humans at work LLC

Do it yourself

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How to deliver Humans At Work℠ in your organization

If you're willing to do the work yourself, you can use the **Humans At Work**℠ program in your organization **free of charge** under the terms of the Creative Commons license. Make sure you understand the terms of this license.

Make sure this is the right program for you

Read the **Program Overview** to make sure you understand the program goals, philosophy and structure. If the goals, philosophy and structure do not fit your needs, trying to adapt the program may waste your time. You should probably be looking for a completely different solution.

Read the **Session Descriptions** to make sure you understand the program concepts and the facilitated discussion-based learning approach. Large portions of each session are set aside for these learning discussions. I encourage you not to see them as “empty space” on the agenda. I assure you, the agenda actually borders on being too crowded, and requires expert facilitation to keep the learning on track. Do not try to squeeze in additional topics.

Download and read the **Agendas and detailed teaching notes** for Sessions 1 – 8, as well as **Tools and Materials**, from the **Program PDF Documents** on the sidebar. You will need to understand each session in detail before you attempt to either customize the program or deliver it as-is.

Setting Up The Program

Get buy-in

At a minimum, your CEO, executives, and Human Resources team must understand and approve the program structure and goals. They must be willing to give active support to the program and the participants.

Active support will include the following:

- Participants need one workday off for each session. Don't schedule the sessions on weekends.

- The company needs to help participants manage their job workload on days when they are in training.

- Company executives must be willing to stand by the management principles of the program over the long term. The company must be willing to insist that managers adhere to these principles – otherwise why train them? The company should reward good management behavior and enforce clear consequences for bad management behavior.

It's well worth your time to have individual conversations with everyone you need buy-in from, as often as necessary, to make sure you have a clear shared understanding of the program's scope and goals.

If company leadership requests it, work with them to develop ways to measure the impact of the program. One suggestion is a pre- and post-program survey of participants' teams and people with whom they have key working relationships, to measure changes in participants' behavior as managers. You should allow at least six months before completing the post-program survey.

You could also choose to set individual goals for participants to meet within six to twelve months of completing the program (e.g. completing team-building with their team, successful completion of a project, etc.).

Select participants

Small groups work best for this program – 6 to 10 participants plus the program leader (and possibly observers, guest experts, or assistants). Fewer than six participants limits the benefits of dialogue and dynamic learning. A session of more than 10 is difficult to facilitate, and runs the risk of marginalizing or excluding some participants.

Whether you cherry-pick participants, or ask for nominations or volunteers, you should work with HR and your executive team to make the final selection. Establish and publish specific criteria for inclusion. If you intend to offer the training on an ongoing basis, publish a schedule. Make the selection process transparent.

I believe it's best, if possible, to chart a fairly narrow experience demographic for each program. There's nothing to be gained by mixing brand new managers with 20-year veterans -- generally, the more experienced people dominate the conversation, the less experienced people defer, and very little meaningful self-anchored learning takes place on either side. It's better to target each round of the program by experience level -- for example, new managers (0 to 18 months experience), managers with 2-5 years, et cetera. People learn these skills best with peers, in an environment made as non-competitive and non-hierarchical as possible.

It's less useful to target by specialty (for example, all sales managers regardless of amount of experience). The skills you are teaching are not tied to what part of the business a manager serves, and you shouldn't assume that a shared career focus will overcome the obstacles created by putting managers of mixed experience levels together in the course.

If you must include participants with a wide range of experience in the same program, make sure you do not allow the more experienced managers to dominate the learning process.

Identify experienced managers to be manager-mentors

Two important homework projects require the help of experienced managers in your company. Participants select a manager to interview at length, and later to shadow for at least a half-day.

It's important for you to identify a pool of qualified, willing managers during the program set-up. Senior leadership and HR should guide this process based on their understanding of the skills you'll be teaching in the program. Make sure the manager-mentors are people who model the values of the program.

Take time to talk with each manager who is selected as a mentor. Make sure they understand and support the program goals.

Ask each manager to be willing to work with two participants maximum. Explain the commitment (a ninety-minute interview with each participant and a half-day spent with each participant, as well as possible follow-up questions).

You may also ask them to consider becoming a formal part of the community of practice that the participants are forming, to provide ongoing mentoring and support.

For a group of 6 – 10 participants, try to identify at least 6 – 8 experienced managers to be available in this role. It's better to qualify more people than you need, in case someone can't meet the commitment. Explain to the pool of managers that they may not be asked to work with a participant, or they may be asked to step in at the last minute if necessary.

Get the support of participants' managers

When you've identified the participants, make sure you enlist the support of each of their managers.

You should take the time to have an individual conversation with the participants and their managers. You should stress that the program is something the CEO , company executives and Human Resources support, and that the company leaders share the program's values and goals.

I recommend drafting an agreement to be signed by the participant, her manager, the head of HR, and the CEO. The agreement should state the program goals and articulate the responsibilities of all parties, including:

- Everyone's agreement that the program is a priority.

- Everyone's acceptance of the program goals.

- The participant's commitment to engage fully with the program.

- The manager's commitment to help the participant manage her regular workload during the program. This might involve sharing work, reducing project commitments, hiring temp workers, etc. These strategies should be worked out in advance and clearly articulated in the agreement.

- Six-month and twelve-month measurement and assessment goals for the participant, to determine that she is practicing, integrating and expanding the base of skills she acquires in the program. This should include assessment by her direct reports, her peers, and her manager.

If the CEO and HR don't support the program, it's still possible to run it on a more "local" basis – for example, for managers within your own department or division. But participants and their managers still need to agree to support each other in the learning process and afterwards, as participants begin to practice the skills.

Program structure

This program is based on eight full-day sessions because that's the <u>bare minimum</u> of time it takes to explore the program concepts effectively. There is a two-week gap between each session so that participants can do their homework and begin practicing their skills.

It you try to reduce the number of sessions, you must consider very carefully what parts of the curriculum are unimportant to a manager's success. Because later sessions of the program build on earlier ones, you must also carefully consider the impact on the overall curriculum of removing any individual concept.

If you choose to substitute your preferred models, tools and concepts in the curriculum, consider carefully whether your new elements are consistent with the program values and goals you have decided on.

If you try to compress the program timeframe into eight consecutive days for 'efficiency,' it won't work. You'll be cramming information into brains and overloading people. They'll be less able to integrate the ideas because they will have no practice time. By the time the eight days are over, they will have lost much of the nuance and impact of the first four days.

If you stretch the time between sessions too long (more than three weeks), you lose the sense of momentum.

If you try to chop the program into what many people think of as 'training' – two-hour chunks of lectures with slides – it won't work. That approach is antithetical to the program philosophy of discussion-based and experience-based learning.

Please, no short cuts. No PowerPoint®. No training videos. No clip-art fill-in-the-blank workbooks. For the love of God, Montressor….

Facilities and setup

I strongly, strongly recommend conducting the full-day sessions offsite. It's more productive. It focuses the group's attention inward on the work without the associations of being "on the job." Meeting in your own company's building will make it harder to learn, not easier, unless you have a superb conference facility as part of your campus.

Regardless of where you are, meet in a room with windows.

The best configuration is small tables (round or square) for 3-4 people each. Each table becomes a *de facto* work group for that session, and it's best when participants sit with different people at different sessions.

I strongly advise you not use a classroom setup, or single large conference table. It's important that people be able to switch easily from a general discussion to talking in their work groups.

The only tools the program leader absolutely needs are flip charts, a marker, a roll of masking tape, and a wall clock. But it's nice to have a white board, several colors of markers, a music player for openings and breaks, and some toys or art supplies on the table for those people who need to keep their hands busy while they learn.

Have food and drinks in the room during the morning and afternoon. Hungry people don't learn effectively. Make sure to include some protein and raw vegetables, not just wheat-based sugary items (unless you want everyone to crash hard at about 11 AM and again at around 2:30).

Provide lunch and insist that everyone attend. People will do just as much learning and community-building through informal conversation as they will in classroom discussion. I advise eating lunch in a different room from the program learning space.

Before The Program

Once you have company support, and have identified your participants, set up an email list or an online group (Yahoo or Google group) for the program.

The list or group should be private to participants and the course leader. Introduce yourself on the list, and ask all participants to introduce themselves briefly. Also publish the homework due for the first session.

Deliver a complete set of course materials to each participant at least <u>two weeks</u> before the first session. These should include:

- A personalized cover letter
- A course binder with all program information:
  - Program location
  - Driving and transit system directions
  - Parking information
  - Names, positions and email addresses of all participants
  - Program leader's email and telephone contact information
  - Program schedule
  - Program goals
  - Agendas, including homework assignments, for each session.

  - Program articles (see list below)
  - Core handouts (you will give additional handouts in individual sessions)
- Program books (except for **Managing Transitions**, which you will give participants during Session 7. See list below.)

Program Books and Articles

The program books and articles contain the bulk of the homework reading, or include key concepts that are used in the program.

The book also form the foundation of the manager's professional library. They are all important to reinforce program ideas and provide resources to the participants as they continue their practice after the program is finished.

Becoming A Manager: How New Managers Master the Challenges of Leadership (2nd Edition) – Linda A. Hill, Harvard Business School Press, 2003

Difficult Conversations: How to Discuss What Matters Most – Douglas Stone, Bruce Patton and Sheila Heen, Penguin Books, 2000

Oxford Guide to Plain English (Second Edition), Martin Cutts, Oxford University Press, 2007

Fierce Conversations: Achieving Success at Work & in Life, One Conversation at a Time – Susan Scott, Berkley Books, 2004

The New Compleat Facilitator: A Handbook for Facilitators (Second Edition) – Drew Howick, Howick Associates, 2002

The Essential Drucker, Peter F. Drucker, Collins Business/HarperCollins, 2001

The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization – Peter M. Senge, Charlotte Roberts, Richard B. Ross, Bryan J. Smith, Art Keliner, Currency/Doubleday, 1994

The Gentle Art of Verbal Self-Defense at Work (Second Edition), Suzette Haden Elgin, Prentice Hall, 2000

Managing Transitions: Making the Most of Change (Second Edition) – William Bridges, Da Capo Press, 2003

These articles are program homework reading. All articles are available for purchase from the publisher's website unless otherwise indicated. If you lose the hyperlinks in this document, visit the Tools and Materials page at the Humans At Work website for links to all articles.

- "The Human Side of Management" by Thomas Teal (*Harvard Business Review*, November-December 1996)
- "The Five Minds of a Manager" by Jonathan Gosling and Henry Mintzberg (*Harvard Business Review*, November 2003)
- "Power Is the Great Motivator" by David C. McClelland and David H. Burnham (*Harvard Business Review*, January 2003)
- "How to Build Your Network" by Brian Uzzi and Shannon Dunlap (*Harvard Business Review*, December 2005)
- "Active Listening" article from Mind Tools, no author credited (available at the Mind Tools company website)
- "Guidelines for Active Listening and Reflection" by Don Sharp of Sales Concepts (available at the Sales Concepts company website)
- "Behavioral interviewing Strategies for Job-Seekers" by Katharine Hansen of Quintessential Careers (available at the Quintessential Careers company website)
- **"**How Management Teams Can Have a Good Fight**,"** by Kathleen M. Eisenhardt, Jean L. Kahwajy and L.J. Bourgeois III (*Harvard Business Review,* July-August 1997)
- "Want Collaboration?" by Jeff Weiss and Jonathan Hughes (*Harvard Business Review*, March 2005)
- "Communities of Practice: A Brief Introduction" by Etienne Wenger (available at his website)
- "Communities of Practice: Learning as a Social System" by Etienne Wenger (available at the Community Intelligence Labs website)

Running The Program

Facilitation skill is essential

The program leader must be able to facilitate discussions toward specific learning goals, and to anchor these discussions with clear, simple explanations of concepts and stories of her own experience that show the concepts in action. Therefore, the leader should be an experienced manager with expert facilitation skills, not solely a trainer, academic or theoretician.

The use of stories as examples is vital to this program (as it is to good management in general). By using stories, you're doing two important things – providing real-world examples to anchor the conceptual learning, and showing participants how to analyze and tell their own stories.

Good storytellers can describe an experience in a way that is compelling, concise, and structured to reveal the key information leading to the "point." Good managers don't tell stories to spotlight themselves, but rather to illuminate some aspect of a current situation in order to help the people around them understand where the manager is coming from, why the manager is behaving in a certain way, and who, at heart, the manager is as a person and a leader. Your stories should be examples of this.

Not all facilitators are good storytellers – if you aren't, you shouldn't lead this course.

This isn't "training" – it's dialogue, discovery, and guided exploration. You must balance between the roles of facilitator and teacher, with emphasis on facilitation. If you aren't comfortable with that, then you should not lead this teaching – no matter how expert you are in any particular subject matter.

Session manifesto

Each session includes a brief amount of time for the program leader to deliver a "manifesto." This when you draw together the concepts, models and tools of each session and show how they affect the human beings who use them. You shift from a facilitator role to a mentor/teacher role as you articulate key session ideas from both a business and a human perspective.

It's important to do this clearly and concisely. And passionately – a manifesto is a statement of belief, of values and concepts you are committed to.

Prepare your manifestos. They are key teaching tools -- don't just stand up and hope for inspiration. Know your key points (in the session curriculum documents, I have provided the key points used in Humans At Work[sm]).

Use specific examples – stories – as anchor points for the manifestos.

Testify and teach – but don't preach and don't perform. This is your chance to speak personally and at length, but it's not about showing how smart or clever or witty you are. It's about clarifying key ideas and delivering them in a way that your participants can connect with.

Handouts

You should prepare handouts of key information – definitions, concepts, theories, models – that you present as part of the curriculum.

I suggest you include core handouts, organized by session, in the program binder you prepare for each participant. You can distribute any supplemental handouts by email, or during sessions (although I don't recommend the latter – if you give people something printed, their impulse is to begin reading it immediately, and you've lost their focus).

Group and table exercises

Sessions include exercises for participants as a large group, or in their table groups of 3 or 4 people. The exercises are designed to help participants ground key concepts, practice with tools, and apply the program ideas to their individual situations.

Have a few additional exercises of various lengths in reserve for each session.

Homework

Homework between sessions is a mix of practice (applying the learning of previous sessions) and preparation (building a base for discussion in upcoming sessions).

The homework is intensive, demanding, and designed to stretch the participants. You'll find a base set of homework assignments after each session – these reflect a two-week gap between sessions. If you decide to separate sessions by three weeks, you may want to consider adding supplemental assignments to give people additional practice or opportunities for reflection.

If you do add assignments, focus on observation, reflection or project work more than reading. Experience is a better teacher than words on pages.

Journals

Keeping a journal is one of the primary program activities. It's not negotiable. There are no requirements for length of entries, but every participant should write in their journal between every session.

What's the journal for? Anything. Everything. Taking notes on session topics and discussion. Working on session exercises. Recording observations as part of homework assignments. And recording any musings, realizations, successes, mistakes, goals, wishes, fears, or hopes that come up at any point during the program, or after.

<u>Documenting</u> this learning is very important. It's not enough to just "think about it." Keeping a journal helps participants get enough distance on their learning experiences to examine those experiences in context of their own lives, values, growth and development – and of the wider framework of good management practices that they are building.

Managing is a process, and any work that managers do to articulate and analyze their own process is good work.

The quality of the writing is not important. This is not a literary competition.

When journals are part of a session exercise or homework assignment, participants will be asked to share information. Otherwise, the journals are as private as the participants want them to be. I suggest participants have the option to turn in their journals to the program leader once or twice, so the program leader can read and comment on their individual experiences. It's chance for the participant to get some direct, private, individual feedback if they wish. But it should not be required.

Attendance and participation

You should require attendance at all sessions, and full participation, in order to successfully complete the program.

Do not allow a participant to derail the program with constant resistance to the values and key concepts of the program. It's the program leader's job to help people <u>understand</u> the concepts, not to <u>sell</u> the concepts.

I want to make sure this difference is clear. You should not expect participants to accept all the concepts, models and tools unquestioningly. It is your job to explain them. You have to be clear about why they are part of the curriculum – how they put the program values of good management into action.

But it is not your job to persuade participants that these ideas are worthy. It is not your job to negotiate the curriculum. It is your job to design a curriculum that clearly, consistently reflects the values of the program – your values of good management. Do not put those values up for grabs.

If a participant really can't get behind the learning, then she's not a good candidate for the program, and she's probably not a good management candidate for your company. Deal with the reality of that. Do not change the program to protect an unwilling participant from the consequences of her own behavior.

This is why it's important to get the full buy-in of the CEO, executives and Human Resources before the program begins. You need to be able to tell a persistently negative participant that the focus of the program is not negotiable, and that her company requires her to learn these skills. If she can not, or will not, then you should remove her from the program.

After The Program

Ask participants for feedback on the program. Do this in person if you can.

Provide support to participants in setting up a community of practice within the company.

The program leader should be available to participants by email or telephone for follow-up questions.

The program leader should schedule a coaching session with each participant three to six months after their program ends.

Three to six months after the program ends, ask participants, their teams and their managers for feedback on the longer-term impact of the program.

If you established program measurements or participant goals prior to the start of the program, follow up and measure the results.