collaborate with a local community college or university to present this program, you would want to abbreviate the information in Module 1 and extend the opportunities for making presentations in Modules 4 & 5.

Other format options may include collaboration with community or business groups to have five – 3-hour segments, or seven – 2-hour segments. Additionally, you could provide the program in two – 7-hour Saturday segments.

It is crucial to keep the program moving. If an exercise takes a little longer, you will probably be able to make it up elsewhere. Overall, you will have to walk a fine line between encouraging participation and moving the program along. Do not allow the program to degenerate into a gab session.

If someone begins to stray from the topic or carries on with a point, you may want to try the following:

Stand and begin to move toward the person who is speaking.

Say, “I appreciate your comments; however, we need to stay with the timeline. I would be happy to hear more about this after we are finished.”

Or,

“In the interest of time, I need to ask you to share the rest of this story during the break.”

Cost: **It is important to place a value on IDP Leadership.** Charging a fee to cover the cost of rental, materials, reproduction costs, etc. is good business. Making a profit for your local is also good business.

To give the program away sends a message that it has no value.

Worksheet for cost calculation:

	Projected Cost
Room rental	_____
AV Rental	_____
Facilitator Fee(s)	_____
Reproduction/copying Trainer Guide Participant Guide Power Point Handout Miscellaneous	_____
1-12/" 3-ring binder(s)	_____
Pens/Pencils/Markers Paper & Activity Supplies	_____
Props/Trinkets/Give-aways	_____
Completion Certificate(s)	_____
Food/Beverages	_____
Graduate Pins/Other	_____
TOTAL	_____

Total divided by the number of participants (how many do you realistically expect) = $ _____

This should be the per participant fee that you would charge to break even.

You may get donations of cash or goods and services from members or other organizations. Collaborate to make this training opportunity a fund-raiser for your organization. See the Templates folder for a sponsorship letter and other information to market this program.

Impromptu Practice Questions:

The following questions are examples of Impromptu questions.

These questions require that the participants “practice” impromptu speeches - without knowing they are practicing.

1. Sam Walton encouraged his employees to “eliminate the dumb.” What dumb practices in your workplace would you like to eliminate?
2. If you were CEO of your organization, what is the first thing you would change?
3. What are some questions you can’t answer?
4. What motivates you to do your very best work?
5. If your workplace were a sporting event, which one would it be and why?
6. What causes stress in your life/ workplace?
7. How do you intend to use this training when you return to work?
8. What question(s) do you wish your boss would ask you?
9. How can creativity be fostered in your workplace?
10. If you were a fruit, which one would it be and why?
11. If you could write a new law, what would it be?
12. If life is a series of dress rehearsals, what is your most memorable?
13. Describe a time when you received poor service and what you learned from that experience?
14. If you could write a new national anthem, what would it be like?
15. What value do you hold true for your life and do others see it in your day-to-day activities?
16. If you could choose to be a famous person, who would it be and why?
17. Describe an ideal community.
18. What word or acronym best describes your life?
19. What can you do with 60 minutes to make a difference for others?
20. If you were to describe your outfit for a fashion magazine, what would you say?

2005-2007
Suggested Topics for the Individual Development 5-minute and Impromptu Presentations

Topics from Legislative Platform	**5-minute prepared speech**
Equal Rights Amendment	
Pay Equity	
Educational Equity & Funding	
Dependent Care	
Reproductive Choice	
Health Care Equity	
Domestic Violence	
Affirmative Action	
Civil Rights	

***Sample* questions for the 2-Minute Impromptu Speech:**

1. It has been said that if you wish to receive, all you have to do is ask. What are some legislative benefits you want to receive within the next 5 years?

2. What would you do to make it possible for all eligible Americans to vote in the next election?

3. You have been given $10,000 to spend on a humanitarian project. What project would you choose and why?

Facilitator

Module 1

BPW/USA:
The Past, Present, and Future

BPW/USA Individual Development Program

Facilitator's Guide

Module One: Welcome, Workshop Overview, BPW: Past, Present, Future

Module One Purpose:

1. Introduce the ID program to participants
2. Manage participant expectations about the content and approach of the program
3. Provide a networking opportunity for participants
4. Provide information about BPW/USA and other BPW entities
5. Have fun in a highly interactive session.

Module One Outcomes:

1. Participants will meet and converse with each other during icebreaking activities.
2. Participants will understand the program structure and content.
3. Participants will learn about BPW legislative initiatives.
4. Participants will understand the variety of ways they can become involved in BPW and how membership will benefit them.

Module 1 References:

1. BPW/USA Policy and Procedures Manual, found at www.bpwusa.org
2. Local organization meeting schedule and Program Calendar for current year.
3. BPW/USA, State, and local marketing materials: brochures, membership applications, etc.
4. BPW/USA ID program materials, including facilitator guide, participant handouts and PowerPoint presentation materials where applicable.
5. A variety of icebreakers to choose from, to tailor the session to the size and makeup of the group.

Additional suggestions:

1. Have a tent place card for each participant. 3x5 or 4x6 index cards make inexpensive tent cards. Regular sheets of paper work well, too, if you have them fold them as though they were putting a letter into a business envelope. Then they can fold up a half inch on one end to hold in the tent.
2. Arrange tables in U-shape if possible, to allow for interaction rather than a lecture-like atmosphere.
3. Create handouts using the PowerPoint Handouts feature. Three slides to a page work well, with ample space for participants to take notes.

Time Requirements:

Welcome	(1 minute)
I-Openers [or the title of your icebreaker]	(8 minutes)
Introductions around the Room/ What Do You Expect?	(10minutes)
Past, Present, and Future of BPW	(30 minutes)
How to become involved	(5 minutes)

Delivering the Workshop:

Welcome

You may wish to have local officers welcome participants. If you are collaborating with a local employer or business, an official from that company may also want to welcome participants. Ensure that welcoming remarks are brief by establishing in advance how many (or few) minutes each speaker has available for his/her greeting, and notifying them of those limits.

Ice Breaker

Any activity that allows participants to move around, interact, and learn more about each other will be appropriate. You can create a Bingo-like sheet where they need to find someone who has a red car, someone who has two sons, someone who is left-handed, someone who plays an instrument, and other unusual characteristics. Be sure they are not too intrusive or personal.

You may want to have participants meet in pairs to interview each other. Give them a question like, "What's the most unusual place you've ever visited?" or, "What's been your most challenging situation with an animal?" or “If you were an animal, what kind of animal would you be, and why?” Make the topic fun and light-hearted, and then ask each person to introduce her/his partner to the group.

Gathering Expectations

Use an easel and flip chart or a white board to write down the expectations that participants have about the program. This is when you will learn what enticed participants to register and come to your program. It will give you information about how well you have described the program in your promotional materials.

If participants give you expectations the program will not be able to deliver, be sure to let them know that at the outset. You may need to say something like, "That is an interesting idea, and we may take that into consideration as we plan future programs. However, at the present time, that is beyond the scope of what we will do in this ID Program."

Be sure to save the pages you use, so you can refer back to them at the end of the program, or even at the end of each module. This reinforces the value of the program and reminds people that they are truly getting what they came for!

BPW History

Mention to participants that the program was developed and created through funding by the BPW/USA Foundation.

Without interaction, this section of the ID Program can be deadly. Do not let it give a bad impression of the rest of your program. You may want to give a pre-session quiz of ten questions or so to test their prior knowledge. Then cover the material and give a post-test. You can offer prizes for winners, most improved, etc.

For your own awareness, read about the history of BPW in the policy and procedures manual prior to presenting this module. It is more extensive than what is included here and gives a real flavor for the initiative and the flow of creating a new national organization.

Include history of your own local organization, or multiple locals if collaborating.

BPW Present

Give participants as much information about your local organization(s) as you possibly can. You want them to be able to make informed decisions about joining BPW, if they are not already members. You also want them to be as committed as possible once they join, so accurate impressions are important.

Closing Activity

Use this time to tie up what you have spent your time on in this module. Perhaps a brief summary from the facilitator, or an around the room to see what people learned or were reminded of would work well. Thank them for their participation and let them know when the next session is scheduled.

INDIVIDUAL DEVELOPMENT PROGRAM

Objectives

1. To develop leadership skills.

2. To hone skills in communication, networking, negotiation, interviewing and dealing with the media.

3. To heighten awareness of the issues people face in achieving goals.

4. To develop strategies for personal, professional and community advancement and change.

INDIVIDUAL
DEVELOPMENT
PROGRAM

Ten Commandments of Effective Seminar Participation

DO

- ✓ Ask a question when you have one.
- ✓ Feel free to share examples, anecdotes, and illustrations involving key concepts.
- ✓ Do request examples for points that seem vague.
- ✓ Think of ways you can pass on the same ideas when you return to work.
- ✓ Be skeptical – you do not have to buy everything you hear today.

DON'T

- ✓ Try to stump the trainer with impossible questions. The trainer admits to not knowing everything.
- ✓ Close your mind to possibilities or concepts.
- ✓ Assume that all topics will meet your needs exactly. (You have to adapt some concepts to your own situation!)
- ✓ Take such detailed notes that you lose track of what is being said. There will be plenty of handouts with plenty of information.

I-Openers

Check off **five** statements and complete them in reference to the work you do. Then review your answers and decide what is most interesting about you. Write that thought at the end of this worksheet. Share the information with the person(s) seated at your table.

I gather__ _____.

I break _____

I question_____.

I define _____.

I establish _____.

I hunt for _____.

I've learned _____.

I organize _____..

I nourish _____.

I produce _____.

I juggle _____.

I satisfy _____.

I make _____.

I finalize _____.

I treat _____.

The most interesting thing about me is _____.

And, the most interesting thing about the others at your table:

The most interesting thing about _____ is _____.

The most interesting thing about _____ is _____.

The most interesting thing about _____ is _____.

The most interesting thing about _____ is _____.

The most interesting thing about _____ is _____.

When you have shared the information with those seated at your table, you may be asked to stand and share information about the person seated on your right or left to the class

BPW/USA History

In June 1919, several like-minded women's groups from around the country gathered in St. Louis and the result was the formation of the National Federation of Business & Professional Women's Clubs. BPW/USA, as it is known today, promotes equity for all women in the workplace through advocacy, education, and information. With 23,000 members in 1,600 organizations represented in every congressional district in the country, BPW/USA includes among its members women and men of every age, race, religion, political party, and socioeconomic background.

BPW/USA monitors federal legislation that affects workingwomen and educates its members to become involved in public policy development in their own workplace, and at the local, state, and federal levels. BPW was one of the original backers of the child labor laws, and, among the first of the women's organizations to endorse the Equal Rights Amendment in 1937. BPW/USA has been a leader in passing much of the nation's landmark civil and women's rights legislation including: the Women's Business Ownership Act; the Child Care Act of 1991; the Civil Rights Act of 1964; the Equal Pay Act; Title IX; and the Equal Opportunity Act.

BPW/USA annually releases its national legislative platform, which includes three planks: Economic Equity, Health, and Civil Rights.

Supported by voluntary contributions from members, BPW's political action committee, the BPW/PAC, provides contributions and endorsements to women and pro-women candidates who support BPW's legislative priorities.

The BPW Foundation, established in 1956, collects, conducts, and analyzes research on issues affecting women in the workplace while providing financial assistance for women to further their education. The foundation raises money to educate women who need additional skills to advance in their careers or re-enter the job market, and for researching and disseminating information about women in the work force.

The BPW plan encompasses three aspects to increase working women's total effectiveness:

- ✓ Professionally - by accessing the tools needed for career advancement and entrepreneurial success,
- ✓ Politically - by supporting working women's issues through BPW's nationwide network and through political action, and
- ✓ Personally - by developing skills through BPW's Individual Development Program, the Young Careerist Program.

The Individual Development Program (IDP) was established in 1968 and has gone through many enhancements through out the years. Today, the IDP Leadership Development course is designed to help women and men improve their personal and professional skills.

PowerPoint Slides Script

(Slide 1) The Past, Present, and Future

BPW – it stands for Business and Professional Women. We're here to introduce you to our organization, its mission and vision, and our signature program – IDP Leadership Development!

(Slide 2) Today's Goals

I'd like to begin by introducing myself as your facilitator for this module. I am _____, a member of the _____ BPW, located in _____.
I would like to welcome you to our IDP Leadership Course. This program has been revised and the development and creation of it has been funded by the BPW/USA Women's Foundation. This program has been developing over the past 30 years and we have discovered some things that work well in that time. Here are the goals we intend to cover during our session today.

- We'll introduce the IDP Leadership Course and tell you what you can expect to learn as we cover the 14 modules.
- We'll talk about your expectations of this course and how we can help achieve those.
- We'll provide a networking opportunity to allow you to get to know your course mates.
- And, we'll have some fun!

(Slide 3 Objectives of IDP

Here are some objectives we'd like to achieve with you during this course.

1. To develop leadership skills.
2. To hone skills in communication, networking, negotiation, interviewing and dealing with the media.
3. To heighten awareness of the issues people face in achieving goals.
4. To develop strategies for personal, professional and community advancement and change.

(Slide 4) DO…

This is our version of the 10 Commandments – at least for making this program a success for you! Let's review those now. [Review the DO list]

1. Ask a question when you have one.
2. Feel free to share examples, anecdotes, and illustrations involving key concepts.
3. Do request examples for points that seem vague.
4. Think of ways you can pass on the same ideas when you return to work.
5. Be skeptical – you do not have to buy everything you hear today.

(Slide 5) DON'T…

[Review the DON'T list]

1. Try to stump the facilitator with impossible questions. I admit to not knowing everything!
2. Close your mind to possibilities or concepts.
3. Assume that all topics will meet your needs exactly. You may have to adapt what you learn here to your own environment.
4. Take such detailed notes that you lose track of what is being said. There will be plenty of handouts with plenty of information.
5. Have fun while learning. That's the most important part, right?

(Slide 6) Getting to Know You!

Now, let's have some fun with a group ice-breaker (that's another word for networking). Activity A is entitled I-Openers. Read through the statements and check five (5) statements that are relevant to the things you do at work. After you have chosen the five statements, think about them and write a statement that describes the most interesting thing about you.
When you have completed that part, share the information with the people seated near you. We'll take 8 minutes to do this.

(Slide 7) Introduction Rules

Now that you've met the people close to you, let's meet everyone in the room!
Look at the introduction rules. When it is your turn to speak, please stand (it helps us to project our voices from the diaphragm). Then, state your name, tell us what you expect to learn from this course, and tell us what you do. If you are working, tell us who you work for.
I'll jot your expectations of this course on the (flipchart/board).
Let's begin with (appoint the first person).

(Slide 8) BPW/USA Mission

I would be remiss if I didn't take this opportunity to share information about the organization that put this program together.
BPW/USA membership is open to both women and men although our mission statement reflects our commitment to women's issues. BPW/USA's commitment to America's workingwomen is reflected in our Signature Events (which we will discuss a bit later), programs and work that benefit local communities, aid in the personal and professional development of women, and raise awareness of issues affecting workingwomen among business leaders and legislators.

(Slide 9) BPW/USA History

Business and Professional Women/USA was founded on July 15, 1919. Throughout the years, three major issues shaped BPW's legislative agenda: the elimination of sex discrimination in employment, the principle of equal pay for equal work, and the need for a comprehensive equal rights movement.
At the advent of WWII, BPW developed a classification system for women with specialized skills critical to the effort and supported the formation of women's branches of the Armed Forces. While wage discrimination has existed in the U.S. since women and minorities first entered the paid workforce, its prevalence was not

felt until the massive influx of women sought work during WWII.
Following the war, the Women's Pay Act of 1945, the first ever legislation to require equal pay, was introduced in the U.S. Congress.
The establishment of "Status of Women" commissions in the U.S. in 1963 was due largely to BPW efforts. President Kennedy recognized BPW's leading role in securing passage of the Equal Pay Act by giving BPW's National President the first pen he used when signing the Act into law.
The first National Legislative Conference, held in 1963 in Washington, D.C. later developed into BPW's current Policy and Action conference, where members lobby Congress and the Administration annually on BPW's legislative issues.

(Slide 10) History, continued

BPW worked to eliminate discrimination based on sex and marital status in credit, capital, and insurance practices. A legislative strategy was developed to achieve the Congressional votes needed and the BPW Political Action Committee (BPW/PAC) was formed in 1979 to endorse federal candidates who favor pro-women issues.
BPW tackled "comparable worth" by calling for newspapers to stop the occupational segregation in classified ads. This practice used to cluster women in a few restricted occupations of low-paying, dead-end jobs. Numerous state and municipal governments revamped their pay scales, recognizing dissimilar jobs may not be identical, but may be comprised of tasks, educational requirements, experience and other characteristics that are equivalent or comparable.
Continuing to focus on workplace issues for women and families, BPW lobbied Congress for nearly a decade until it saw passage of the Family and Medical Leave Act in 1993.
Discussions and legislative efforts continue on "comparable worth", workplace equity, sexual harassment, the glass ceiling, health care reform, dependent care, tort reform, increasing the minimum wage, lifetime economic security and pay equity.
From birth through death, BPW is focusing on the issues that impact women and their families in the US, and abroad.
BPW is host of a number of Signature Events.
Each April, a date is set to host nationwide "Equal Pay Day" events. The date corresponds to the time of the new year when the average woman's salary catches up to the salary earned by her male counterpart through December 31 of the previous year. In 2004, pay equity figures showed that women earned 76 cents to each dollar their male counterpart earned for the same job. Minorities earned less.
National Business Women's Week is celebrated each year in October. It focuses attention on the contributions of women in business.
There is a BPW/USA Women's Foundation offering career advancement scholarships to women 25 years or older. We have the Virginia Allen Young Careerist Program that helps young women and men, 21-35, hone their professional skills.
You are participating in the IDP Leadership Development course to help you build the skills that will enable you to take the next important step in your career.
We host WOMEN*omics* forums that address issues that affect workingwomen in order to gain a better understanding of what they need and want gain work-life balance.

(Slide 11) Who We Are

BPW members are working women, and yes, some men from every job skill and classification who are seeking to advance their career goals, earn higher salaries, build stronger business, achieve pay equity and equal opportunities, and establish rewarding careers. As all women gain earning power and spending power, they are reshaping U.S. consumer trends. And, BPW members are on the leading edge of that trend.

(Slide 12) Membership Opportunities

Wow! Membership does have its rewards with BPW. One of the most valuable benefits of membership is the opportunity to meet other professional women and men at Signature Events, Conferences, and Programs sponsored by BPW/USA and the BPW Foundation. Whether you're looking to exchange ideas, build business leads, find peers in your field, or learn how to lobby, BPW/USA connections have proven invaluable for BPW members.

The joint voices of BPW/USA members are heard on Capitol Hill and by the Administration on issues of importance to working women and men. Through individual member contact or by our staff efforts, BPW/USA is recognized as an important play when issues of workplace equity and work-life balance are being considered.

The BPW Career Center allows members to post resumes, view job listing, create a job agent that conveniently emails jobs that match your search directly to you, create an account to help you manage job searches, resumes, cover letters and much more!

Link to the Home Buyer's Assistance site – an innovative, consumer-friendly way to learn about purchasing a home or refinancing an existing home mortgage. It's "powered" by Fannie Mae, the nation's largest provider of funds to lenders for home financing.

Looking for BPW items or possibly items for your own business use? Check out the BPW store with our partner, Carlson Craft. Order business cards, stationery, invitations, holiday cards and more at a 15% discount on every order.

Globalnet GNP has website services that benefit your local and state BPW organization. For you techie types: they have 1000 megabytes of web space, up to 500 email accounts, web control panel, detailed visitor statistics, 24/7 technical support, database administrator, and many other features that you may need in your business.

Travel with your business? BPW members can receive a 20% discount on corporate rates by calling 1-800-WYNDHAM. Need a car? Your BPW membership entitles you to up to 10% off special daily, weekend, weekly and monthly rates with Avis.

All this, and the benefits of belonging to a great organization! But wait, I didn't tell you about the comprehensive member email system, the quarterly magazine, the legislative hotline, or the Headquarter News. How can you turn down a great organization like this?

[If creating a presentation for your local or state organization, insert your specific information here]

(Slide 13) Membership Opportunities

I hope you have had fun learning about our organization. We have membership

materials available for you today. You may want to request that your employer support your membership, or you may choose to join on your own. I hope the material we have covered today will be helpful either way.
All leaders need to be involved in their communities and belong to an organization that offers networking and educational opportunities. We hope BPW is that group for you, but if not, seek an organization that fits your needs and career objectives.

Slide 13 What is next?

Facilitator

Module 2

I'm not confused, I understand you!

Understanding peers and employees' behavioral styles – managing for improved performance.

INDIVIDUAL
DEVELOPMENT
PROGRAM

BPW/USA Individual Development Program
Facilitator's Guide
Module Two: Stereotypes, Activity, DISC Model Overview

Module 2 Purpose:

1. Introduce the impact of stereotyping.
2. Provide activity to raise awareness of personal behavioral style.
3. Provide DISC Model of Human Behavior overview
4. Have fun while learning about self and others.

Module Two Outcomes:

1. Participants will learn to identify stereotyping and its impact on behavior.
2. Participants will learn about the traits of the four behaviors of the DISC Model of Human Behavior.
3. Participants will learn to recognize primary behavioral traits in self and others.
4. Participants will understand the differences in communication styles.

Module Two References:

1. Managing for Success, **http://www.managingforsuccess.org/ttidisc/disc.php**
2. Target Training International **http://www.discsupersite.com/shop/DISCPersonalProfileSystem2800Series**.
3. Who Do You Think You Are, Anyway? Rohm, Robert A, Ph.D., and Carey, E. Chris, Personality Insights, Inc. ISBN 0-9641080-3-8
4. Understanding How Others Misunderstand You: A Unique and Proven Plan for Strengthening Personal Relationships. Voges, Ken and Braund, Ron. Moody Press. ISBN 0-8024-1106-1
5. What Makes You Tick, What Ticks You Off. Carbonell, Mels, Ph.D. Uniquely You Resources. ISBN 0-9627245-2-1
6. Why Do I Do What I Do? Dunstone, Virginia, M.S. Gate Publishing. ISBN 0-9638282-0-7
7. Personality Puzzle. Littauer, Florence and Littauer, Marita. Baker Book House Company. ISBN 0800716760
8. The Big Book of Personality Tests. Didato, Salvatore V., Ph.D. Black Dog & Leventhal Publishers. ISBN 1-57912-281-7

Module 2 Time:

1. Stereotype Discussion	15 minutes
2. Personality Quiz	10-15 minutes
3. DISC Model Overview	30 minutes

Closing Activity

Use this time to tie up what you have spent your time on in this module. . Thank them for their participation.

- Ask the participants to call out words that mean “stereotype” to them. Use a dry erase whiteboard, flipchart, or an overhead projector to record the responses. Have the participants discuss how the words make them feel.
- Ask participants if they have felt “stereotyped” during their life.
- Ask participants what “stereotypes” they hold or believe and why.

Understanding a person’s culture, heritage, and religion can be a first step in eliminating a stereotype. Many practices, mannerisms, speech patterns, and even food choices stem from a person’s culture, heritage, or religion. We tend to “stereotype” those who are not like us.

Discuss the following statement:

Stereotypes affect our **expectations** of *those* people and affect our **behavior** toward *those* people.

When we “classify or type” people based on information that is entrenched in our minds from our parents, teachers, friends, or personal experiences, we begin to hold expectations of “how” they should act or be. These impressions have an influence on the behavior we display toward them.

Over time, stereotyped people begin to internalize the way others see and treat them. They begin to become the “stereotype” by behaving to the expectations.

What are some common stereotypes that we hear regularly? (List)
(The following are some common stereotypes…participants will have others)

- Women are moody, weak, overly emotional, sensitive
- Women take things personally
- Women are sex objects
- Women are better nurturers
- Women are the “weaker” sex
- Men are superficial
- Men and boys like their “toys”

Behaviors and personality styles tend to be things that are “classified” or “typed.” We have all worked with someone who “hears” or “sees” things differently than we do. We may refer to them as “odd” or “different” because they are not *just like us*.

Eleanor Roosevelt is quoted as saying, “If we were all alike, most of us would not be needed.” We are all important and we are all needed. Understanding the differences between people is the key to effective communication and working relationships.

Do you know your primary behavioral style? Do you know and understand how you relate to others? Do you understand the value of having a team, department, or business that is blended with varying behavioral styles?

Activity A, Module 2

Does Your Job Satisfy Your Personality Needs?

Focus on your thinking style at work. For each of the ten items below, choose two answers from among the lettered choices. Put the number **5** next to your first letter choice for each item, and the number **1** next to your second letter choice.

Question	**A**		**B**		**C**		**D**	
I enjoy jobs that:	Are technical and refined		Involve People		Allow independent action		Have much variety	
My main objective is to:	Be the best in my field		Feel secure in my job		Get recognition for my work		Have a status position	
When faced with a problem, I:	Apply careful analysis		Rely on my feelings		Look for creative paths		Rely on proven approaches	
When uncertain about what I do, I:	Search for facts		Delay making a decision		Explore a possible compromise		Rely on hunches and intuition	
Whenever possible, I avoid:	Incomplete work		Conflict with others		Using numbers or formulas		Long debates	
In social settings I generally:	Think about what is being said		Listen to conversations		Participate in what is going on		Speak with others	
I am good at remembering:	Places where I met people		People's personalities		People's names		People's faces	
Others consider me:	Disciplined and precise		Supportive and compassionate		Imaginative and creative		Aggressive and domineering	
I dislike:	Boring work		Being rejected		Following rules		Losing control of others	
I am especially good at:	Solving difficult problems		Interacting with others		Seeing many possibilities		Recalling dates and facts	
Total each column								

Tally up the number values you've assigned to each letter. The two letters that have the highest scores correspond to your two major thinking styles at work…which you'll learn about now.

A = C **B = S** **C = I** **D = D**

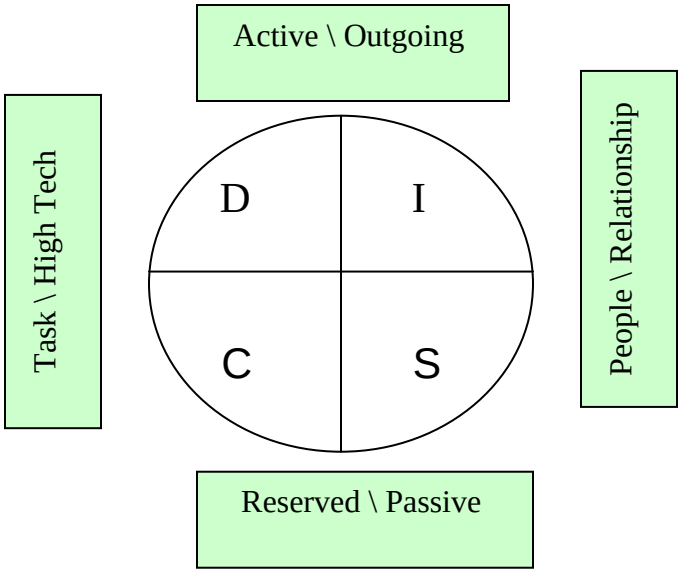
Handout B, Module 2

DISC Model of Human Behavior

- ✓ The DISC Model of Human Behavior is a blend of a person's natural **motor** (the speed you do things) and **compass** (the focus or direction you prefer) functions.

- ✓ Your *Active and Outgoing* or *Reserved and Passive* tendencies are your **Motor** functions.

- ✓ Your *Task or High Tech* or *People and Relationship* tendencies are your **Compass** functions.



If you feel you are *Active/Outgoing* + *Task-Oriented* = **D** behavioral style
If you feel you are *Active/Outgoing* + *People-Oriented* = **I** behavioral style
If you feel you are *Reserved/Passive* + *People-Oriented* = **S** behavioral style
If you feel you are *Reserved/Passive* + *Task-Oriented* = **C** behavioral style

- ✓ **Everyone is a unique blend of all four behavioral styles to a greater or lesser degree, with one style standing out as your primary (driving) style.**

What two letters had the most points on the "Does Your Job Satisfy Your Personality Needs?" test? Those styles represent your primary (driving) styles.

There is no "right" or "wrong" behavioral style. Our challenge is to understand our behavioral style and learn to adapt it to fit each situation.

Handout C, Module 2

Overview of DISC Model

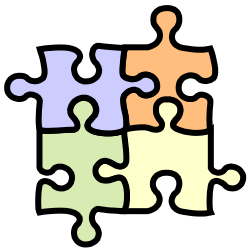
D behavioral styles tend to be:
Dominant, Dynamic, Diligent, Determined, Decisive, and Doer; but can also be seen as Dictatorial, Dogmatic, Dreamer, Direct, Demanding, Defiant by other behavioral styles

I behavioral styles tend to be:
Inspirational, Influencing, Interested in People, Impressive, Interesting, and Imaginative; but can also be seen as Impressionable, Important, Interchangeable, Inducing, Impulsive, Illogical by other behavioral styles

S behavioral styles tend to be:
Steady, Stable, Secure, Supportive, Servant, and Sweet; but can also be seen as Submissive, Shy, Status Quo, Sentimental, Sameness, Sucker by other behavioral styles

C behavioral styles tend to be:
Competent, Cognitive, Careful, Conscientious, Critical Thinking, and Compliance Wanting; but can also be seen as Cautious, Calculating, Correct, Conformist, Consistent, Cold by other behavioral styles

No one is "stuck" with his/her behavioral style.
You have all four styles within yourself. Learn to adapt to each situation.



D I S C

PowerPoint Slides Script

(Slide 0) Module 2

The purpose of this session is to 1) introduce you to the DISC Model of Human Behavior, and 2) equip you with information about behavioral styles that will help you better communicate with the people in your life.
In other words, today we'll help you DISCover who ***you*** are and perhaps answer some questions about why you do the things you do. We'll also cover how to better communicate with the people you live with, work with, and socialize with!
In the next few minutes we will discover the "answer key" – the system, the reason, the sense – to reading patterns of people, so you will be more productive, less stressed, and enjoy what you're doing in life!

(Slide 1) Module 2 Goals

Read from slide

- ☐ Introduce the impact of stereotyping
- ☐ Provide activity to raise awareness of personal behavioral style
- ☐ Provide DISC Model of Human Behavior
- ☐ Have fun while learning about self and others

(Slide 2) Everyone has an ENGINE..

The "circle of Human Behavior" is divided into two segments. The first segment shows our internal engine function, the force within us that determines the speed by which we move through life. We're either "Active or Outgoing" (always on the GO) or "Passive and Reserved" (taking things one step at a time).

(Slide 3) Outgoing / Reserved

Those of you who felt your engine was revving fast most of the time tend to be:

- ✓ Positive about life,
- ✓ enthusiastic about everything,
- ✓ energetic – always on the go,
- ✓ involved in things and projects,
- ✓ fast-paced, and
- ✓ optimistic.

Those who felt their engine was running a bit slower tend to:

- ✓ live life at a slower pace,
- ✓ show caution and concern for things and others,
- ✓ be a bit hesitant when making decisions,
- ✓ be critical thinkers, and
- ✓ be very observant.

(Slide 4) Everyone has a COMPASS…

The second segment of the "circle of human behavior" portrays our internal COMPASS. It is what directs our attention, desires, and focus through life. We are

either “task or high tech” in our interests or we have a natural tendency to “people persons.”

(Slide 5) People-Oriented / Task-Oriented

Those of you who felt you were people-oriented tend to:

- ✓ care about relationships and others,
- ✓ share what you have and know,
- ✓ be very emotional over things,
- ✓ like feeling passionately and
- ✓ love friendships.

On the other side of the compass are the task-oriented people. You like:

- ✓ form and function in your life – order,
- ✓ developing programs,
- ✓ making plans,
- ✓ seeing projects through to the end, and
- ✓ to know there is a process.

(Slide 6) DISC Model of Human Behavior

When we put the two segments of the circle of human behavior together, we get the DISC Model.
The “D” falls in the quadrant that is both Outgoing and Task-Oriented.
The “I” falls into the Outgoing and People-oriented.
The “S” falls into the Reserved and People-Oriented.
The “C” falls into the Reserved and Task-Oriented group.
Question: If you had to choose between the two, how many in the audience would say you are more Active and Outgoing? (Raise hands) How many would say you are more “Passive and Reserved?” (Raise hands). How many think you are task-oriented? (raise hands) And, how many feel you are “people-oriented?”
I want to point out that these styles are not “right” or “wrong” – just different. No one is purely a “D”, “I”, “S”, or “C”.
We are a blend of all 4 parts – usually with one as a primary drive, the others styles are supporting and add to the uniqueness of your behavior!

(Slide7) PQ – Personality Quotient

We have all heard of “I.Q. (intelligence quotient). Now you can learn about P.Q. -- Personality Quotient!
Understanding your behavioral style is an important step to understanding the “why” in what you do. Your behavioral style is your drive, your motivator.
Once you understand your style, you can begin to pick out behavioral drives in others. If you can learn to “meet others where they are”, you can build and enhance your personal relationships, work relationships, and social relationships!

(Slide 8) High “D” Traits

“D” style people tend to be emphatic. It represents the way they approach life – take charge and do it! You’ll notice that each style has a list of descriptor words that match the letter. D styles are drivers and doers; they like to get things done and be in control. Their focus is to get the job done and overcome opposition to achieve their

goals. Their outlook on life is to lead or to be in charge. They have an overwhelming strength of mind, seldom take no for an answer. No to them means "try again later". They can be to the point; they say it & forget it. They get things done – their way.
A "D" is quick to make a decision – they see outcomes quickly.
They make the world go around – movers and shakers. Visionaries – see great ideas and plans. They persevere when others fail.
"D" types like activity, bigness, competition, hard work, major productions, to fight, and to be in charge. They can be critical of poorly performed tasks, run roughshod over people, are hard to please, very self confident. They don't often give compliments believing that approval and encouragement lead to complacency.

(Slide 9) High "I" Traits

The I-words here describe the outgoing & people-oriented "I" style. They love to be the center of attention and recognition. They make you feel great, help you feel the mountain-top experience.
They can sell snowballs to snowmen! Everything they say is better than reality.
They make things happen, are great "cause agents" or stimulators.
Can lighten up a room, they can overwhelm you; they can be flashy!
An "I" is fun to watch, knows a lot of people, tells a lot of stories, laughs, and will imitate others.
They are easily influenced, followers who set trends/fads, flamboyant.
They hate little jobs or small tasks; they like to start at the top. They like titles and status.
"I's" establish relationships easily, a stranger is only a friend they haven't met.
They can be the social butterfly in the office – they see a part of their job description (whether it is there or not) to be in the "know" about other's lives, be the first to suggest a party (for just about anything), and will usually be the ones to start the "fun" at any gathering.
The "I" likes exposure to people, lots of activity, making people happy, selling, short-term projects, and have lots of friends. They are prone to exaggerate, and wrongly believe that talking and doing are synonymous!

(Slide 10) High "S" Traits

Ah, the "S". Where would the world be without these people? These are the practical people – keep it simple, stay inside the lines, don't fix it if it isn't broke!
They bring balance to the people equation because they can "see" both sides. They make excellent mediators.
They like things to remain constant – like doing things one at a time, in order, very sequential. Can set watch by them, same route each day, same time…
"S's" will be there for you – and want you there for them. Great secret keepers, great helpers – their hardest word to say is, "NO." They look for ways to cooperate and help.
They are so special – not pushy or bossy – they make you feel at home.
An "S" takes orders well, they like to please.
They prefer to sit back & watch, never raise hands to answer a question.
No change – no conflict!
An "S" will save everything – (just check out their attics and closets).
Like everything just as it is – has to do with their hearts – not their heads.

They like peace, friendly environments, teamwork, finishing a job. They are loyal friends, reluctant decision makers, and seldom in a hurry.

(Slide 11) High "C" Traits

The "C" style wants to know the "why" behind everything they do. Their focus is to make sure things are done in a correct manner. They always like to know what is going on, but prefer to observe rather than be in the midst of things. They know that they know that they know what they know.
Their thinking skills are awesome!
They always look before they leap! "Measure twice, cut once," is their motto.
They have been known to proofread *Xerox copies*.
They think in terms of income – bottom line. "If your outgo exceeds your income, your upkeep will be your downfall."
They analyze situations, can see behind the scenes.
They follow instructions and want everyone else to, as well.
A "C" can stay on track long after others have given up.
They enjoy being right and they get along with the tried and proven- change for change-sake is not comfortable to them.
They can be non-communicative, rational, logical…
They have a high capacity for intellectual achievement. They don't make mistakes – they have lots of questions, enjoy details, and tend to irritate people! Perfection to the point of being impossible to satisfy.

(Slide 12) What is your personality quotient?

Remember, no one is purely a "D", "I", "S", or "C." Each of us is a blend of these four styles, to a greater or lesser degree.
Whatever your strongest trait is, your complementary trait is (probably) adjacent to it.
If you are a "D", you are probably a "D with I" or a "D with C" In our circle of human behavior, remember the "I" and "C" were adjacent to the "D". The "S" traits will probably be your weakest and will require more focus to understand, cultivate and display.
If your primary trait is an "I", your complementary traits are probably "I with D" or "I with S." Your weakest trait will probably be a "C".
If you are an "S" your complementary traits will probably be "S with I" or "S with C." The weakest trait will probably be a "D" – and it will require more focus to understand, cultivate and display this trait.
If you are a "C", you are probably a "C with D" or "C with S" and the "I" will the trait that is most difficult for you to identify with.

(Slide 13) DISC Graph

Your goal is to learn to adjust your style to have some of all these characteristics at the appropriate time. Knowing when to "raise" your "D" or lower your "I" is a skill. More than just having fun, "I" can inspire where "D" may bully, "S" might shrink back, and "C" might fume. Learn to balance your 4 behavioral styles. You have them all within – to a greater or lesser degree.

Are there any questions?

Facilitator

Module 3

If I were to ask you…

Reading people, listening skills, and knowing how to recruit the right person for the task!

INDIVIDUAL
DEVELOPMENT
PROGRAM

BPW/USA Individual Development Program
Facilitator's Guide
Module Three: Learning to adjust behavior, Listening to what others say, Body Language, Appearance and Dress.

Module 3 Purpose:

1. Build on DISC model of human behavior styles to create teams.
2. Understand other communication styles
3. Provide basis for understanding perceptions and receptions of others
4. Discuss importance of understanding body language
5. Discuss appearance and dress

Module 3 Outcomes:

1. Participants will learn about adjusting behaviors to meet other's needs.
2. Participants will understand the need to listen to others and determine responses.
3. Participants will understand the need to watch for body language cues.
4. Participants will learn about the importance of appearance and dress for success.
5. Participants will have fun while learning how to work as a team.

Module 3 References:

1. America's Competitive Secret: Women Managers. Rosener, Judy B. Oxford University Press. ISBN 0195119142
2. Body Language. Fast, Julius. Pocket Books. ISBN 0671673254
3. Gender in the Workplace: A Case Study Approach. DeLoot, Jacqueline. Sage Publications. ISBN 076191479X
4. The Sound of Your Voice. Fleming, Carol. Simon & Schuster Audio. ISBN 0671796658
5. Women and Men in Management, 3rd Edition. Graves, Laura M. and Powell, Gary N. Sage Publications. ISBN 0761921966

Module 3 Time

Opening, "What I learned about myself in Module 2 was…"	1 minute per participant
Discussion, Learn to "Adjust" Your Behavior	10 minutes
Activity, What Behavioral Style would you hire…	10 minutes
Power Point, Reading Behavioral Styles	15 minutes
Discussion, Body Language	10 minutes
Discussion, Appearance and Dress	10 minutes
Activity, The Human Knot	5 minutes

Closing:
Thank participants for coming.

Additional suggestions:

Use a white or black board to "list" participant suggestions, other than those listed, for body language and appearance and dress. Have a volunteer write the suggestions.

Learn To "Adjust" Your Behavior

Half the world is composed of people who have something to say and can't, and the other half who have nothing to say and keep on saying it. –Robert Frost

We can adjust. We can avoid labels and say, "I need to develop more of these qualities in my life – and now I know how to do that."

Knowing when to "*raise* your D" or *lower* your D" is a skill. When should you be in charge and when should you follow the leadership of others?

There is skill in exercising "I" characteristics. More than just having fun, "I's" can inspire where "D's" might bully, "S's" might shrink back, and "C's" might fume – which is the best way to enlist others in your cause?

Balance is important in utilizing "S" traits. Other types can learn how to help and support when it is not convenient, while "S's" may need to learn a balance in saying, "No, I am not going to get involved this time."

We can learn the importance of "raising our C" and getting quality information and details, while "C's" themselves can "lower" theirs at times, to be more trusting and less critical.

The real goal is learning to adjust your style to have some of each of the DISC characteristics at appropriate times. Learn to communicate to the other person's behavioral style.

1. Understand the communicator. What behavioral style is he/she communicating [from]? Try to "think" as they do to avoid misconceptions (distortion).
2. Credibility/reputation compels attention and respect.
3. Use words and phrases that are understandable (clarity).
4. Be aware of cultural differences.

Discussion:

What behavioral style would you hire for the following positions and why?

- Symphony conductor
- Jewelry shop owner
- Air Force jet-engine mechanic
- Teacher
- Massage Therapist
- Tax accountant
- Novelist
- Event Planner

Handout B, Module 3

Reading Behavioral Styles

Each personality style has different "hot buttons." Listen to what they might say:

D

- I like to be in charge.
- I like situations that change a lot.
- When I work, I work hard.
- When I play, I play hard.
- I like to have power.
- I am not afraid to take a reasonable risk.
- I like to make decisions.
- I do not like the same routine.
- I do not like doing slow or repetitive tasks.
- I like new challenges.
- I like to solve problems.
- I like to be in authority.

I

- I like many friends.
- I like acceptance.
- I like other people to handle the details.
- I like a friendly environment.
- I like encouragement.
- I prefer short projects to long ones.
- It is important to me to be popular.
- I do not like many rules.
- I like to "go" and "do."
- I dislike too many regulations.
- I like public recognition.
- I am easily distracted.

S

- I like a stable lifestyle.
- I like to please others.
- I enjoy people enjoying life.
- I do not like starting new projects.
- It makes me happy to see others happy.
- I do not work well with aggressive people.
- I like to feel appreciated.
- I like routine procedures.
- I do not like "daring" events.
- I like to feel secure.
- I enjoy finishing a task.
- I do not mind being told what to do.

C

- I like quality.
- I do not like a lot of silliness.
- I like detailed tasks.
- I like logical information.
- I like charts and graphs.
- I like to find creative solutions.
- I like to be reassured.
- I like to be organized.
- I have high standards for others and myself.
- I tend to be a perfectionist.
- I like to be commended for doing good work.
- I like to know and do things step-by-step.
-

Each style has a "comfort zone": "I like an environment where…"

D

- I can be in charge of others and myself.
- I have freedom to set my own priorities and pace.
- I have opportunities for advancement.
- I can look good.
- There are a lot of different activities and challenges.
- I can see that I am growing.

I

- There are people to talk [to].
- Good work is recognized and praised.
- There is opportunity to influence others.
- Everyone has a good attitude.
- People are accepted.
- There are positive working conditions.
- I am free from a lot of details and repetitive tasks.

C

- There is a specific plan.
- I do not have someone working over my shoulder.
- There is no "hurried" activity.
- There are exact roles and job descriptions.
- Expectations are clear.
- Changes are made slowly and carefully.
- I can be rewarded for new ideas.

S

- I can identify with a group.
- Sincere appreciation is shown.
- There is a regular routine of events.
- I do not feel rushed and under pressure.
- There is not much change.
- We specialize in a few things.
- I know what and where my boundaries are.

Body Language

- ✓ Stand tall – a dominant posture says you are in charge.
- ✓ Crossed arms can signify hostility if accompanied by flared nostrils or tensed arms and chest.
- ✓ Leaning back while crossing arms may be a sign of contemplation (or a nonverbal sign that the room is too cold).
- ✓ Failure to make eye contact may mean the person is lying, or may also mean the individual cannot stand scrutiny.
- ✓ Looking up at the ceiling while rapidly blinking eyes. The person is seriously considering your proposal or the matter at hand.
- ✓ Taking a deep breath and sighing. The person has gotten past the stress of the meeting and can now relax.
- ✓ Forced or crooked smile. Genuine smiles are nearly always symmetrical. Phony ones tend to be lopsided.
- ✓ An over long smile, frown, or look of disbelief. Authentic expressions last only four or five seconds.
- ✓ Sitting forward in a seat or leaning toward you represents interest in what you are saying.
- ✓ Avoid standard “gestures” in a culturally diverse audience. The “thumbs up” gesture may mean “good” or “all right” in the U.S., but in Greece and other Mediterranean areas, it mean “up yours.”
- ✓ The “A-okay” sign (thumb held to forefinger to form an O”) means, “Everything is fine” in the U.S., but in France and Belgium it means, “You’re worth zero.” In Greece and Turkey, it is an invitation for sex, or a vulgar insult.
- ✓ In some Asian cultures, it is considered a dishonor for a woman to look at a man when he speaks to her.
- ✓ Signs of happiness or satisfaction include smiling, relaxed posture, serene facial expression, unrestrained movement.
- ✓ Signs of unhappiness or dissatisfaction: frowning, tense posture, pursed lips, furrowed brow, flared nostrils, rigid body, lack of movement, or nervous movement.
- ✓ Signs of agreement include nodding, winking, smiling, serene eye contact.
- ✓ Signs of disagreement: shaking the head side-to-side, frowning, crossing the arms, pursing the lips.
- ✓ Signs of disinterest or distraction: looking away, hunched shoulders, arms folded on chest with a placid face, vacant eyes, sighing.
- ✓ A person who has a leader status will often take a central spot in meetings, speak without seeking permission, exhibit a dominant behavior, touch others with pats on the shoulder or back, initiate and terminate most transactions.
- ✓ A person who perceives a subordinate status may take a peripheral spot in meetings, seek permission before speaking, show agreement of what the leader may say, and follow the lead of the person in charge.
- ✓ Dress as well as or better than your audience. A professional appearance confers status. It also makes you feel good about yourself; and that comes through your body language.

Some people transmit messages through body language for which they are unaware. For example, a person may be intently listening or thinking and develop a "scowl" or "intense" look on their face that others read as "angry or upset." Someone may cross their arms across their chest because it is chilly in the room, but others may perceive that as "closing them off" from the conversation.

Persons with low back discomfort will appear to fidget in their chair in an attempt to find a comfortable position; others may mistake that for boredom or lack of interest in the conversation.

A man may nod his head during a conversation to show agreement. A woman usually nods her head to indicate that she *hears* what you are saying. A man assumes a woman agrees with him when she is actually just listening.

Women tilt their heads when they talk. In Women as Managers, it states that a tilted head is the sign of a good listener and women are excellent listeners. Men usually keep their heads up, chins forward, and not tilted, and relax their shoulders – thus coming across with authority and power.

Men make 12 major movements. Women make 27 (adjusting clothing, jewelry, or hair). The more movements you make in business the less powerful you seem.

Women's voices tend to rise at the end of sentences, making it sound as though they are asking a question rather than making a statement. The lower your voice is, the more credible it sounds.

Men take up physical space. Powerful people "spread" out by taking up the space around them. They push their chair away from the table and get comfortable, where women tend to pull up to the table. Men spread their papers and information around on the surface before them; women tend to stack neatly in front of themselves.

What wrong messages do you unconsciously send to others with your body language? Take a few moments to think about body language habits that you may have that are perceived in a contrary way to how you feel.

Would someone think you are?

- ✓ Disgruntled, upset, or angry
- ✓ In agreement, in favor of, ready to move forward
- ✓ Closing off further conversation
- ✓ Open to ideas and discussion
- ✓ A team player
- ✓ An antagonist

Appearance and Dress

Do

Dress appropriately for the situation.

Dress conservatively for work situations.

Dress **for the position** you aspire to.

Wear jackets to enhance your authority.

Determine your colors; they have a major impact on how you look.

Carry yourself with confidence at all times.

Strive for a “together” look; that is, a well coordinated appearance with accessories.

Class exercise –

For Women – Do Not…	**For Men – Do Not…**

The Human Knot

The purpose of this activity is help participant's see that all behavioral styles are needed to make a team whole. It takes everyone to work together to complete the task.

1) Form groups of 6-8.

2) Choose an open area to accommodate this activity.

3) Gather your group (team) together in a circle, standing shoulder-to-shoulder (facing inward).

4) Have everyone put both hands into the middle of the circle, and <u>with eyes closed</u>, grab hold of two hands, and then open their eyes.

5) The Challenge – build cooperation among the behavioral styles within the group by doing the following:
Untying the knot you have just created without ever breaking your grip.
When successfully completed, you will have one or more complete circles of team members hand to hand.

PowerPoint Slides Script

(Slide 1) Module 3

Welcome to the third module of the ID Program. This module reviews what we learned about behaviors in Module 2 and builds on that information to help you build your team. You may build a team in your workplace, an organization you belong to, at church, and sometimes at home!

(Slide 2) Module 3 Goals

Read from Slide

- ☐ Build on DISC Model information
- ☐ Understand other communication styles
- ☐ Provide basis for understanding perceptions and receptions of others
- ☐ Discuss importance of body language
- ☐ Discuss appearance and dress

(Slide 3) Learn to Adjust…

We can adjust. We can avoid labels and say, "I need to develop more of these qualities in my life – and now I know how to do that."
Knowing when to "raise your D" or lower your "D" is a skill. When should you be in charge and when should you follow the leadership of others?

There is skill in exercising "I" characteristics. More than just having fun, "Is" can inspire where "Ds" might bully, "Ss" might shrink back, and "Cs" might fume – which is the best way to enlist others in your cause?

Balance is important in utilizing "S" traits. Other types can learn how to help and support when it is not convenient, while "Ss" may need to learn a balance in saying, "No, I am not going to get involved this time."
We can learn the importance of "raising our C" and getting quality information and details, while "Cs" themselves can "lower" theirs at times, to be more trusting and less critical.

The real goal is learning to adjust your behavioral style to have some of each of the DISC characteristics at appropriate times. Learn to communicate to the other person's behavioral style!

1. Understand the communicator. What behavioral style is he/she communicating from? Try to "think" as they do to avoid misconceptions or distortions.
2. Credibility/reputation compels attention and respect. If you make it a habit to speak honestly and hold high standards for yourself, others will pay attention to you.
3. Use words and phrases that are understandable. Be clear and concise in what you say. Avoid lingo or paraphrases. Avoid acronyms that only your group understands.
4. Be aware of cultural differences. We discussed this in module 2. Different cultures may be raised with different standards for values and beliefs. Understand them first and adapt to meet them where they are.

(Slide 4) Who would you hire?

Let's have some fun with this activity. Look at the various jobs listed, and decide what behavioral style you would choose to fill the position. Think about the things we discussed in Module 2.

- ✓ What behavioral style would you look for in a [list the position]?

- ✓ Why do you think that style would be a good fit?
- ✓ Does anyone else have a different behavioral style?

[There are no right or wrong answers. Each behavioral style can work within any job – it depends on the environment they work in. Chances are a symphony conductor will have some "C" traits, a successful jewelry store owner may be an "I" to sell or a "D" who likes to be in control (and hires people to sell). The class should have fun with this activity.]

<u>(Slide 5) The "D" might say</u>

When you learn to listen to others, you will begin to pick up on classic statements that define their primary behavior. Listen to what a dominant, decisive, doer "D" may say.
[Review the style's "hot buttons"]

- ☐ I like to be in charge
- ☐ I like situations that change a lot
- ☐ When I work, I work hard
- ☐ When I play, I play hard
- ☐ I like to have power
- ☐ I am not afraid to take a reasonable risk
- ☐ I like to make decisions
- ☐ I do not like the same routine
- ☐ I do not like doing slow or repetitive tasks
- ☐ I like new challenges
- ☐ I like to solve problems
- ☐ I like to be in authority

<u>(Slide 6) The "I" might say</u>

Let's see how the "I" behavior is different than the "D"
[Review the style's "hot buttons"]

- ☐ I like many friends
- ☐ I like acceptance
- ☐ I like other people to handle the details
- ☐ I like a friendly environment
- ☐ I like encouragement
- ☐ I prefer short projects to long ones
- ☐ It is important to me to be popular
- ☐ I do not like many rules
- ☐ I like to "go" and "do"
- ☐ I dislike too many regulations
- ☐ I like public recognition
- ☐ I am easily distracted

<u>(Slide 7) The "S" might say…</u>

Here we have the sweet, steady, stable "Ss". Do you begin to see the distinct differences in the behavioral styles?
[Review the style's "hot buttons"]

- ☐ I like a stable lifestyle
- ☐ I like to please others
- ☐ I enjoy people enjoying life
- ☐ I do not like starting new projects
- ☐ It makes me happy to see others happy
- ☐ I do not work well with aggressive people
- ☐ I like to feel appreciated
- ☐ I like routine procedures

- ☐ I do not like “daring” events
- ☐ I like to feel secure
- ☐ I enjoy finishing a task
- ☐ I do not mind being told what to do

(Slide 8) The “C” might say

The “C”: cautious, calculating, critical-thinkers.
[Review the style’s “hot buttons”]

- ☐ I like quality
- ☐ I do not like a lot of silliness
- ☐ I like detailed tasks
- ☐ I like logical information
- ☐ I like charts and graphs
- ☐ I like to find creative solutions
- ☐ I like to be reassured
- ☐ I like to be organized
- ☐ I have high standards for others and myself
- ☐ I tend to be a perfectionist
- ☐ I like to be commended for doing good work
- ☐ I like to know and do things step-by-step

Four distinctive behaviors, each bringing a point of view to the team that makes it whole. Blending a committee, a team, an organization, or your department at work is important to overall success. Understanding how to communicate among the four behaviors will allow you to manage the team effectively.

(Slide 9) The “D” comfort zone

It is important to understand what each behavioral style “needs” to feel comfortable in their environment. As we review the list, you’ll note that some of the things are intangible items, but very important for their comfort.
D -

- ❑ I can be in charge of others & myself
- ❑ I have freedom to set my own priorities
- ❑ I have opportunities for advancement
- ❑ I can look good
- ❑ There are a lot of different activities and challenges
- ❑ I can see that I am growing

(Slide 10) The “I” comfort zone
I -

- ☐ There are people to talk to
- ☐ Good work is recognized and praised
- ☐ There is opportunity to influence others
- ☐ Everyone has a good attitude
- ☐ People are accepted
- ☐ There are positive working conditions
- ☐ I am free from a lot of details and repetitive tasks.

(Slide 11) The “S” comfort zone
S -

- ☐ I can identify with a group
- ☐ Sincere appreciation is shown

- ☐ There is a regular routine of events
- ☐ I do not feel rushed and under pressure
- ☐ There is not much change
- ☐ We specialize in a few things
- ☐ I know what and where my boundaries are

(Slide 12) The "C" comfort zone

C –

- ☐ I do not have someone working over my shoulder
- ☐ There is no "hurried" activity
- ☐ There are exact roles and job descriptions
- ☐ Expectations are clear
- ☐ Changes are made slowly and carefully
- ☐ I can be rewarded for new ideas.
- ☐ There is a specific plan

(Slide 13) Body Language

We've addressed comfort, now let's talk about the things we say without speaking! That's right, "body language."
Our posture – let me see how many of you are sitting up straight, shoulder's even? Aha! Caught you slouching!
A dominant posture says you are in charge.
Where you place your arms can send communication signals, as well. Crossed arms can signify hostility (or it's cold in this room). Leaning back while crossing arms my be a sign of contemplation.
Failure to make eye contact may mean the person is lying, or may also mean the person can not stand scrutiny.
Looking up at the ceiling while rapidly blinking eyes can mean the person is seriously considering what you just said.
Facial expressions can also "tell" another person what you are thinking. Genuine smiles are nearly always symmetrical. Phony smiles tend to be lopsided. Authentic expressions such as smiles, frowns, or looks of disbelief last only four or five seconds. If held longer, they may be phony.
Signs of happiness or satisfaction include smiling, serene facial expressions, unrestrained movements and relaxed posture.
Signs of unhappiness or dissatisfaction include frowning, tense posture, pursed lips, furrowed brow, flared nostrils, rigid body, lack of movement, or nervous movement.
What are signs of disagreement? [Wait for participant responses]. Some could be looking away, hunched shoulders, arms folded across chest, vacant eyes,…
The rule of thumb for dress and appearance: Dress as well as or better than your audience or peers. Dress for the job you aspire to, not the one you have. Knowing you look good is reflected in your body language and posture.
Commanding your space is also important. A person who has a leadership role will usually take the central spot in meetings and expand the space around them. They take up the space around them on the table by spreading out their materials, they push their chair back from the table a bit, rather than sitting up close.
[Refer to Handout C for other body language tips]

(Slide 14) Q & A

Some people transmit message through body language for which they are unaware. For example, a person may be intently listening or thinking and develop a "scowl" or "intense" look on their face that others read as "angry or upset." Someone may cross their arms across their chest because it is chilly in the room, but others may perceive that as "closing them off" from the conversation.

A “D” will be listening to the conversation, but may already have as much information as he/she needs to make a decision, so will fidget or appear bored. They are thinking, “Let’s get on with this, you’re wasting my time.”
An “I” may be overwhelmed with too much detail and get a “glazed” look or begin to doodle until the conversation moves to another subject that perks their interest.
The supportive “S” will work very hard to follow the agenda and may either exhibit “concern” if tasks or projects exclude others in the group or nod in “support” of the group while suppressing concerns.
The cautious “C” may scowl or frown at statements that they perceive are non-related to the subject at hand.
Take a few moments to think about body language habits that you may have that are perceived in a contrary way to how you feel.
Would someone think you are?

- Disgruntled, upset, or angry?
- In agreement, in favor of, ready to move forward?
- Closing off further conversation?
- Open to ideas and discussion?
- A team player?
- An antagonist?

(Slide 15)

- ☐ How would a “D” appear to be bored with the conversation?
- ☐ How might an “I” appear to be disinterested?
- ☐ Give an example of expressions an “S” may exhibit.
- ☐ What body language signals might a “C” send to others?

A “D” behavior may begin to tap his/her fingers or pencil on the table, or fidget.
An I may begin to doodle or gaze out the window.
An S will try very hard not to appear bored.
A C will look at a watch or clock on the wall and begin to gather up papers and items to leave.

(Slide 16) Appearance and Dress

- ☐ Dress appropriately for the situation
- ☐ Dress conservatively for work situations
- ☐ Dress for the position you aspire to
- ☐ Wear jackets to enhance your authority

I’m going to open this conversation up for general discussion. Many of you may work for companies who have dress codes for their employees. What things about a person’s appearance are most important to you?
[Open discussion – ask for volunteer to list items on flip chart/board].

(Slide 17) More on appearance

- ☐ Determine your colors
- ☐ Carry yourself with confidence
- ☐ Strive for a “together” look

First impressions are important – make yours count!

Facilitator

Module 4

Taming the Tension Tyrant.

Creating Presentations

INDIVIDUAL
DEVELOPMENT
PROGRAM

BPW/USA Individual Development Program
Facilitator's Guide
Module 4: Activity Quiz, Presentation Tips, Target Practice, Building the Presentation

Module 4 Purpose:

1. Introduce concepts of effective presentation design
2. Provide a model for creating presentations
3. Show skills, tips, and measures that provide positive presentation results
4. Show participants how to improve attention and retention of audience
5. Provide participants with means to overcome presentation anxiety

Module 4 Outcomes

1. Participants will become familiar with presentation elements and aspects
2. Participants will learn techniques to inspire audiences
3. Participants will learn how to overcome presentation anxiety
4. Participants will be introduced to terminology and theory of effective presentations
5. Participants will learn about audience types
6. Participants will learn to create presentations to influence, inform, or inspire.

Module 4 References:

1. Powerful Presentations that Inspire Any Audience. Jeary, Tony. High Performance Resources, Inc.
2. Inspire Any Audience. Jeary, Tony. Trade Life Books. ISBN 1-57757-023-5
3. The Instant Trainer. Charles, C. Leslie and Clarke-Epstien, Chris. McGraw-Hill. ISBN 0-07-011958-9
4. How to Develop & Promote Successful Seminars & Workshops. Shenson, Howard L. John Wiley & Sons, Inc. ISBN 0-471-52709-2
5. How to Teach Adults. Draves, William A. Learning Resources Network. ISBN 0-914951-20-3

Module Time

Opening activity – Presentation Quiz	10 minutes
Handout A – Review of creating the Bulls eye	15 minutes
Handout B - Overview of Important Parts	10 minutes
Handout C - Discussion of Types...	10 minutes
Discussion of the Funneling Process	15 minutes
Take home activity – Create 5-minute Presentation	

Quiz: What Do You Know About Making Effective Presentations? (*Powerful Presentations that Inspire*)

1. Approximately how many words per minute does the average person speak?
   a. 500 c. **200**
   b. 100 d. 400

2. Which is the aspect of communication that is most perceived by an audience?
   a. The Spoken Word
   b. Body Language 53%
   c. Tone of Voice
   d. Room Color Scheme

3. Approximately how many words per minute can the average person effectively hear and process?
   a. 500
   b. 600
   c. 700
   d. 800

4. What is the length of the average adult attention span?
   a. 15-20 minutes
   b. 27-31 minutes
   c. 5-7 minutes
   d. 12-15 minutes

5. The method used to get consistent feedback from your audience during a presentation is called
   a. targeted questioning
   b. verbal surveying
   c. testing the waters
   d. business entertainment

6. What is first in determining the objectives of a presentation?
   a. Defining the audience
   b. Knowing the action your audience should take
   c. Knowing how many people will be in your audience
   d. Both A & B

7. The method used to get input and feedback from a specific audience member is called
   a. verbal surveying
   b. targeted questioning
   c. targeted polling
   d. business entertainment

8. Which of the following are parts of the four levels of learning?
   a. Unconscious Incompetence & Conscious Competence
   b. Conscious Unconsciousness & Incompetent Consciousness
   c. Conscious Incompetence & Unconscious Competence
   d. Both A and C

9. What is the major cause of nervousness in general?
   a. Claustrophobia
   b. Low self-esteem
   c. Fear of the unknown
   d. Paranoia

10. What is one of the best ways to build rapport with an audience?
    a. Start early, finish late
    b. Skip lunch
    c. Talk about commonalities
    d. Spell their names right on their name tag

11. In a presentation environment, one of the best ways to reduce nervousness is
    a. Valium
    b. Preparation
    c. Avoidance
    d. Procrastination

12. Which of the following is an effective way to establish credibility and gain 100% audience buy-in?
    a. Trust Transference
    b. Be Yourself
    c. Tell the Truth
    d. All of the above

13. What are the four column headings of a basic 3-D Outline?
    a. What, When, How, Why
    b. Who, How, Where, When
    c. Where, How, Why, Who
    d. Time, What, Why, How

14. The concept of _____ gets and keeps audiences involved, attentive, and happy.
    a. Free golf
    b. Free money
    c. Business entertainment
    d. Presentation brevity

15. During a presentation, one of the best ways to reduce nervousness is
    a. Read from your notes
    b. Get the audience involved
    c. Don't look at the audience
    d. Look over the heads of the audience

16. "Audience Closure" accomplishes what?
    a. Solutions to childhood emotional trauma
    b. Proves that expectations were met
    c. Clears the presentation room
    d. Summarizes the key points of the presentation

17. What is the process used to identify the core objectives of a presentation?
    a. The Filtering Process
    b. The Funneling Process
    c. The Derivative Process
    d. The Smelting Process

18. Sitting in your audience's seats prior to the presentation accomplishes what?
    a. A more complete preparation
    b. Gives you the audience perspective
    c. Brings one more unknown to the known
    d. All of the above

19. What is the generally recommended number of objectives for a presentation to address?
    a. 1 or 2 c. **3 or 4**
    b. 2 or 3 d. 5 or 6

20. Which of the following best summarizes our task of meeting audience expectations?
    a. Learning and using audience members names
    b. Create winning opportunities
    c. Be flexible
    d. Give value- do more than is expected

Life is a series of presentations, so take the skill to its highest level.

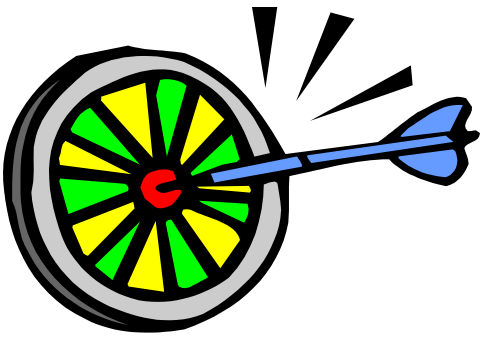
Ask the participants to name a type of presentation they may do each day.

- Greeting another person
- Speaking on the telephone
- Discussing a project with peers or co-workers
- Talking to the children, your spouse, your parents
- Asking for or giving directions
- Chatting with a person in the check-out line at the store

Presenting well, inspiring audiences, and being effective in front of groups are powerful skills.

In spite of your natural comfort level in front of a crowd, most people must talk to groups.

Think of any presentation as a target, with five areas you have to hit before you can claim a bulls eye.



1. Know your audience (who are they, what do they do, do they have anything in common, why are they there?)
2. Define your topic (3-4 objectives)
3. List time, what, why, how. (Have a plan: what are you doing – will you use Audiovisual, props, sing, and dance? Why are you doing what you do? How will you accomplish your goal?)
4. Involve audience (Ask them questions, get their feedback, involve them in activities, give them prizes)
5. Summarize/close

VIP (Very Important Parts)

- People perceive faster than we speak: average person speaks 200 words per minute; the average listener can hear and perceive 800 words per minute.
- Use body language and tonality: it accounts for 53% of how a person perceives the message.
- Vary method of delivery every 5-7 minutes: that is the length of the average adult's attention span.
- Verbally survey the audience every 15-20 minutes.
- Define an action you want the audience to take.
- Connect with the audience through commonalities.
- Know your audience – involve them.
- Layer materials – disperse evenly through presentation.
- Know the needs of your audience members.
- Types of audience members: vacationers, prisoners, graduates, and students.
- Review audience expectations at the beginning.
- Work the room to stimulate the audience.
- Have the audience write their names on materials to gain ownership.
- Own your environment.
- Have a collection of props, handouts, and give-aways: this is business entertainment.
- Be yourself
- Use trust transference (refer to a well-respected book, person or colleague)
- Be honest, one lie or mis-truth will destroy your credibility
- Use a little humor – keep it clean, appropriate, and as applicable as possible.
- Rehearse before a mirror , a video camera, or other people
- Do light stretching exercises just before you go on.
- Envision yourself in front of a smiling, receptive audience!

The type of presentation: influences, informs, inspires, or is impromptu.

The type of audience: Prisoners (I really don't want to be here), Vacationers (I don't really care about the message, I'm just happy to be away from work), Graduates (I know all of this, why am I here?), and Students (Teach me what you've got – I'm ready to hear your message).

The Opening: grab attention, set the tone, clarify purpose, and build rapport.

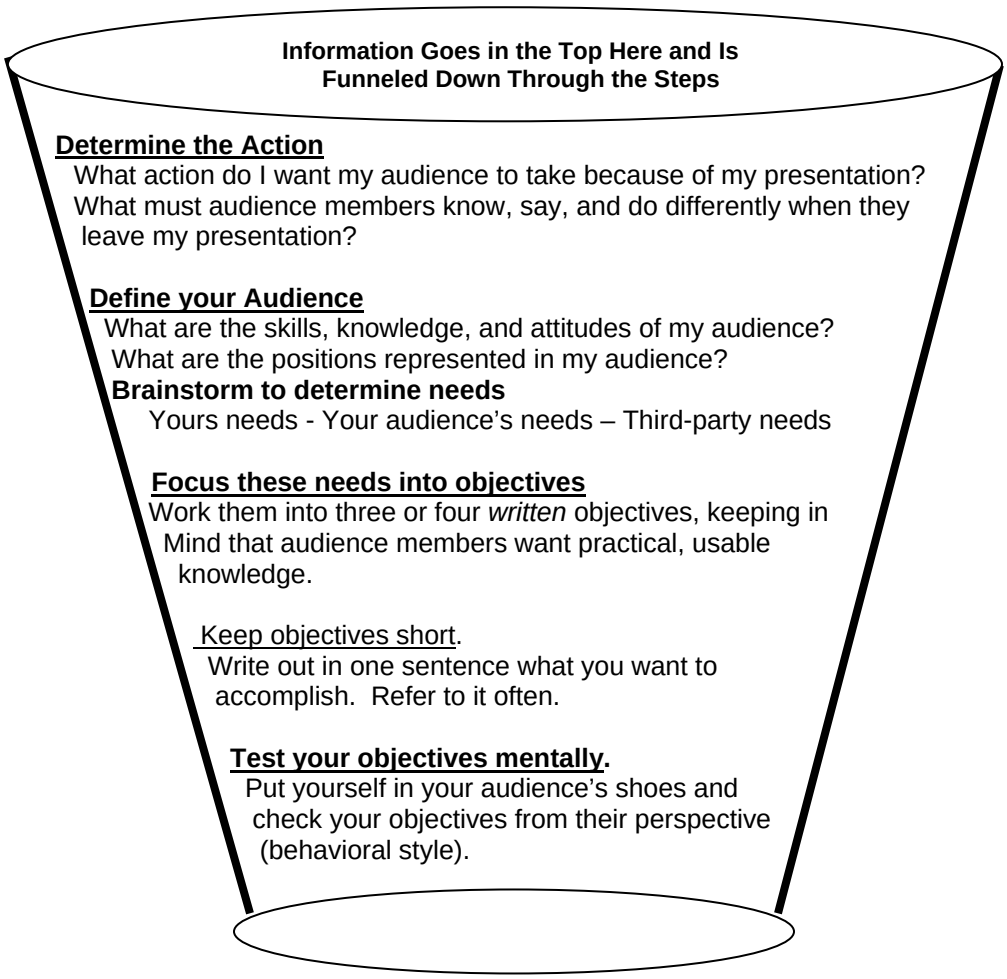
The Body: The "substance" of your presentation – 3-4 key points that support your objectives.

The Closing: reinforces your key points and attaches some emotional response to evoke positive action(s).

The four levels of learning a skill:

1. **Unconscious Incompetence** – a time when the learner is only not unaware of skill, but moreover would not be good at it if he/she were aware. A baby does not know about tying his shoe and could not tie it if he did.
2. **Conscious Incompetence** - the learner is aware of the skill, but cannot perform it. A child becomes aware of Mom and Dad tying shoes, but cannot do it.
3. **Conscious Competence** – the learner is aware of the skill and can consciously perform it. A child can tie his shoes, but sticks his tongue out because he has to think about it.
4. **Unconscious Competence** – the learner performs the skill without thinking about it. It becomes an automatic response. A child ties his shoes without thinking about it.

The *Funneling Process* takes all the things you might do and funnels them down to a solid core of doable, reachable objectives. The problem with coming up with a new presentation – for novices and masters alike – is deciding where we want to go and how we want to get there. The *funneling process* will help you solve this problem.



Result = Core Objectives of Your Presentation

1. Determine the Type of Presentation
   a. Is it to influence (convince, motivate, change behavior, purchase product/service)?
   b. Is it to inform (transfer knowledge or skill, explain a concept or situation, demonstrate)?
   c. Is it to inspire (motivate, recharge, entertain, move)?
   d. Is it impromptu (little/no time to prepare, right now)?
2. Determine the Presentation Objectives
   a. What action do I want the audience to take?
   b. Who is my audience?
   c. Brainstorm the needs
      i. Your needs
      ii. The audience needs
      iii. Third party needs (conference, convention, organization, etc.)
   d. Focus needs into 3-4 clear, concise objectives
   e. Test your message from the various behavioral styles.
      i. Do you meet the needs of each learning style (Do I see it, Do I hear it, Can I touch it-hands on)
      ii. Do you make points that each behavioral style can perceive (DISC)
3. Be aware of all parts of presentation
   a. Opening (grabs attention, set the tone, and direction, clarify purpose, audience benefits, and build rapport).
   b. Body (the substance of your presentation. Key points – 3 to 4 – that build on your objectives).
   c. Closing (reinforces your key points and attaches some emotional response to evoke positive action).
4. Delivery Options and Tools
   a. Power Point/Overheads
   b. Flipcharts
   c. Dry Erase Board
   d. Role Play
   e. Skits
   f. Case Study
   g. Video
   h. Small Group Discovery
   i. Experiential, Demonstration
   j. Other
5. Determine the Limitations/Restraints
   a. Time (preparation/set-up and presentation).
   b. Location (room setup, logistics, multiple rooms, sites, travel needs)
   c. Budget (equipment, media, room etc.)
   d. Equipment (what's ideal vs. what's available and within budget)

PowerPoint Slides Script

(Slide 1) Module 4

Welcome to Part One of the Presentation Modules. In this session, we'll cover the basics of writing an effective presentation. Let's take a look at our goals.

(Slide 2) Module 4 goals

- ☐ Introduce concepts of presentation design
- ☐ Provide a model for creating presentations
- ☐ Show skills, tips, and measures that provide positive presentation results
- ☐ Show how to improve attention and retention of audience members
- ☐ Provide means to overcome anxiety

[Following review of the notes, you will want to hand out: What Do You Know about Making Effective Presentations?]
This is a fun quiz to see how well you are prepared to give a presentation. In a few minutes, we'll review the answers and proceed with the module's instruction.

(Slide 3) The answers are next

(Slide 4) Answers to quiz
Here are the answers to the quiz. Every question will be covered today as we move through the material.

1. C
2. B
3. D
4. C
5. B
6. D
7. C
8. D
9. C
10. C
11. B
12. D
13. D
14. C
15. B
16. D
17. B
18. D
19. C
20. D

(Slide 5) The bull's eye

[Ask participants to list a type of presentation they may do each day – have someone volunteer to write the types on the flip chart/board]

Presenting well, inspiring audiences, and being effective in front of groups are powerful skills.
In spite of your natural comfort level in front of a crowd, most people must talk to groups. Think of any presentation as a target, with five areas you have to hit before you can claim a bull's eye.

1. Know your audience (who are they, what do they do, do they have anything in common, why are they there?)
2. Define your topic (3-4 objectives are the most you want to cover in any given presentation)
3. List time, what, why, how. Have a plan: what are you doing – will you use Audiovisual, props, sing, dance? Why are you doing what you are doing? How will

you accomplish your goal?

4. Involve the audience. As them questions, get their feedback, involve them in activities, and give them prizes.
5. Summarize your points. What did you tell them? Then, close – make the appeal, make the ask. Whatever the purpose of your presentation, don't forget to ask for the audience's response – what did you want them to do?

(Slide 6) Very important parts

The average person speaks 200 words per minute; the average listener can hear and perceive 800 words per minute.
Body language and tone of voice account for 53% of how a person perceives the message you are sending.
The average length of an adult's attention span is 5-7 minutes. Therefore, it is important to vary your method of delivery that often. Change where you stand, what props or audiovisual styles you are using, do something to involve the audience.
Every 15-20 minutes (if your presentation is that long), verbally survey the audience. Ask them what points have been important, what objectives were covered, how the temperature of the room is…
Never close a presentation without telling the audience what you want them to do. Make the "sales pitch." Do you want them to take action, to think about an issue, to join a group, etc?
What do you have in common with the audience? Find that common ground at the beginning of your presentation and "make them family." It helps to have them feel comfortable with you.
Know who you are writing to before you write. Who are they? What do they do for a living? What are their ages? Why would they come to your presentation?

(Slide 7) Very important parts, cont.'

Disperse handouts evenly throughout the presentation (or have someone do so for you). If you give materials out in advance, you risk losing some audience members' attention because they are reviewing the materials and not listening to you.
There are four types of audience members: vacationers (I don't really care about the message, I'm just happy to be away from work), prisoners (I really don't want to be here), graduates (I know all of this, why am I here), and students (Teach me what you've got – I'm ready to hear your message).
It's important to ask the audience at the beginning of your presentation what they expect to receive. Some may have misconceptions about your topic and unless you address that up front, they will be disappointed in whatever you say. Others may expect much more than you can give.
Stimulate your audience by working the room. Move around. Walk up to audience members and involve them in your presentation. Invite audience members to come up on the stage with you. Ask the audience members questions.
Have a collection of props, handouts, and give-aways. This is called business entertainment and people love to walk away from a presentation with something.
Above all, be honest and trustworthy. One little white lie or mistruth will destroy your credibility.
You know the answer to the question, "How do you get to Carnegie Hall?" Yes. It is practice, practice, practice. Rehearse before a mirror, a video camera, or other people. Envision yourself in front of a smiling, receptive audience.

(Slide 8) Elements of presentations

Each presentation you make will have a purpose; therefore, we can categorize them. You will either attempt to influence your audience to do something, be informational with your message, inspire your audience to do great things, or you will be given no time to prepare

and give the impromptu presentation!
As you create your presentation, you will create your opening. The opening should grab the audience's attention, set the tone of your presentation, clarify the purpose of why you are all there, and build rapport – get that "family feeling" established.
The Body of your presentation is the substance, the meat. Here is where you will want to cover the 3-4 key points that support your objectives.
The closing reinforces your key points and attaches some emotional response to evoke positive actions from your audience. Remember, what do you want them to do when you are finished?

(Slide 9) 4 levels of learning

Any skill that you attempt to teach during a presentation needs to be broken down by the level of your audience's knowledge. That is, is it a new concept that they need to work through? Is it a concept that they already know and you're adding to their skill level?
As we learn new skills, we progress through a series of competencies. The first level is unconscious incompetence. This is a time when the learner is only not unaware of skill, but moreover would not be good at it if he/she were aware. A baby, for example, does not know about tying his shoe and could not tie it if he did.
At the conscious incompetence level, the learner is aware of the skill, but cannot perform it. A child becomes aware that Mom or Dad ties his/her shoes, but cannot do it.
Conscious Competence occurs when the learner is aware of the skill and can consciously perform it. A child can tie his shoes, but may stick out her tongue while thinking through the process.
We reach the skill level of unconscious competence when the learner performs the skill without thinking about it. It has become an automatic response. A child ties her shoes without thinking about.

(Slide 10) The funneling process

The Funneling Process takes all the things you might do and funnels them down to a solid core of doable, reachable objectives. The problem with coming up with a new presentation – for novices and masters alike – is deciding where we want to go and how we want to get there. The funneling process will help you solve this problem.

(Slide 11) The funnel

Determine the Action: What action do I want my audience to take because of my presentation? What must audience members know, say, and do differently when they leave my presentation?
Define your audience: What are the skills, knowledge, and attitudes of my audience? What are the positions represented in my audience?
Brainstorm to determine needs: your needs, the audience's needs, 3rd party needs (who hired you)
Focus the needs into objectives: 3-4 clear, concise objectives are all you can expect to relay in your message. Keep in mind that audience members want practical, usable knowledge.
Test your message from the various behavioral styles. Can your audience "see" it, hear it, touch-it? Do you make points that each behavioral style can perceive?
Keep Objectives short: Write out in one sentence what you want to accomplish. Refer to it often.
Test your objectives mentally: Put yourself in your audience's shoes and check your objectives form their perspective (remember the behavioral styles).

(Slide 12) What did you learn?

[Review slide with participants – Hand out 5-minute prepared speech topics…

- ☐ Who can tell me what the bull's eye is?
- ☐ List some VIP (very important parts) points.
- ☐ What does the funneling process do?

Are you ready to write your presentation?

Facilitator

Module 5

Standing Up and Standing Out

Oral Presentation

INDIVIDUAL
DEVELOPMENT
PROGRAM

BPW/USA Individual Development Program
Facilitator's Guide
Module 5: Tips for Successful Public Speaking, Props/handouts/give-aways, Impromptu Tips, Individual presentations

Module 5 Purpose:

1. Provide practical tips and techniques for successful presentations
2. Provide mental model to follow for successful impromptu presentations
3. Build confidence to overcome presentation anxiety
4. Apply constructive critique concepts
5. Deliver a prepared presentation
6. Deliver an impromptu presentation

Module 5 Outcomes:

1. Participants will learn additional public speaking/presentation tips
2. Participants will practice and develop public speaking/presentation skills
3. Participants will learn to critique in a constructive manner
4. Participants will learn to follow a mental model for impromptu presentations

Module 5 References:

1. Powerful Presentations that Inspire Any Audience. Jeary, Tony. High Performance Resources, Inc.
2. Inspire Any Audience. Jeary, Tony. Trade Life Books. ISBN 1577570235
3. The Instant Trainer. Charles, C. Leslie and Clarke-Epstien, Chris. McGraw-Hill. ISBN 0070119589
4. How to Develop & Promote Successful Seminars & Workshops. Shenson, Howard L. John Wiley & Sons, Inc. ISBN 0471527092
5. How to Teach Adults. Draves, William A. Learning Resources Network. ISBN 0-914951203

Module 5 Time

Handout A, 10 Tips for Successful Public Speaking	10 minutes
Handout B, Use of Props…	10 minutes
Impromptu presentation tips	15 minutes
Practice Impromptu Presentations/Critique	35 minutes
Personal 5-minute presentation/Critique	1-2 hours

Additional suggestions:

Make enough evaluation copies for each participant to comment on fellow presenters. Ask participants to make constructive notes for other presenters to review. What things did they notice or hear during the presentations. What suggestions would they offer to help the presenter improve on future presentations?

10 Tips for Successful Public Speaking

1. **Know the room**
   Be familiar with the place in which you will speak. Arrive early; walk around the speaking area and practice using the microphone and any visual aids.

2. **Know the audience**
   Greet some of the audience as they arrive. It is easier to speak to a group of friends than to a group of strangers.

3. **Know your material**
   If you are not familiar with your material or are uncomfortable with it, your nervousness will increase. Practice your speech and revise it if necessary.

4. **Relax**
   Be yourself. Do not try to be another person.

5. **Visualize yourself giving your speech**
   Imagine yourself speaking in a loud, clear, and confident voice. When you visualize yourself as successful, you will be successful.

6. **Realize that the audience wants you to succeed**
   Audiences want you to be interesting, stimulating, informative, and entertaining. They do not want you to fail because there is something in what you have to say for them.

7. **Don't apologize**
   If you stumble or get tongue-tied – stop, smile, and repeat the statement. If you lose your place, say, "Now, where was I?"

8. **Concentrate on the message – not the medium**
   Focus your attention away from your own anxieties, and outwardly toward your message and audience. Your nervousness will dissipate.

9. **Turn nervousness into positive energy**
   Have passion for the subject of your presentation, use movement, and body language to show your enthusiasm for the subject.

10. **Gain experience**
    Experience builds confidence, which is the key to effective speaking. Practice, Practice, Practice.

Props, handouts, give-aways

Choose the delivery options and tools for message impact and audience participation. For example:

Power Point/Overheads	Flipcharts	Dry Erase Board
Role Play	Skits	Case Study
Video	Small Group Discovery	Experiential
Demonstration	Games	Audience Polling
Handouts	Music	Trinkets
Give-aways	Costumes	

Make eye contact with each person in the room.

Move about the room, if possible. Some situations keep you at a podium, but learn to use hand gestures and tonality to draw the audience attention to you.

Involve the audience.

Be deliberate in delivery. Avoid beginning statements such as: “Um,” “Like...,” “I mean,” etc.

Impromptu presentation Tips

In making any presentation, the opening and closing words are probably more important than the words that come between them. This holds especially true for the impromptu speech.

If you are suddenly put on the spot, do not panic. You know the fundamentals of organizing your thoughts and the topic.

1. **Think**
   Any topic can be split into components. Before you speak, break it down into a pattern of organization such as:
   a. past, present, and future (time-oriented),
   b. by topic to be covered,
   c. the pro’s and con’s of an issue.

2. **Give introductory remarks**, such as:
   a. What is your relationship to the topic?
   b. How does the topic impact your personal or professional life?
   c. Why is the topic of interest to you?

3. **Transition to your main points** by stating what you will cover.

4. **Deliver the points of your presentation** in an orderly fashion.

5. **Summarize** your points.

6. **Conclude** with a strong close.

Activity A, Module 5

5-minute prepared presentation

2-minute impromptu presentation

Evaluation Summary

Scoring: 1=Lowest to 10=Highest

Five Minute Prepared Speech

	Points	
Preparation	1 – 10 max.	_____
Content	1 – 10 max.	_____
Self-Confidence/Poise	1 – 10 max.	_____
Clarity	1 – 10 max.	_____
Expression/Gestures	1 – 10 max.	_____
Posture and Eye Contact	1 – 5 max.	_____
Audience Interest	1 – 5 max.	_____
Topic Selection	1 - 5 max.	_____
Timing	-10 or 0	_____

(=/- 10 seconds = 0 points, +/- 11 seconds or more = -10 points)

TOTAL POINTS – Five Minutes Prepared Speech (max. 65 points) [ ]

Two-Minute Impromptu Speech

Content/Organization	1 – 10 max.	_____
Self-Confidence/Poise	1 - 7	_____
Clarity	1 - 5	_____
Expression/Gesture	1 - 5	_____
Posture and Eye Contact	1 - 4	_____
Audience Interest	1 - 4	_____
Timing	-10 or 0	_____

(+/- 10 seconds = 0 points, +/- 11 seconds or more = -10 points)

TOTAL POINTS – TWO-MINUTE IMPROMPTU SPEECH (max. 35 points) [ ]

Grand Total for both categories (max. 100 points) [ ]

Activity A, Module 5 (Optional Multi-person score-sheet)

Five Minute Prepared Speech

	Name	Name	Name	Name	Name	Name
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
TOTAL						

(+/– 10 seconds = 0 points, +/– 11 seconds or more = –10 points)

TOTAL POINTS – Five Minutes Prepared Speech (max. 65 points)

Two-Minute Impromptu Speech

9.						
10.						
11.						
12.						
13.						
14.						
15.						
TOTAL						

(+/– 10 seconds = 0 points, +/– 11 seconds or more = –10 points)
TOTAL POINTS – TWO-MINUTE IMPROMPTU SPEECH (max. 35 points)

Grand Total for both categories (max. 100 points)

PowerPoint Slides Script:

(Slide 1) Module 5

Module 5 is building upon all the other modules you have reviewed to date. The last module focused on writing an effective presentation and knowing the audience you are planning to address. This module focuses on the actual presentation skills you will use.

(Slide 2) Module 5 goals

Today's Goals

1. Provide practical tips and techniques for successful presentations
2. Provide mental model to follow for successful impromptu presentations
3. Build confidence to overcome presentation anxiety
4. Apply constructive critique concepts
5. Deliver oral presentations

(Slide 3) Tips for public speaking

- ☐ Know the room
- ☐ Know the audience
- ☐ Know your material
- ☐ Relax
- ☐ Visualize yourself giving presentation
- ☐ Audience wants you to succeed
- ☐ Don't apologize
- ☐ Concentrate on message
- ☐ Turn nerves into energy
- ☐ Gain experience

Be familiar with the place in which you will speak. Arrive early; walk around the speaking area and practice using the microphone and any visual aids.
Greet some of the audience as they arrive. It is easier to speak to a group of friends than to a group of strangers.
If you are not familiar with your material or are uncomfortable with it, your nervousness will increase. Practice your speech and revise it if necessary.
Be yourself. Don't try to be another person. Do some light stretching exercises before your presentation. Do visualization techniques – see yourself as a calm, assured speaker.
Imagine yourself speaking in a loud, clear, and confident voice. When you visualize yourself as successful, you will be successful.
Audiences want you to be interesting, stimulating, informative, and entertaining. They do not want you to fail. There is *something* in what you have to say to them.
If you stumble or get tongue-tied – stop, smile, and repeat the statement. If you lose your place, say, "Now, where was I?" (Verbal surveying…)
Focus your attention away from your own anxieties, and outwardly toward your message and audience. Your nervousness will dissipate.
Have passion for the subject of your presentation, use movement, and body language to show your enthusiasm for the subject.
Experience builds confidence, which is the key to effective public speaking. Practice, practice, practice.

(Slide 4) Props, handouts, giveaways

Here is a list of the many things you can do to add to your presentation. Choose the delivery options and tools for message impact and audience participation.

Don’t focus solely on props, handouts and giveaways to save your presentation. Remember to make eye contact with each person in the room (or look in all directions if it is a large auditorium).
Move about the room, if possible. If you are confined to a podium, remember to use body language and tonality to draw the audience attention to you.
Involve the audience
Be deliberate in delivery. Avoid beginning statements such as: “Um,” Like…” “I mean,” “You know,” etc.

- ☐ PowerPoint
- ☐ Overheads
- ☐ Video
- ☐ Demonstration
- ☐ Handouts
- ☐ Giveaways
- ☐ Flip charts
- ☐ Skits
- ☐ Games
- ☐ Music
- ☐ Costumes
- ☐ Dry Erase Board
- ☐ Case Study
- ☐ Experiential
- ☐ Audience Polling
- ☐ Trinkets

(Slide 5) Impromptu speech model

Think. Any topic can be split into components. Before you speak, break it down into a pattern of organization such as:

1. Past, present, and future (time-oriented)
2. By topic to be covered (there may be more than one)
3. The pro's and con's of an issue.

Give introductory remarks, such as:

1. What is your relationship to the topic?
2. How does the topic impact your personal or professional life?
3. Why is the topic of interest to you?

Transition to your main points by stating what you will cover.
Deliver the points of your presentation in an orderly fashion.
Summarize your points
Then, conclude with a strong close.

(Slide 6) Evaluation process

- ☐ Focus on positive, constructive comments
- ☐ Ask questions, "Did you realize that you…"
- ☐ Suggest alternatives
- ☐ Give praise where deserved

During this process, we will all be involved in evaluating the presentations. I would like to review some acceptable critique guidelines.
First, this is a learning environment. We are not here to bash anyone, but to support everyone. This is a secure and safe place to learn.
As you review the evaluation summary sheet, you will notice areas that we will focus on for critique purposes. Each of these areas has been covered in a module.
Think of the things we have covered. If someone, for example, uses the phrase "Um" often, remember that it is a nervous habit that covers a pause in thought processes. Often, the presenter doesn't realize how often they use the phrase.
Say, "Did you realize that you use "Um" before many of your sentences?"
If someone paces during a presentation, you could suggest an alternative to help them relieve their nervousness, such as: "Try standing beside a table or podium for support," or "Try to move only when you begin a new objective or point."
If someone has good eye contact, or vocal tonality, or body language, say so.
Any questions?

(Slide 7) Practice, practice, practice!

☐ Now, it's your turn!
Review the Impromptu Speech Model –you'll be given a question or statement to answer in a 2-minute time-frame!

1. 30-seconds to think of answer
2. Time-keeper will give 30-second warning

3. Time-keeper will stand at 2 minutes

[You may practice delivery of the 2-minute Impromptu Presentation by asking various questions of your choice. It is best to have enough questions for the number of people in your group, so everyone has the same opportunity to “think through the process” and deliver their presentation. You may choose to do this in small groups or as a whole.]

Facilitator

Module 6

Define And Shine!

Networking – A Skill for Life!

INDIVIDUAL
DEVELOPMENT
PROGRAM

BPW/USA Individual Development Program
Facilitator's Guide
Module 6: Networking activity, Working through the Bull's Eye, Drafting the Elevator Pitch, Networking with DISC

Module 6 Purpose:

1. Show participants that networking can be fun.
2. Provide networking tools to be used for any occasion.
3. Provide examples of introductions that work.
4. Introduce ways to build a network for success
5. Provide information for follow-through.

Module 6 Outcomes:

1. Participants will learn some examples of organization and group networking.
2. Participants will learn steps to effectively network.
3. Participants will understand the networking circle of influence.
4. Participants will practice networking techniques.
5. Participants will learn to introduce their needs.
6. Participants will develop additional skills in understanding the DISC behaviors

Module 6 References:

1. Networking: The Skill the Schools Forgot to Teach. D'Amour, Cynthia. Jump Start Books. ISBN 0965460002
2. The World's Best Known Marketing Secret. Misner, Ivan R., Ph.D., and Devine, Virginia. Bard Press. ISBN 1885167377
3. Why Do I Do What I Do? Dunstone, Virginia, M.S. Gate Publishing. ISBN 0-9638282-0-7

Module 6 Time:

1.	Activity A – Keys to Your Success	10 minutes
2.	Handout A – Networking Through the Bull's Eye	15 minutes
3.	Handout B – Drafting Your Elevator "Pitch"	20 minutes
4.	Handout C – DISC Behaviors through Networking	10 minutes
5.	Questions/Answers & Discussion	5 minutes

Networking and Creativity
Keys to your success

Talk to those seated at your table and have them sign on the line that corresponds to their experience. They cannot sign on more than two (2) lines.

Owns a red car _____

Worked at current job for less than six months _____

Moved from another region of the country _____

Attended a national business conference _____

Has read today's newspaper _____

Owns a vacation home _____

Has grandchildren _____

Has children under 5 _____

Played sports in high school _____

Loves to cook _____

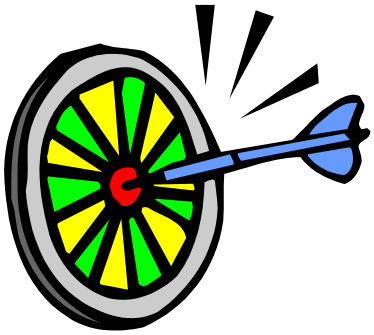
Is a native of this state _____

Walks for exercise _____

Was promoted within the last year _____

Has at least one pet _____

Networking through the Bull's Eye



The point of networking is to expand outward from the bull's eye. You and those close to you are the bull's eye. Those you know, who know those you do not know extend outward in widening circles around you.

The inner circle (bull's eye) represents your family and friends. They may not be knowledgeable in your field or area of expertise, however, they may know people who are. The important thing to remember is to let your family and friends know what you need. Do not assume that they know you need contacts to expand your business or organization.

The middle ring represents contacts you know only through social or business awareness and your inner circle's business and personal contacts. These could be professional contacts from previous jobs/internships, neighbors, parents of friends, family physicians, lawyers, accountants, contacts within community/religious organizations, local merchants.

The outer ring represents people who you do not know personally, but with whom you have some affiliation (professional organization, alumni group, etc.) Events or activities would bring you together. You, therefore, have similar interests, but would have diverse careers or business influence.

Be clear about what you do and what it is you are seeking. Be specific. For example, "*I sell widgets that make Whatzits run quietly. I'm looking for a contact in a company that produces Whatzits."*

If you do not ask, you will not receive. Whom you know that knows who you do not know is the basis of networking.

Ask participants to share examples of "Who you know who knows someone you do not know…"

Success stories?
"I wish I had told them" stories?

Drafting Your "Elevator Pitch"

Steps

- Convey who you are and who you represent (include statement about your skills, talents, background or experience)

  "I am a product sales representative (I sell things) for ABC Corporation in Mytown. We manufacture quality yard and garden products. I have been in sales of some sort for 10 years, and I love what I do. My name is Starr Sellers.

- State what you want to do

  Currently, I am looking to expand our distribution area into the surrounding counties and I am looking for home centers, garden shops, and the like.

- Reference the person's industry, company and/or issue

  I see you are in the automotive field. Some of the larger chain stores have automotive departments. Whom do you do business with outside the county?

- Present next steps and/or create an opportunity for another discussion or meeting

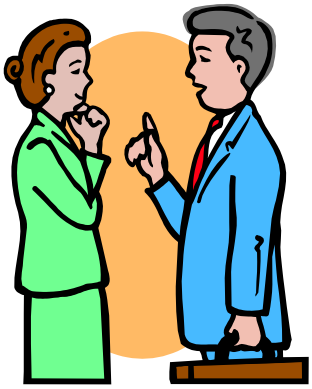
  We should get together. I am sure we could help each other and increase our business. Are you free for lunch this week?

- Express Thanks

  Follow through with a personal note of thanks for the meeting. If you promised to do something, do it.

Skills

- Show enthusiasm, confidence, genuine interest and/or empathy
- Use terms with which the person is familiar
- Put yourself in the person's place
- Appear focused on earning the person's interest, time and trust
- Listen
- Be appreciative



Have participants practice their "pitch" with other at their table.

Using Your Behavioral Style to Network

The following charts overview the differences between behavioral styles and how they network with others. Remember, each style works from its own perspective. Understanding how each one networks with others will be beneficial to you.

Networking Assets

D	I	S	C
May have no problem initiating the pitch and be direct, will be quick.	Can spot an opportunity and be optimistic about it	Will seek to solve problems and be helpful to the other person	Will practice and be prepared to deliver their pitch.
May like the challenge of it and be motivated to “win” the person over.	May get attention through energy and enthusiasm; will appear very interested in people.	Will listen and empathize well; will get an action step from the pitch.	Will state facts and ask pertinent questions.

Networking Liabilities

D	I	S	C
Could be rejected or feel defensive, even angry if cannot “win”.	May set self up to fail; may be overly optimistic or oversell; may not listen to a “no”.	May have trouble initiating the pitch, may hold back.	May not initiate if it does not make sense or does not have the time to do it right.
Could be viewed as pushy; may not be personable enough.	May take too much time and not listen carefully.	May not overcome objections or project sense of urgency.	May get into details and not get action step; may accept “no” too quickly.

PowerPoint Slides Script

(Slide 1) Module 6

Are you ready to learn how to be a more effective net-worker?

(Slide 2) Module 6 goals

1. Show that networking can be fun
2. Provide networking tools
3. Provide examples of introductions
4. Introduce ways to build a network
5. Provide information for follow-through

[Read from slide]
Let's begin this module by having a little fun – networking! No matter what group or organization you are in, you can do "ice-breaker" activities, like the one we're about to do, as a means of networking. There are several books and resources available that offer these types of activities for any occasion.
[Hand out Networking and Creativity – Keys to Your Success, Activity A]

(Slide 3) Networking through the bull's eye

- Expand from the Bull's Eye
- Inner Circle – Family & Friends
- Middle Circle – Social or Business contacts
- Outer Circle – Other contacts

The point of networking is to expand outward from the bull's eye. This bull's eye is a little different than the one you learned about in creating presentations.
You and those close to you are the bull's eye. Those you know, who know those you do not know extend outward in widening circles around you.
The inner circle (bull's eye) represents you, your family and friends. They may not be knowledgeable in your field or area of expertise, however, they may know people who are. The important thing to remember is to let your family and friends know what you need. Do not assume that they know you need contacts to expand your business or organization.
The middle ring represents contacts you know only through social or business awareness and your inner circle's business and personal contacts. These could be professional contacts from previous jobs/internships, neighbors, parents of friends, family physicians, lawyers, accountants, contacts within community/religious organizations, local merchants.
The outer ring represents people who you do not know personally, but with who you have some affiliation (professional organization, alumni group, etc.). Events or activities would bring you together. You, therefore, have similar interests, but would have diverse careers or business influence.

(Slide 4) If you don't ask, you won't receive!

- Be clear
  - What do you do?
  - What is it you want?
  - Who you know that knows who you do not know is the basis of effective networking!

Be clear about what you do and what it is you are seeking. Be specific. For example, "I sell widgets that make Whatzits run quietly. I'm looking for a contact in a company that sells Whatzits. Do you know anyone?"

[Ask participants to share examples of "Who do you know who knows someone you do not know…" Ask for a success story, or a "missed opportunity" that participants may have experienced.]

(Slide 5) The elevator pitch

- ☐ Your name & company
- ☐ State what you want to do
- ☐ Reference the person's industry, company and/or issue
- ☐ Present next steps
- ☐ Express Thanks
- ☐ Follow-through

When networking, be sure to tell others who you are and who you represent. You may include a statement about your skills, talents, background, or experience.)
"I am a product sales representative (I sell things) for ABC Corporation in My Town. We manufacture quality yard and garden products. I have been in sales of some sort for 10 years, and I love what I do. My name is Starr Seller."
After introductions are made (don't be rude and blurt everything about yourself out in one statement), tell the other person(s) what you want to do.
"Currently, I am looking to expand our distribution area into the surrounding counties and I am looking for home centers, garden shops, and the like."
Then, (because you have allowed the other person to introduce themselves and give their title and company) you can reference the person's industry, company and/or issue.
"So, you are in the automotive field. Some of the larger chain stores have automotive departments. Whom do you do business with outside the county?"
This statement may or may not open further immediate opportunities for you with this networking prospect. Your next step may open doors in the future.
Present next steps and/or create an opportunity for another discussion or meeting.
"We should get together. I am sure we could help each other and increase our business. Are you free for lunch this week?"
Express thanks. Follow through with a personal note of thanks for the meeting. If you promised to do something, do it.

(Slide 6) Networking skills

- ☐ Show enthusiasm
- ☐ Use familiar terms – no acronyms
- ☐ Put yourself in other person's shoes
- ☐ Appear focused
- ☐ Listen
- ☐ Be appreciative

Your networking skills, much like your oral presentation skills, need practice to perfect. You will need to show enthusiasm, confidence, and a genuine interest and or empathy for the other person's requests, as well. Networking is not a one-way street with you being the all-time recipient.
Use terminology that is familiar. Try not to use acronyms or buzz-words that only people in your industry would understand.
Put yourself in the other person's place. You wouldn't want to be cornered by an aggressive, over-bearing person – so don't be one.
Appear focused on earning the person's interest, time and trust. We've all had the experience with the hand-shaking politician who is looking over your shoulder at the next person he/she is going to meet. Focus on the person you are with at the moment.
Listen. Remember the saying, "You have two ears and one mouth. Use them in proportion."
Be appreciative of the information you receive. Say "thank you" often.

[Using the Networking skills model above, have participants practice their "elevator pitch" skills. Depending on the size of your group, the participants can stand and give a 60-second introduction:
Who are they?
Who do they represent?
What do they want to do?
Or, you may have participants "network" at with those seated near them.

(Slide 7)DISC Behavioral Style Networking Assets

D	I	S	C
May have no problem initiating the pitch and be direct, will be quick.	Can spot an opportunity and be optimistic about it	Will seek to solve problems and be helpful to the other person	Will practice and be prepared to deliver their pitch
May like the challenge of it and be motivated to "win" the person over.	May get attention through energy and enthusiasm; will appear very interested in people.	Will listen and empathize well; will get an action step from the pitch.	Will state facts and ask pertinent questions.

(Slide 8) DISC Behavioral Style Networking Liabilities

D	I	S	C
Could be rejected or feel defensive, even angry if cannot "win"	May set self up to fail; may be overly optimistic or oversell; may not listen to a "No"	May have trouble initiating the pitch, may hold back	May not initiate if it does not make sense or does not have the right time to do it right
Could be viewed as pushy; may not be personable enough	May take too much time and not listen carefully	May not overcome objections or project sense of urgency	May get into details and not get action step; may accept "no" too quickly.

(Slide 9) Q& A

- ☐ What questions and comments do you have about what we have learned so far?
- ☐ Do you feel you have gained some new skill sets?
- ☐ What has been the most valuable thing you have learned from this program?

Facilitator

Module 7

It's All About You!
Interviewing Skills

INDIVIDUAL
DEVELOPMENT
PROGRAM

BPW/USA Individual Development Program
Facilitator's Guide
Module 7: Activity - Value-Added Talents, Handout on DISC Strengths and Challenges, Handout - Interview Preparation and Follow-through, Activity – Practice Interviews.

Module 7 Purpose:

1. Prepare participants to be successful interviewers and interviewees.
2. Provide a framework for preparing to interview.
3. Provide a guide for follow-through after an interview.

Module 7 Outcomes:

1. Participants will utilize prior information about DISC behaviors and examine their own strengths, talents, and abilities.
2. Participants will learn to identify personal challenges.
3. Participants will learn to prepare for an interview.
4. Participants will learn how to follow-through after an interview.
5. Participants will practice interview techniques.

Module 7 References:

1. Best Answers to the 201 Frequently Asked Interview Questions. DeLuca, Matthew. McGraw-Hill Trade. ISBN 007016357X
2. Human Resource Champions: The Next Agenda for Adding Value and Delivering Results. Ulrich, Dave. Harvard Business School Press ISBN 0875847196
3. Why Do I Do What I Do? Dunstone, Virginia, M.S. Gate Publishing. ISBN 0-9638282-0-7
4. Workforce Management, www.workforce.com

Module 7 Time:

Activity - A Case in Point	10 minutes
Overview – DISC Strengths and Challenges	5 minutes
Handout – Preparing for Interview…	15 minutes
Preparation – Individual interview notes	10 minutes
Practice – Individual Interviews	15 minutes
Q & A -	5 minutes

A Case In Point

Suppose your CEO invited you into the office tomorrow, closed the door and asked you this question:

“What added value do you bring to your job that directly contributes to the profitability, success, and growth of this company?”

Or,

You are considered for a position on the board of one of the most prestigious organizations in your community and while being interviewed by members of the board, you are asked:

“What special talents or abilities do you have that will directly contribute to the profitability, success, and growth of our organization?”

How would you respond?

List your value-added or special talents and abilities:

_____

_____

_____

_____

_____

The following chart represents some of the traits you would use when asked to "describe your strengths or what would you bring to this organization?" These traits represent how a person would work and respond in normal circumstances.

Your Behavioral Style – Your Strengths

D	I	S	C
Strong-willed Determined Independent Optimistic Practical Productive Decisive Leader Confident	Friendly Compassionate Carefree Talkative Outgoing Enthusiastic Warm Personable Fun	Calm Dependable Easygoing Trustworthy Efficient Practical Conservative Diplomatic Humorous	Gifted Analytical Sensitive Perfectionist Aesthetic Idealistic Loyal Self-sacrificing Thorough

The following chart represents behavioral traits that develop when a person is under pressure, tired, or overwhelmed. We need to understand that other traits can see (perceive) your trait acting or responding in this manner when stressed.

Challenges are Strengths pushed to an extreme…

Your Challenges

D	I	S	C
Reckless Rude Impatient "Pushy" Dictatorial Conceited Offensive Arrogant Abrasive Ruthless	Unrealistic Manipulative Emotional Gossip Impulsive Unfocused Excitable Directionless Daydreaming Purposeless	Lacking Initiative Dependent A "sucker" Indecisive Uncommunicative Inflexible Resistant to change Easily manipulated Slow Resentful	Compulsive Critical Unsociable "Nosey" Easily Offended Fearful Inflexible Doubtful Worrisome "Picky"

Preparing for the Interview and Follow-through

You have sent out your resume and been called to a first interview. What should you do to prepare?

1. Gather information about the company or organization. Ask for an annual report, brochures, or information about the company. An annual report will usually list officers and board members. Review their website. Research the product or service.

2. Write out a list of questions you would like answered about the company, its management philosophy, the job and its responsibilities.

3. Make a list of your strengths, the expertise, and talent(s) you would bring to the job.

4. Have a summary portfolio of your accomplishments ready. Include letters of recommendation, awards, honors, and volunteer activities. This is very important if you are entering the workforce for the first time. (The items should be placed chronologically in protective sheets, and then placed in a 3-ring binder). You may be asked to leave it…never put original documents in a portfolio.

5. Ask either the person who contacts you, or call the front desk and ask about the company dress code. Do not assume that you know – always dress a level above the expectation.

6. Leave the dangling jewelry, heavy cologne, and loud colors at home. Dress conservatively. If you have to ask yourself if what you are wearing is appropriate, it probably is not.

7. The interviewer will probably ask questions about your prior job history. Questions may come up about why you left jobs or positions. You may be asked about salary expectations, travel restrictions, values, goals, etc. Think of all possible questions and prepare truthful answers.

8. During the interview, you will usually be asked if you have questions. Review the ones you have written out in advance. If they have not been addressed, feel free to ask them.

9. State that you have “put together a portfolio of your achievements and, time allowing, would like to have the interviewer look through it.”

10. Ask the interviewer(s) for their business card. Promptly write a “thank you” note, expressing your appreciation for the opportunity to interview. Even if you do not get the position, the person may recommend you to a manager or executive they know because you showed good manners.

11. It is appropriate to ask when the position is expected to be filled, and if you can expect a letter or phone call to let you know if you are under further consideration.

12. Always offer your hand and thank the interviewer(s) for their time and consideration. If you feel this company or organization is a place you would like to join, say so.

Practice Interview

Divide into teams of two (2). One team member will be the interviewer, the other the interviewee. Time the interviews and keep them to 5 minutes each.

Take a few moments to review your strengths – what "You's can you use?"

When you have completed the interview, switch roles.

Have participants take a few moments to prepare themselves for the interview.

What do you want the interviewer to know about you:

_____

_____

_____

_____

_____

_____

_____

_____

Were there any surprises in your interview? What things did you feel most prepared to discuss?

Sample Interview Questions:

Interviewer:

1. What do you see as your key strengths?
2. What are your biggest frustrations and challenges?
3. Why do you want to work for [ABC Company]?
4. Where do you see yourself in five years?
5. What are your goals?
6. What has been your greatest achievement?
7. What do you see as the primary purpose for this position?
8. What is your management style?

Interviewee:

PowerPoint Slides Script

(Slide 1) Module 7

Here we are at Module 7 – we're half-way through this leadership development training! Are you still having fun learning new ideas or reinforcing things you already knew?

(Slide 2) Module 7 goals

- ☐ Prepare to be successful interviewers and interviewees
- ☐ Provide a framework for preparing to interview
- ☐ Provide a guide for follow-through

(Slide 3) A case in point

- ☐ What added value do you bring to your job that directly contributes to the profitability, success, and growth of this company?
- ☐ What special talents or abilities do you have that will directly contribute to the profitability, success, and growth of this organization?

Suppose your CEO invited you into the office tomorrow, closed the door and asked you this question: [Read first question from slide].
What would be your response? Or, you are considered for a position on the board of one of the most prestigious organizations in your community and while being interviewed by members of the board, you are asked: [Read second question from slide].
Take a moment to list your value-added or special talents and abilities on a sheet of paper.
What types of things did you list? Character traits, behavioral style traits, or other? [Discuss]

(Slide 4) DISC Behavioral Style Strengths

This chart represents some of the traits you would use when asked to "describe your strengths" or "what would you bring to this organization?" These traits represent how a person would work and respond in normal circumstances.

D	I	S	C

Strong-willed	Friendly	Calm	Gifted
Determined	Compassionate	Dependable	Analytical
Independent	Carefree	Easygoing	Sensitive
Optimistic	Talkative	Trustworthy	Perfectionist
Practical	Outgoing	Efficient	Aesthetic
Productive	Enthusiastic	Practical	Idealistic
Decisive	Warm	Conservative	Loyal
Leader	Personable	Diplomatic	Self-sacrificing
Confident	Fun	Humorous	Thorough

(Slide 5) DISC Behavioral Style Challenges

This chart represents behavioral traits that develop when a person is under pressure, tired, or overwhelmed. These are challenges we need to watch for in our behavior.

D	**I**	**S**	**C**
Reckless	Unrealistic	Lacking initiative	Compulsive
Rude	Manipulative	Dependent	Critical
Impatient	Emotional	A “sucker”	Unsociable
“Pushy”	Gossip	Indecisive	“Nosey”
Dictatorial	Impulsive	Uncommunicative	Easily
Conceited	Unfocused	Inflexible	offended
Offensive	Excitable	Resists change	Fearful
Arrogant	Directionless	Easily manipulated	Inflexible
Abrasive	Daydreaming	Slow	Doubtful
Ruthless	Purposeless	Resentful	Worrisome
			“Picky”

We need to understand that other traits can see (perceive) a behavioral style acting or responding in this manner when under pressure.
For example, an “S” sees “Calm” as a personal strength, but a “D” or a “C” may see that calmness as “lacking initiative.”
The “I” sees “Talkative” as a good strength, but an “S” or “C” may perceive that as “gossip.”

(Slide 6) Interview Preparation

1. Gather information
2. Write out questions
3. List strengths, expertise, talents
4. Prepare summary portfolio
5. Call ahead – ask about dress code
6. Arrive at least 10-minutes early

You have sent out your resume and been called to a first interview. What should you do to prepare?
Gather information about the company or organization. Ask for an annual report, brochures, or information about the company. An annual report will usually list officers and board members. Review their website. Research the product or service they provide.
Write out a list of questions you would like answered about the company, its management philosophy, the job and its responsibilities.
Make a list of your strengths, the expertise, and talent(s) you would bring to the job.
Have a summary portfolio of your accomplishments ready. Include letters of recommendation, awards, honors, and volunteer activities. This is very important if you are entering the workforce for the first time.
The original items should be placed chronologically in protective sheets, and then placed in a 3-ring binder. You may be asked to leave your portfolio. Never put original documents in a portfolio you take to an interview.
Ask either the person who contacts you, or call the front desk and ask about the company dress code. Do not assume that you know – always dress above the expectation.
Leave the dangling jewelry, heavy cologne, and loud colors at home. Dress conservatively.
If you have to ask yourself if what you are wearing is appropriate, it probably is not.

<u>(Slide 7) At the interview</u>

- ☐ Never sit until directed to
- ☐ Set items on floor or lap
- ☐ Have list of questions ready
- ☐ Be truthful and honest
- ☐ Refrain from refreshments
- ☐ Say, “Thank you.”
- ☐ Be courteous to staff
- ☐

It is proper to wait to sit down until you have been directed to a seat. Most interviews are done in settings that put you, the interviewee, in the “hot seat.”
Do not use the desk or side table to set your purse, folder, or briefcase on. Place large items on the floor beside your seat. You may keep your folder or notebook with your questions on your lap or on a table, if seated at one. That way, they will be easy to access when you need them. During the interview, you will usually be asked if you have questions. Review the ones you have written out in advance. If they have not been addressed, feel free to ask them at that time.
The interviewer will probably ask questions about your prior job history. Questions may come up about why you left jobs or positions. You may be asked about salary expectations, travel restrictions, values, goals, etc. Think of all possible questions and prepare truthful answers.
Some prospective employers will offer a beverage during an interview. It is best to politely refuse. You wouldn’t want to spill something by accident.
State that you have “put together a portfolio of your achievements and, time allowing, would like to have the interviewer look through it.”
It is appropriate to ask when the position is expected to be filled, and if you can expect a letter or phone call to let you know if you are under further consideration.
Ask the interviewer(s) for their business card before leaving. Always offer your hand and thank the interviewer(s) for their time and consideration. If you feel this company or organization is a place you would like to join, say so.
Be sure to thank the staff (assistant, secretary, or receptionist) for their kindness. The staff is often asked their impression of employment candidates.

<u>(Slide 8) Follow-through after an interview:</u>

- ☐ Write a “thank you” note
- ☐ Call at the specified time

Promptly use the business card you received during the interview to write a “thank you “note to each interviewer. Express you appreciation for the opportunity to interview. Even if you do not get the position, the person may recommend you to a manager or executive they know because you showed good manners and interviewed well.
If you are told that a decision will be made by a certain date and you are promised to be notified, it is appropriate to contact the interviewer and ask if the position has been filled or if there is a delay.

<u>(Slide 9) Practice Interviews</u>

- ☐ Divide into team of two (2)
- ☐ One team member will be the interviewer, the other the interviewee
- ☐ Time the interviews – 5 minutes
- ☐ Switch roles

Use Handout C, Sample interview questions. In this format and timeframe, we won’t have time to use the interviewee questions, but they are great for you to refer to when you go on your next interview!

Facilitator

Module 8

Meet Me in the Middle!

Understanding Negotiation

INDIVIDUAL
DEVELOPMENT
PROGRAM

BPW/USA Individual Development Program
Facilitator's Guide
Module 8: Handout – Negotiating, Outcomes, Dealing with Difficult Situations, Handout – Overview of Negotiation styles with Behaviors, Activity – Role-Play, Handout – Tips

Module 8 Purpose:

1. Introduce elements of negotiation
2. Provide examples of negotiation in day-to-day life
3. Provide information for negotiation in management and leadership roles
4. Provide information to negotiate with DISC behavioral styles
5. Have fun negotiating in practice activity.

Module 8 Outcomes:

1. Participants will learn techniques to successful negotiation.
2. Participants will learn types of negotiation.
3. Participants will learn steps to deal with difficult situations and people.
4. Participants will utilize prior information about DISC behaviors and learn about negotiation among behaviors.
5. Participants will role-play various negotiation scenarios.

Module 8 References:

1. Play Like a Man, Win Like a Woman: What Men Know About Success that Women Need to Learn. Evans, Gail. Broadway Publishers. ISBN 076790463X
2. Start with NO…the Negotiating Tools that the Pros Don't Want You to Know. Camp, Jim. Crown Business ISBN 0609608002
3. Why Do I Do What I Do? Dunstone, Virginia, M.S. Gate Publishing. ISBN 0-9638282-0-7
4. Women Don't Ask: Negotiation and the Gender Divide. Babcock, Linda and Lachever, Sara. Princeton University Press. ISBN 069108940X
5. You Can Negotiate Anything. Cohen, Herb. Bantam Books. ISBN 0-553-28109-7

Module 8 Time:

Handout A – Description of Negotiation Negotiation Outcomes Dealing with Difficult Situations	20 minutes
Handout B – Ways to Negotiate with Behavioral Styles	10 minutes
Activity A - Negotiation Role-Play	15 minutes
Handout C – Negotiation Tips	10 minutes
Q & A	5 minutes

Negotiating

Negotiation is:
The process of influencing another to arrive at a settlement of some matter, or
A transaction between two parties when both have something the other needs.

Ask participants to list a few examples: (List on flip chart or white/black board).

Bargaining for a better price on an item.
Soliciting funds from a potential donor.
Resolving differences.
Convincing someone to buy a product or service.
Influencing people to try a new approach.
Making mutual decisions.
Mediating conflict.
Securing a pay raise.
And much more . . .

Some element of negotiation can be involved in virtually every human transaction.

Negotiation Outcomes

The following are examples of how negotiations between A and B can end:

WIN/LOSE	1 party wins; 1 party loses
LOSE/LOSE	No deal or a bad deal for both
WIN/WIN	**A good deal for both**

Which is the most desirable outcome? _____

Open discussion with participants:
What type of situations can you think of that would end in win/lose?
What could you do to prevent a win/lose situation?

Dealing with Difficult Situations

Guidelines for dealing with difficult situations:

1. Don't passively tolerate situations or treatment you object [to].
2. Address the situation assertively, not aggressively.
3. Allow the person to "save face" (give the person the benefit of the doubt).
4. Stress the benefits of your position for the person and/or organization.
5. Take control and turn the situation around.

Dealing effectively with difficult situations is the mark of a strong leader.

Ways to Negotiate with Behavioral Styles

If you are a D…

- You tend to be strong-minded and confident.
- You become bored easily with too much detail.
- You like new and innovative ideas.

So, when you are dealing with a…

D – Do not be too strong or overbearing…just be yourself. "D" types see "eye-to-eye" quickly. Let the other "D" have some control, too!
I – Go out of your way to be extra friendly. Let them talk and tell their latest adventure, story, joke, etc. Be a little less "businesslike." You should hit it off well.
S – Slow down a little bit and do not scare them. Your strong style may intimidate them. Be friendly. Give them a chance to digest the facts. Do not over stress the "new." They like the stability of the tried and proven.
C – Answer all of their questions. Give facts, figures, comparison, charts, graphs, etc. They love proof. Take things a little slower. Do not be pushy. Give them time to think. Answer their objections. Do not be phony.

If you are an I…

- You are very sociable and people-oriented.
- You lack attention to detail and get bored easily.
- You love to have fun and talk a lot.

So, when you are dealing with a…

D – Cut the jokes and the small talk. Get to the bottom line quickly. Be businesslike. Stress results. Do not waste time.
I – Remember, you are not there just to visit! Be careful not to talk each other to death! Remember to "ask for the order" or schedule a follow-through meeting.
S – Talk in terms of people and stories. Use facts along the way. Provide stability through basic training and product knowledge. Earn their trust. Be careful not to "come on too strong" or be overly friendly too soon.
C – Cut the socializing. Cut the stories. Do not waste their time. Give facts and figures. Do your homework. Do not be silly. Provide proof. Raise your "C." This can be a challenge for you …concentrate!

If you are a C…

- You are well organized and efficient, preferring planning to spontaneity.
- You like sticking with proven ideas and products.
- You are "facts and figures" oriented, using reason rather than emotion.

So, when you are dealing with a…

D – Head to the bottom line. Do not overwhelm them with facts or figures. Give the big idea. Have more courage in what you are doing. Show results, goals, and achievements.
I – Let them talk a little more. Laugh at their stories. Show enthusiasm. Do not overwhelm them with facts and figures. When possible, give them the experience and fun of "trying out" the product or idea for themselves.
S – Be friendly, not too businesslike. Give them the "space" they need to accept your presentation. Talk about family. Do not be pushy. Slow down a bit.
C - You will be right at home. Your thorough and precise presentation will be appreciated. You will see the same issues. This should be your best presentation.

If you are an S…

- You are very dependable, but need more confidence.
- When placed in a new position, you can be easily discouraged.
- You accept "No" too easily…you need to be a little more forceful.

So, when you are dealing with a…

D – Try to have more confidence. Be a little more assertive. Recognize that they may challenge you. Do not be intimidated by the strong-willed "D".
I – Do not lose control by letting them "ramble." Keep the direction of the meeting focused. You both like people and should be able to relate well. Watch out for their "over-friendly" attitude.
S - They, like you, need reassurance. Be a little more confident than usual. You will get along well. Do not forget to be brave and "close the deal."
C – Answer their questions. Be confident in your product or plan. Remember that "C" types will challenge you with skepticism. That is normal. Firmly present facts and figures. Your slower approach will work well in your favor.

Negotiation Role-Play

Each of the following scenarios presents an opportunity for negotiation with one or more individuals.

Scenario One

You are the management team for a major hospital in a large city. Competition is stiff in your market with two competing hospitals in the area. You have just received word that three patients in the last 24 hours have contracted a serious contagious disease while receiving treatment at your hospital, and it has been determined the most likely source is a hospital employee. The press will arrive in less than 10 minutes.
Before the press arrives:

a) prepare a statement to read to the press,
b) make a plan of action to discover the source, and
c) determine a course of action if the source turns out to be a hospital employee.

* Divide into two teams to determine the outcome of this situation.

Scenario Two

A vendor has promised to deliver a particular project two weeks from today. Due to circumstances beyond your control, you now desperately need the project completed one week from today. In the past, this vendor has been fairly accommodating, but when you approach him on this deadline he seems inflexible. So you request a face-to-face meeting.
* Select two team members to meet with the vendor to do the negotiating.
Privately share with the individual playing the part of the vendor that the key concern is not that the vendor is incapable of meeting the new deadline. He has heard that your company has provided free products and services to other vendors, yet you've never offered this kind of perk to him. So the vendor feels no obligation to do this favor.

Scenario Three

A-1 Corporation has just ended its fiscal year with essentially now growth. In past years, 800 employees have enjoyed a substantial bonus, but this year only $10,000 is available for bonuses.
* Divide into two groups: (1) Will represent the interests of the employees and (2) will represent the interests of management.
Develop a plan to spend the money with the goal of creating as much positive impact for the company and employees as possible.

Negotiation Tips

If life is a game, negotiation is a way of life. –Herb Cohn, You Can Negotiate Anything

- Be reality oriented – see things as they really are without passing judgment.

- Analyze the situation. Is it an emotional issue or one that process can work [through]?

- Determine what power you hold
  - Power is the ability to get things done
  - How do you exercise control over people, events, and situations
  - Use power as a means, not an end

- Determine the amount of time you need
  - Are there deadlines to meet
  - Have you set a timeline to accomplish certain tasks or gather information – establishing a timeline is a key factor
  - Have you built in time for delays or unknown factors – sometimes information does not arrive in a timely fashion, people get sick, emergencies happen.

- Information is the heart of the matter
  - It affects our appraisal of reality – too little and we can make the wrong decision.

  - It affects the decisions we make - having all the facts at hand is important.

  - Who, what, where, why, when, and how -- Knowing all the details helps determine the direction of our decision.

Ask for questions and answers. Allow the participants to share ideas or answers. When a question is asked, answer with, “Who would like to answer that?” This opens the floor for group discussion.

PowerPoint Slides Script

(Slide 1) Module 8

Welcome to Negotiation 101! Who in this room has had to negotiate something today? What did you negotiate? (Participants will list some things such as, "Who is going to pick up the kids after work" or "What will we do for dinner?")

(Slide 2) Module 8 goals

1. Introduce elements of negotiation
2. Provide examples of negotiation
3. Provide information for negotiation in management and leadership roles
4. Provide information to negotiate with DISC behavioral styles
5. Have fun negotiating

(Slide 3) Negotiation is…

The process of *influencing* another to arrive at a settlement of some matter,
-or-
A *transaction* between two parties when both have something the other needs.

[Ask participants to list a few examples: Have someone volunteer to write on the flipchart/board]

- ✓ Bargaining for a better price on an item,
- ✓ soliciting funds from a potential donor,
- ✓ resolving differences,
- ✓ convincing someone to buy a product or service,
- ✓ influencing people to try a new approach,
- ✓ making mutual decisions,
- ✓ mediating conflict,
- ✓ securing a pay raise.

Some elements of negotiation can be involved in virtually every human transaction.

(Slide 4) Negotiation outcomes

- ☐ WIN / LOSE — 1 wins, 1 loses
- ☐ LOSE / LOSE — A bad deal for both
- ☐ WIN / WIN — A good deal for both

Which of the outcomes is the most desirable?
[Open discussion with participants:]
What type of situations can you think of that would end in win/lose?
What could you do to prevent a win/lose situation?

(Slide 5) Dealing with difficult situations

- Don't passively tolerate situations
- Be assertive, not aggressive
- Give benefit of the doubt
- Stress benefits
- Take control

Dealing effectively with difficult situations is the mark of a strong leader. When dealing with difficult situations:

1. Don't passively tolerate situations or treatment you object to.
2. Address the situation assertively, not aggressively. You can show boldness without brashness.
3. Allow the person to "save face." Give the person the benefit of the doubt if they admit to a misunderstanding.
4. Stress the benefits of your position for the person and/or organization. How will a settlement or agreement best benefit them?
5. Take control and turn the situation around.

<u>(Slide 6) Ways to negotiate with DISC styles</u>

If you are a "D" ☐ You tend to be strong-minded and confident ☐ You become bored easily with too much detail ☐ You like new and innovative ideas
When a "D" deals with a … D – Do not be too overbearing, let the other "D" have some control. I – Go out of your way to be friendly, be a little less businesslike. S – Slow down a little, be friendly, and give them time to digest the facts. C – Answer all their questions, take things slower, give them time to think.

[Read the slide top box]
The "D" interacting with another "D" behavior:
Don't be too strong or overbearing…just be yourself. "D" types see "eye-to-eye" quickly. Let the other 'D" have some control, too.
When a "D" deals with an "I":
Go out of your way to be extra friendly. Let them talk and tell their latest adventure, story, joke, etc. Be a little less "businesslike." You should hit it off well.
Slow down a little bit and do not scare the "S" behavior. Your strong style may intimidate them. Be friendly. Give them a chance to digest the facts. Do not over stress the "new." They like the stability of the tried and proven.
When a "D" deals with a "C": Answer all their questions. Give facts, figures, comparison, charts, graphs, etc. They love proof. Take things a little slower. Do not be pushy. Give them time to think. Answer their objections. Do not be phony.

<u>(Slide 7) Ways to negotiate with DISC styles</u>

If you are an "I" ☐ You are very sociable and people-oriented ☐ You lack attention to detail and get bored easily ☐ You love to have fun and talk a lot

When an “I” deals with a …

D – Cut the jokes, get to the bottom line, and don’t waste time.
I – Don’t talk each other to death.
S – Talk in terms of people, provide stability, and earn their trust.
C – No socializing, give facts and figures, do your homework.

[Read the slide top box]
The “I” dealing with a “D” behavior:
Cut the jokes and the small talk. Get to the bottom line quickly. Be businesslike. Stress results. Do not waste time.
For another “I” your biggest challenge will be remembering you are not there just to visit. Be careful not to talk each other to death. Remember to “ask for the commitment, order, or agreement” or schedule a follow-through meeting.
The “I” behavior needs to talk in terms of people and stories to the “S.” Provide stability through basic training and product knowledge. Earn their trust. Be careful not to “come on too strong” or be overly friendly too soon.
When an “I” negotiates with a “C” they need to cut the socializing. Cut the stories. Do not waste their time. Give facts and figures. Do your homework. Do not be silly. Provide proof. Raise your “C” – this can be a challenge so concentrate.

<u>(Slide 8) Ways to negotiate with DISC styles</u>

If you are an “S”

- You are dependable, but need more confidence
- When in a new position, you can be easily discouraged
- You accept “No” too easily…you need to be more forceful

When you deal with a …

D – Try to have more confidence, do not be intimidated.
I – Don’t lose control, keep focused, and beware of their friendly style.
S – They, like you, need reassurance. Be brave and close the deal.
C – Answer questions, be confident, be firm when presenting.

[Read the slide top box]
The “S” dealing with a “D” behavior:
Try to have more confidence. Be a little more assertive. Recognize that they may challenge you. Do not be intimidated by the strong-willed “D.”
Your dealings with the “I” will be fine if you don’t let them take control and “ramble.” Keep the direction of the meeting focused. You both like people and should be able to relate well. Watch out for their “over-friendly” attitude.
Other “Ss” need reassurance, too. Be a little more confident than usual. You will get along well. Do not forget to be brave and “close the deal.”
When an “S” negotiates with a “C”: Answer their questions. Be confident in your product or plan. Remember that “C” types will challenge you with skepticism. That is normal. Firmly present facts and figures. Your slower approach will work well in your favor.

(Slide 9) Ways to negotiate with DISC styles

If you are a "C" ☐ You are organized, efficient, and prefer planning to spontaneity ☐ You like sticking with proven ideas and products ☐ You are "facts and figures" oriented, using reason over emotion
When you deal with a … D – Go to the bottom line, the big idea, show results and goals. I – Let them talk more, show enthusiasm, minimize facts and figures. S – Be friendly, give the "space," talk about family, slow down. C – You'll be right at home.

[Read the slide top box]
The "C" dealing with a "D" behavior:
Head to the bottom line. Do not overwhelm them with facts or figures. Give the big idea. Have more courage in what you are doing. Show results, goals, and achievements.
For the "I" you will need to let them talk a little more. Laugh at their stories. Show enthusiasm. Do not overwhelm them with facts and figures. When possible, give them the experience and fun of "trying out" the product or idea for themselves.
When a "C" negotiates with an "S" they need to remember to be friendly, not too businesslike. Give them the "space" they need to accept the presentation. Talk about family. Do not be pushy. Slow down a bit.
And, finally, when a "C" negotiates with another "C" – well, it's rarely a negotiation. They are right at home with each other. Their thorough and precise presentation will be appreciated. They see the same issues. This should be a negotiation made in heaven!

(Slide 10) Negotiation tips

- ☐ Be reality-oriented
- ☐ Analyze the situation
- ☐ Determine what power you hold
- ☐ Determine the amount of time you need
- ☐ Information is the heart of the matter

If life is a game, then negotiation is a way of life.
Be reality oriented – see things as they really are without passing judgment.
Analyze the situation. Is it an emotional issue or one that process can work through? You can win with process if you keep personality (this is not the same as behavioral styles) and emotions out. Personality here means not attacking the person, but the process the person has not followed.
Determine what power you hold. Power is the ability to get things done. Ask yourself how you exercise control over people, events, and situations. Use power as a means, not an end.
Determine the amount of time you need. Are there deadlines to meet? Have you set a timeline to accomplish certain tasks or gather information? Establishing a timeline is a key factor.
Have you built in time for delays or unknown factors – sometimes information does not arrive in a timely fashion, people get sick, emergencies happen.
Information is the heart of the matter. It affects our appraisal of reality – too little and we can make the wrong decision.

It affects the decisions we make – having all the facts at hand is important.
Who, what, where, why, when and how – Knowing all the details helps determine the direction of our decision.
[Open the discussion for questions and answers. Allow the participants to share ideas or answers. When a question is asked, answer with, “Who would like to offer an answer to that?”

(Slide 11) Negotiation Role-Play

Hand out Activity A
[Either work through the 3 role-plays as a group or divide the group into teams and let each one solve a role-play. Since there are no cut-and-dry outcomes to the role play scenarios, the group can work out a best-case solution]

Facilitator

Module 9

Best in Class!

Developing Leadership Skills

INDIVIDUAL
DEVELOPMENT
PROGRAM

BPW/USA Individual Development Program
Facilitator's Guide
Module 9: Discussion – What is Leadership, Activity – The Perfect Boss, Handout – Behavioral Styles of Leaders, Handout – Keys to Effective Leadership & 5-areas

Module 9 Purpose:

1. Provide a foundation for leadership skill development
2. Provide information on DISC Leadership Behavior
3. Provide information on DISC Follower Behavior
4. Provide insight into keys for effective leaders
5. Provide guidelines to develop leadership traits

Module 9 Outcomes:

1. Participants will utilize prior information on behavioral styles
2. Participants will learn additional aspects of behavioral styles in leadership
3. Participants will have fun selecting the perfect boss.
4. Participants will discover keys to effective leadership.
5. Participants will learn what others expect of them as leaders.

Module 9 References:

1. Leadership and Self Deceptions: Getting Out of the Box. The Arbinger Institute. Berrett-Koehler Publishers. ISBN 1576751740
2. The Difference "Difference" Makes: Women and Leadership. Rhode, Deborah L. Stanford University Press. ISBN 0804746354
3. The 21 Indispensable Qualities of a Leader: Becoming the Person Others Will Want to Follow. Maxwell, John. Thomas Nelson Publishers. ISBN 0785274316
4. Think Like a Manager. Fritz, Ph.D., Roger. National Press Publications. ISBN 1-55852-052X
5. See You At The Top. Ziglar, Zig. Pelican Publishing Company. ISBN 1-56554-706-3

Module 9 Time:

Handout A - Effective Leadership Discussion	10 minutes
Activity – The Perfect Boss	10 minutes
Handout B – Behavioral Styles of Leaders	10 minutes
Handout C – Keys to Effective Leadership	15 minutes
Handout D – Factors in Leadership Effectiveness	10 minutes
Expectations of Leaders	5 minutes

EFFECTIVE LEADERSHIP

Leadership: The ability to motivate and influence the behavior of individuals and groups.

Power: The ability to influence others, to shape events, and to achieve personal goals.

Discuss your perception of Leadership and Power… (List items on flip chart or white/black board)

Activity: (Participants will need pencil/pen and paper)

The Perfect Boss

What: a way to illustrate the criteria we use when judging people for leadership positions.

Before learning about the DISC behavioral styles, would you have considered a perfect boss to be one with a particular behavioral style?

How:

1. Think of all the famous people that you would like to work for; the people who you think would provide strong, fair leadership, and would possess a strong sense of business.
2. Pick the one you would *most* like to work for and share your choice, as well as your criteria for choosing them.
3. Take a poll to see who the top three choices are, the most unusual choice, the youngest choice, the oldest choice, etc.

Discussion:

Have fun with this exercise.
Use a flip chart or white/black board to list the various people and the traits they possess.
"Vote" on the top three choices – have participants clap, cheer, etc. to vote on choices.

Behavioral Styles of Leaders

The different behavioral styles display different leadership qualities. Each style is unique in its ability to lead or be led. We need to understand these traits and learn to value them. The key to effective leadership is to recognize your behavioral style, and select a complimenting team from the other behavioral styles. Remember, it is important to create a "whole" team, a blend of all behavioral styles. Each style brings a unique perspective and balance to your team, as well as talents and service.

"D" Leaders –

D's are *take control* and be *in charge* types. They do not like people telling them what to do. "D" leaders can be too pushy and forceful. They need to control their direct and demanding approach to management. They make better leaders when they learn to slow down, be gentle, and not so demanding of others.

"I" Leaders –

I's are *inspiring* and *enthusiastic*. They love to lead and influence others. Naturally great presenters, they tend to talk too much. "I" leaders need to listen more and not be so sensitive to rejection. They are the most impressive and positive leaders. "I's" love crowds, but need to be interested in individuals.

"S" Leaders –

S's are the *sweet, steady,* and *stable* leaders. They seldom demand anything. They are friendly and loyal, but tend to be too nice. They need to be more aggressive and assertive. Overly sensitive to their shortcomings, "S's" need to be more confident. They hate to take risks. They often miss opportunities because of their caution. Reliable and relaxed, they are more reserved.

"C" Leaders –

C's are *competent* and *compliant.* They go by the book and want to do everything just right. They are thorough and detailed-oriented, but tend to be too informative. "C's" need to be more positive and enthusiastic. They answer questions people are not asking. When optimistic, "C's" are extremely influential. They should not concentrate on problems, but focus on potentials.

"D" followers –

"D's" respect strong leaders. They want to be part of a winning team. They follow with power and authority in mind. They wonder, "*Will this action make me more respected and/or get the job done?"* "D" followers need choices, rather than "*get-in or get-out"* ultimatums. They need opportunities to do their own thing.

"I" followers –

I's follow with their hearts. They tend to be impulsive followers. They want opportunities that will make them look good. "I" followers talk a lot. They make great first impressions. Their high egos and ability to persuade often turn them into the leaders in order to rise to the top. Sometimes you do not know who is leading whom.

"S" followers –

S followers do not make quick decisions. They like leaders who are understanding and gentle. They want to establish a relationship with a leader who will be around for a long time. "S's" are concerned about service and stability. When it comes to sensible and slow judgment, "S" followers feel right at home. They like familiar and low-key environments.

"C" followers –

C's are "consumer report" type followers. They analyze each decision. They love research and development. "C"s are quality-oriented followers. They do not like quick or costly decisions. Meticulous and precise, they follow with their minds, rather than hearts. "C's" seldom respond positively at first. They often want time to think about their decisions. Once convinced, they follow best.

Keys to Effective Leadership

Research shows that we are capable of moving our own leadership style closer to the ideal by:

1. Develop a climate that encourages trust, candor, and open communication with a free sharing of information.
2. Adopt the belief that the best motivation is self-motivation. If the proper climate and leadership are provided most people will want to be productive and efficient.
3. Involve people in problem solving and improvement planning when they are in a position to contribute.
4. Listen to people and try to see merit in their needs (understanding the behavioral styles).
5. Set clear goals and help people understand organizational objectives.
6. Rearrange jobs/tasks to allow a greater degree of responsibility and self-direction.
7. Recognize that conflicts between the needs of individuals and the organization are inevitable, but should be confronted openly using problem-solving strategies.
8. Use mistakes as a learning opportunity rather than concentrating on placing blame.
9. Have high expectations of others while providing them support and encouragement in attaining their objectives.
10. Provide recognition for superior performance.

Concepts, Skills, Techniques & Applications

What must be led – *to lead effectively*

Area 1 – Leading Self

- ✓ Appraisal of yourself and your actions before judging others
- ✓ Analysis of personal behavioral style

Area 2 – Leading Work

- ✓ Lead through planning and follow-through: use Strategic Plans, Priorities, Posterities
- ✓ Lead by Objective and Results

Area 3 – Leading People

- ✓ Staff and strengthen the organization
- ✓ Train and Develop employees
- ✓ Awards based on performance and progress

Area 4 – Leading Relations

- ✓ Communicate with individuals and groups
- ✓ Increase motivation, cooperation, and teamwork

Area 5 – Leading Situations

- ✓ Handle situations and behaviors immediately
- ✓ Solve problems and be a decision-maker

Factors in Leadership Effectiveness

Effectiveness in leadership is a career-long process involving eight fundamental factors. Understanding and implementing these factors early in any process assures greater benefits. Each of the eight steps is important but they each build upon one another. This model works well in relationships, as well as business.

1. Evaluating results
    a. It is important to ask, “Where have we been?”
    b. What are the accomplishments?
    c. What have been the milestones?
2. Analyzing needs
    a. Where are we now?
    b. Where do we need to go?
3. Setting objectives (we’ll study this in depth in Module 13)
    a. What should we do?
    b. How will progress be measured?
    c. What specific indicators will be used?
4. Determining accountability
    a. Who will do what by when?
5. Measuring progress
    a. How am I doing?
    b. How are you doing?
    c. How are we doing?
6. Appraising performance
    a. How did I do?
    b. How did you do?
    c. How did we do?
7. Recognizing improvement
    a. How will you be rewarded?
8. Projecting the future
    a. What must we continue to do?
    b. What should we stop doing?
    c. What should be changed?

Expectations (5 basic needs) of Leaders *by others*:

1. What do you expect from me?
2. Give me an opportunity to perform.
3. Let me know how I am getting along.
4. Give me guidance where I need it.
5. Pay and promote me according to my contribution.

PowerPoint Slides Script

(Slide 1) Module 9

Who wants to improve their Leadership Skills? Okay, then – let's get started!

(Slide 2) Module 9 goals

- Provide a foundation for leadership skill development
- Provide information on leadership behaviors
- Provide insight into keys for effective leaders
- Provide guidelines to develop leadership traits

(Slide 3) Effective leadership

[Read from slide]

- Leadership: The ability to motivate and influence the behavior of individuals and groups.
- Power: The ability to influence others, to shape events, and to achieve personal goals.

What is your perception of Leadership and Power?

[Have a volunteer list items or concepts on flipchart or board]

(Slide 4) The Perfect Boss [Participants will need a pencil/pen and paper]

This activity is a way to illustrate the criteria we use when judging people for leadership positions. Before learning about the DISC Model of Human Behavior, would you have considered a perfect boss to be one with a particular behavioral style?

- Think of all the famous people that you would like to work for; the people who you think would provide strong, fair leadership, and would possess a strong sense of business.
- Pick one and share your choice, as well as why you chose them.

[Take a poll to see who the top three choices are, the most unusual choice, the youngest choice, the oldest choice, etc.]

[Have fun with this activity. Use a flipchart or board to list the various people and the traits they possess. "Vote" on the top 3 choices by having the participants clap, cheer, etc.]

(Slide 5) "D" leadership styles

The different behavioral styles display different leadership qualities. Each style is unique in its ability to lead or be led. We need to understand these traits and learn to value them.

As Leaders –	As Followers –
Take control	Respect strong leaders
Like to be in charge	Will be on winning team.
Do not taking orders	Like power and authority
Can be pushy	Look for respect
Can be forceful	Like to see job done
Are usually direct	Need choices
Can be demanding	Don't like ultimatums.

(Slide 6) “I” leadership styles

The key to effective leadership is to recognize your behavioral style, and select a complimenting team from the other behavioral styles.

As Leaders –	As Followers –
☐ Inspiring and enthusiastic ☐ Love to lead and influence ☐ Natural presenters ☐ Tend to talk too much ☐ Sensitive to rejection ☐ Impressive and positive	☐ Follow with their hearts ☐ Tend to be impulsive ☐ Opportunities that make them look good ☐ Talk a lot ☐ Make great impressions ☐ High egos and ability to persuade

(Slide 7) “S” leadership styles

The S leaders will create a team of people they can trust. They will look for loyalty, commitment, and family values in their employees.

As Leaders –	As Followers –
☐ Sweet, steady, and stable ☐ Seldom demand anything ☐ Friendly and loyal ☐ Tend to be too nice ☐ Overly sensitive ☐ Hate to take risks ☐ Reliable and relaxed	☐ No quick decisions ☐ Like gentle caring leaders ☐ Establish long-term relationships ☐ Concerned about service and stability ☐ Sensible and slow judgment ☐ Familiar and low-key environments.

(Slide 8) “C” leadership styles

Remember, it is important to create a “whole” team, a blend of all behavioral styles. C leaders may find it hard to hire outgoing, talkative “I” behaviors.

As Leaders –	As Followers –
☐ Competent and compliant ☐ By the book ☐ Do everything just right ☐ Thorough and detailed ☐ Tend to be too informative ☐ Answer questions people are not asking ☐ Concentrate on problems	☐ “Consumer report” types ☐ Analyze decisions ☐ Love research and development. ☐ Quality-oriented ☐ No quick/costly decisions ☐ Meticulous and precise ☐ Seldom positive at first.

(Slide 9) Effective Leadership Keys

- ☐ Develop a climate that encourages
- ☐ Self-motivation is the best motivation
- ☐ Involve people in problem-solving
- ☐ Listen to people
- ☐ Set clear goals
- ☐ Confront conflict
- ☐ Have high expectations
- ☐ Provide recognition

Research shows that we are capable of moving our own leadership style closer to the ideal by:

1. Developing a climate that encourages trust, candor, and open communication with a free sharing of information.
2. Adopt the belief that the best motivation is self-motivation. If the proper climate and leadership are provided most people will want to be productive and efficient.
3. Involve people in problem solving and improvement planning when they are in a position to contribute.
4. Listen to people and try to see merit in their needs (understand the behavioral styles and their motivation).
5. Set clear goals and help people understand organizational objectives.
6. Rearrange jobs/task to allow a greater degree of responsibility and self-direction.
7. Recognize that conflicts between the needs of individuals and the organization are inevitable, but should be confronted openly using problem-solving strategies.
8. Use mistakes as a learning opportunity rather than concentrating on placing blame.
9. Have high expectations of others while providing them support and encouragement in attaining their objectives.
10. Provide recognition for superior performance.

(Slide 10) Concepts, skills, techniques, & applications

- ☐ Area 1 – Leading Self
- ☐ Area 2 – Leading Work
- ☐ Area 3 – Leading People
- ☐ Area 4 – Leading Relations
- ☐ Area 5 – Leading Situations

What must be led – needs to be lead effectively.

Leading self: appraise yourself and your actions before judging others. Do a personal behavioral style assessment to identify your strengths and challenges.

Leading Work: Lead through planning and follow-through, use strategic plans, priorities, posterities. Lead by objectives and results.

Leading People: Staff and strengthen your organization. Round out your team with a blend of behavioral styles. Train and develop employees to be the best they can be. Give awards based on performance and progress.

Leading Relations: Communicate with individuals and groups and increase motivation, cooperation, and teamwork.

Leading Situations: Handle situations and behaviors immediately. Solve problems and be a decision-maker.

(Slide 11) Become a good leader

1. Evaluate results
2. Analyze needs
3. Set objectives
4. Determine accountability
5. Measure progress
6. Appraise performance
7. Recognize improvement
8. Project the future

Effectiveness in leadership is a career-long process involving eight fundamental factors. Understanding and implementing these factors early in any process assures greater benefits. Each of the eight steps is important but they each build upon one another. This model works well in relationships, as well as business.

1. Evaluating results: it is important to ask, “Where have we been?” “What are the accomplishments?” “What have been the milestones?”
2. Analyzing needs: Where are we now? Where do we need to go?
3. Setting objectives (we’ll discuss this in more detail in Module 13): What should we do? How will progress be measured? What specific indicators will be used?
4. Determining accountability: Who will do what by when?
5. Measuring progress: How am I doing? How are you doing? How are we doing?
6. Appraising performance: How did I do? How did you do? How did we do?
7. Recognizing improvement: How will you be rewarded?
8. Projecting the future: What must we continue to do? What should we stop doing? What should be changed?

(Slide 12) Expectations of leaders by employees

1. What do you expect from me?
2. Give me an opportunity to perform.
3. Let me know how I am getting along.
4. Give me guidance where I need it.
5. Pay and promote me according to my contribution.

As employees, would you agree that these are valid expectations?

Facilitator

Module 10

Get Into It and Out of It!

Parliamentary Process

INDIVIDUAL
DEVELOPMENT
PROGRAM

BPW/USA Individual Development Program
Facilitator's Guide
Module 10: Activity Quiz, Review, the Agenda, Terminology, Steps for Handling Motion, Pass, or Defeat Motions

Module 10 Purpose:

1. Introduce Parliamentary Process to participants
2. Explain importance of process in many aspects of life
3. Provide rules for group leadership.
4. Provide information to make meetings effective and efficient.
5. Provide sound advice on classification and precedence of motions.

Module 10 Outcomes:

1. Participants will learn elementary Parliamentary Process
2. Participants will learn to effectively and efficiently chair a meeting
3. Participants will learn to make or amend a motion.
4. Participants will learn basic terminology used in Parliamentary Process.

Module 10 References:

1. Parliamentary Procedure at a Glance. Jones, O. Garfield. Penguin Books. ISBN 0140153284
2. Robert's Rules of Order (10th Ed.). Robert III, Henry M., Evans, William J., Honeman, Daniel H., and Balch, Thomas J. Perseus Publishing. ISBN 0738203076

Module 10 Time:

Activity – Matching Exercise	5 minutes
Review	5 minutes
Handout – Study Questions & Answers	10 minutes
Handout – The Agenda & Verbiage	15 minutes
Handout – Terminology	10 minutes
Handout – Steps for Handling Motions	5 minutes
Handout – Pass or Defeat Motions	10 minutes

Additional Recommendations:

The Facilitator should review Parliamentary Process via the internet or local library to review Robert's Rules of Order. There will many questions from the participants. Having a reference copy of Robert's Rules of Order on hand will be helpful.

Activity A, Module 10 Facilitator's Answer Sheet

Matching Exercise

Place the appropriate letter in the box beside the number. Use each letter only once.

1. [N] Addressing the chair	A. Taking the vote on a motion; calling for the vote
2. [J] Announcing the vote	B. A motion that introduces business.
3. [M] Assigning the floor	C. One of the two steps needed to seek and secure permission to speak.
4. [L] Chair	D. A member introduces a motion.
5. [I] Debating the question	E. A member verbally agreeing that a motion should come before the meeting.
6. [K] Handling a motion	F. Formally placing a motion before the assembly for debate.
7. [B] Main motion	G. A formal expression of the will, opinion, or preference of the members about a submitted matter.
8. [D] Making the motion	H. The person who is chosen to conduct business, usually the president.
9. [C] Obtaining the floor	I. The discussion of a motion by the members.
10. [O] President	J. A declaration by the chair of the results of the vote.
11. [H] Presiding officer	K. The six steps necessary for consideration of a motion.
12. [A] Putting the question	L. The presiding officer.
13. [E] Second	M. The recognition of a member by the chair giving the right to speak.
14. [F] Stating the question	N. A member seeks permission from the presiding officer to speak.
15. [G] Vote	O. The person who is elected or appointed to lead the organization.

Rearrange in the proper sequence by placing the appropriate number in the block.

[**5**] A. Chair states the motion.

[**4**] B. The motion is seconded.

[**3**] C. The member makes a motion.

[**8**] D. The chair announces the vote.

[**6**] E. The motion is debated (discussed).

[**1**] F. The member rises and addresses the chair.

[**7**] G. The chair takes the vote.

[**2**] H. The member is recognized by the chair.

Study Questions & Answers

1. What do you call the presiding officer?
   Madam (or Mr.) President or Madam (or Mr.) Chairman

2. How do you make a motion at a meeting?
   Rise, address the chair, state your name, and say, "I move that…" (state your motion). Do not give any explanatory statements.

3. What is required before a motion becomes a subject for discussion?
   A second.

4. How many amendments can be attached to a motion at one time?
   Two

5. Where did we get the idea of using rules of procedure for meetings?
   From the English Parliament

6. How can we delay action on a motion?
   Send it to committee, lay it on the table, or postpone it.

7. When a member wishes to introduce a new item of business (that is, to make a main motion), what is the first thing to do?
   Rise, address the chair, and wait for recognition.

8. May a member wishing to make a main motion interrupt a speaker?
   No, a member rises to seek recognition only when no one else has the floor.

9. Who has the right to speak first in debate on a question?
   The maker of the motion.

10. What is the number of times a motion is stated while it is being dealt with?
    Three times

11. Can the chair close debate when a member is seeking to speak?
    No, not as long as any member wishes to speak (unless there is a pre-determined time limit for debate by the assembly).

12. What does "Are you ready for the question," mean?
    Is there any discussion or is there any further discussion?

13. What does "putting the question," mean?
    To call for the vote.

14. What statement does the chair make if the motion is agreed to?
    The "ayes" have it and the motion is carried (or adopted).

15. What statement does the chair make if the motion is not adopted?
    The "noes" have it and the motion is lost.

The Agenda

Following an agenda is not only important in organizational meetings, but is necessary in business and committee meetings, as well. Time and efficiency are two key reasons that an agenda is used. Get into it – and out of it!

The Order of Business

- ✓ Call to Order
- ✓ Roll call (or determining a quorum)
- ✓ Reading and approval of minutes
- ✓ Reports of officers and standing and special committees
- ✓ Unfinished Business (We do not refer to it as "old" business. It is *unfinished* if it is still on the agenda.
- ✓ New Business
- ✓ Adjournment

Possible additions would be an invocation or ceremony, communications, announcements, a speaker, pass the gavel, etc.

Typical language used by the chair:

"I call this meeting to order."

"Will the secretary, [name], please call the roll?

"We have a quorum. Will the secretary please read the minutes of the last meeting?"

"Are there any corrections to the minutes?" "Corrections" is all that needs to be asked. Stating "additions, corrections, etc." is redundant.

"If there are no (further) corrections, the minutes stand approved (as read / as corrected).

"We'll now move to officer's reports. Will the treasurer, [name], please submit his/her report?"

"Are there any questions concerning the treasurer's report?" (If none) "Thank you, [name]. Will the vice-chair [president], [name], please give his/her report?" You can not move to accept the treasurer's report, because you do not know the accuracy of it. It is placed on file for review [or audit].

"We'll now move on to unfinished business. At the last meeting John Doe of the Office Operations Committee moved that…is there discussion?"

"The meeting is now open for new business."

"The chair recognizes [name]."

"It has been moved and seconded that …Is there any discussion?"

"We will now vote on the motion that …All in favor say, 'Aye.' All opposed say, 'Nay.' The motion is carried [or defeated]."

"If there's no objection, the meeting is hereby adjourned." (Or, "Is there a motion to adjourn?")

Terminology used in parliamentary procedure

Executive Committee: The Executive Committee (EC) consists of the elected officers of the organization and the Parliamentarian, who serves without a vote. The EC is usually empowered to act in the interim between meetings of the general assembly.

Board of Directors: The Board of Directors consists of the Executive Committee and all Standing Chairs. They each have a vote.

General Business Session: A general business session consists of the Executive Committee, Board of Directors, and all members in attendance. A quorum (see bylaws) and a majority of the EC must attend to hold a valid vote.

Parliamentary Terms

Adjourn:	To dissolve the meeting until the next regular or special meeting.
Amend:	To modify or change a motion.
Announcing the Vote:	Action taken by the Chairperson after a vote is concluded. Must state if the motion is carried or if it is lost.
Chair:	Any person presiding over an assembly. To chair a meeting means to preside over it.
Carried:	The same as the terms "passed" or "adopted" when referring to action taken on a motion.
Ex-Officio:	A member of a committee by virtue of the office held; does not assume the chair;
General Consent:	Obtaining unanimous consent from the assembly on any matter without requiring a motion and vote Note: If there is even ONE objection, the matter must be put to a vote and a majority decide.
Germane:	A matter is considered germane if it relates to the subject that is under consideration.
Main Motion:	One that introduces a subject to the assembly.
Majority:	More than half the votes cast.
Move:	To propose a motion. NOTE: The proposer says, "I move…;" not "I make a motion…"
Postpone to a Definite Time:	A motion used to provide time for further consideration and for obtaining more information before action is taken.
Previous Question:	To cut off discussion and bring the immediate vote upon the pending question. Not debatable. Not amendable. Requires a two-thirds vote to carry.
Quorum:	Number of persons required to be present at a business meeting before business can be legally conducted.
Reconsider:	To bring to the assembly a motion which has already been disposed of. Must be **made the same day of the meeting or the meeting immediately following, by the one who voted with the prevailing side.**
Rescind:	To annul a motion when the time limit for reconsideration is past. To annul action.
Second:	To agree that a motion should be considered. Without a second, a motion dies. This action simply allows a motion to be considered.
Table:	To set aside for the time being the motion under discussion, with the privilege of taking it up again at some future time. NOTE: It requires a motion to "Take from the table" before it can be considered again after being tabled.
Unanimous:	Means every voting member present at a meeting favored or opposed the motion.
Withdraw:	To remove a motion that has been made, seconded, and stated by the Chair, without prejudice and without a vote.

Eight Basic Steps for Handling a Motion

Handling motions can be fun and exciting, if you know how to follow Parliamentary Process!

1. STAND AND ADDRESS THE CHAIR:
   Rise and address the Chair by saying, “Madame President” or “Mister Chairperson.” In larger groups, the person would state his/her name and affiliation.

2. GAIN RECOGNITION:
   The Chair says, “The Chair recognizes…” This lets the membership know that the person has the floor and no one else can speak at the moment.

3. MAKE THE MOTION:
   The maker says, “I move that…” If referring to a motion that comes from a committee, the maker of the motion may state: “By recommendation of the _____ Committee, I move that…”

4. SECOND THE MOTION:
   The seconded says, “I second the motion.” [NOTE: if using motion forms, the seconded has already signed and the maker states after reading the motion, and I have a second.” The copy of the motion then goes to the Chair for reading to the membership. Written motions are preferred so the exact intent is carried through.]

5. THE CHAIR STATES THE MOTION:
   “It has been moved and seconded that…” The motion will be stated 3 times before the vote is taken.

6. THE CHAIR ASKS FOR DEBATE OF THE MOTION:
   “Is there any discussion?” The maker of the motion has the first opportunity to speak to the motion. The chair will direct additional debate by asking if someone is in the affirmative or in opposition to the motion and allow equality to the debate.

7. THE CHAIR PUTS THE MOTION TO A VOTE:
   “It has been moved and seconded that…” “All those in favor of the motion please say Aye; all those opposed, please say No.”

8. THE CHAIR ANNOUNCES THE RESULT OF THE VOTE:
   “The motion has carried and you have just voted to…” or “The motion has lost.”

How to Help Pass or Defeat Motions

Proponents or opponents to either promote or adopt motions and resolutions, or to obstruct and defeat them can legally use the following tactics or proceedings.

NOTE: Vote and function at meetings. Do not be idle or unconcerned. In addition, do not sleep on your rights, when you do, you forfeit them.

TO HELP PASS A MOTION:	HOW TO DEFEAT A MOTION:
1. Second it. Say, "I second the motion."	1. Do not second it. Be silent.
2. Speak for it before the vote is taken.	2. Speak against it before the vote is taken.
3. Vote for it.	3. Vote against it.
4. Vote against indefinite postponement to rescue it.	4. Move to postpone indefinitely to "kill" it.
5. Amend it sensibly to improve and perfect it.	5. Amend it adversely to ridicule it or encumber it.
6. Vote against referring it.	6. Move to refer it.
7. Vote against postponements or delays, and pass it now.	7. Move to postpone it to the next meeting – delay it.
8. Defeat the "previous question" to (continue to) bring out its good points in debate.	8. Move the "previous question" to shut off (further) discussion of its good points.
9. Vote against tabling it.	9. Vote to table it.
10. Vote against recessing so as not to give free time.	10. Move to recess to go after votes.
11. Vote down any motion to reconsider.	11. If the motion is passed move to reconsider it.
12. Carry out passed motions at once, so they cannot rescind.	12. If a passed motion remains un-executed, move to rescind.
13. Vote down adjournments to pass it right now.	13. Move to adjourn and delay or obstruct its passage.

SPECIAL NOTES:

Support or oppose questions at meetings and conventions with all your skill and eloquence, then abide by the result (the majority has spoken) – thus preserving harmony and unity, and safeguarding the organization's dignity and integrity.

PowerPoint Slides Script

(Slide 1) Module 10

Have you ever been in a meeting that seemed to go in circles? Well, I'm here to help you learn how to have a smooth, effective and efficient meeting by using parliamentary process!

(Slide 2) Module 10 goals
[Read from slide] [Hand out Activity A]

1. Introduce parliamentary process
2. Explain importance of process in life
3. Provide rules for group leadership
4. Provide information to make meetings effective and efficient
5. Provide advice on motions
6.

Before we begin to learn about parliamentary process, I'm going to give you a fun matching exercise to complete. These are common terms used in parliamentary process. You won't be graded, so don't worry! This is a learning experience.

(Slide 3) Test your knowledge

Take a few moments to work through the quiz and matching exercise –

How well do you know Parliamentary Process?

(Slide 4) Study questions

- What do you call the presiding officer?
- How do you make a motion at a meeting?
- What is required before a motion becomes a subject for discussion?
- How many amendments can be attached to a motion at one time?
- What does BPW/USA require as a parliamentary authority?
- Where did we get the idea of using rules of procedure for meetings?

Answers:

- Madam (or Mr.) President or Chairman
- Rise, address the chair, state you name, and say, "I move that…" (state your motion). Do not give any explanatory statements.
- A second.
- Two
- Robert's Rules of Order (latest edition)
- From the English Parliament

(Slide 5) More study questions

- What is the number of times a motion is stated while it is being dealt with?
- Can the chair close debate when a member is seeking to speak?
- What does "Are you ready for the question," mean?
- What does "putting the question," mean?

Answers:

- Three times (once by the maker, and twice by the chair)
- No, not as long as any member wishes to speak (unless there is a pre-determined time limit for debate by the assembly)
- Is there any discussion or is there any further discussion?
- To call for the vote

(Slide 6) And, more questions

- How can we delay action on a motion?
- When a member wishes to introduce a new item of business (that is, to make a main motion), what is the first thing to do?
- May a member wishing to make a main motion interrupt a speaker?
- Who has the right to speak first in debate on a question?

Answers:

- Send it to committee, lay it on the table, or postpone it.
- Rise, address the chair, and wait for recognition
- No, a member rises to seek recognition only when no one else has the floor.
- The maker of the motion

(Slide 7) More study questions

- What statement does the chair make if the motion is agreed to?
- What statement does the chair make if the motion is not adopted?

Answers:

- The "ayes" have it and the motion is carried (or adopted)
- The "noes" have it and the motion is

(Slide 8) The agenda

- The Order of Business
  - Call to order
  - Roll call (or determining a quorum)
  - Reading and approval of minutes
  - Reports of officers, standing, & special committees
  - Unfinished Business
  - New Business
  - Adjournment

Following an agenda is not only important in organizational meetings, but is necessary in business and committee meetings, as well. Time and efficiency are two key reasons that an agenda is used. Get into the business – and out of it!

A note on Unfinished Business: we do not refer to it as "old" business. Old business was handled – a motion passed or defeated. Business deferred until another time is "unfinished" if it is still on the agenda.

Possible agenda additions would be an invocation or ceremony, communications, announcements, a speaker, pass the gavel, etc.

(Slide 9) Typical language by the chair

- I call this meeting to order
- Will the secretary, [name], please call the roll?
- We have a quorum. Will the secretary please read the minutes of the last meeting?
- Are there any corrections to the minutes?
- If there are no (further) corrections, the minutes stand approved (as read / as corrected). Regarding asking if there are "Corrections" to the minutes: Corrections is all that needs to be asked. Stating additions, corrections, etc. is redundant.
- We'll now move to officer's reports. Will the treasurer, [name] please submit his/her report?

(Slide 10) More words by the chair

- Are there any questions concerning the treasurer's report? Thank you, [name]. Following the treasurer's report: You can not move to accept the treasurer's report, because you do not know the accuracy of it. It is placed on file for review or audit. You would only state that the treasurer's report will be filed for audit if you indeed hire an accounting firm to perform one. The chair would continue with additional officer and committee reports in order, stating, "Will the vice-chair [president], [name], please give his/her report?

- We'll now move on to unfinished business. At the last meeting Joe Doe of the Office Operations Committee moved that…is there discussion?
- The meeting is now open for new business.
- The chair recognizes [name].
- "It has been moved and seconded that…Is there any discussion?

(Slide 11) And, more words by the chair

- "We will now vote on the motion that…All in favor say, "Aye." All opposed say, "Nay." The motion is carried [or defeated].
- If there's no objection, the meeting is hereby adjourned."

(Slide 12) Parliamentary groups

- Executive Committee
- Board of Directors
- General Business Session

The Executive Committee (EC) consists of the elected officers of the organization and the Parliamentarian, who serves without a vote. The EC is usually empowered to act in the interim between meetings of the general assembly.
The Board of Directors consists of the Executive Committee and all Standing Chairs. They each have a vote.
A general business session consists of the Executive Committee, Board of Directors, and all members in attendance. A quorum (see bylaws) and a majority of the EC must attend to hold a valid vote.

(Slide 13) Parliamentary terms

Adjourn:	To dissolve the meeting until the next meeting or special meeting.
Amend:	To modify or change a motion.
Announcing the vote:	Action taken by the Chairperson after a vote is concluded. Must state if the motion is carried or if it is lost.
Chair:	Any person presiding over an assembly. To chair a meeting means to preside over it.
Carried:	The same as the terms "passed" or "adopted" when referring to action taken on a motion.
Ex-Officio:	A member of a committee by virtue of the office held; does not assume the chair; does not vote.

(Slide 14) More parliamentary terms

General Consent:	Obtaining unanimous consent from the assembly on any matter without requiring a motion and vote. Note: If there is even ONE objection, the matter must be put to a vote and a majority decides.
Germane:	A matter is considered germane if it relates to the subject that is under consideration.
Main Motion:	One that introduces a subject to the assembly.
Majority:	More than half the votes cast.
Move:	To propose a motion. NOTE: The proposer says, "I move…;" **not** "I make a motion…"
Postpone to a Definite Time:	A motion used to provide time for further consideration and for obtaining more information before action is taken.

(Slide 15) And, more parliamentary terms

Previous Question:	To cut off discussion and bring the immediate vote upon the pending question. Not debatable. Not amendable. Requires a two-thirds vote to carry.
Quorum:	Number of persons required to be present at a business meeting before business can be legally conducted.

Reconsider: To bring to the assembly a motion which has already been disposed of. Must be made the same day of the meeting or the meeting immediately following, by the one who voted with the prevailing side.

Rescind: To annul a motion when the time limit for reconsideration is past. To annul action.

Second: To agree that a motion should be considered. Without a second, a motion dies. This action simply allows a motion to be considered.

Table: To set aside for the time being the motion under discussion, with the privilege of taking it up again at some future time. NOTE: It requires a motion to "Take from the table" before it can be considered again after being tabled.

Unanimous: Means every voting member present at a meeting favored or opposed the motion.

Withdraw: To remove a motion that has been made, seconded, and stated by the Chair, without prejudice and without a vote.

(Slide 16) 8 basic steps for handling a motion

Handling motions can be fun and exciting, if you know how to follow Parliamentary Process!

Stand and Address the Chair: Rise and address the Chair by saying, "Madame President" or "Mr. Chairperson." In larger groups, the person would state his/her name and affiliation.

Gain Recognition: The Chair says, "The Chair recognizes…" This lets the membership know that the person has the floor and no one else can speak at the moment.

Make the Motion: The maker says, "I move that…" If referring to a motion that comes from a committee, the maker of the motion may state, "By recommendation of the _____ Committee, I move that…"

Second the Motion: The seconded says, "I second the motion." [NOTE: if using written motion forms, the seconded has already signed and the maker states after reading the motion, and I have a second." The copy of the motion then goes to the Chair for reading to the membership. Written motions are preferred so the exact intent is carried through.]

The Chair States the Motion: "It has been moved and seconded that…" The motion will be state 3 times before the vote is taken.

The Chair asks for Debate on the Motion: "Is there any discussion?" The maker of the motion has the first opportunity to speak to the motion. The chair will direct additional debate by asking if someone is in the affirmative or in opposition to the motion and allow equality to the debate.

The Chair puts the Motion to a Vote: "It has been moved and seconded that…" "All those in favor of the motion please say, 'Aye;' all those opposed, please say 'Nay.'

The Chair Announces the Result of the vote: "The motion has carried and you have just voted to…" or "The motion has lost."

(Slide 17) How to pass a motion

- ☐ Second it
- ☐ Speak for it
- ☐ Vote for it
- ☐ Vote against indefinite postponement
- ☐ Amend it sensibly to improve it
- ☐ Vote against referring it
- ☐ Vote against postponements
- ☐ Defeat the "previous question"
- ☐ Vote against tabling it
- ☐ Vote against recessing
- ☐ Vote down any motion to reconsider
- ☐ Carry out passed motions at once
- ☐ Vote down adjournments

Proponents or opponents t either promote or adopt motions and resolutions, or to obstruct and defeat them can legally use the following tactics or proceedings. In order to be an active participant in the parliamentary process you must vote and function at meetings. Do not be idle or unconcerned. In addition, do not sleep on your rights, when you do, you forfeit them.

Second it. Say "I second the motion."

Speak for it before the vote is taken.
Vote for it
Vote against indefinite postponement to rescue it.
Amend it sensibly to improve and perfect it.
Vote against referring it.
Vote against postponements or delays, and pass it now.
Defeat the "previous question" to (continue to) bring out its good points in debate.
Vote against tabling it.
Vote against recessing so as not to give free time.
Vote down any motion to reconsider.
Carry out passed motions at once, so they cannot rescind.
Vote down adjournment to pass it right now.

(Slide 18) How to defeat a motion

- ☐ Do not second it
- ☐ Speak against it
- ☐ Vote against it
- ☐ Move to postpone indefinitely
- ☐ Amend it adversely
- ☐ Move to refer it
- ☐ Move to postpone it
- ☐ Move the "previous question"
- ☐ Vote to table it
- ☐ Move to recess
- ☐ Move to reconsider
- ☐ Move to rescind
- ☐ Move to adjourn

Do not second it. Be silent.
Speak against it before the vote is taken.
Vote against it.
Move to postpone indefinitely to "kill" it.
Amend it adversely to ridicule it or encumber it.
Move to refer it.
Move to postpone it to the next meeting – delay it.
Move the "previous question" to shut off (further) discussion of its good points.
Vote to table it.
Move to recess to go after votes.
If the motion is passed move to reconsider it.
If a passed motion remains unexecuted, move to rescind.
Move to adjourn and delay or obstruct its passage.
Support or oppose questions at meetings and conventions with all your skill and eloquence, then abide by the result (the majority has spoken) – thus preserving harmony and unity, and safeguarding the organization's dignity and integrity.

(Slide 19) Are we having fun yet?

- ☐ General Gavel Tips
- ☐ Begin on Time
- ☐ Communicate

When calling a meeting to order, stand at the podium or lectern and rap the gavel ONE time. Wait until the membership quiets to proceed.
The gavel is not to be used as a weapon. Lay it aside until the meeting is adjourned.
Upon adjourning, rap the gavel ONE time to close the meeting.
Begin every meeting at the appointed time. Do not wait for late-comers. Tardiness should not be tolerated.
If there must be delay in beginning a meeting (power outage, etc.) communicate that to the members present.

Facilitator

Module 11

There are fewer rules than you think!

Business Etiquette

INDIVIDUAL
DEVELOPMENT
PROGRAM

BPW/USA Individual Development Program
Facilitator's Guide
Module 11: Business Etiquette Overview, Activity

Module 11 Purpose:

1. Review elements of etiquette
2. Provide up-to-date information on new technology use
3. Provide guidelines for decorum in business settings
4. Provide information on dining and gratuities
5. Review protocol for business meetings

Module 11 Outcomes:

1. Participants will learn the importance of following etiquette procedures in business
2. Participants will learn current rules for use of electronic technology
3. Participants will learn the protocol for dining, tipping, and responding to invitations.
4. Participants will review protocol for what not to do in business settings.
5. Participants will practice a business situation where knowledge of etiquette rules is important.

Module 11 References:

1. Pat Cornish, Past BPW/USA President, PowerPoint
2. Do not be a Cell Phone Boor. Fitzgerald, Michael. http://story.news.yahoo.com?tmpl=story&u=/ttzd/20040219/tc_techtures_zd
3. E-Mail and Instant Messaging. Fitzgerald, Michael http://story.news.yahoo.com?tmpl=story&u=/ttzd/20040219/tc_techtures_zd
4. The Little Book of Etiquette. Long, Sheila M. Barnes & Noble Books. ISBN 0760720193

Module 11 Time

Class activity – Etiquette Faux Pas	10 minutes
Handout - Overview of Business Etiquette	50 minutes

Other Recommendations:

This module was designed around the power point presentation developed by BPW/USA Past National President, Pat Cornish. It is highly recommended that you use this power point for this module.

Place sample "thank you" notes, copies of e-mails received or sent with correct information and grammar, a sample menu (or actual menus), business cards, and items from the discussion on the tables for review.

Begin the module by having participants write on a 3x5-index card the one etiquette faux pas that bothers them most. Pass the cards to the person on their left and read aloud.

If you have the luxury of additional time, you may choose to offer Activity A, Module 11, "What Would You Do?"

Business Etiquette

Business Etiquette Why?

- ✓ Must be aware of more rules of behavior than you expect to encounter in most social situations.
- ✓ Need to be aware of the sort of behavior that is expected in the world of work so you can move with confidence and ease.

Knowing

- ✓ What to say
- ✓ How to react in various situations

Understanding the corporate culture

Success in getting, keeping, and advancing in a job depends 85 percent on people skills - and only 15 percent on technical knowledge and skills.

Business Booboos

What are some other Business Booboos you can name?

- ✓ Complimenting

Greetings & Introductions

Self-Introduction

- ✓ Hugs and Kisses
- ✓ Rise to the occasion
- ✓ The proper handshake
- ✓ Opening the door

Visiting Do's and Don'ts

Workplace Etiquette

- ✓ Electronic -Email
- ✓ Telephone
  - Answering
  - Placing Calls
  - Closing a call
  - Telephone Tag
  - Voice Mail
  - Cell phones and beepers
  - Answering Machines

The Boardroom and Dining **-** The Ten Commandments

Tipping

Strategies for a Successful Meeting

- ✓ Speak Up
- ✓ Have an agenda

Business Cards

Correspondence

What Do You Do?

It is your first week on the job as a mid-level manager of XYZ International. Your boss (a D behavioral style) asks you to come to her office. When you arrive she says, "Mr. Yamamoto, head of Tokyo's division and Mr. Abdul Shareek-Osan from the Mid-east division will be here on Friday. Arrange a luncheon meeting and get audio-visual to set up the presentation area. By the way, they are both bringing their wives, so plan to keep them entertained while we do business. I know you can handle this, now I have a meeting to get [to]. Let me know by tomorrow what you plan."

You are on your own. You need to arrange:

- ✓ Meeting room
- ✓ Meal(s)
- ✓ Audio-visual presentation
- ✓ Something for the spouses to do…

Your considerations:

_____

_____

_____

_____

_____

Your plans:

_____

_____

_____

_____

_____

Class Discussion:

Meal planning – two cultures are involved. A luncheon salad, fruit plate or vegetarian-style dish would be the most appropriate in this setting of diverse cultures.
Plan to escort the spouses to a light lunch in a local restaurant (where they can order from a menu), then on a tour of your city's museum, art center, or historic site.
Allow the class to brainstorm ideas and come to a consensus.

PowerPoint Slides Script

(Slide 1) Module 11
This module is on Business Etiquette. We're going to have fun with it - and you might even pick up some new etiquette habits!
We've used information for this module that was gathered and presented by Past National President, Pat Cornish.

(Slide 2) Module 11 goals

- ☐ Review elements of etiquette
- ☐ Provide up-to-date information
- ☐ Provide guidelines for business decorum
- ☐ Provide information on dining & tipping

(Slide 3) Business etiquette why?
Career-conscious people entering the business world must be aware of more rules of behavior than they would encounter in most social situations.
You need to be aware of the sort of behavior that is expected in the world of work so you can move within that world with confidence and ease.
The rules of business etiquette are unique, as is the entire approach to etiquette in the business world.
And you must understand this special way of thinking about relationships and behavior and how it applies to your dealings with your superiors, your colleagues, and your subordinates.

(Slide 4) Knowing accepted ways of doing things
Knowing the accepted ways of doing things is vitally important and becomes even more important the higher you rise in the ranks.
Technology like cell phones, teleconferencing, and e-mail require people to learn new rules of civility.
Management today values manners in the workplace as never before. More and more firms are organizing in-house training in etiquette for their employees. Career-minded executives are finding a connection between civility and success.

(Slide 5) The corporate culture
If you think it would be nice but not necessary to know the rules of corporate etiquette, consider this remarkable statistic from three separate research projects by Harvard University, the Carnegie Foundation, and the Stanford Research Institute: Success in getting, keeping, and advancing in a job depends 85 percent on people skills and only 15 percent on technical knowledge and skills.
Needless to say, then, mastering the rules of business etiquette can help your career.
The first thing you should know is that these rules do not have the same foundation as those you may have learned as a child. Your childhood rules evolved from the code of chivalry which called for deference to others not on the basis of gender and/or age.
However, relationships in the business world have always been based primarily on rank, much like any military system. Rank, the degree of power vested in different individuals, gives a business organization the structure it needs to function effectively.

(Slide 6) Business booboos
Let's go over some Business Booboos….Expressing Negative attitudes: If you are feeling and thinking negatively, your mindset will find expression in surliness, bad temper, and general unpleasantness.
Wearing inappropriate clothing: Although we like to think that we judge others by their behavior and not their appearance, it remains true that we base our opinions of others, to a large degree, on what we see.

Failing to make introductions: allowing someone to stand without introducing him or her can make everyone present feel uncomfortable.
Disregarding social courtesies: Forgetting to say please, thank you, and excuse me and failing to perform other common civilities makes colleagues and supervisors doubt your judgment.
Taking messages carelessly – well that speaks for itself.
When someone criticizes another in public (politicians all get failing marks here), the criticizer comes off looking worse than the person being criticized.
Don't make people wait – it is frustrating and discourteous.
Using vulgar and inappropriate language is a definite no-no.
Giving someone the run-around gives the impression you like ducking responsibility and giving vague or conflicting answers.

(Slide 7) Complimenting
Complimenting people on their appearance is perfectly correct if the compliment is sincere. At the office, however, you are best to compliment the work not the clothes. When giving or receiving a compliment, keep in mind the following points: (read from slide)
The most important thing to remember about business etiquette is that so much of it is based on rank. If you remember this, common sense and a cool head should get you through most situations.

(Slide 8) Greetings & introductions

- When making introductions the old adage of introducing the woman to the man is no longer valid.
- Introduce the more prominent to the less prominent.

When making an introduction, introduce the person who is being presented last. Also, keep in mind that social etiquette is based on chivalry. Business etiquette is based on hierarchy. Gender and age play no role, but rank and authority do.

(Slide 9) Greetings & introductions
(Read first bullet from slide)

- Include something of interest that would start a conversation if the situation permits.

Governor (insert your governor's last name), this is (_____), BPW/USA President. _____, I don't know if you knew that Governor _____ has been a BPW member for 25 years.

(Read second and third bullet from slide)

- When you have been introduced try and use the persons name three times.
- Ask to have the name repeated if it was not clear.

(Slide 10) The name game?
Coming up blank…how many times has this happened to you? If you are the one being introduced and the introducer seems to have forgotten your name, help them out – extend your hand, smile and offer your name. People wince inwardly when you mispronounce their names. It is a serious breech of business etiquette. If you don't know the correct pronunciation of someone's name, ask. If you are still in doubt, ask apologetically for the person to repeat it.
Jokes or wisecracks about a person's name are not funny and are offensive. If you own name is difficult to pronounce, help the person who is trying to pronounce it. You can smile and say, "It's a tough one, isn't it?"

(Slide 11) Hugs & Kisses

This issue has different reactions from different parts of the USA. In general, hugs and kisses are inappropriate in any *business* environment. It is acceptable at a business/social function to kiss your spouse – if you happen to be getting along that day.
Touching others in the workplace, whether they are of the same gender or not, is impolite. No patting someone on the back (or other body parts – this isn't a sporting event). No putting your arm around someone. And no putting your hand on his or her back.

(Slide 12) Rise to the occasion
(Read from slide)

- If you don't rise to the occasion, you will sink in the estimation of others.
- Everyone should stand when being introduced.

If you are introducing yourself in a situation where everyone is seated around a table, stand, regardless of whether people before you stood or not.

(Slide 13)The proper handshake
(Read from slide)

- Involves eye contact
- Is firm put painless
- Lasts about three seconds
- Takes only two or three pumps
- Starts and stops crisply
- Doesn't continue through the entire introduction

You shake hands when someone offers his/her hand to you, when you first meet someone, when greeting guests, when greeting your host/hostess, when renewing an acquaintance, and when saying "Good-bye."

(Slide 14) What about doors?
For such simple things, doors can cause a lot of confusion. Let's simplify matters. (Read from slide)

- If you reach the door first, open it, go through it and hold it.
- Men no longer hold doors for women just because they are women.
- Allow senior executive to reach door and go through it first.
- If someone's arms are laden, hold the door regardless.

These rules are set aside when you are hosting others, in which case you open the door for your guests and motion for them to precede you.
For a revolving door, you go first and wait for the others to come through after you.
In any case, always thank a person who holds a door for you.

(Slide 15) Visiting
Your role, when visiting someone else's office is that of a guest whether it is within your company or without. Don't walk in and settle down as if you were entering your own office. Here are some guidelines:
(Read slide)

- Don't be late
- Present business card
- Ask where to hang coat, if you have one
- In the office, wait to be told where to sit
- Don't lay papers on desk or floor
- Put briefcase/handbag on floor next to you
- Don't fiddle with or touch anything on desk
- Leave promptly when business complete
- Send thank you note within 24 hours

(Slide 16) Workplace etiquette
In the next section we are going to cover workplace etiquette – electronic, telephone voice-mail, cell phones, and answering machines.

(Slide 17) Electronic etiquette
Miss Manners first wrote about e-mail etiquette in 1992, not that long ago, but long enough for this "new" technology to have developed some poor etiquette habits!
(Read slide)

- E-mail is easy and fun to use
- Casual in our approach
- Doesn't go away when you hit delete
- Can be retrieved and traced

Always use a subject line; be brief and to the point; use proper grammar & punctuation; and put your name at the end. Do not type in all caps (it is considered "screaming" at the recipient); Emoticons (smiley faces, etc.) are not appropriate for business e-mail, and should be used sparingly on personal e-mail.
E-mail is acceptable for informal invitations; informal thank you and RSVP.
Most experts recommend avoiding e-mailing about emotional topics. Don't tell family and friends about a death or serious illness via e-mail. Don't fire someone, or resign from a job via e-mail. Never declare your love for someone for the first time in an e-mail. Such subjects should be handled in person unless it is simply not possible. In that case, use the telephone.
Remember, your company owns your computer and is free to examine any functions you perform and any material you download. If you wouldn't want it posted on the office bulletin board, don't put it into an e-mail.

(Slide 18) Business telephone etiquette
Everybody knows how to use the telephone, but very few people know how to use it to their best advantage.
(Read Slide)

- Vocal quality counts for 70%
- Words spoken count for 30%
- What you say and how you say it are important
- Be sure listener gets message loud and clear
- Don't chew, eat or drink while on the phone

Speak unto others as you would have them speak unto you. It's up to you, the speaker, to make sure the listener gets the message.
When using the telephone, use your mouth for speaking only.
Answer the telephone no later than the second ring if you can. "Hello" is better than "Hi."
Identify yourself with both your name and company or department. Don't let a phone call pre-empt an in-person visit.
For example, if it's 2 pm – the person with the 2 pm appointment has priority over the person you are speaking with on the telephone.
Place your own call. If the person you are calling has to wait for you to come on the line, he or she is apt to think you consider your time more important than theirs.
If you call a business just before closing time, you will be rushed and given half-hearted attention at best.
If you get another call, the first caller has priority. Tell the second caller you will get back to him or her and resume your first conversation. Of course, if you have the luxury of having a receptionist or secretary, they can manage that detail for you.

Make sure you have a good reason to make a call, and deal with your business in a prompt, organized way. Don't be trivial or long-winded. Chatty calls with no real purpose send a message to the receiving party that you have time to make unnecessary calls.

(Slide 19) Closing the call

People remember the way telephone conversations end.

If you have a chatty caller who is droning on too long, say something like “I’ll have to hang up now. My 2:00 appointment is here,” or “Much as I'd like to chat, I’m on a deadline at the moment. Is there anything else I can help you with?”

After the call, do your homework. Everybody appreciates a follow-up and follow-through. Keep any agreements you make. If you have promised to provide information or data, get that material to the other person promptly.

(Read slide)

- Thank the person for the call
- End on a positive note
- Don’t say “See ya”, “Bye-Bye” or “Later”, say “Goodbye”

(Slide 20) Telephone tag

Telephone Tag is annoying, frustrating, irritating and inescapable.

Part of a secretary’s job (or office manager/AA) is to give the boss a chance to get some work done.

Establish a cordial relationship with that person over the telephone…this can be very helpful in getting information, such as when Mr. Jones is apt to be free, when the best time to call him is, and what time he returns from lunch.

When you get the “best time”, make it clear that you will be calling then.

If you are asking that Mr. Jones return your call, tell the secretary the best time to reach you. Be as specific as you can. If you are not available for the return call, you will have to begin the whole process again.

(Slide 21) Voice mail etiquette

Leaving voice mail is another business fact of life that is here to stay. It’s a good & useful tool for conveying information within your company. However, clients or others calling in from outside may find it annoying.

The message for voice mail should give the caller some choices – leave a message, call another extension or switch to the receptionist. However, few things are more annoying than messages with too many, mostly irrelevant options.

The message you leave should embody the journalist’s five W’s.

(Read Slide)

- Who
- What
- When
- Where
- Why

(Slide 22) Cell phones & beepers

A mere decade ago, a ringing cell-phone was an exotic annoyance. Now we barely notice people chatting away into space as they walk down the street. High-tech has rules of etiquette, too.

Technology creates new ways for people to communicate, but also new opportunities for embarrassment. Ask yourself if your electronic behavior respects the person with whom you are communicating.

Do not treat your devices as if they’re more important than people. Turn your cell phone off when you enter a meeting; go to lunch or dinner, at movies, museums, job interviews, worship services, funerals, and when you are driving.

Talk quietly on your cell phone in public.

If you must take a call during one of the afore-mentioned, place the phone on vibrate so it will not interrupt others in attendance. Excuse yourself from the table or room.

The same principle applies to beepers. Be prepared to be out of touch in certain situations or get a beeper that can be switched to vibrate.

(Slide 23) Answering machine greeting & messages

Answering Machine – Recording your greeting.
Write out your specific words & make several practice tries.
Smile when you speak so that you sound enthusiastic & approachable.
Forget about sound effects or other gimmicks; cute is unprofessional.
Briefer is Better: "This is _____ speaking. At the sound of the tone please leave your name, telephone number, and the best time to reach you. I'll return your call as soon as possible."
When leaving a message on a voice mail or answering machine, be sure to leave your full name, why you are calling, mention the best time for you to be reached, and leave your complete telephone number. Giving your telephone number is important because the person receiving the call may be retrieving it from another location and won't know how to reach you.

(Slide 24) The boardroom & the dining room

Don't be misled about meetings. The fact remains that important things do happen at meetings, and perhaps the most important of these is that people learn about – and form judgments about – each other.
Many of us go into meetings without being fully prepared and make the wrong impression by what we don't say and by gestures we make unknowingly. Think of meetings as opportunities to impress your colleagues and superiors and to meet others.

(Slide 25) Strategies for successful meetings

Make sure you read all the materials provided in advance, including the agenda, before going into the meeting
Nobody takes a latecomer seriously. It doesn't convey the message you are busy, only that you are disorganized.
Make sure you take along the agenda, papers, pens, and notebook. Have them at hand so you don't have to fish around while others wait.
Leave the paper clips alone. Don't stretch the rubber bands or doodle on your notepad.
If you do expect an urgent call, let the chairperson know when you enter the meeting and sit near the door so you can leave & return with the least disruption.
If you must cross your legs, do so at the ankles. Otherwise, you look inattentive and altogether too casual.
Crossing your arms in front of you communicates hostility. Sit straight and don't slouch. You will look alert and attentive.
No matter how much your mind wants to roam, remember that meetings are a place for team players and enthusiasm.
Unless you are certain about how the seating arrangements work, ask where you should sit.
Shake hands with your colleagues, introducing yourself to those you don't know and calling those you do know by name.
Do these preliminaries while you are still standing. If you are seated and a new introduction is made, stand up.

(Slide 26) Speak up

Think before you speak and keep what you say as brief and to the point as possible. Avoid confrontational language and public criticism. Establishing battle lines helps no one. Say, "I disagree because it seems to me that…" instead of "You're wrong. If you took time to read the report, you would know that…"
Don't interrupt someone who is speaking. No matter how much you disagree, wait for the speaker to make his or her point before interjecting your opinion.
Remember it is better to make recommendations & suggestions than to give orders or take inflexible positions.

(Slide 27) The agenda

The agenda should include all items to be discussed along with the amount of time to be devoted to each. It should be written so that the most important items are handled first, in case the meeting runs short. Make sure that everyone has a copy of the agenda well in advance of the meeting.

(Slide 28) Business meals ten commandments
(Read slide)
1. Thou shalt not jump straight into business talk. Wait until the main course is removed before discussing business.
2. Thou shalt not be late. If you are the host, arrive early.
3. Thou shalt not table-hop.
4. Thou shalt not talk politics, diet, or family.
5. Thou shalt not dominate conversation.

The host should suggest menu items if others are unfamiliar with the restaurant's fare.
Order something easy to eat – lobster or BBQ ribs, for instance, can be very messy.
No doggie bags if you are the guest.

(Slide 29) more Ten Commandments
- ☐ 6. Thou shalt not dawdle over ordering or eating
- ☐ 7. Thou shalt not drink too much alcohol
- ☐ 8. Thou shalt not fight over who pays the bill
- ☐ 9. Thou shalt not neglect thy table manners
- ☐ 10. Thou shalt not forget to show appreciation

The person who makes the invitation pays. To reduce confusion by the wait staff, leave credit card with the Headwaiter, or indicate, "Please take my guests orders first."

(Slide 30) Tipping
Wait staff & bartenders – 15-20% before tax
Head waiters only if extra service provided
Washroom if helped - .50
Bell Staff & Sky caps $2 per bag
Chambermaid - $5-10 for 1 first class hotel; $3-5 for a moderate hotel; based on service; family maybe more; one night not necessary
Room Service – 15% before service charge
Calling a cab - $1-3
Taxi - .50 minimum should be 15% of fare
Plan ahead – get small bills to use. Have money in pocket or placed for easy access.

(Slide 31) Business cards
Business cards provide information about you – your name, your company, your title, and how you can be reached.
(Read bullets two and three from slide here)
Present you business card type side up
Be selective, don't give to everyone. If your cards are soiled, damaged, or out of date, get new cards.
Carry to social functions. You never want to miss a networking opportunity.

(Slide 32) Correspondence
Be sure to proof read, even if you've run spell check!
Sign it –
Be sure to verify spelling of names – get a name if you only have a company
To Whom It May Concern - not dear Sir/Madame
If you are unsure to gender or title, use first and last name
Use first name only if you would do so in person
Sentences should be 12 – 15 words long

Letters should be one page
Signature should not contain titles.

(Slide 33) Thank you
Thank you for sharing your time with me today. It has been a pleasure to enlighten you about the business of etiquette.

Facilitator

Module 12

You Have the Right to Write!

Grassroots Advocacy

INDIVIDUAL
DEVELOPMENT
PROGRAM

BPW/USA Individual Development Program
Facilitator's Guide
Module 12: Chips Activity, Democracy Overview, Why Get Involved, Contacting Legislators, Get out The Vote

Module 12 Purpose:

1. Increase awareness of public participation in the advocacy process
2. Introduce ways to organize community and citizens' groups
3. Provide information for contacting legislators
4. Provide information for legislative structure and process
5. Encourage participants to exercise their right to vote

Module 12 Outcomes:

1. Participants will participate in activity designed to show inequality
2. Participants will experience attempting to barter for higher assets
3. Participants will learn processes of legislation
4. Participants will learn processes for establishing community or citizens' groups
5. Participants will understand importance of voting

Module 12 References

1. A Citizen's Guide to State Government. (Most states produce a similar guide to be distributed free to constituents. Request copies from your state legislator.)
2. BPW/USA Public Policy, information can be found at www.bpwusa.org

Module 12 Time:

1.	Activity A, Chips	15 minutes
2.	Handout A, Communicating with Legislators	15 minutes
3.	Handout B, Grassroots Organizations/ Get out the Vote	25 minutes
4.	Questions/Answers & Discussion	5 minutes

You will need to purchase at least two boxes of poker chips to use for the exercise at the beginning of this Module.

Activity A, Module 12.

A Reason to lobby….

CHIPS

Divide the group into teams of 4-6 people each

1. On the front table are several red, white, and blue chips. Pick a representative from your table.
2. When instructed, send your representative to the table to gather as many chips as they can in 15 seconds.

Do a "Get ready, set, go" and have the team representatives all go to the table to pick their chips. Give them **20** seconds from "Go" to gather as many chips as possible.

5. Count the number of chips they get, tallying each color separately.

Tally

Red	White	Blue

Each color chip has a value: but they will not know the value until after they have received them.
The values for each chip:
Blue chips are worth $25
Red chips are worth $10
White chips are worth $1

6. With the value of each chip now known, your group needs to attempt to gain the most valuable chip(s).
   Begin bartering, buying, or selling with other groups to gain as many valuable chips as possible.

Discussion: Ask for participation from the group.

How did it make you feel to have the most "valuable" chips?
- With control and power over others
- Successful
- A winner

How did it make you feel to have the least "valuable" chips?
- Poor
- Oppressed
- Without a chance to change

What were the barriers to gaining "value" if you had none?
- There was no point to try.
- The "rich" did not want to barter for less valuable items.
- It felt unfair that we did not have a level playing field to begin.

What would you have done differently if you had known the value of your chips in the beginning?
- Gone for most valuable chips
- Found an equitable way to dispense all chips

What is the benefit of knowing the value of the things we are going after, especially when we are seeking equity?
- Value can equal power

It is important in a democracy that citizens help keep their legislators informed. In order to be true representatives of the people, legislators need to know the thinking of their constituents on those issues upon which decisions will be made, and the facts on which such thinking and conclusions are based. As a citizen, *you* can help insure good legislation on state and national levels by communicating with your elected representatives at the proper time.

Personal Contacts

- ✓ Take time to read all available material on the bill or issue that concerns you.
- ✓ Express concern over a particular bill or issue.
- ✓ Know when and where to contact a legislator.
    - o Call ahead and make an appointment
    - o Let appointment scheduler know the issue you wish to discuss
- ✓ Share genuine expert knowledge with legislator (all views are welcome but expertise valued)
- ✓ Be constructive in explaining clear ideas, the reasons for change, and strong facts to support.
- ✓ Lobby those who do not support your position
- ✓ One to two well-informed lobbyists are effective.
- ✓ Briefly identify yourself and who you represent
- ✓ Do not “overkill”
- ✓ If you disagree, use a calm, reasonable attitude.
- ✓ Listen to legislators explain their views
- ✓ Take notes, give answers you know, and offer to get ones you do not.
- ✓ Give your legislator a fair chance to examine all sides of an issue.

Letter Writing and E-Mail

- ✓ Personal letter or email may be effective means of communicating
- ✓ The facts on writing letters …
    - o Be addressed properly
    - o Know legislator’s full name and correct spelling
    - o Use the title “The Honorable” (full name)
    - o Include your full name and contact information
    - o Avoid form letters and petitions
    - o Time the arrival of your letter
    - o Know what you are writing about
    - o Be brief
    - o Give reasons for your position
    - o Be constructive
    - o Write on issues of priority concern
- ✓ Write a letter of appreciation when you feel the legislator has done well.

Grassroots Organizations

Why would you form or become involved in a grassroots (the people) organization? It is common for an individual or small group of people to become advocates for something they strongly believe in.
Some examples of grassroots organizations:
Mothers Against Drunk Drivers
Human Rights Watch
The Equality Project
Hate-Crime Network
Youth Coalition
There are thousands of advocacy organizations listed on the internet.

Organize - How to

- ✓ Form a group to lobby for or against legislation
  - More effective than 1 or 2 individuals
  - More visible
  - Have greater resources
  - Carries more political weight
- ✓ Define goals
  - Research available material
  - Keep track of bill's progress
  - Attend committee meetings
  - Meet with legislators
- ✓ Meet and greet legislators before you have a need
  - Friendly, personal acquaintance
  - Help with campaign
  - Form basis for lobbying efforts
  - Learn how the system works
  - Find out how a bill becomes law
  - Learn the committee structure
  - Determine who are dealing with your area of concern

Get Out the Vote

What activities can you become involved with in your community to get more voters to the polls?

- Help your organization or business with a voter registration event
- Offer to be a driver on election day to take people to the polls
- Write letters to the editor about utilizing your "right to vote."
- Volunteer to be a poll watcher or worker.
- Speak to high school classes about the importance of voting.

PowerPoint Slides Script

(Slide 1) Module 12
The right to vote wasn't just handed to Americans. They had to fight for it.
When the polls open on Election Day, every citizen over the age of 18 will be able to cast a vote. It is a right we take for granted; one that defines our nation as a democracy. But universal suffrage — letting everyone vote — did not appear overnight with the ratification of our Constitution. Two hundred years ago, you had to be white, male, and wealthy in order to vote. People have dedicated their lives to changing that fact. Without them, suffrage might still be the privilege of a chosen few.

(Slide 2) Module 12 goals
- ☐ Increase awareness of public participation in the legislative process
- ☐ Introduce ways to organize community and citizen groups
- ☐ Provide information for contacting legislators
- ☐ Provide information for legislative structure and process

(Slide 3) Chips
[Review the instructions so everyone understands what they need to do.]
- ☐ Divide into teams of 4-6 people

1. On the table in front are several red, white, and blue chips. Pick a representative from your team.
2. When instructed, send the rep to the table to gather as many chips as they can in 15 seconds.
3. Tally each color separately.

Okay, on your mark, get ready, GO!
[Be sure to have your stopwatch or a watch with a second hand to time 15 seconds]
[After the chips have been gathered and counted]

(Slide 4) The value of Chips
Each color chip has value. The values for the chips are:
Blue = $25.00 Red= $10.00 White= $1.00
Now, with the value of your chips known, figure out how much your team is worth.
The next step in the activity is to barter for the most valuable chips. You can buy, sell, trade, and exchange as many chips as possible to gain the most valuable ones. You can **only** barter with the chips.
You have 3 minutes [time this].

(Slide 5) The reason for advocacy
Class Discussion
- ☐ How did it make you feel to have the most “valuable” chips?
- ☐ What were the barriers to gaining “value” if you had none?
- ☐ What would you have done differently if you had known the value of your chips in the beginning?
- ☐ What is the benefit of knowing the value of the things we are going after, especially when we are seeking equity?

(Slide 6) Grassroots organization
Why would you form or become involved in a grassroots (the people) organization?

It is common for an individual or small group or people to become advocates for something they strongly believe in. Some examples of organizations that began as grassroots organizations:
Mothers Against Drunk Drivers
Human Rights Watch
The Equality Project
Hate-Crime Network
Youth Coalition
Business & Professional Women
Citizens (For or Against) Something….
There are thousands of advocacy organizations listed on the internet.
[Read from the slide]

- Why Organize
    - A grassroots organization is
        - More effective than 1 or 2 individuals
        - More visible
        - Have greater access to resources
        - Carries more political weight

<u>(Slide 7) Grassroots organization</u>

- More members can
    - Research available material
    - Keep track of a bill's progress
    - Attend committee meetings
    - Meet with legislators

<u>(Slide 8) Lobby at home</u>
[Read from the slide]

- You don't have to travel to your state capitol or to Washington, DC to lobby.
- Each representative and senator (both state and US) has "home" offices in their district.
- You can call the legislative aides working in those offices to set appointments.

If you are planning to lobby a representative or senator on an issue and you have never done so before, you may want to begin "at home." Home is safe territory. Home is where the representative and senator live. While their schedules are busy, they plan for time in their home offices to meet with constituents.
Remember, you are a voter. You may have helped to elect them. They want to hear from you about issues and concerns. They may be in a position to draft new legislation based on something you present to them. They may be in a position to rally additional support for a pending bill. But, first, they need to know how you feel.

<u>(Slide9) Communicating with legislators</u>
It is important in a democracy that citizens help keep their legislators informed. In order to be true representatives of the people, legislators need to know the thinking of their constituents on those issues upon which decisions will be made, and the facts on which such thinking and conclusions are based. As a citizen, you can help insure good legislation on state and national levels by communicating with your elected representatives at the proper time.
Take time to read all available materials on a bill or issue that concerns you. Each state

has a legislative website that lists the bills that have been proposed. The information will tell you if the bill is in committee and who the co-sponsors are.
Express concern over a particular bill or issue. Call ahead and make an appointment. Let the legislator's appointment scheduler know the issue you wish to discuss. They are too busy to just sit and chat. Focus on one issue.
Share genuine expert knowledge with legislator. While all views are welcome, expertise is valued.
Be constructive in explaining clear ideas, the reasons for change, and strong facts to support your point of view.
Lobby those who do not support your position. Those who do support a bill don't need to be lobbied (check to see if they have already co-signed as sponsors).
One to two well-informed lobbyists are effective.
Briefly identify yourself (and who you represent if you are part of an organization or citizen's group).
Do not "overkill" the issue. Be prepared to tell the legislator who already supports the bill and ask them to consider co-sponsoring it, as well. Don't assume that your legislator knows about every bill that has been introduced. There are hundreds of bills introduced annually.
If you disagree with your legislator, use a calm, reasonable attitude. Remember, honey attracts more bees than vinegar.
Listen to legislators explain their views. There may be ways to amend the bill before it gets through the committee.
Take notes, give answers you know, and offer to get ones you do not.
Give your legislator a fair chance to examine all sides of an issue.

<u>(Slide 10) Letters & Email</u>
[Read from the slide]

- Personal letters & Emails are effective
- Letters…
    - Addressed properly
    - Use legislator's full name (spell correctly)
    - Use "The Honorable" as title
    - Include your full name and contact info
    - Avoid form letters and petitions
    - Time the arrival
    - Be brief, concise
    - Be constructive
    - Write on issues of priority concern

And don't forget to write a letter of appreciation to your legislator when they have done well! They need to hear encouraging words, too.

<u>(Slide 11) Meet & greet early</u>
Although to this point we have talked about why you lobby a legislator, the reality is you should get to know legislators before you have a need or concern.
Build a friendly, personal acquaintance. It doesn't hurt to have them recognize your name when the time comes to lobby on an issue.
Help with their campaigns. There are many jobs that don't require more than an hour or two of service and your help will be greatly appreciated and remembered.
Form basis for lobbying efforts. Truly understand the issue. Research the facts – pro and con. Know why you are committed to take a stand.

Learn how the system works. Understand that a freshman representative or senator has less “pull” or “power” than a second or third term legislator. That doesn’t mean they won’t fight for your cause, but it can mean they will have to go to a higher ranking legislator to draft a bill or get votes for a current piece of legislation.
Find out how a bill becomes law. There are hundreds of bills each year that never make it to the assembly for a vote. Every bill that is introduced goes through “committee.” If the committee chair doesn’t want to move the bill, he/she can refuse to put it on the agenda for committee action. It could be reviewed by the committee and sent back for modification. It could be passed by certain committee members *if* something they want done is added to the bill. It could sit “in committee” and die without being addressed during that legislative session. This process happens in both the House and Senate. If a bill makes it through committee, and passes the House and Senate, the Governor or the President still have to sign on to make it a law.
You need to know who serves on each committee, which committees hold the most power (usually the one dealing with the budget) and who has the power to push your issue through.

<u>(Slide 12) Get out the vote</u>
You can probably think of many more opportunities to “Get out the Vote” in your community.
Let’s discuss some of the issues that you may feel strongly about in your community:
[List on flipchart or board]

- School Board
- Municipal utilities
- Property tax increase
- Business taxes
- Parks and recreation
- Environmental issues
- Youth
- Seniors
- Education

<u>(Slide 13) Advocacy</u>
The Random House Thesaurus uses the following synonyms for the word advocacy: to champion, campaign for, plead the case of, speak out for, support, back advance, further, promote, recommend, and endorse.
Those are action words that require some physical and emotional response, aren’t they?
I will leave you with the question, “Are you ready to be an advocate?”
Thank you.

Facilitator

Module 13

Reach for the Stars

Setting Goals

INDIVIDUAL
DEVELOPMENT
PROGRAM

BPW/USA Individual Development Program
Facilitator's Guide
Module 13: Activity, Discussion, Activity

Module 13 Purpose:

1. Understand the purpose of having a mission, values, and goals.
2. Establish guidelines for setting goals personally and professionally.
3. Develop a systematic plan for establishing goals.

Module 13 Outcomes:

1. Participants will use activity to determine the need for a "plan".
2. Participants will learn to think through and develop short-term and long-term goals.
3. Participants will discuss the purpose of mission, values, and goals.
4. Participants will understand the value of establishing goals in all aspects of life.

Module 13 References:

1. Brain Training for Teams. Franklin Covey Co.
2. Franklin Planner. Franklin Covey Co.
3. Motivation and Goal-Setting: How to Set and Achieve Goals and Inspire Others. Cairo, Jim. Career Press. ISBN 1564143643
4. Training Ziggets: Personal Development. Ziglar, Zig. Ziglar Training Systems. ISBN 1-56207-645-0

Module 13 Time

1.	Landscaper's Logic Activity	10 minutes
2.	Mission, Values, Goals	20 minutes
3.	Setting Personal Goals Discussion	10 minutes
4.	Goal-setting Activity	20 minutes

(The goal of this activity is to get the participants started. Twenty minutes will not be enough time for them to create a true plan. Some may need hours or days to think through this process).

Handout A, Module 13

Landscaper's Logic

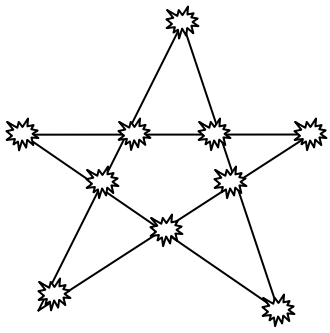
Participants may work as teams, small groups, or individually at your discretion. Have participants (either alone or in teams) draw their plan on a sheet of paper.

Take a moment to figure out how to plant this eccentric millionaire's rose garden with the ten rosebushes. It is a challenge. This activity sets the stage for our discussion today on setting goals. Have you heard the statement, “Fail to plan, and you plan to fail?”

You have been contracted to landscape an eccentric millionaire's rose garden with 10 exquisite rosebushes.

You are to arrange the rose bushes in five straight rows with four bushes in each row. You cannot go to the store and buy more rose bushes. It can be done with 10.

Draw your planting plan below. Answer: 5-point Star



What are your thoughts and ideas about this problem?

What steps did you consider as you designed your plan?

How important is it to know what the end-result should look like?

Were there any other unique plans that met the criteria?

Handout A, Module 13

Mission, Values, Goals

Let's talk about how these words help us to plan for our lives.

1. Discover what matters most to you

   a. What do you want to have?

   This is the step where you will want to think hard about what it is that makes you happiest. This means that you must discover what matters most to you! Toys? Vacations? Relationships? Family? Finances? Career?

   b. What do you want to do?

   In order to accomplish anything in life you first have to have a "mission". What does this mean?

   Your mission statement is a written expression of your unique purpose, your personal philosophy on how you want to live.

   c. Who do you want to be?

   Use the "Have, Do, Be" list as a roadmap for your statement. Focus in on the concept, "What do I want my life to be about?" Ask yourself - what drives you?

   An example of a personal mission statement:

   "I will find success in helping others."

2. Plan what matters most, and

   a. Review your "have, do, be" list

   Write down all the things you want to have, all the things you want to do, and all the things you want to be. The last part – what you want to be – can be a little tricky. You cannot be royalty unless you already are or marry into it. Think of character traits (some of those things you learned about yourself in the DISC model). Which of those characteristics are most important to you? Compassion? Honesty? Cleverness?

   Separate your thoughts in the "to be" category according to the roles you play. For example, as a manager, you might want to be good at giving positive comments to your employees, being organized, being timely, being fair.

   As a parent, coach, or friend, you may want different characteristics.

   b. Prioritize each item

   How will you have, do, and be all the things you listed? If owning a seaside resort is something you would like to do, how will you go about reaching your goal? Among the things you would like to do, where does it rank in order of importance? How will you organize your life so that you are spending time doing the things that matter most to you?

   c. Make end results tangible, achievable

   What will your seaside resort look like? Visualize the layout, the grounds, and the rooms. Do the same with each goal you have listed for yourself.

   Now, determine the time (hours, days, weeks, or years) it will take you to accomplish your goal(s). You may find that your goals will require a change in your present income or style of living.

   Take the time to review what you have on hand; what do you do, and what will be the result? Make sure you know what the priority is, and most important, make sure for your own piece of mind that the result is tangible and achievable.

3. Act in accordance with what matters most

a. Implement - Do it!

Put your plan into action. Break down the goals into workable, manageable elements by week, month, and year.

b. Begin by doing small things daily

At the beginning of each week, break down your weekly activities into daily tasks.

c. Build on things weekly/monthly

If your long-term goal is to buy that seaside resort and you have set a goal to save $500 per month for the next five years, you will need to list that as a monthly goal. If you are paid weekly, you will want to deduct $125 from your income to put into savings.

Keep in mind that "Rome wasn't built in a day" and it may take you some time to reach your final goal.

Evaluate and act accordingly with what matters most. Begin by taking time and thinking things through. Do small things first and as the time goes by build on these values in order to reach your final goal.

Not everything we set out to do is accomplished. Obstacles, circumstance, and life have a way of changing some of our plans and the timeframe may have to be adjusted. Remember that great things happen when you plan for them.

When it comes to your life, you are the only authority.

Handout, Module 13

Setting Personal Goals

To balance your life you need to

- Know where you are today
- Know where you want to be
- Choose which areas are a priority for you

Use the following steps to set your personal goal(s)

Step #1 Identify your goal

Step #2 My benefits from reaching this goal

Step #3 Major obstacles and mountains to climb to reach this goal

Step #4 Skills or knowledge required to reach this goal

Step #5 Individuals, groups, companies and organizations to work with to reach this goal

Step #6 Plan of action to reach this goal

Step #7 Completion date

PowerPoint Slides Script

(Slide 1) Module 13
Goals. We've heard about them all our lives – what are your goals? What goals do you have for this job? What goals do you have for this business? Sometimes, the goals in our lives have seemed overwhelming!

(Slide 2) Module 13 goals
- Understand the purpose of having a mission, values, and goals
- Establish guidelines for setting goals personally and professionally
- Develop a systematic plan for establishing goals

(Slide 3) Landscaper's Logic
- You have been contracted to landscape an eccentric millionaire's rose garden with 10 exquisite rosebushes.
- You are to arrange the rose bushes in five straight rows with four bushes in each row. You cannot go to the store to buy more rose bushes.
- Draw your planting plan.

[Participants may work as teams, small groups, or individually at your discretion. Have participants draw their plan on a sheet of paper]
Take a moment to figure out how to plant this eccentric millionaire's rose garden with the ten rosebushes. It is a challenge. This activity sets the stage for our discussion today on setting goals. Have you heard the statement, "Fail to plan, and you plan to fail?"

(Slide 4) The rose garden answer
(5-point star)
What are your thoughts and ideas about this problem?
What steps did you consider as you designed your plan?
How important is it to know what the end-result should look like?
Were there any other unique plans that met the criteria?
The process of thinking through this plan and figuring out how to achieve the end result was not easy for some of you. Setting goals, planning for the future, and following a plan to reach our dreams will take time and effort. But with thoughtful planning, we can achieve the rewards of our actions.

(Slide 5) Mission, values, goals
- Discover what matters most to you
  - What do you want to have?
  - What do you want to do?
  - Who do you want to be?
- Plan what matters most
  - Review your "have, do, be" list
  - Prioritize each item
  - Make end results tangible, achievable

Let's talk about how these words help us to plan for our lives.

1. Discover what matters most to you

What do you want to have? This is the step where you will want to think hard about what it is that makes you happiest. This means that you must discover what matters most to

you! Toys? Vacations? Relationships? Family? Finances? Career?

What do you want to do?

In order to accomplish anything in life you first have to have a mission. What does this mean? Your mission statement is a written expression of your unique purpose, your personal philosophy on how you want to live.

Who do you want to be?

Use the "Have, Do, Be" list as a roadmap for your statement. Focus in on the concept, "What do I want my life to be about?" Ask yourself – what drives you? An example of a personal mission statement: "I will find success in helping others."

2. Plan what matters most, and

Review your "have, do, be" list

Write down all the things you want to have, all the things you want to do, and all the things you want to be. The last part – what you want to be – can be a little tricky. You cannot be royalty unless you already are or marry into it. Think of character traits (some of those things you learned about yourself in the DISC model). Which of those characteristics are most important to you? Compassion? Honesty? Cleverness?

Separate your thoughts in the "to be" category according to the roles you play. For example, as a manager, you might want to be good at giving positive comments to your employees, being organized, being timely, being fair. As a parent, coach, or friend you may want different characteristics.

Prioritize each item.

How will you have, do, and be all the things you listed? If owning a seaside resort is something you would like to do, how will you go about reaching your goal? Among the things you would like to do, where does it rank in order of importance? How will you organize your life so that you are spending time doing the things that matter most to you?

Make end results tangible, achievable.

What will your seaside resort look like? Visualize the layout, the grounds, and the rooms. Do the same with each goal you have listed for yourself.

Now determine the time (hours, days, weeks, or years) it will take you to accomplish your goal. You may find that your goals will require a change in your present income or style of living.

Take the time to review what you have on hand; what do you do, and what will be the result? Make sure you know what the priority is, and most important, make sure for your own piece of mind that the result is tangible and achievable.

<u>(Slide 6) Act on it!</u>

- ☐ Implement – Do it!
- ☐ Do small things daily
- ☐ Build on it weekly/monthly/annually
- ☐ Evaluate

When it comes to your life, you are the only authority!

Act in accordance with what matters most.

Implement – Do It! Put your plan into action. It doesn't do a bit of good to plan and not follow-through. Break down the goals into workable, manageable elements by week, month, and year.

Begin by doing small things daily. At the beginning of each week, break down your weekly activities into daily tasks.

Build on things weekly/monthly/annually. If you long-term goal is to buy that seaside resort and you have set a goal to save $500 per month for the next five years, you will need to list that as a monthly goal. If you are paid weekly, you will want to deduct $125 from you

income to put into savings.
Keep in mind that “Rome wasn’t built in a day” and it may take you some time to reach your final goal.
Evaluate and act accordingly with what matters most. Begin by taking time and thinking things through. Do small things first and as the time goes by build on these values in order to reach your final goal.

(Slide 7) Obstacles & challenges
Not everything we set out to do is accomplished. Obstacles, circumstance, and life have a way of changing some of our plans. The timeframe may have to be adjusted. Remember that great things happen when you plan for them.

Let’s talk about things that have been obstacles in your lives – how have you worked through them?

(Slide 8) Balance your life
- ☐ Know where you are today
- ☐ Know where you want to be
- ☐ Choose which areas are a priority for you

In order to be honest about your goals, you need to ask yourself some serious questions.
Where am I today? Look at all aspects of your life – financial, spiritual, education, career, family, health.
Ask yourself if you are realistic in the concepts for where you want to be...
What areas of your life are your priorities now, and where do you want to see those priorities in the future.

(Slide 9) My goals
1. Identify goals
2. Benefits from reaching this goal
3. Major obstacles and mountains to climb
4. Skills or knowledge required
5. Individuals, groups, companies and organizations
6. Plan of action
7. Completion date

Take the remaining time and begin to think through your personal mission, values, and goals. This is a guide for you to use to work through the process.
There is no way we can complete this process in the hour we have. This is a “take-home” assignment. Some of you will earnestly work at this; others will toss it aside as soon as you leave.
You are never too old to discover your mission, your values, and set new goals.
This process can be evaluated and revised year by year. Plan for it!
Identify your personal goal. Determine what benefits you will achieve from reaching your goal – what is in it for you? What obstacles do you know you will meet on your way to reaching your goal? What special skills or additional knowledge will be required of you to get to the goal you have set? Who can help you to achieve your dreams – who do you know or who can you contact for assistance? Once you have answered all those questions, you can complete a plan of action. All you need to do is add the completion date so you have a visual picture of when you want to have your goal in place.

Facilitator

Module 14

Memories are made of this!

Getting media coverage for your business & organization

INDIVIDUAL
DEVELOPMENT
PROGRAM

BPW/USA Individual Development Program
Facilitator's Guide
Module 14: PR or Marketing, Concepts for Working with Media, Format of Press Release, Activity

Module 14 Purpose:

1. Introduce participants to various forms of media
2. Provide information to help determine best media use
3. Provide information to create the message
4. Provide opportunity to develop a press release

Module 14 Outcomes:

1. Participants will learn the distinctions between public relations and marketing
2. Participants will learn variety of media outlets
3. Participants will learn to dress for success in media interviews
4. Participants will learn to create media packets, press releases

Module 14 References:

1. Great Promo Pieces: Create Your Own Brochures, Broadsides, Ads, Flyers, and Newsletters That Get Results. Holtz, Herman. John Wiley & Sons, Inc. ISBN 0-471632244
2. Media Planning: A Practical Guide. Surmanek, Jim. McGraw-Hill Trade. ISBN 084424521
3. The Associated Press Stylebook. Goldstein, Norm. Perseus Publishing. ISBN 0738207403

Module 14 Time:

1.	Handout A – PR/Marketing and Media Relations	15 minutes
2.	Handout B – Working with the Media	15 minutes
3.	Handout C - How to write a Press Release	10 minutes
4.	Activity A – Writing a Press Release	15 minutes
5.	Course evaluation	5 minutes

Additional suggestions:

If possible, gather contact information for local media outlets: newspapers, television, radio, public access.
Include: Media name, contact person, telephone number, fax number, email address

Be sure to have all participants complete the IDP Evaluation.

You should have certificates of completion ready to hand out. Individual Development Program Graduate pins are available for purchase through Carlson Craft at http://www.bpw.cceasy.com/

Handout A, Module 14

Public Relations, Marketing or Both?

Public Relations: the promotion of goodwill by distributing information about the degree of goodwill existing between the organization and the public.

Marketing: creating an atmosphere [to attract sales, memberships, volunteers, etc.] through advertising or other forms of information about a product or service to a targeted audience.

Media Relations

Listed below you will find ideas of "Media Relations". Many you already use and some will be new.

1. List of your local media. These would include Newspapers (weekly, daily, etc.), radio, television, newsletters and your email list or groups.
2. Remember to include the "Who, What, Where, When and Why" in your information. When dealing with the "public," peak their interest in your story.
3. Ask members to help "pave the way." Do they personally know someone in the media?
4. Brainstorm on what to do before the event, during an event, and after an event.
5. Make it a worthy project or event. It must be different than other events and it must "sell" to the public.
6. Other organizations would benefit by your event, so keep them in mind for possible collaboration.

Publicity Tips

1. Have a public relations or contact person. One person should be the spokesperson for your group, business, or event.
2. There are two types of Public Relations: internal and external. Internal public relations is as important as external. Keep those on the inside "in the loop" and aware of all coverage before it happens.
3. Utilize all types of media for coverage of an event. People utilize different means to find out what is going on. Don't assume that everyone reads the newspaper.
4. Develop a "plan of action."
5. Show appreciation. Don't forget to say "thank you" to a reporter or editor when they have covered your event.

WORKING WITH THE MEDIA

Be prepared. Knowing your facts will enable you to speak with confidence and poise and add to your credibility.

Anticipate possible questions.
Since the media do not provide questions ahead of time, generating a list of possible questions will enable you to prepare answers so you are not caught off-guard.

Determine your key points. If you are clear about the points you need to convey, they are more likely to be covered than if you simply allow the reporter to control the agenda. Bring questions that are far off the points you want to cover by structuring your answers to make these points.

Stay cool. It is easy to be flustered or thrown off guard by a confrontational reporter. Remember your appearance is supposed to enhance your image and that of your organization. Calmly handling whatever comes your way will win you points with the public.

Speak only on the record. Do not assume that a reporter will honor, or remember, that your point was "off the record." Say only what you want to see in print or hear on the air.

Be positive. Reporters love sensational and negative news. Do not make it easy for them to get this.

Remember your audience is the public. Consider the impact of what you are about to say. It is easy to get involved in this interview as a one-on-one exchange, and forget you are making a public speech.

Dress appropriately. A strictly professional look will enhance your credibility. Avoid flashy prints, hounds tooth patterns, extremes of black or white, large jewelry or anything that will distract from your message.

Project a natural, at ease image. Even though you may be nervous (everyone is!), act naturally, as you would talking to a friend.

Do not feel pressured to respond instantly. Take a few moments to think, if necessary. Rushing to fill silences can lead you to say things you otherwise would not.

Do not be reluctant to say, "I don't know." It is preferable to say you do not know than to give a wrong or misleading answer. Simply add that you will be happy to find the answer and get back to them. Then be sure to do it.

Indicate on whose behalf you are speaking. State whether you are speaking as an individual or on behalf of your organization, especially if you are closely identified with a particular group

What media resources are in your community?

Print Broadcast Public Access Other

Write your press release in an inverted pyramid style. The most important facts and details should be in the first paragraph. The next paragraph should contain a “story” about the information – an explanation of why you are doing something.

The last paragraph should contain information about who you are as an organization or group and further contact information (i.e. how would someone learn more about you…website, telephone, fax, email?)

Your press release should be contained on one (1) page, if possible. Header information should be on your letterhead and have:

FOR RELEASE: Immediately or Date

CONTACT:
(Your spokesperson,
E-mail address, and
telephone number(s)
both day and evening)

[PRESS Release] or [PRESS Advisory] or [Photo Opportunity]

Body of Information
Double-spaced

###

Writing for Press

You have an event or program to promote. List the following key elements:

Who is sponsoring the event:

_____

What is the purpose of the event:

_____

When is the event:

_____

Where is the event:

_____

Why is the event being held:

_____

How can people attend:

_____

(Is there a cost, a number to call for reservations, invitation only, deadline for responses, etc?)

What is *different* or *unique* about your event than any other? What will make it "news"?

_____

_____

_____

PowerPoint Slides Script

(Slide 1) Module 14
Well, here we are at Module 14! You've worked hard and we are at the final part of this course. How do you feel about what you have learned?

(Slide 2) Module 14 goals
- Introduce various forms of media
- Provide information to determine best media use
- Provide information to create the message
- Provide opportunity to develop a press release

(Slide 3) PR or Marketing
- Public Relations (PR)
  - The promotion of goodwill by distributing information about the degree of goodwill existing between the organization and the public.
- Marketing
  - Creating an atmosphere [*to attract sales, memberships, volunteers, etc.]* through advertising or other forms of information about a product or service to a targeted audience.

According to the dictionary, these are the definitions for PR and Marketing. As you can see, they are closely tied and often one overlaps the other. The other big difference is cost. Most PR can be achieved with little or no expenditure. Marketing, on the other hand, can be a hefty percentage of your budget.
We'll overview some of the factors now.

(Slide 4) The Value of Marketing
A marketing plan focuses on the strategies that determine the direction and success of your products and services.

Fail to Plan and You Plan to Fail!
The marketing plan is a highly detailed, heavily researched and, hopefully, well written report that many inside and possibly outside the organization will evaluate. It is an essential document for both large corporate marketing departments and for startup companies. A marketing plan forces you to look (1) internally at the results of past marketing decisions, (2) externally to fully understand the market in which you operate, (3) sets future goals and provides direction for efforts that everyone should understand and support, and (4) is a key component in obtaining funding to pursue new initiatives.
A marketing plan can be a component within an overall business plan.

(Slide 5) Marketing your message
"Think in terms of sound bites, rather than news releases that run on for several pages. Give the media a reason to give you newspaper or Web space or airtime."
Rick Frishman, president of Planned Television Arts

While organizations rarely think about buying publicity (advertising), many small business owners think first about advertising, but that can often be the most expensive method and not necessarily the most effective. Marketing experts say you might be better off trying to get publicity for your company or organization first.
To do that, you need to give the media a reason to give you newspaper or Web space or airtime. Just because you have a product or service you love won't be enough – remember, you need to have something that's likely to help a local TV station get higher ratings, or a newspaper sell more copies or a Web site sell online ads.

You also need to have a message that is succinct – think in terms of sound bites, rather than news releases that run for several pages. Consider this: a dry cleaner who gives away free coffee when people drop off their clothes is engaging in marketing that's likely to bring in more business as customers start talking to their friends.
Or, let's say you run a restaurant or diner; offer customers a free beverage for the road. The idea is to get your customers to believe you're giving them something extra for their money.

(Slide 6) Media Relations Tips

- What to have and do:
  - List of local media
  - Who, what, when, where, why, and how
  - Who knows whom
  - Brainstorm
  - Worthwhile project or event
  - Collaboration

How do you get your message out? You first need to research and create a list of your local media. These would include newspapers (daily, weekly, etc.), radio, television, outdoor, newsletters and your email list to groups.
Remember to include the journalist's 5-Ws: "Who, what, when, where, why, and how."
When dealing with the "public" peak their interest in your story.
Use your networking skills to help "pave the way." Who do you know who personally knows someone in the media that you could use as a contact?
Brainstorm on what to do before the event, during an event, and after an event.
Make it a worthy project or event. It must be different than other events and it must "sell" to the public.
Other businesses and organizations would benefit by your event, so keep them in mind for possible collaboration.

(Slide 7) Publicity tips

- Have a public relations contact
- Internal and External PR
- Utilize all types of media
- Develop a "Plan of Action"
- Show appreciation

Have a public relations or other contact person. One person should be the spokesperson for you group, business, or event. This ensures that all the information given out is correct and the same.
There are two types of PR: internal and external. Internal public relations is as important as external. Keep those on the inside "in the loop" and aware of all coverage before it happens.
Utilize all types of media for coverage of an event. People use different means to find out what is going on. Don't assume that everyone reads the newspaper.
Develop a "Plan of Action." Who is going to do what and when!
Show appreciation. Don't forget to say "thank you" to a reporter or editor when they have covered your event.

(Slide 8) Working with the media

- Be prepared
- Anticipate possible questions
- Determine your key points
- Stay cool
- Speak only on the record
- Be positive

Be prepared. Knowing your facts will enable you to speak with confidence and poise and add to your credibility.

Anticipate possible questions. Since the media do not provide questions ahead of time, generating a list of possible questions will enable you to prepare answers so you are not caught off-guard.
Determine your key points. If you are clear about the points you need to convey, they are more likely to be covered than if you simply allow the reporter to control the agenda. Bring questions that are far off the points you want to cover by structuring your answers to make these points.
Stay cool. It is easy to be flustered or thrown off guard by a confrontational reporter. Remember your appearance is supposed to enhance your image and that of your organization. Calmly handling whatever comes your way will win you points with the public.
Speak only on the record. Do not assume that a reporter will honor, or remember, that your point was "off the record." Say only what you want to see in print or hear on the air.
Be positive. Reporter love sensational and negative news. Do no make it easy for them to get this.

(Slide 9) Working with the media

- Remember your audience is the public
- Dress appropriately
- Project a natural, at ease image
- Do not feel pressured to respond instantly
- Do not be reluctant to say, "I don't know."
- Indicate on whose behalf you are speaking.

Remember your audience is the public. Consider the impact of what you are about to say. It is easy to get involved in this interview as a one-on-one exchange, and forget you are making a public speech.
Dress appropriately. A strictly professional look will enhance your credibility. Avoid flashy prints; hounds tooth patterns, extremes of black and white, large jewelry or anything that will distract from your message.
Project a natural, at ease image. Even though you may be nervous (everyone is!), act naturally, as you would talking to a friend.
Do not feel pressured to respond instantly. Take a few moments to think, if necessary. Rushing to fill silences can lead you to say things you otherwise would not.
Do not be reluctant to say, "I don't know." It is preferable to say you do not know than to give a wrong or misleading answer. Simply add that you will be happy to find the answer and get back to them. Then be sure to do it.
Indicate on whose behalf you are speaking. State whether you are speaking as an individual or on behalf of your organization, especially if you are closely identified with a particular group.

(Slide 10) What resources do you have?

- Print
  - Daily newspaper
  - Weekly newspaper
  - Outdoor
  - Other
- Broadcast
  - Radio
  - Television
  - Satellite
- Public Access
  - Local cable channels
- Email lists; Websites

[Review and discuss]
Other ideas or concepts (write them on the flip chart)

(Slide 11) Delivering the message

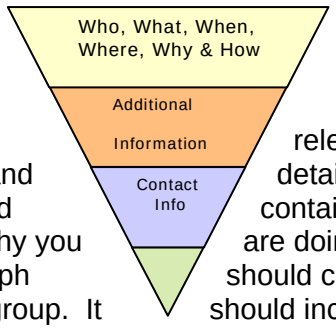
- Format of message
  - Press Release
  - Press Advisory
  - Photo Opportunity

There are three ways to get your message delivered. You can write a Press Release, a Press Advisory, or send information about a Photo Opportunity.
A Press Release is a "news" story that gives all the details for an event or program.
A Press Advisory is a tickler (of sorts) that says there "is a story here" – you should come.
A Photo Opportunity alerts the media that there may be something worthwhile to photograph.

(Slide 12) The release

- Write information in an inverted pyramid style
- Most important facts in 1st paragraph
- Should be on 1 page
- Always include contact information

Inverted Pyramid



Write your press release in an inverted pyramid style. The most important facts and details should be in the first paragraph. The next paragraph should contain the "story" about the information – an explanation of why you are doing something.
The last paragraph should contain information about who you are as an organization or group. It should include further contact information (i.e. how would someone learn more about you, website, telephone, fax, email?)
Your press release should be contained on one (1) page, if possible. Header information should be on your letterhead and have your contact information (spokesperson's name, email address, day and evening telephone numbers).
While a press release is most common, press advisories are also used. These are brief statements of things that are going to happen. You may have broken a story a few months ago about a project or event, now you want to "remind" people that it is going to happen.
Photo opportunities are often good ways to get additional coverage. It may be a slow news day, and the staff needs to fill the empty space. They may send a crew to film or photograph your event – if it is different, fun, not the normal "grin and shake", and of public interest.

(Slide 13) Write your news

- Who is sponsoring the event
- What is the purpose of the event
- When is the event
- Where is the event
- Why is the event being held
- How can people attend
- What makes this different

Now it is your turn to practice. You have an event or program to promote. List the following key elements:
Who is sponsoring the event? A group, organization, business, several people?
What is the purpose of the event? Why are you doing this?
When is the event? Be sure to list date and day of the week and the time.
Where is the event? List the location and directions (for example "at the corner of Fifth Street and Vine).

Why is the event being held? While similar to the purpose, this question asks why you are doing this. This statement may carry an emotional plea to the public to support the event.
How can people attend? Is there a cost, a number to call for reservations, invitation only, deadline for responses, etc?)
What is different or unique about this event from any other? What will make it newsworthy?

(Slide 14) Evaluation time

- ☐ Please fill out the evaluation form
- ☐ Complete it as accurately as possible
- ☐ Add comments and suggestions

We value your input! Thank you for participating!
It has been so much fun to be a part of this course. I want to thank you for your attendance and participation. You have been the reason this course has been successful. Please be sure to add comments or suggestions to the evaluation. We want to continue to improve the program based on your feedback.

[If participants have completed all 14 modules, you may award certificates of completion at this time]

Acknowledgements, References & Suggested Reading, & Course Evaluation

Business and Professional Women's Foundation

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Resources used:

1. A Citizen's Guide to State Government. (Most states produce a similar guide to be distributed free to constituents. Request copies from your state legislator.)
2. America's Competitive Secret: Women Managers. Rosener, Judy B. Oxford University Press. ISBN 0195119142
3. Best Answers to the 201 Frequently Asked Interview Questions. DeLuca, Matthew. McGraw-Hill Trade. ISBN 007016357X
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5. BPW/USA Public Policy, information can be found at www.bpwusa.org
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INDIVIDUAL DEVELOPMENT PROGRAM

Evaluation of Individual Development Program

On a scale of 1-5 (with 5 being excellent), please rate the program, presenters, materials, and environment.

Excel.	Good	Average	Fair	Poor	
5	4	3	2	1	Did the program meet your expectations?
5	4	3	2	1	Was there adequate interaction & participation?
5	4	3	2	1	Quality of material and handouts?
5	4	3	2	1	Length of sessions for content provided?
5	4	3	2	1	Are the segments/material beneficial to your work?
5	4	3	2	1	Was the content of the material challenging?
5	4	3	2	1	Was the diversity of facilitators beneficial?
5	4	3	2	1	Would you recommend the ID Program to others?
5	4	3	2	1	Atmosphere and comfort of room?
5	4	3	2	1	Value of program (price for information received)?

How could the program be improved?: _____

_____

The section(s) that were especially helpful to me were: _____

_____

Other thoughts or feelings about the program, the materials and/or the instructor(s):

_____

_____

_____

_____
Participant Name (Optional)