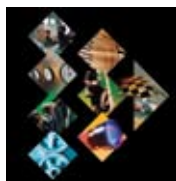


SYSTEMATIC TEACHING



RAPID RESULTS. LASTING VALUE.



# ***Kepner-Tregoe*** ***Systematic Teaching***

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# Guide to Systematic Teaching—Introduction

## Why Have a Guide

Since 1958, Kepner-Tregoe has been teaching adults such topics as problem solving and decision making, managerial leadership and project management. Over the decades, Kepner-Tregoe has formed an approach to teaching adults called Systematic Teaching.

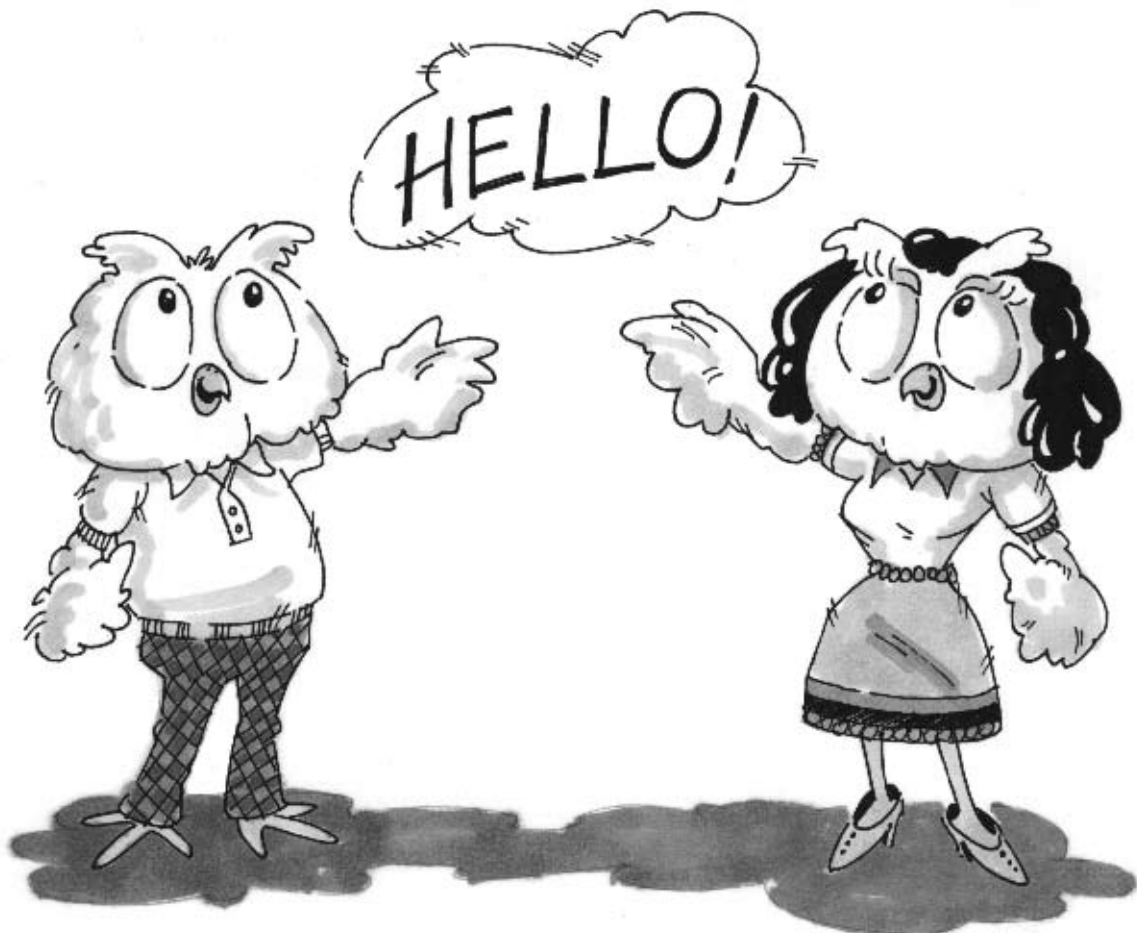
Systematic Teaching is the basis for all Kepner-Tregoe training programs. Over 6,000 people have been trained to be Kepner-Tregoe instructors. While many had no teaching experience, they became capable instructors by mastering the art of using Systematic Teaching in a workshop.

This guide condenses those years of experience into an easy-to-use seven-step approach for Systematic Teaching. It is meant to be an introductory experience for instructors to help them master teaching a Kepner-Tregoe training program.

There are two key sections to this guide. The first section outlines each of the steps of Systematic Teaching. It also provides a framework for understanding the outline and teaching approach of the Kepner-Tregoe program.

The second section covers some key communication skills necessary to be a master instructor. Here you will have a chance to start mastering such communication skills as presenting, listening, giving feedback and coaching. As you can see from the topics, this section covers far more than how to talk.

It is the intent of the guide to not only help you become an instructor of a Kepner-Tregoe program, but also touch most aspects of your life.



## **How This Guide Will Help You**

There are four purposes for this guide:

1. It should build your competence as an instructor of a Kepner-Tregoe program.
2. It should also build your confidence as you become an instructor.
3. It will give you some information and skills for preparing your outline for a Kepner-Tregoe workshop. While you will be given “tried and true” outlines to work from, you will find it better to “personalize” that outline to make it more relevant for you and your learners.
4. Understanding this approach will help make you more effective in practicing your teaching segments in the Kepner-Tregoe Leader Development Institute (LDI).

You are encouraged to use the things that you learned here in other parts of your life. Many people have found that while teaching effectiveness has increased using these ideas, their fear of public speaking has also disappeared and, in fact, they enjoy working with groups.

*Something for you to think about: Invest a few minutes now and list some specific ways that completing this guide can be useful for you. Please be specific to start making this guide pay off for you.*

## **How to Use This Guide**

While you are free to study intently the entire guide, these tips may save some time:

- If you are a newcomer to teaching, then start by skimming the entire first section, which outlines the steps of Systematic Teaching, to get an overview of how to teach. Then study the communication topics in Section Two. Finally, return to the first section and study the steps in detail.
- If you are a teaching veteran, then skim the first section by reviewing the last page of each chapter to look at the recap. If there is any chapter where the recap seems confusing, or with which you disagree, then study that chapter in more detail. Then look at the second section on communication skills, and check those skills which you have already mastered. Come prepared to discuss those items on which you will need the most work.

## **Recap**

- Systematic Teaching is a tried and true way to teach adults. It is based on accepted adult learning principles which have helped train over three million adults throughout the world on such difficult topics as problem solving, decision making, planning, project management and leadership.
- The first section of this book covers the process for Systematic Teaching. This format for teaching underlies most of the Kepner-Tregoe programs. Understanding the format will help you prepare your own version of the Kepner-Tregoe outline.
- The second section of the book reviews basic communication skills and will help you start building your competence and confidence in those skills.

Welcome to the journey of becoming a Kepner-Tregoe instructor. Most of your predecessors—some 6,000 Kepner-Tregoe Program Leaders—have found the journey both fun and rewarding. Hopefully this guide will ease you down the path.



# **Section I: Seven Steps to Teaching Excellence**





# Chapter One: Introduction and Overview to Systematic Teaching

## Steps to Teaching Excellence

Imagine that you are about to go on a journey to an unknown land. Anxiety usually precedes such a trip. If you have never travelled or travel infrequently, you may be doubly anxious. Even seasoned veterans know that unforeseen twists and turns of a new journey can be uncomfortable.

In a sense, anyone starting to teach a Kepner-Tregoe workshop, is like such a traveller. While many people have taught the Kepner-Tregoe program successfully, each started out with some fears about what lay ahead.

As you approach an important journey, what one thing would you like to have in your hand? While some would say a credit card, a map merits more serious consideration.

A new traveller, one who has never been on such a journey, finds a map essential. The map shows where to start, where pitfalls might lie and how to make critical choices when a fork in the road appears. Generally, those people who have no teaching experience will find this book particularly valuable. Systematic Teaching provides a tried and tested path for beginners to become effective instructors.

Even the seasoned traveller values a map. If the map is good, the seasoned traveller can know when they get off track and quickly get back on the best path to their destination.

Similarly, those readers who are seasoned instructors will find Systematic Teaching worthwhile. They will find it reassuring that this guide largely confirms what they have found works in a classroom. In fact, Systematic Teaching is based on the experience of people who have taught themselves to be excellent instructors.

*Several cautions are worth noting about the approach to Systematic Teaching.*

- The steps of Systematic Teaching are just an approach or a framework for teaching. They are not a lock-step method which forces people to be unnatural. There is much room for individual differences in approach and style in using Systematic Teaching. In fact, the excellent instructor brings his or her personal strengths to bear within this framework.
- Systematic Teaching works on a wide variety of topics. As you will see, it works best on cognitive learning where the instructor starts with an idea or skill for the learner to be able to use.
- Systematic Teaching is geared toward behavior change and use of the skill on the job. Learning profound or complicated theories requires more cerebral approaches.

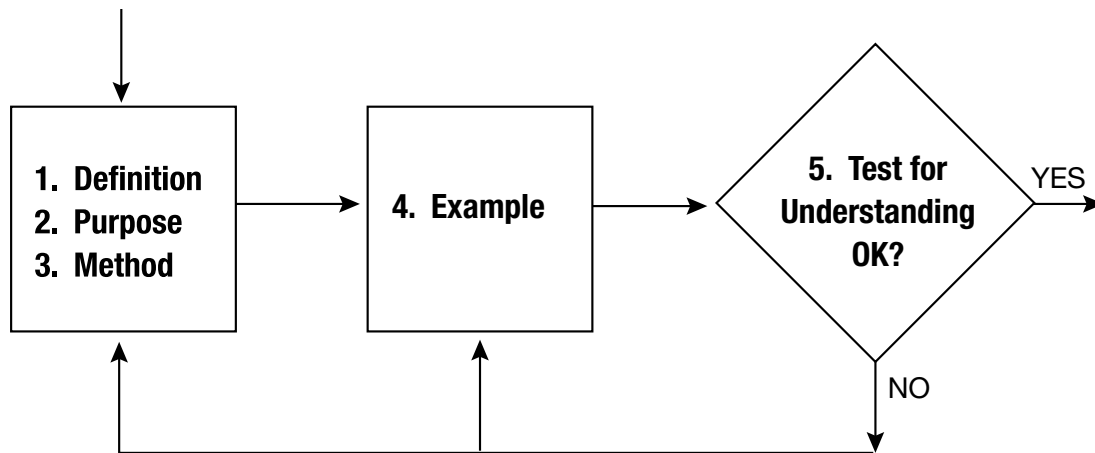
## An Overview to Systematic Teaching

For convenience sake, let's look at teaching happening in two different time frames. First of all, an initial time frame when some information is presented and people begin to understand those ideas. We will call this the initial teach period. Immediately following this period, the second teaching phase occurs when the instructor and the learner make sure that the learner has learned. This often involves asking some questions to test the learner's understanding and some re-teaching. That is, re-teaching may be necessary any place where the learner is confused or is inaccurate.

## **The Initial Teach**

The Kepner-Tregoe program is often composed of a series of 15-20 minute teaching segments. Each segment is an instructor led discussion or activity where learners begin to acquire mastery of a specific idea.

The five major steps or phases during this initial teach phase are reflected in the figure below:



The instructor first starts by **defining** the idea that is to be taught. In essence the instructor shows **what** is to be learned.

Then the instructor quickly leads the discussion on the **purpose** of that idea: the instructor teaches **why** the idea is useful.

Then the instructor presents different **methods** for using that idea; he teaches **how** to use the idea.

In order to make this learning stick, a skilled instructor will often use examples that are very appropriate for the learner. These concrete examples are particularly useful in helping people digest the ideas.

As you can see in step five the instructor finds a way of testing the learner's understanding. If the learner understands, then the instructor is ready to move on and can appropriately transition to the next learning point. If, for some reason there has been a breakdown in learning and the learner does not understand, then it will be necessary to do some additional teaching. This additional teaching may mean some additional lecture from the instructor, discussion by several learners, the use of better or different examples, or the use of some reference tools provided to the learner.

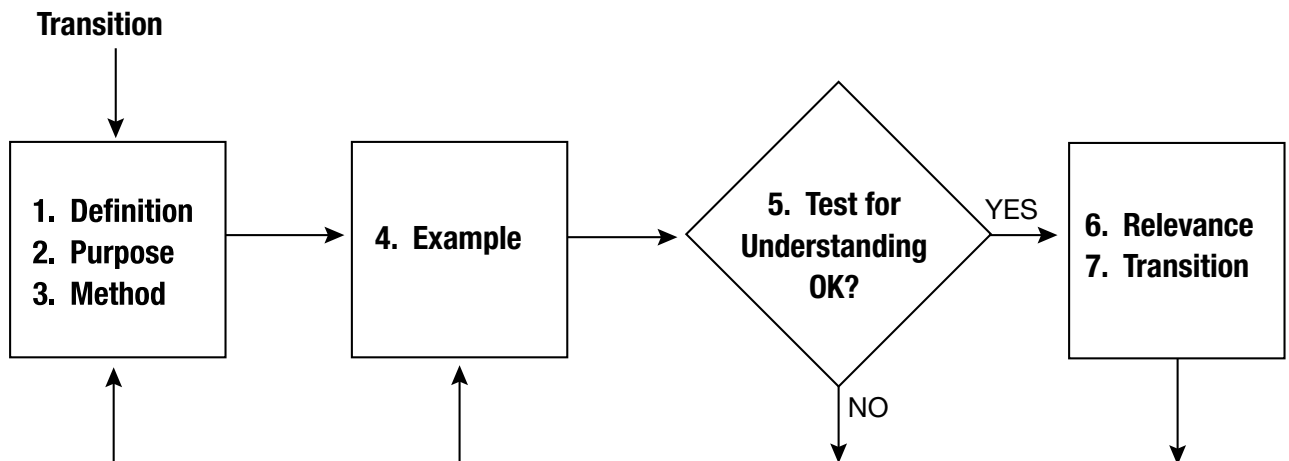
It is useful to view Test for Understanding as a key part of the learning process and not as an indictment of failure on the part of the instructor. The world's best instructor, as a matter of habit, will test for the learner's understanding. This instructor can move ahead when everyone is ready or provide for individual tutoring if one or two individuals just don't get the message.

In summary, during this initial teaching phase, the instructor, often by way of discussion and using visual aides to emphasize key points, teaches the "what," "why," and "how" of each Kepner-Tregoe idea. Examples are used and every attempt is made to build learner relevance of the "what," "why," and "how" of each idea.

Even if the instructor is extraordinarily powerful, not every learner will pick up all of these points and understand their nuances. Different people learn at different speeds and have their own preferred learning style. Consequently, it is unrealistic to expect that everyone will master each idea within the first 15 or 20 minutes of the teach. Instead the next phase of teaching becomes essential.

## **Part Two: Making Sure the Learner Understands**

The final two steps of Systematic Teaching can now be added to the basic teaching segments.



During the second teaching phase, the powerful instructor builds relevance of the idea for the learner. The instructor of the Kepner-Tregoe ideas particularly focuses on showing how the idea can be used in the learner's job or personal life.

Looking at the steps of Systematic Teaching, they suggest a linear sequential approach. In fact, it is far more useful to view these almost as a spiral. An idea is presented, an example used to clarify it, then the instructor tests for understanding and is ready to transition to the next idea. At any time the instructor may choose to lead a discussion or present a brief lecture. Whatever will appeal to the learner is best.

There is a great deal of individual freedom in following this path. No one need fear that they will be made to follow an instructional approach that will not fit them.

Just as many travellers have crossed foreign seas to find their fortune, many people have used Systematic Teaching to become the most powerful instructors they can be.

## **Recap**

- The steps of Systematic Teaching provide a tried and tested path for beginners to become effective instructors.
- The Systematic Teaching Guide can also be a valuable tool for the experienced instructor. It is a good reference tool.
- The five major steps during the initial teach phase are: Definition, Purpose, Method, Example and Test for Understanding.
- The final two steps of Systematic Teaching are: Relevance and Transition.
- Using Systematic Teaching will help you to become a more powerful instructor.



## Chapter 2: Give a Definition

So, what is the first thing you say when you start teaching? While a good start is essential anytime, it is particularly true in teaching, since time is usually short in a workshop.

Once the learner is ready to learn you should be ready to teach.

We suggest the very first point that needs covering is a brief description or presentation of the topic that is about to be taught. The briefer, the better. This is just like a book title. It should be enough to grab the learners' attention and convey exactly what will be taught.



### Some Tips on Giving a Definition

Since most people only understand 25% of what they hear, and disappointingly, only remember 10% of that later, defining terms by listing them on the easel is very useful. Start by giving the name of a specific idea or technique followed by a short statement of the meaning.

Now is the time to be very conscious about the learners' language. What terms do they already know that can be used to convey the meaning of your term? For example, a doctor teaching a group of small children might talk about "boo-boo's." When talking with medical students, the terms that would be used would be first, second and third degree burns, lesions and abrasions.

## **Chapter 2: Give a Definition**

The medical field has advanced significantly because it has developed a common language for referring to its science. Similarly, Kepner-Tregoe proposes a common language for mastering the invisible processes of thinking. It is only fair, then, to start any teaching by defining the Kepner-Tregoe terms in a language the learner can understand.

In order to check their understanding of a term, a wise instructor often will ask for synonyms of the term. Then a discussion can be started which clarifies the exact meaning of the term to be taught.

One tip: Don't overkill giving out a definition. Be as concise and brief as possible. Later you will have an opportunity to teach more steps on how to use each idea. Right now, just strive for understanding of exactly what it is that you are teaching.

Additional ways of defining your terms are to use the process guide or a reference notebook that's available in your workshop, and have people turn to the glossary so that they can better understand the meaning of each term. Most importantly, people start using the glossary to better understand the Kepner-Tregoe approaches to problem solving and decision making.

### **Recap**

- Start by defining your terms. Give a concise definition of what you mean.
- Use terms that the learners understand already.
- Write the definition on the easel. Refer to it in the glossary so that people can see as well as hear what you mean.

Once they clearly understand what is to be learned, then they are ready for the next stage of Systematic Teaching, and ready to be motivated to learn.

## Chapter 3: Show Purpose

Learning can be such hard work that learners need a reason why they will want to learn a new idea. Most of your participants will not be professional students who want to learn everything. Many adults are skeptical about learning. They often have a “show me” attitude that puts the burden of proof on the instructor.

Let’s face it, most of your participants do not have to be in your workshop. They could find some excuse for being elsewhere. If they have to be physically present, learners always have the right to take a “mental vacation” by letting their minds wander. So, after defining the idea to be learned, the instructor must spend some time showing why learning that idea will be purposeful.

This helps the learner become (or stay) motivated. Since we don’t have motivation pills to give out during a teach, it is essential that the instructor pay attention both to initial motivation, getting the learner interested in learning the idea, and to “ongoing motivation,” maintaining that learner’s interest in learning.

The best way of doing this is to show that each idea that will be learned has a purpose to it.



### Two Different Kinds of Purposes

In Kepner-Tregoe programs, there are two different kinds of purposes that can be shared with the learners. Each idea has a logical reason for using it, as well as a personal payoff for doing it.



## **Chapter 3: Show Purpose**

The logical reason for using an idea describes why the idea is reasonable. For example, preventive action reduces the probability of potential problems by affecting its likely causes. If the learner thinks about it a little bit, the judgment will be made that this seems both logical and correct.

To find the logical reasons for each step within the Kepner-Tregoe process, look to the next step in the process, e.g., you identify likely causes so that you can have a specific focus for your preventive action.

Some learners are interested in understanding why an idea exists. For these analytic learners, discussing the logical reason for using each specific step is often enough. For other learners, there is a stronger interest in identifying the personal benefits of using an idea. For example, we might state, "By anticipating likely causes, you can cut down the number of preventive actions and lower your overall cost."

Interestingly enough, most of the steps within the Kepner-Tregoe processes will either help find the correct answer, save time over the long-term, and/or avoid embarrassment. Most learners can identify with any or all of these benefits as being worthwhile.

### **How to Show the Purpose of Each Step**

The simplest, most direct way of showing the purpose, is to state it very succinctly, e.g., "We find preventive actions to avoid the embarrassment and the cost of having any future problems."

As a change of pace, you might also present a relevant job dilemma facing most of your learners and discuss how to handle it.

Do not be afraid of involving the learners and helping them explore why each idea might be useful. Just asking the question "What would be the payoff to you of using this idea?" not only gets the learner thinking, but also can generate interesting discussion around the purpose of each of your ideas and what is the payoff of using these ideas for your learners.

A powerful instructor is often willing to share personal examples of how each idea has personally helped the instructor. One or two "war stories" will convince the skeptic the idea is worth a try.

### **Recap**

- Learners need to see the purpose behind an idea to stay motivated.
- The instructor needs to help the learner see that each idea makes sense.
- The learner must see that each idea has a payoff to it.
- The best payoff is something that is very relevant to the learner.

## Chapter 4: Describe the Method

So far in Systematic Teaching you have defined an idea worth learning and pointed out the purpose for that idea. In a sense, the learner has seen that there's gold on the horizon. But now the learner needs to know how to go about getting that gold.

Consequently, the bulk of the teaching is often done at this time, when the instructor outlines specific techniques or ways to use each idea. In a sense, the instructor is giving the learner the tools to help get the gold. As with any tool, the more specific, the better.



### Tips on Teaching Methods

First of all, be as specific as possible. Since you will be giving feedback to the learner on how well they used these methods, it is only fair that you be specific and clear about each method.

Therefore, you should list the specific techniques used to implement each Kepner-Tregoe idea. If you can't list it on the easel, then make reference to it on a Kepner-Tregoe worksheet, or in the reference book. The key here is to make it visible; to support people who learn in different ways.

Much of the learning in the Kepner-Tregoe workshops is about asking the right question at the right time. Therefore, it is often worthwhile to list that question on the easel or transparency and have the people practice asking that question on a case they already know.

## **Chapter 4: Describe the Method**

When you list questions be sure to tell your learners if these are the particular questions to ask or if they should ask this type of question. When you test possible causes in Problem Analysis there is a particular question to ask. When you list concerns in Situation Appraisal there are many different questions you can ask depending on the circumstances.

Telling learners how and showing them how are very closely related. Even though you will use a visible teaching example to show how each idea works, you may give quick verbal examples while you are still explaining how to use an idea. These need not be consistent from idea to idea. Be careful not to overdo these verbal examples since they tend to slow your teach down.

A note about learning styles...

You should always make the key points of the method visible to your participants. Some of them will learn best by seeing them, some by hearing you say them. Some learn best by writing notes and others need to say or do things themselves. When you explain how to use an idea you show and say what learners need to know. Many instructors will write out the method portion of the teach on an easel or transparency so that learners have time to write notes themselves. At any rate you should watch your participants to be sure they have time to take notes if they wish.

When you finish explaining the method for an idea or technique you should have supported all of these styles except "saying and doing." You will use Examples, Test for Understanding, Build Relevance and practice after the teach to help learners say and do things themselves.

### **Recap**

- Now is the time for specific teaching of questions that can be asked or specific behaviors used to implement any Kepner-Tregoe idea.
- Make questions as specific as possible so that people can start practicing them.
- It often is worthwhile to demonstrate the different techniques through a personal interchange with the members of the class or to use previous case material to make some of these key learning points.

This is where the real gold of the Kepner-Tregoe workshop lies. If the learner can walk away knowing and being able to use the specific methods taught at this stage, then their attendance in the workshop will have paid off for them.

## Chapter 5: Give Examples

Nothing teaches as well as a good example! It communicates abstract learning in real-life terms. Think about it for a second. Exactly what is an example, and what makes it so powerful?

An example is some concrete illustration of your teaching point. It is a typical instance that has happened in the learner's life, which makes some theoretical point. Since it has really happened, it has real meaning to a learner.

Unfortunately, good examples are not always easy to find. Things that first occur to us may not be appropriate for a learner. While they may work very well for the instructor, the learner may find it confusing or irrelevant.

Trying to find examples is worth the search. Examples help in several different ways.

- Examples can clarify abstract teaching points.
- Examples help link one idea to another.
- The example can make the point more relevant for the learner.
- Some learners have difficulty dealing with theory, and must have concrete examples to solidify their learning.



### Different Kinds of Examples

Usually you will use one main teaching example and several small examples to support particular ideas. The main teaching example should be developed as the teach progresses from idea to idea. This provides continuity and shows how ideas fit together.

## **Chapter 5: Give Examples**

Most times it is best to find a typical instance in the learner's previous experience to make the teaching point. These real-life examples are far better than "mythical" stories that the instructor might make up.

For small, verbal examples you may want to consider using analogies. These are making comparisons between things that are similar, but that may be unlike. For example, we might talk about how Potential Problem Analysis is like doing preventive maintenance on a plan. There is enough similarity here that people can get the point. Analogies also can be a powerful way of making learning points.

With a little ingenuity, the instructor can often work out a demonstration of each of the techniques. For example, the idea of making things specific could be demonstrated by asking questions of the instructor to specifically describe a personal ailment. This way, the learners can begin to see how questions can be used as well as the payoff in coming up with a more specific description of any problem.

Another valuable method of showing correct methods for using these ideas is to have teams think back to when they were doing a case or application, and help them recall what technique they were using that was particularly helpful. This is one of the reasons why it can be so valuable for the instructor to observe the teams as they are working on cases and job applications. The instructor can then help the group discover specific techniques they were intuitively using.

### **What Makes an Example Good**

There are several criteria that can help you develop good examples:

- A good example directly makes the learning point.
- A good example is simple (no diverting points or distractions.)
- A good example is relevant to the learner.
- A good main example has visual aspects or can be drawn on the easel.
- A good main example can be easily given within five minutes or so.

### **Preparing an Example**

The first step in developing an example is to specifically state the learning points. List out the specific points that need to be made. Next, think about where the learners might have seen or observed something that shows this. This gives you a raw example. Refine this by practice teaching with several people to see what works and what doesn't.

### **Using an Example**

The search for examples is worth the effort. In a relatively short teaching time, examples can deliver an intellectual and emotional message to the learner. When you are using an example, there are three stages to the delivery:

- Setting up the example (developing the background or setting the scene so that learners can understand the example.)
- Actually telling the example.
- Referring back to it several different times to get added value and show links between ideas.

Usually you will use one main teaching example and several small examples to support specific ideas. The main teaching example should illustrate all of the concepts you will teach in a segment. It should be developed a little at a time so that you always show the current concept.

Be careful about getting ahead of the teach in your main example. If your example shows things you have not taught, you will get questions which can't be answered without teaching a future topic.

When you give an example—do it! Model the behavior you want your learners to use when they practice. Demonstrate frequently and tell the learners what you are doing. This is also a great opportunity to show links back to concepts you taught earlier.

## **Controlling your example**

Examples can be extremely powerful if they are handled well. One key to doing this is to control the content of the example. You spend time preparing an example because you want to show the important teaching points your learners need. You know what the example needs to say so that all of those points can be made quickly and clearly.

What do you think could happen if your main teaching example was changed while you were in the middle of your teach? Painful experience has provided this short list:

- You may miss teaching points you planned to make.
- You may raise questions you aren't ready to answer.
- You may find the example doesn't work at all.
- You may spend more time in the example than you want to.

These sorts of things often happen when an instructor allows participants to change or add to an example during a teach.

This does not mean you should close down participation during your teach. On the contrary, you want participation. Here are some things you can do to encourage participation while you control your example:

- Invite learners to ask you process questions—then you can provide the content answers from the example. Process is what you want them to focus on, not the content of the example!
- Use short verbal examples for specific ideas in addition to your main teaching example. These can be discussed and modified more easily because they don't need to support future teaching points.
- Keep your perspective. If the group is getting very involved in the content of the example they can lose focus on the concept you are teaching. If you see that happen, point it out to the group.

If someone suggests content for your example, acknowledge them and agree or disagree, but do not add their suggestion to your example.

- Learners who describe their own examples are great! They are building relevance for themselves and probably for others as well. Encourage them but do not try to use their example as your teaching example.
- If someone persists in trying to change your example, simply say that it is yours. Tell them that you understand they might do things differently, and that might be OK, but this is how you are doing it now to show how the process works.

### **Keep Your Example Short**

Teaching a single concept or technique (e.g., Preventive Action) will usually take less than ten minutes. Giving your example should take roughly half of that time. If you need to show something which would take time to develop then pre-draw that part of the example and reveal it when you need it.

Also remember, anything you make visible in a teach is liable to end up in the learner's notes, so keep your main teaching example simple and to the point.

### **Use Your Example to Help Test for Understanding**

Examples are used to illustrate concepts and techniques. Once you have shown learners how to do something, you can ask them to try it. When they do you can see how well they understand. This is another reason to have participants ask process questions while you provide the content answers from your example. You get a good sense of their understanding and ability to use what you have just taught.

### **Recap**

- An example is an illustration of a teaching point. It makes concrete what may seem very abstract to the learner.
- Finding a good example is like mining for gold. You have to look in a lot of different fields, and be prepared to polish and refine any nuggets you find.
- The best examples directly make the learning point and are very relevant to the learner. They can be easily stated, and often have a strong visual component.
- Prepare well. Develop and practice your example before you teach.
- When you give your example, demonstrate the behavior you want your learners to use.
- Control the content of your main teaching example. Have the learners ask process questions, then you can give answers from your example. This way you are sure.
- Keep your examples short. Verbal examples should be very quick (less than one minute). Each segment of your main teaching example should also be short (under 5 minutes).

## Chapter 6: Test for Understanding

Imagine this nightmare. You are teaching a difficult topic in a land called Ask No Questions, but there is no way of finding out if the learner is learning. They are not asking questions and have only deadpan expressions. You are not allowed to ask questions to see if they are getting what you are saying. Instead, you must teach in a vacuum, on to the next point, hoping and praying that they understand the basic point. It is only toward the end of the session that you learn that they don't even know the very basic point of what you have been teaching. All that time was wasted. What's more, you've been frustrated because you don't know what they know.

Testing for understanding is needed to give the instructor (you) information about how the learner is doing. It can change teaching in a vacuum to teaching in a dynamic, fun atmosphere. The primary purposes of testing for their understanding are:

- To know how much learning is happening for each learner and for the group.
- To adjust your teach (within limits) to compensate if learners need help.

Testing for understanding also pays off for the learners. When the instructor tests for understanding and the learner answers correctly, the learners see their own personal growth, and are motivated to learn more. Testing for understanding also changes what might be a dry lecture into a dynamic dialogue involving the learners.





### Secrets to Testing for Understanding

Testing for understanding does not come naturally for most instructors. They tend to teach the way they have seen others teach back in school. The school model was usually based around the dry lecture method with little two-way communication.

Therefore, the first secret to testing for understanding is to write your questions into your outline. You should also be alert for opportunities in the class to test for understanding.

Testing for understanding may require nothing more than carefully observing the learners. In the workshop, when the learners apply the ideas on cases you have an opportunity to discover their level of capability. If they start with confidence and use the ideas appropriately, then the instructor gets automatic feedback that the student has learned.

Pay particular attention to the non-verbal cues from the learners. If they seem confused or act non-responsive, then the odds are good that the “light” has not gone on yet.

Don’t be passive about testing for understanding. It is too important to leave to chance. Therefore, you will want to ask questions to make sure that you know what the learner knows. Most of this chapter will look at a powerful way to ask testing for understanding questions.

### When to Test for Understanding

The master instructor tests for understanding any time that it “feels right.” A puzzled look becomes a cue to ask a test for understanding question.

A beginning instructor will pay more careful attention to planning when they test for understanding. Here are some critical times to do just that:

- After the example for each key teaching point, make sure that people understand at minimum the definition and purpose of that point.
- After any teaching point that you think might be difficult to understand, stop and invest a little more time probing their understanding.

*Something to think about: Think through the topics you will be teaching and list two or three specific points that you think will be difficult for your participants to learn.*

- You should also test for understanding after covering a building block idea. Some Kepner-Tregoe points provide building blocks to understand other ideas that will be taught later in the program. For example, in Problem Analysis the idea of “IS NOT” is used later to help find distinctions, and still later to test for possible cause. Therefore, it is essential that people understand the “IS NOT” idea.

*Something to think about: What ideas do you see as key building blocks which your learners have to understand in the workshop you are about to teach?*

- Some ideas are easy to understand conceptually but not as easy to use in practice. Asking problem specification questions in the language of a specific situation is a good example. For this you test understanding by asking learners to practice on the spot.

### Tips for Asking Test for Understanding Questions

The reason for asking a Test for Understanding question is to get accurate information about a specific point from the learner. Therefore, it is essential that your questions get the information you as an instructor need. These tips will help you develop those powerful questions:

- Use open questions like, “What is the definition for preventive action?” You will learn

more, and the learner will think more with such open-ended questions. Avoid closed questions which presume an answer.

- Test what you are teaching. If you just explained an idea then see if learners know it. If you just demonstrated a technique, then ask learners to do it.
- Test what you taught before. Sometimes learners will find links for themselves if you ask them to think about an earlier idea.

The instructor first needs to think through what to find out from the learners to assure that they've learned. Typically, you either want to check and see that the learner understands the theory that you're discussing or the application of it. If you want to make sure they understand the definitions or the relationship of your point to other points that have been previously taught, then you will be interested in asking a theory question. If, however, you want to check and see if the learner is ready to apply, then you need to be thinking through an application question.

## **Theory Questions**

Some different kinds of theory questions to ask are:

- How would you define this idea?
- Why logically would you use this idea?
- What is the relationship between this idea and an earlier idea?
- What is the difference between this idea and another idea?

## **Some Questions for Application**

Here are a variety of questions to help focus learner attention on application, and to test their understanding about application.

- What would be the value of using this idea on your job?
- How would you use this idea?
- Ask the learner to demonstrate the idea.
- In what situations would this idea be particularly useful?
- If you were using this idea in handling a situation, and you got into trouble, what would you do next?
- Think through how you last handled a similar problem—what would have been a better way of addressing that situation? How might you have used our idea in that situation?

## **Directing Your Questions**

When you test for understanding it is important that you make it safe for learners to answer without failing or being embarrassed. Here are some techniques you can use to do this:

- Ask the whole group...at first. If you ask specific questions, but pause before you direct them to an individual, everyone will give their attention to the question. You will have a moment to observe nonverbal signals to help you direct the question. For example: "Why do we look at distinctions to suggest changes?...Kathleen, what do you think?"
- Tolerate some "dead air" when you ask a question. Give the learners a chance to offer answers rather than choosing them in advance. Sometimes people will need time to think or to formulate their answer. Allow some silence after you ask, especially if you

## **Chapter 6: Test for Understanding**

have not directed the question to a specific person.

- Vary the difficulty of your questions so everyone has a chance to get some right.
- Say who doesn't need to answer before you ask a question. This invites participation from the quiet people without putting anyone on the spot.
- If you as the instructor really want to test the understanding of most of the people in the group about an idea, then ask one of the "slower" learners. While you run the risk of getting a wrong answer, if you get a good one you know most of the class understands, and you can go on with confidence. Be sure to vary who you ask.
- Occasionally, ask the test for understanding question of one of your quicker learners, and let them have the opportunity of teaching the rest of the class the point. If they struggle, you can bet there are several others who also don't understand.
- Make it OK for learners to be wrong. Be sure you don't embarrass someone with a question. Focus on the one correct thing someone may say in an otherwise confused answer. Try to improve their answers instead of correcting them.
- Generally, look for people who are likely to be right. This will reinforce them and help others who may not be as comfortable with the ideas.

Don't confuse asking, "Are there are any questions?" with testing for understanding. Asking if there are any questions is more an attempt to be polite or to buy some time. Asking if there are any questions almost cues the class not to have any. You don't know what their silence means.

Instead, the powerful instructor asks a specific test for understanding question of specific people to find out what the learners have learned. Avoid asking a general test for understanding question that might be answered by anyone in the group. Almost inevitably, the eager beaver will dominate this question and leave the instructor wondering how many people really know the answer to it. It is far better to ask a specific person a specific question and be sure what this learner has learned.

What do you do if you get an incorrect answer? Now you know the point was missed, and it is time to back up and re-teach that point. Go back and make sure people understand first the definition, and then the purpose of the point. Take the time to write down key points on the easel to make certain that the learners are with you.

What if you get a correct answer? Acknowledge it and reward the learner and the entire class. This is a time for quick celebration, then move on to the next point.

What if you get a semi-correct answer? This normally happens. Identify the parts of the answer that are correct, and acknowledge the learner for being partially correct. Then re-teach the parts that need correcting. Be certain to summarize this teach by giving a fully correct answer, so that everyone is with you.

**Recap**

- Testing for understanding changes what would be a dry, one-way communication from instructor to learner into a dynamic conversation where the instructor and learners come to know that the learners indeed know the learning point.
- A key tool in testing for understanding is asking specific theory or application questions about the learning point to specific people.
- While some instructors avoid testing for understanding, powerful instructors use it as a matter of habit. In your Kepner-Tregoe training, we will emphasize building the habit for testing for understanding. Once it becomes habit, your teaching and even your daily conversations will become more effective.
- Test for understanding so that you know how much learning is taking place and so you can adjust your teach to help learners.
- Write Test for Understanding questions in your outline.
- Anticipate...look for potential tough spots or building block ideas.
- Use specific, open questions. If you do ask a closed (yes/no) question, get an answer and then ask "why?"
- Be sure to test understanding for both theory and application.
- Make it safe for learners to give open honest answers.



## Chapter 7: Build Relevance

The chances are good that there will be no professional students in your class. Everyone expects payoff from what you are teaching.

While this may seem to put pressure on you, in fact the learners' desire to get value out of every idea will be a great asset. When you show the relevance of everything you teach, you will build and maintain motivation easily.

Consequently, throughout all teaching, it will pay the instructor to make certain that each comment is pertinent to the learner, with language the learner understands. One continuing theme of all Kepner-Tregoe workshops is relevance. There are, however, certain times in the learning cycle when it will be key to accentuate relevance.

Let's review what the learner has been through already. The learner has moved from being curious to being motivated. The learner has even started to understand the point being made and how to use it. Some learners will already be developing confidence about their ability to use the ideas. If you think of a learner as moving from Ignorance to Want, to Try, to Do, most learners by this time in the learning segment will be at the Want stage and be ready to start trying out the ideas. Now is the time to start building the relevance of the learning points that you have defined and shown how to use.

There are two key reasons to build relevance:

- To build or maintain the motivation of the learner.
- To start to transfer the knowledge and skills to the job.



### **Different Kinds of Kepner-Tregoe Job Applications**

Over the years, it's been discovered that there are several kinds of benefits that can be accrued by the learner using the Kepner-Tregoe ideas.

- Many folks often use these ideas to resolve a specific concern or implement a specific plan.
- These ideas can be built into the normal, daily practices of the learner.

While resolving a problem that has been around for a long time is dramatic, it is often the continuously improving daily practices that yield significant results.

Therefore, the instructor should explore both kinds of applications with the learners, and help them see which will be more useful for them.

There are several degrees of formal use of the Kepner-Tregoe ideas. Certainly the most evident use is pulling out a worksheet and writing out a very formal analysis. This kind of use may be necessary on the more complex kind of issues.

However, many people get significant value by habitually using one good question. For example, when people are starting to talk about a potential problem, habitually asking "What can be done to prevent that," can save embarrassment, time and money.

It also will be useful to show how the Kepner-Tregoe ideas are useful not only on the job, but also in other facets of the learners life. Any of the Kepner-Tregoe processes can be used to tackle complicated personal concerns; many community projects have been furthered by using these ideas.

There is a wide variety of application possibilities with any of the Kepner-Tregoe ideas. During this stage of the learning cycle, the instructor has an opportunity to discuss these different kinds of applications and help the learner start getting value from the Kepner-Tregoe ideas.

### **When to Build Relevance**

The best time to build relevance for a particular idea is just after successful Test for Understanding. In fact the two steps are often done at the same time. You want to be careful to avoid building relevance when learners don't really understand an idea. This can create misunderstanding when a learner works backward from a wrong idea of how things relate, to how you really do them.

### **How to Build Relevance**

Clearly the best approach is to discuss the different kinds of application, and how each idea might be used. The powerful instructor often asks "How will we use this idea back on the job?" and lists the different application opportunities the class has already seen. Be prepared to seed this list by offering a few suggestions of your own.

It often is useful to have a few "war stories" on what previous learners have done back on the job. Now is the time to show their worksheets, or perhaps even have them come in and discuss how they have used the Kepner-Tregoe ideas. It also is worthwhile to discuss the challenges that currently face each of the learners as they try to problem solve or to plan back on the job. The instructor then can start discussing how to handle each of these difficulties, (such as arguments, not enough time, not enough information) and show the value of the Kepner-Tregoe ideas in real-life problem solving.

Each workshop has planned times when learners are encouraged to start a specific application. Recognize that they probably do not have enough information or time to totally resolve the issue now. But by starting the application, they can begin to see the relevance of the Kepner-Tregoe ideas to their job. The instructor should make certain the learners have realistic expectations of success. A good start on a difficult problem that has plagued the learner for the last few months is a significant success.

Finally, an additional way to build relevance is to have the learner start building a plan for using these ideas back on the job. At any time, the instructor might ask learners to pull out a blank sheet of paper, and start listing the different things they want to do to get value from this workshop. Coming up with such a laundry list can be extremely useful at the end of the workshop and provides the planning which also helps the instructor start establishing a coaching relationship.

## **Recap**

- During all learning, the instructor should strive to make the learning relevant to the learner, and particularly to their application of the Kepner-Tregoe ideas.
- After the learner understands the ideas and has become reasonably confident, it is a good time to discuss and start application.
- There are two approaches to application:
  - Resolving a specific concern
  - Improving the normal daily practices
- There are several different ways of building relevance:
  - Leading a discussion about how the ideas might be used on the job
  - Discussing how to overcome certain problem solving challenges now facing the learner
  - Actually starting a specific application
  - Starting to develop a plan for later application
- While relevance is a continuing theme, now is the time when it must move to center stage for the learner to get value from the program.
- Be sure your learners understand an idea or technique before you try to build relevance.





## Chapter 8: Make a Smooth Transition

Recall the last time that you were riding in a manual transmission car and the driver really didn't know how to shift gears. The herky-jerky motion ruined the ride and probably any conversation while the driver was frantically trying to shift.

Moving from one topic to the next can bring the same discomfort to the learner if the instructor is not good at transitioning.

However, moving from one topic to the next need not be a herky-jerky experience. It can be as smooth as an experienced race car driver down-shifting through a tricky curve. No loss of movement and little loss of momentum.

Why do transitions merit a special step of their own in Systematic Teaching? One reason is that most people do them so poorly. They treat transitions as an afterthought and just blurt off something like, "and the next step is." Transitions have two important purposes:

- Keep the learner on track.
- Help the learner see the links between what they've already learned and what they are about to learn.



### Tips on Transitioning

Do not treat transitions as an afterthought. They need to be as carefully planned as any part of the teach. In fact, smooth transitions require:

- Adding notes about making the transition into your outline on the last page of a segment so that you don't have to flip your outline sheets to make the transition.

## **Chapter 8: Make a Smooth Transition**

- Using an orientation easel which keeps all the steps currently being taught visible to the learner. We suggest that this easel be at the same place, probably the left hand side, so the instructor automatically knows where to go to discuss what has been learned so far as well as to preview coming attractions. Often, this is just a list of process steps or ideas which you are teaching. This is also called a “topic list” or a “road map” for the teach.

There really are two distinct parts to the transition. First, a quick review of what has been learned so far. Second, a brief preview of what’s coming up.

- It often is wise in the preview to identify why the next step is important. We call this, “lead with the need.” For example, “so we’ve learned about coming up with preventive action that reduces the probability of a potential problem. But occasionally the problem will happen anyway, so we need some way of reducing its seriousness if it does happen. We call these actions contingent actions and that will be our next subject.”

The best transitions do not take much time. They review a point that has already been learned and just preview a coming attraction.

When you’re moving from one learning activity to another, more time will have to be spent summarizing what has happened and introducing what is coming. We call these major transitions, “bridges.” They deserve even more detailed outlines and probably would profit from an example. For instance: When you finish teaching a group of ideas and you are ready to have learners practice them on a case or other exercise, you should “bridge” from the teach to practice.

### **Recap**

Good transitions are planned, not spontaneous. They are built into the outline so they can be used every time.

- Use an orientation easel so you can visually show how you are shifting topics.
- Be sure to answer two questions:
  - What have we learned so far? and
  - Why is the next topic important to learn?

Just like shifting of gears in a race car, great transitioning comes with experience. But it also comes from the willingness of the instructor to keep the learner on track at all times.

# **Section II: Communicating and Teaching**



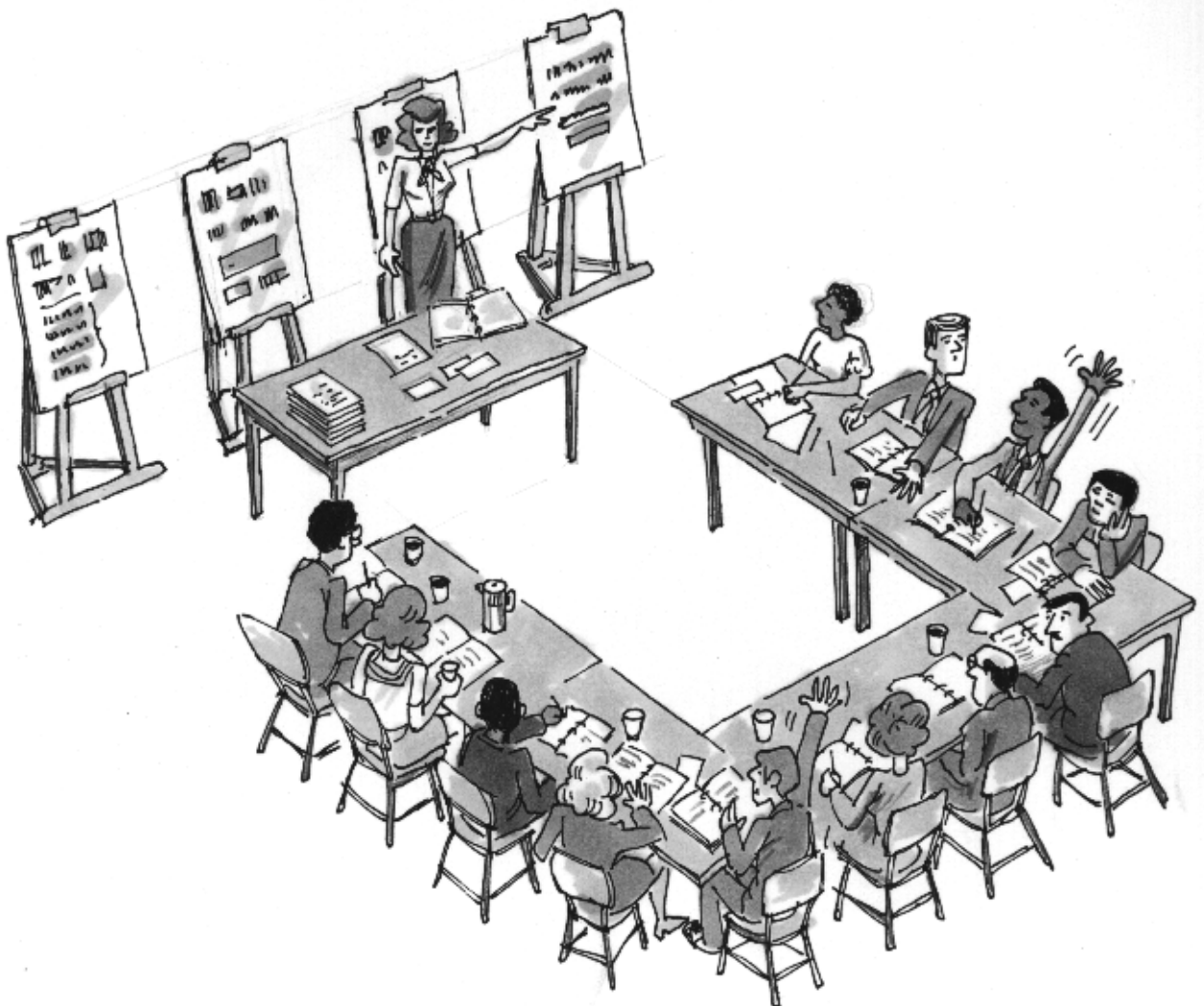
## Chapter 9: Presentation Technique

Everyone looks for one secret to teaching. Some say it's knowing your subject better than anyone in the room. Others say the secret is being able to put yourself in your learner's shoes. While both help, a more fundamental secret of teaching is the ability to communicate. After all, the essence of teaching is transporting what is in the mind and heart of the instructor to the learner. Consequently, the master instructor must become a master communicator.

We don't all start out as great communicators. While early childhood and even school years are spent learning to talk and hear what other people are saying, teaching requires more than just talking and hearing. Teaching a group of adults requires both powerful skills for presenting information and listening to their concerns.

This chapter looks at both parts of communicating. Sending the ideas out to the learner by way of powerful presenting as well as listening to their replies, questions, and concerns and adapting your message to their needs.

This chapter assumes that communication must be a two-way street. A message sent and received, and a reply given to let you, the instructor, know that the message was received. This two-way interaction becomes vital for teaching.



### **Powerful Presenting**

Most of us fear standing in front of a group and saying our piece. Our experience in less formal communications has not really prepared us for dealing with 16 or so different people at one time.

But there is really little to fear when teaching to a group. They are as interested in your teaching success as you are. In fact, they have their time and future at stake since they will have to demonstrate that they have learned. You usually can count on their attention and cooperation if you follow some simple rules of communication. We call these the Ten Commandments of Powerful Presenting.

### **The Ten Commandments of Powerful Presenting**

While Moses did not bring these down from the mountain on a stone tablet, years of experience has shown that a powerful presenter follows these Ten Commandments of Powerful Presenting.

- Be clear before talking
- Be audience centered
- Communicate one idea at a time
- Use different media to make your points
- Use examples
- Summarize frequently
- Find ways to involve the learner
- Avoid distracting mannerisms
- Communicate feelings
- Vary your speech pattern

It is interesting to note that the first half or so of these start before you stand in front of the group. The conception of a great presentation starts in its planning. While the final three have to do with how you say what you say, the first seven give you some real guidelines for planning. All ten are essential to become a powerful presenter.

Let's take a look at each one to start our mastery.

#### **Be Clear Before Talking**

All of us have seen somebody who seems to be thinking on his feet. Meandering around as he opens his mouth before his brain is engaged, confusing everyone. While learners rarely demand that you use perfect grammar and well formed sentences, they have a right to expect that you know what you want to say before you start talking.

#### **Be Audience Centered**

The hallmark of a great speaker is that he is able to identify with his audience. The language used is comfortable and familiar to the audience. Examples are highly relevant. The good instructor is not off on an ego trip or dealing with a hidden agenda. Instead everything the instructor says and does is oriented to the audience. Unfortunately, many instructors break this commandment by using teaching as a chance to grind their personal axe.

## **Communicate One Idea at a Time**

Most instructors have found that teaching one idea and making certain that it gets across is worth more than covering an entire series of points in a short time. Covering too much confuses a learner and makes it difficult to test understanding. Be patient and you will have more success in teaching.

## **Use Different Media to Make Your Point**

Research has shown that people digest information one of three ways:

- Visually (what they see)
- Auditorily (what they hear)
- Kinesthetically (what they feel, either physically or emotionally)

Each individual develops a preferred learning style based on one of these elements. Therefore, the powerful instructor has learned to vary his approach to appeal to all three styles. Not only do they have a powerful way of saying their point, but they can back it up with some visual aids or some drawings to appeal to the visual learner. The extraordinary instructor may also provide ways for people to actually experience the point through some examples. Cases or application work consolidate their learning.

## **Use Examples**

Most learners want practical results. They just don't want to add to their knowledge. Consequently, learners often thirst for examples of different learning points. Being able to show a learner a concrete example boosts the instructor's credibility as well as quenches the learner's interest.

## **Summarize Frequently**

Since most learners do not take good notes of what is being said, the instructor must frequently remind people of points which have already been made. By summarizing frequently, the instructor can reinforce previous learning and re-orient the learner to the different points that have been made. Probably no more than ten minutes should pass during a teaching segment without some form of summary of what has been learned and what is currently being presented. A summary is definitely needed at transitions between major learning segments.

## **Find Ways to Involve the Learner**

Learning should be an active process which hooks the learner's mind. Instead of just giving a lecture, the powerful instructor asks questions, waits for the answers and discusses.

Some ways of getting learner participation are:

- Ask them to write down their answers
- Ask them Test for Understanding questions
- Encourage them to debate you
- Have pair discussions
- Give them homework over coffee break



## **Chapter 9: Presentation Technique**

Here are a few ways to promote group involvement:

- Full group exercises
- Case practice
- Individual or small group application
- Ask them for examples

*To summarize where we are now, we have overviewed seven of the commandments of Powerful Presenting:*

- Be clear before talking
- Be audience centered
- Communicate one idea at a time
- Use different media to make your point
- Use examples
- Summarize frequently
- Find ways to involve the learner

*Each of these points can be incorporated in planning the presentation before the instructor appears in front of the learners.*

*The next three points present some guidelines for the actual presentation.*

### **Avoid Distracting Mannerisms**

In daily communications we often form bad speech habits such as saying, “uhh” every time we shift thinking or we shift our eye glance away from people while communicating. Unfortunately, the stress of talking to a group often amplifies these mannerisms and can distract the learner from the message. Experience with public speaking and practice often helps these mannerisms go away.

One of the benefits of practicing teaching segments in front of friends is to point out such mannerisms. Awareness of the mannerism is the first step to correcting it. Gradually instructors develop their own comfortable presentation style which will be used to feature the message and not be distracting.

### **Communicate Feelings**

The instructor need not be ashamed of passionately believing in the topic, nor is there any reason to hide feelings about learner progress. If the instructor is pleased, then that should show. If for some reason the instructor is disappointed, it helps the teaching become more human while the communication moves to a deeper level.

### **Vary Your Speech Pattern**

All of us have dropped off to sleep when listening to Marty Monotone, the instructor who stays at one level and volume. Changing the level of the voice makes it more interesting while changing the volume gives the instructor a way of adding greater emphasis to the presentation. While many have formed a habitual speech pattern, altering that pattern makes the presentation both more interesting and powerful.

## **Something to Think About**

Now is the time to take a look at yourself and see how you stack up on these commandments. Please review the list on the second page of this chapter and note which commandments you currently follow and which commandments you frequently break. During your Kepner-Tregoe Leader Training you will have an opportunity to practice all of these commandments and learn how they can work for you.

## **Teaching Techniques**

People tend to learn more easily using different learning styles. Here are several different techniques you can use to get your point across:

- Stating it
- Writing it down
- Physically demonstrating it
- Using examples

In using the above techniques it is important to pay attention to your learners, teach to need, and if necessary, bend the schedule.



## Chapter 10: Listening—the Hidden Talent

If you would ask most people to rank the skills needed to be an outstanding instructor, speaking would probably be at the top of the list. At the bottom of the list might be the notion of listening. Unfortunately, this perception blocks most instructors from being truly effective. In fact, some of the most teachable moments occur after an individual has asked or answered a question.

If the instructor has truly heard the question and understands the concern in back of the question, then the instructor's answer may catapult the learner to a new level of understanding. At minimum, the instructor who listens to the learner develops a reputation of being learner oriented and not off on an ego trip.

Unfortunately, listening is a skill too often ignored in our training. Although many of us had to attend a speech class in school there is no equivalent requirement to attend a listening class. In fact, we often confuse hearing with listening.

Listening is really understanding the message, not just parroting someone else's words. This means understanding the meaning of those words as well as the underlining concerns and feelings of the speaker.

Consider the following times as opportunities for learning breakthroughs if the instructor brings the power of listening to that moment:

- When someone asks a question
- When a learner gives an answer to the instructor's question
- When learners start a dialogue among themselves about the lesson

Listening can convert each of these occasions to a teaching moment that surpasses anything that could be gained by the instructor just talking.



## **Chapter 10: Listening—The Hidden Talent**

Unfortunately, listening is an acquired skill and not an innate one. Many of us have developed personal barriers to listening which seriously prevent us from being effective. Consider the following list of barriers and see which seems true of you:

- Avoiding listening—not taking the time to listen
- Biasing—hearing what you want to hear, rather than what is said
- Daydreaming—letting your mind wander while listening
- Preparing an answer—planning your response, rather than listening
- Interrupting—not letting the speaker finish
- Judging—evaluating rather than understanding the speaker's words
- Pretending to listen—becoming too mechanical in using listening techniques

Exploring each of these barriers in greater detail will help us become more aware of what holds us back from being powerful listeners.

### **Avoiding Listening**

Sometimes we are rushing so much to our next task that we refuse to take time to listen. This can be particularly true for instructors who feel that they are behind in their outline. They often view learner questions as something to avoid. Unfortunately, this attitude is easily seen and cuts out questions from learners and seriously hampers learning.

### **Biasing**

It is true that many people hear only what they want to hear. They have a selective bias against certain people or certain topics. This can be particularly crippling in an educational setting if the bias prevents an instructor from hearing a plea for help from a learner.

### **Preparing Your Answer**

Upon the first comment some people automatically go into a planning mode where they are preparing their answer. Unfortunately, this can kill an instructor who may come up with a sensational answer to the wrong question. Instead of preparing a brilliant answer the instructor should focus first on understanding the question and then take a few seconds to compose an appropriate answer.

### **Interrupting**

In the rush to find an answer some instructors interrupt a learner in mid-sentence with a curt answer that stops the learner from forming a total question and leads, appropriately, to the feeling that they have been cut off by the instructor.

### **Judging**

Some people judge any comments or questions rather than try to understand them. By putting good and bad value judgments on any learner comments, the instructor stops the process of understanding exactly what the question is and moves into the field of moral judgments. Such excursions cut off all communications.

## **Daydreaming**

While everyone is aware of learners daydreaming, it's also possible for instructors to daydream during a class and start fantasizing about what they'll be doing in the evening or over the weekend. Such vacations obviously interrupt accurate communications.

## **Pretending**

Some instructors have become so skilled at active listening techniques that they invoke those techniques with phrases such as, "as I understand it, you are concerned about..." and start using these statements ritually. Learners soon catch onto the fact that you are pretending to listen and that there is "no one home" to really attend to their questions or concerns.

## **Something to Think About**

Scan through the seven barriers and list below the one which you fear will interfere most with your teaching effectiveness. Being aware of the possibility of a barrier is a healthy first step to dealing with it. It is the unconscious, habitual use of these barriers that makes most people ineffective. Once you are aware of them you can overcome them.

## **How to be a More Effective Listener/Instructor**

Experts in listening have long known that listening needs to be approached from an active perspective where you really try hard to listen rather than being passive and just letting it happen. They often suggest that you follow this general process:

- Get ready for listening.
- Establish contact with the learner.
- Clarify any of the learner's questions.
- Acknowledge that you received the learner's message.
- Reply to the learner appropriately.

We will next look at each of these general phases of active listening and see how to use them in a teaching situation.

## **Getting Ready to Listen While Teaching**

Becoming aware of any personal barriers to listening is a healthy first step of getting ready to listen. If you observe yourself daydreaming or interrupting someone, you are catching yourself in those barriers. Occasionally ask a coach to observe your teaching and see if any of these barriers operate.

Another key part in getting ready to listen is to develop the attitude any questions that come from the learner represent teachable moments and not personal threats.

It is a shame that many instructors approach learners as enemies and seem to react defensively if a question comes from the class. Instead of a threat, the question actually represents a learning opportunity where the learner can be involved while a key teaching point is made. That is why it is wise at the start of the class to offer a general invitation to raise questions at anytime and to make it clear that questions are expected from the learners.

## **Chapter 10: Listening—The Hidden Talent**

Unfortunately, some instructors have fallen into the bad habit of making the comment, “any questions?” as they make a transition to another point. Everyone in the room knows that the instructor really does not want questions at this time and consequently they comply. The instructor compounds this farce by not allowing any time for questions. Once the instructor falls into this trap, then learners give up the option to ask questions and everyone loses.

Contrast this with the instructor who legitimately asks for questions, pauses a while and then answers the first questions very thoroughly. Everyone now knows that the instructor is generally interested in learning and is being honest with the group.

### **Establish Contact With the Learner**

When a question or comment is raised, the instructor should go out of his/her way to make certain that they have established some kind of direct contact with the learner. Actually moving a step or two closer to the learner while establishing direct eye contact can be very valuable. Maintaining that eye contact while the learner is talking is also very powerful. This has the added benefit of helping the instructor see all the nonverbal signs from the speaker about their concerns and feelings on the issue. The learner really begins to sense that the instructor cares and the learner is ready to address the major issues.

### **Clarification**

It is important for the instructor to understand any comment or question prior to answering it. The instructor will find it very worthwhile to press for clarification of the question. To get clarification, it may be necessary to ask the learner to rephrase the question. Other learners in the class may also be used to help communication by identifying what they see as the question or concern initially raised by a learner.

If the question still remains unclear, then the instructor is wise to ask for an example to make the theoretical concern more concrete.

### **Acknowledge That You Understand the Learner**

An effective habit to develop after believing that you understand a comment or a question is to rephrase or paraphrase that question to make certain of your understanding and to let the speaker know that you have got their meaning. This acknowledgment confirms your understanding of the issue as well as lets the learner know that they have not been ignored.

### **Reply to the Answer**

Most questions are not tricky. They require only a clarification of the definition of an idea, its purpose, or some techniques for using it. It can be directly answered by a prepared instructor and reinforce the learning for everyone in the room.

## **Recap**

- Listening need not be a forgotten skill for instructors. By listening to the learner's comments and questions, moments of ignorance can be transformed into powerful teaching opportunities.
- The key to an instructor's effectiveness is a self awareness of their personal barriers to learning and the willingness to set those barriers aside in order to really listen to the learner.
- By pressing for clarification of any learner questions, the issue can become clear and replies to the question can become more succinct and pointed.
- Interesting enough, the listening skills in the classroom can also be powerfully used in personal communications, on the job and at home, and generate continuing benefit for you.





## Chapter 11: Coaching—Supporting Use

Many of us have a favorite coach. He probably coaches our favorite team and has developed a record for winning. This chapter is not about that kind of coach, the one responsible for an entire team. Instead this chapter looks at the kind of coaching that an instructor is often called upon to do to help learners improve performance. This kind of coach looks carefully at the performer and sees how they're doing, provides them with feedback, suggestions and support and stays with them until they have become master performers. Come to think of it, the success of many sports teams also depends upon this kind of coach.

There are two different faces to this kind of coach: supporter and critic. First, the coach must support improved performance, and may do this by being a cheerleader, a planner, or helping remove obstacles to performance. An additional dimension to coaching is actually giving feedback and serving as a critic; both parts are essential to performance coaching.

Early in the class the typical instructor presents information, tests the understanding of the learners and answers their questions. The start of the workshop is invaluable for learning. Later in the class, however, the learners will begin to practice the ideas and perhaps even start applying them to their real life. Here the coach takes over alternately providing critique and support to help the learners become better.

Frequently, a coach may be needed outside beyond the classroom. Attending a class may not be enough to master the skills. Instead it may be wise to have a coach available back on the job.

This chapter will look at supporting the use of Kepner-Tregoe ideas both in class and on the job.



## **Why Coaches are Needed**

There are three primary reasons why using a coach will make sense:

1. Changing behavior is not that easy.
2. The learner may live in a performance system which favors old habits.
3. Performers may not be able to see what they're doing and need another pair of eyes to improve their performance.

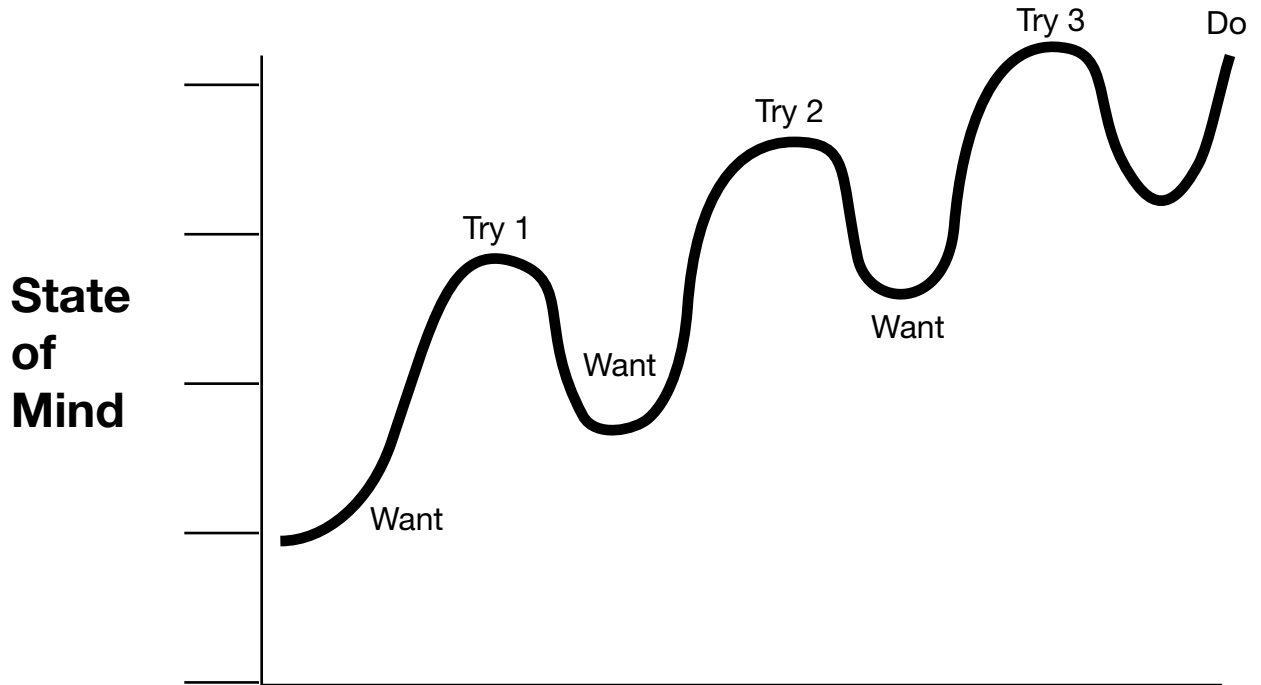
## **Behavior Change Isn't That Easy**

"You can't teach an old dog new tricks," and, "People resist change" are sayings from our folklore. They reinforce the idea that change sometimes can be very difficult. In order to become an effective problem solver, old habits have to be unlearned. Natural instincts, like jumping to conclusions, have to be curtailed. What's more, the systems within which we live may reinforce undesired behavior.

It can often be a shock to find that the environment that a person is in may not support desirable performance. But think about it a bit. Some people know what they ought to do, but find that they are caught in a kind of system that makes it very difficult to do the right thing. Many find that it seems almost impossible for them to change because they are caught up in an environment or relationship with people that encourages their bad habits.

Many people in industry would say, "Well, yes, but that would never be true for what would happen in my organization." Such folks faced a rude awakening at the start of the Total Quality Movement once they learned how to chart performance and identify problems. When they took their findings to their team leaders or engineers, many found that no one really wanted to listen or admit there was a problem. The entire system in their environment seemed to operate against what everyone knew ought to be done. No wonder that just saying to somebody "Do the right thing" may not be enough. They may need a personal coach or supporter to help them through the tough spots.

Because of this natural resistance, people often go through a natural sort of up and down kind of cycle when they try and master a new behavior. We will call this the Want-Try-Do cycle. Imagine that a good friend of yours is learning a new complicated skill. That person will probably go through the emotional highs and lows reflected below.



The learner's emotional ups and downs as they master different behavior.

Your friend starts off wanting to do the behavior and will become more excited as he moves to his first practice attempt. The new behavior often sets high, unrealistic expectations. We will call that first attempt Try 1. Try 1 probably will not match the goal your friend had for the first attempt. Consequently, your friend will be down. After a little time regrouping your friend may very well want to try again and begin to get excited again as they move toward Try 2. If Try 2 fails, as frequently happens, they may again be emotionally low. At this time some may choose to give up and not even want the new behavior anymore. Imagine, if a coach is there to help during this cycle, then the learners may move onto Try 3 and continue the cycle upward until finally moving from trying to doing.

Most of us can look at our own personal experience and see that the Want-Try-Do cycle is valid. Fortunately, the trend is normally upward as we get progressively closer between trying and doing.

Imagine when we don't always have the perspective to see our progress or the emotional stamina to go through the normal ups and downs of this cycle. Helping a learner through this cycle is the primary contribution that a coach can make. Consequently, we will find that the coach often alternates between supporting people as they move from want to trying and then providing correcting input to their tries and help learners move from trying to doing.

### **The Coaching Process**

Coaches do whatever is necessary to help their learners improve their performance. Coaching their success often centers around these four phases:

- Form a coaching partnership.
- Plan performance improvement.
- Support use (trying).
- Give feedback.

We will look at each one of these phases in-depth to build your competence for coaching.

### **Forming a Coaching Partnership**

A learner has to learn to trust the coach. The learner is in a very vulnerable spot since they will be trying and probably failing. They need to know that they are in safe hands with the coach.

A coach also needs to know that the learner will be coachable and willing to follow the coach's suggestions. They need to form a partnership built around improving performance.

Fortunately, when learners come to a class they are often willing to be coached by the instructor. They see the instructor as an expert and they want to improve. Certainly during the early stages of a Kepner-Tregoe workshop, the trust relationship between learner and instructor is built so that a foundation is laid for coaching.

It always will be worthwhile for coaches and learners to discuss the learner's goals for performance. Ask what they want to get out of the workshop or out of specific application assignments. Partners share goals. Discussion of these goals goes a long way in forming a partnership.

If for some reason the coach does not feel that he has the trust of the learner, then some time needs to be invested getting the learner's permission to coach. These are the points the coach and learners need to agree upon:

- On what topic can we work together?
- How good does the learner want to be?
- How should coaching be done—publicly or privately?

If public coaching won't be acceptable, then get an agreement for private coaching. Without the learner's acceptance of the coaching, all the rest of the process fails.

### **The Coaching Dialog**

All coaching will be fruitless unless the coach and the learner have an honest conversation. The wise coach will find a private spot and start discussing the following issues: What goals does the learner have for using Kepner-Tregoe ideas? What is the payoff that the learner wants from Kepner-Tregoe ideas? What stands in the way of using them? What specific skills or help does the learner want from the coach? How can the coach and the learner work together?

It will be particularly important to discuss how the learner wants to receive feedback. Many people want it straight from the shoulder during the game. Other people prefer a private conversation after they have had a chance to recover. While either way can work, normally, the sooner the better. The key thing is that the coach and the learner have “formed a contract” on how they will work together; and both have a common target for the coaching.

### **Planning What to do After the Workshop to Improve Performance**

All Kepner-Tregoe workshops are built toward leaving the class with a plan for using the ideas that have been learned.

At the end of each application assignment, there is an opportunity for the learners to plan what they will do next in carrying forward that application.

### **Supporting Use**

Coaches should recognize that practice always brings with it an anxiety since there always is the possibility of failing. Consequently, the coach should go out of the way to provide positive support for the learners by voicing confidence in what they will be able to do.

We are not talking cheerleading, with its false sense of optimism. Instead what’s needed is identifying the progress that has been made so far and noting the specific strengths the learner brings to the practice.

It will also be desirable at this time to build realistic expectations of what can be done in each practice application. It is far better to say that this next application will only be about defining a problem instead of letting them believe they will find an answer to an age old problem. Support, above all, depends on being honest, specific and positive. When the coach adopts this kind of attitude, it becomes contagious, and the learners are able to do the practice much better.

A good coach will also try to spot and remove obstacles to good performance. These may be things like: missing information, approval needed to continue, a misunderstanding about some idea or no markers to write with.

### **Specific Tips on How to Support Use**

There are several times in teaching a Kepner-Tregoe class where coaching becomes paramount; either when people are practicing the concepts on a case or doing an application. During these times the instructor’s personal support and appropriate critique are essential. Some additional tips to bring the power of coaching to the classroom are:

- **Ask these process coaching questions to help a learner review.**
  - Where are you in the process?
  - What questions did you ask to get information? Was that the right question?
  - What question are you trying to answer?
  - What is the next process step?
- **Forget finding the “right” answer. Focus on process.**

During your comments, when they are in application, you stay in Kepner-Tregoe process. If they follow logical process, they will find the best answer for themselves.

- **Don't do the analysis for them; let them do it.**

They'll learn much quicker by doing the work themselves, and they will keep ownership of the results. This makes feedback much more effective when they are finished.

- **Give support early and often...but not for long.**

When small groups are practicing during a workshop, circulate quickly to make sure they all get started properly. When you visit a group, start by looking and listening for at least one minute. Look for obstacles which will frustrate the group or keep them from making progress. If you don't see any, leave. If you see one, intervene using the process coaching questions.

- **At the conclusion of an application, ask them what they've learned about the Kepner-Tregoe processes and help them plan their next steps on resolving the issue.**

Planning next steps probably includes something to do back on the job which you can follow up.

### **How to Support Use After the Class.**

If you had the learners generate action plans before the end of class, then you have set the stage for your post class coaching.

Do not hesitate to make phone calls or even drop by and ask, "How's the application going?" Recall that the environment in which they operate may not be supportive of what they've been taught in class. It will be essential that you show up and give your support after the class. Often a phone call is all that's necessary to get learners back on track.

When you're coaching after the class, beware of taking over their problems. Instead let them continue to be owners of their issue while you provide help by way of reminding them of process questions that can help them find their own solutions.

While many of the same guidelines that worked during class will work after class, the following are some specific tips that will pay off for supporting use after the class.

- Encourage any progress that is made.
- Always leave the learner with a plan for the next steps, particularly process steps to success.
- Help them track their plan.
- Help them remove any barriers to application or use. Be particularly attentive to barriers such as not enough time or information to do a solid analysis.
- Help them celebrate their successes and acknowledge their hard work.

Follow-up is key to coaching after the class. A few phone calls or visits will go a long way toward encouraging use and helping people learn while they are on the job.

## **Summary So Far...**

Coaching is a valuable activity for a course instructor. There are two major facets to coaching: supporting the use of the workshop ideas and giving feedback.

During the course and after the course the effective instructor should be available for personal coaching and will be seen as giving personal support for each learner.

A key part of that coaching is giving effective feedback; the next chapter covers that vital and important topic.





## Chapter 12: Coaching—Giving Feedback

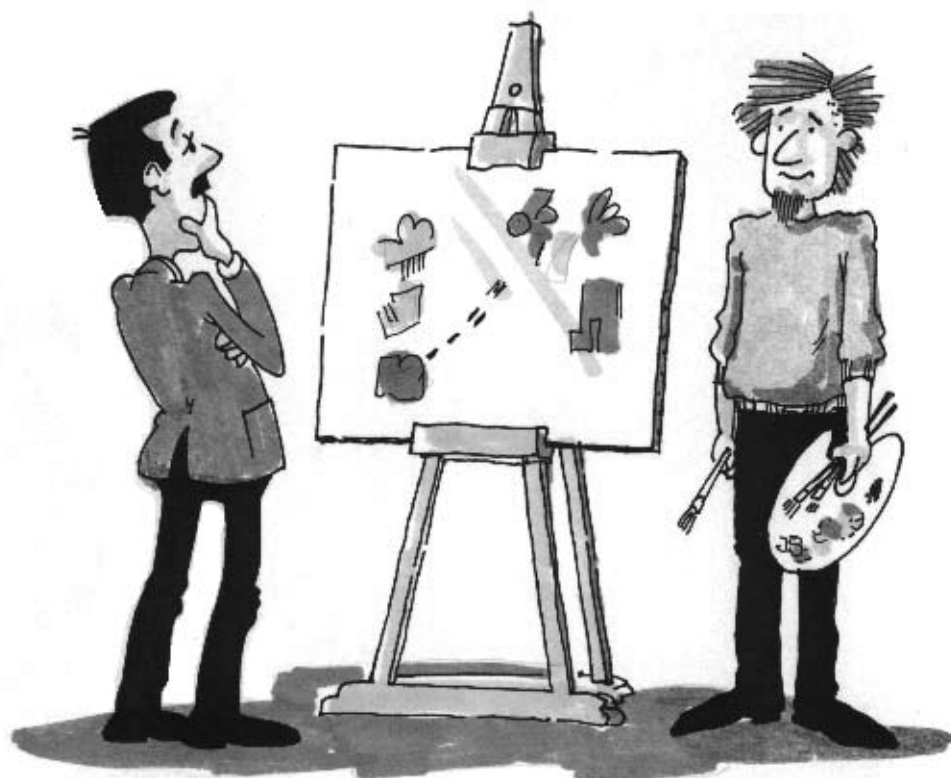
Picture this nightmare: you are playing a game and want to improve how you play it, but have absolutely no idea if your scoring is off or what you're doing that's right or wrong. How would you get better? Frustrating thought, isn't it?

Let's make that nightmare a little more concrete. Imagine that you were taking up bowling for the first time. You carefully select your ball and have a good coach to tell you how to approach the lane and release your hand for a nice straight ball. Unfortunately, someone has placed a big screen fifteen inches above the alley that goes up to the ceiling. So the ball gets through, you hear some sounds of pins falling but you have no way of seeing what your ball did or how many pins you knocked down. There are no electronic score boards although some smart-aleck yells out, "not good enough" after you've thrown your ball. What do you do next? Do you throw more to the left or right, harder or softer, faster or slower? It's all a puzzle, and a frustrating one at that.

This is what learning would be like if there were no feedback, and too many workshops are set up that way.

Giving feedback is the most critical skill that an instructor can have. If the instructor can give feedback that maintains the learner's motivation while giving specific directions on how to improve, then the learning time is significantly reduced.

Bear in mind there are three purposes to giving feedback. First, is to give specific information to the learner to help them correct their performance. Second, the way the feedback is given can maintain the motivation of the learner to learn. Finally, effective feedback can build the learners' satisfaction with their own growth. These purposes are met only if feedback is effectively given and received.



### Tips on Giving Feedback

Avoid giving long paragraphs and lengthy descriptions of feedback to a learner. Instead follow these guidelines. Focus on making comments that are:

- **B** for Behavior
- **R** for Relevant
- **A** for Actionable
- **T** for Timely
- **S** for Specific

While our mothers taught us only to say nice things, we can use BRATS to help us give powerful feedback.

#### **B Behavior**

Do not critique someone's personality or attitude. It will only make them angry and confused. Instead focus on their behavior that you have observed. Pinpoint that behavior and tell them whether it is effective or ineffective.

#### **R Relevant**

Relevance is in the learners' eyes. Focus on those behaviors that will help the learners meet their goals. By selecting those items, you will move the learners forward. They will be motivated and accept feedback more easily.

#### **A Actionable**

Focus on actionable behavior. Pick only the behavior that the learner can easily change. Asking someone to be as strong as Hercules is neither reasonable nor fair. Asking them to ask more specific questions and giving them the wording of that specific question gives them specific ways of getting better.

#### **T Timely**

The trouble with report cards or performance appraisals is that they come too late to do any good. In the workshop you are about to teach, focus on giving feedback as soon after the performance as possible. Don't wait until the end of the class or a convenient coffee break. It is useful to summarize each case exercise by giving each team a little feedback on what they did well and how they could get better next time.

#### **S Specific**

Generalization will not help. Instead, identify specific behavior that keeps people from their goals.

### Feedback is Positive

Unfortunately, some of us do not receive critique very well. We may take suggestions from someone else as a challenge to our personal worth. It is essential that the instructor giving feedback be positive and phrase all comments in a positive way.

That doesn't mean that the instructor ignores things that the learner has done wrong. Far from it. The most positive gift that a instructor can give is to help someone avoid disaster on the job. The intent of the instructor will be apparent. Consider this comment:

“Pat, if you ask more specific questions to define the problem earlier, you can avoid a lot of wasted time getting started on your team.”

The tone was positive while the specific feedback was corrective in nature.

Bear in mind that corrective feedback is inherently positive. It is meant to end up with something being positive in the future.

### **Tips on Receiving Feedback**

So far, we have focused on giving feedback since that often is what the instructor must do. The instructor can also establish certain guidelines during the workshop that will help learners benefit from getting feedback. Try these guidelines on for size. Use these guidelines personally and see how they help you profit from getting feedback:

1. Stop any defensiveness when getting feedback and don't challenge it.
2. Don't try to explain why you did something, just listen to what behavior is being described and why it didn't work.
3. Focus on understanding the feedback; you don't have to agree with it.
4. Think about the feedback and thank the person giving it for trying to help.
5. Ask questions to clarify the feedback and help make it specific.

### **Tips on Giving Feedback—(Debriefing) a Practice Case**

It will be essential that you are in the room and see what they do on the case. Be alert to how they start out even if they establish a specific statement or goal for themselves on what they will accomplish. Often people will complain about getting a poor start. Therefore, the more you can help them see how to get a better start the better your feedback to them.

Recall that giving feedback starts with observing their behavior. You have to be in the room when the team starts working on the case in order to give them meaningful feedback later.

Later, when you must give feedback or judge their worksheets, you may become puzzled by what they say on the worksheet. If you were not in the room when they came up with that specific worksheet, then ask them to report how they came up with a specific point. For example, by asking the following question, it will help the group reconstruct what their process was for solving a case:

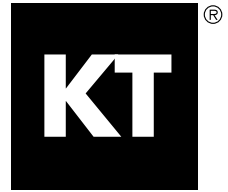
What process question did you use to get that answer?

If they actually asked a process question, then you can critique it. If they can't recall the question that they used, then chances are good the answer came out of their hunches and not the process they used.

In giving feedback in a Kepner-Tregoe workshop, most times you will make visible the process that the team used to arrive at their answers and critique the process rather than judging their answers. By focusing on the process that individuals and teams use, you give them an opportunity to improve how they approach a wide variety of problems.

### **Recap**

- Coaching is moving learning beyond the classroom into the real world of the learner. A coach helps the learner improve performance by providing support during difficult moments, correcting errors and replanning performance.
- The rewards for coaching are seeing the learners actually use the ideas that have been taught and seeing the organization benefit from improved performance.
- Feedback is giving or receiving information about the learner's performance. If that feedback focuses on specific behavior and comes at the right time, it can be invaluable in helping the learner grow.
- While difficult, it will be helpful to view feedback as positive.
- It will be essential to be selective in your feedback. It is far better to give one or two points of feedback on areas that will really make a difference for the learner rather than overwhelm the learner with long paragraphs of what's wrong.
- It is also important to note that feedback is best aimed at improvement and not perfection. Few of us, particularly as we're starting out, aim and even reach perfection. However, we can continuously improve ourselves and grow toward perfection. Some key points to remember in giving feedback are:
  1. Be selective, focus only on important items.
  2. Aim for improvement and not perfection.
  3. Use BRATS



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