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Technology Preferences of Multiple Generations in the Workplace Classroom

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Esther Jackson

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2018

Abstract

Technology Preferences of Multiple Generations in the Workplace Classroom

by

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MA, Wayne State University, 2003

BS, Wayne State University, 1999

Project Study Submitted in Partial Fulfillment
of the Requirements for the Degree of
Doctor of Education

Walden University

August 2018

Abstract

Differences in race, ethnicity, gender, and age have shaped the most diverse workforce in recent years and have also influenced the workplace learning environment. Variability in age created several generations that presented an instructional challenge in the workplace for trainers who have not recognized and understood generational differences. The purpose of this study was to investigate how employees in 4 generations differed with respect to attitudes toward instructional approaches using technology in the workplace classroom. A theoretical framework incorporating Knowles' learning theory of andragogy guided this quantitative survey design study. The sample of 731 city employees from various departments completed the Media and Technology Usage and Attitudes Scales administered through an online survey tool. One-way ANOVA indicated that only on the Positive Attitudes Toward Technology scale, scores of the oldest generation, the Traditionalists, were significantly less positive than those of the 3 younger generations (Baby Boomers, Generation X, and Millennials) who did not differ significantly from each other. Research findings led to the conclusion that some differences existed in generational attitudes toward instructional approaches. Based on this conclusion, a 3-day leadership workshop was created, which includes recommendations for a customized approach to instructing the generations. Implications for social change include the potential for organizations to modify instruction to correspond with attitudinal differences of the generations and allow organizations in all industries to take proactive steps for workforce changes in learning.

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Dedication

To God first and foremost for being my solid rock and foundation as a reminder that “I was built for this” and anything is possible with you on my side. To my mother, whose love and inspiration provided the drive I needed to believe in myself and persevere to the finish with this work and everything else I endeavor to do. Without you, I would not be the woman who was able to achieve this accomplishment. To my father, who taught and advised me to trust in God at all times and especially in the midst of challenges. To my sister and best friend who reminded me that you are encouraged by my achievements which motivates me to do more. To my little brother, who believes in me and always showed me love.

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Section 1: The Problem

The Local Problem

The generational mix present in the workplace marks a historic plateau for the workplace learning environment (Toosi, 2012). All employers, including public sector organizations, must face the challenge of effective training delivery across generational divides in the workplace classroom. One problem concerns the need for training a diversified generational mix of learners in the workforce, along with the need for training using more technology implementation (Wolfson, Cavanagh, & Kraiger, 2014). To stay competitive and productive, organizations must ensure effective training design and delivery decisions are made for its workforce (Salas, Tannenbaum, Kraiger, & Smith-Jentsch, 2012).

In recognizing that learners account for four generations, their technological preferences for instruction should not be overlooked (Napier, Dekhane & Smith, 2011). The influx of several generations at one time is characteristic of numerous workplaces in the private and public sectors. The presence of this type of diversity could create challenges with as many as four approaches to learning to work and learning in the workplace (Kapoor & Solomon, 2011). Aside from the varied ages, communication styles, values, and work styles, differences in technology preferences are also characteristic of the generational span (Elias, Smith & Barney, 2012). Thus, these age-related differences have a strong relevance to workplace learning.

The organization under study was a local government in a Midwestern state which will be referred to as *the city* in this study. The city employed 9,000 employees in nearly

40 city departments. Training was conducted for employees covering a range of ages, representing various staff classifications, in classroom sizes of up to 50 in a class, depending on the topic. For example, the city had a complex system for managing employee time and attendance. Several generations of employees had to complete workplace training due to changes in work processes. Employees had to be trained in using new software for managing employee work hours, employee attendance, creating analytical reports, and managing employee leaves of absence. Low-rating course evaluations, employee performance after training, and the use of traditional instructional strategies (Human Resources Manager, personal communication, May 20, 2015) prompted the need for this study to investigate if more modern approaches should be used.

An internal training team was responsible for designing training for city employees. However, despite the observable wide range in employee ages, the instructional strategies gave no consideration to generational differences for the generations of employees in the same classroom (Human Resources Manager, personal communication, May 20, 2015). The technology included in the courses only required learners to use a computer for reading content and completing a multiple-choice quiz at the end. This study aimed to determine whether the low level of technology currently used in training represents a gap in practice indicating a need for tailoring instruction to the technology preferences of various generations represented in the city workforce.

Rationale

Evidence of the Problem at the Local Level

The city was not alone in not using technology to full advantage. Realizing the need to assist state and local governments in identifying ways to leverage technology for service improvement and greater efficiency, the Obama Administration established the Office of Science and Technology Policy (OSTP; The White House, 2015). The OSTP established a Tech Team to report on the condition of technology usage for the city in this study. This report included suggestions for information technology roles to be added to the city and an evaluation of the city's infrastructure. With these suggestions, there was specific reference to the need for upgrading technology and more targeted employee training with the new technology upgrades.

The city's workplace training environment needed to meet training and development needs using instructional strategies that accommodated a population consisting of multiple generations (Tang, Cunningham, Frauman, Ivy & Perry, 2012). The results from this study were expected to indicate if there is a need for changes in the instruction for the city's workplace classroom to become more aligned with differences in generational needs.

Evidence of the Problem from the Professional Literature

Changing demographics in the workplace were evident in the workplace learning environment. At least 25% of the workers were eligible for retirement, being at least 51 years of age, (Human Resources Manager, personal communication, May 20, 2015). Workers eligible for retirement in public and private sector organizations were staying in

the workforce beyond retirement age. The delay of retirement for older workers was creating a greater mix of learners in the public sector workplace (Tones, Pillay & Kelly, 2011).

Anderson's (2015) case study conducted for the American Association of Retired Persons examined these changing demographics in the workplace, specifically, issues with modern retirement due to an aging workforce. Testimonials, organizational documents, and annual reports were used to highlight issues present with modern retirement. Anderson explained that some organizations could not afford to lose the knowledge and skill of their eligible retirees without having the resources to replace them. It was the workers ages 50 and up who retained the organization's knowledge and experience.

Similarly, Roodin, and Mendelson (2013) found that rising healthcare and other costs forced public and private sector organizations to make cuts in employee benefits which also led to employees delaying retirement. As increased changes were recognized in the workforce demographics due to workers continuing beyond traditional retirement age, organizations viewed their knowledge and skills as a great asset due to their work experience. While these senior workers had greater knowledge and experience, they also needed training to bring some of their skills up to date.

Workplace training was needed to equip all employees with the skills and knowledge to perform their work tasks. The importance of efforts to achieve a successful blend of instruction and technology in workplace training could not be minimized by organizations. Ahmad and Tarmudi (2012) explained, "As training technologies and

generational groups change over the next decade, numerous issues in both training and technology will need to be addressed to meet the demands of this evolution” (p. 305). New knowledge needed to be infused with technology for workers to stay abreast of changes in their fields and work tasks that implemented updated processes (Monaco, 2012). A Bureau of Labor Statistics report indicated that the middle generations represented over 75% of the national workforce in 2012, but workplace learning practices targeted one generation—usually the one representing those who taught the instructors (O’Boyle & Harter, 2013). If generational needs were not represented in instructional approaches and techniques, the desired outcome—learner response and performance—could not be fully achieved (Wolfson et al., 2014). With this in mind, the purpose of this study was to investigate differences among four generations of employees in their attitudes towards technology used in the workplace learning environment.

Definitions of Terms

The terms listed were defined based on their relevance to this study.

Blended learning: A combination of teaching and learning techniques with mixed modes of instructional technology to provide a superior learning experience (Thoms, 2013).

Cuspers: Individuals who were born in the early years of a generation’s year span but who share characteristics with the generation prior, or they are born near the end of the year span of a generation and share characteristics with the generation following theirs (Van Der Walt & Du Plessis, 2010).

Generation: A group of persons who were born in the same time span and share the same life experience events, attitudes, and values (Schullery, 2013).

Generational gap: The “wide distinctions in cultural norms between members of a younger generation and the previous one” (Ahmad & Tarmudi, 2012, p. 306).

Innovation: The implementation by a public-sector organization of new or significantly improved operations or products (Chartered Institute of Public Finance & Accountancy and the International Federation of Accountants [CIPFA & IFAC], 2013, p. 181); it is the improvement of “cities through the implementation of tools, ideas, and engagement methods that strengthen the relationship between government and citizens” (Black & Burstein, 2013, p. 1).

Public administration: An organization providing services at the federal, state, or local level in accordance with the law (Jordan, Lindsay, & Schraeder, 2012).

Public sector entity: Described as “one or more legal bodies managed as a coherent operational entity with the primary objective of providing goods or services that deliver social benefits for society” (CIPFA & IFAC, 2013, p. 49).

Public sector services: “All the outputs of a public sector entity, such as products, services, or regulation geared toward achieving certain outcomes” (CIPFA & IFAC, 2013, p. 49).

Technology: Knowledge, techniques, or tools used to accomplish objectives or human purposes; can be any tools or machines involved in the completion of a task or solving a problem (Van Volkom, Stapley, & Amaturro, 2014).

Technology-based instruction: Any form of training delivered primarily with the use of any technology medium (Wolfson et al., 2014).

Workplace learning: The process of acquiring knowledge, skills, and/or attitudes to improve the individual or organizational performance (Crouse, Doyle, & Young, 2011).

Significance of the Study

In their discussion of good governance in the public sector, the CIPFA & IFAC (2013) stated, “Generally, the main objective of public sector entities is to achieve outcomes—enhancing or maintaining the well-being of citizens—rather than generating profits” (p. 6). In maintaining the well-being of the citizens, employees needed adequate knowledge of job functions and processes to complete their jobs, thereby directly and indirectly serving the citizens.

Work productivity and employee performance were potentially inhibited by a failure to consider generational differences in instructional approaches with technology (Vining, 2011). Workplace training for public sector employees was vital to the success of governmental operations (Gau, 2013) particularly as more public sector entities were experiencing fiscal pressures leading them seeking out innovative approaches to public service (Keefe, 2012). In the city, innovation was taking place within the time and attendance system to effect better resource allocation and use of technology which was going to require education and training for city workers in using the new and advanced technology. However, workplace training methods needed to be updated to adapt to the characteristics of learners who were more diverse, due in part to older generations who

were not retiring as predicted previously because of the economic effects of changes in compensation and benefits (Legas & Sims, 2011; Society for Human Resource Management [SHRM], 2013).

Results from this study may be useful to the city by shedding light on the perspectives of several generations of employees in response to technology used in training for the workplace. Information obtained on employee perspectives can be used to restructure training approaches with customized technology inclusion to address generational gaps in instruction (Rogowsky, Calhoun, & Tallal, 2014). Employee feedback can highlight ideas to be implemented in training approaches that are more favorable for employees (Schoonbeek & Henderson, 2011), can reveal any negative aspects of the training approaches that should be discontinued or altered, and may also identify the aspects of technology approaches that may be the most challenging for some generations.

Research Questions and Hypotheses

This study was designed to assess the technology preferences of several generations of workers who are recipients of the workplace instruction provided by the city. I focused on the following research question:

Research Question: What are the differences among the four generations in employee attitudes toward technology use in the workplace classroom?

H_0 : There are no significant differences among the four generations with respect to attitudes toward technology use in the workplace classroom as measured by the Media and Technology Usage and Attitudes Scale.

H_1 : There are significant differences among the four generations with respect to attitudes toward technology use in the workplace classroom as measured by the Media and Technology Usage and Attitudes Scale.

Review of the Literature

Study Framework

A theoretical framework informed this study by connecting adult learning, generations, and technology within the topic of workplace learning. Knowles (1980) formulated the adult learning theory which he called *andragogy*, defined as “the art and science of helping adults learn” (p. 43). Andragogy was built upon an original knowledge base of four assumptions with two added later (Knowles, Holton, & Swanson, 2015). The six assumptions can inform adult trainers and educators for program design and development. The first four assumptions are that (a) adults move from dependency to increasing self-directedness as they mature, (b) the reservoir of experience for adults continually grows to become their richest resource for adult learning, (c) the readiness for adults to learn is relevant to their social role which triggers a need to learn something new, and (d) adults learn for immediate application of those things that can be applied in problem solving or coping with real-life situations (Knowles, 1984). The assumptions that were later added are that (e) internal motivators such as self-esteem are more potent than external motivators, and (f) the need for adults to know the reason they are learning something (Knowles et al., 2015). The assumptions proposed by Knowles and colleagues suggest implications for the instructional design of adult programs and learning activities for the different generational groups of adults in the workplace.

Andragogy added to a knowledge base to inform adult trainers and educators for program design and development (Knowles, 1984). Educators were able to use andragogy theory as a knowledge base for practical application and in recognizing the relevance of generational differences in adult learning through the use of technology (Bear, 2012). A basis for understanding the shortcomings of workplace instructional strategies for multiple generations of adult learners needed to begin with setting the foundation for what a generation is, specifying the age groups of adults included, and describing the current vehicles for effecting learning in the groups.

Search Strategies

The exhaustive literature review for this study included gathering findings of researchers and opinions of various authors on the topics of generations and learning. Additional topics applied in the search strategies were generational differences, generational diversity, generations in the workplace, instructional technology, professional development, and workplace learning. These topics were mapped to subtopics that included blended learning, informal/formal learning, and technology for a topical online search using multiple databases including ERIC, Education Research Complete, PsycARTICLES, PsycEXTRA, PsycINFO, PsycTESTS, ScienceDirect, ProCentral, ProQuest, and Thoreau. The acquired sources were categorized according to the depth of information provided in the content for one of the topics above.

Sources with substantial information on multiple topics were categorized in multiple categories. This search resulted in nearly 150 references. References were eliminated if they were found to be secondary sources after greater scrutiny, if they

lacked the necessary criteria (recent publication, credible author/researcher, organizational affiliation) for an acceptable academic reference. The final list of sources was less than 100 to be reviewed for the study.

The Generations

Several authors defined a generation as a group of individuals who share life experiences at similar ages (Berk, 2013; Costanza, Badger, Fraser, Severt, & Gade, 2012; White, 2011). Adult learners can be categorized into four generational groups represented in the workplace: Veterans, Baby Boomers, Generation X, and Generation Y who are also called Millennials (Hannay & Fretwell, 2011). The oldest generation included the Veterans who were ages 70 to 90 years old. Following them were the Baby Boomers in the range of ages 51 to 69 (Kapoor & Solomon, 2011). These two generations included the workers who were eligible for retirement based on their age (Anderson, 2015). Generation X was the next generation covering ages 35 to 50. The final group was Generation Y representing workers ages 18 to 34 (Young, Sturts, Ross, & Kim, 2013).

Disagreements existed concerning the beginning and ending birth years used to define the generations. In the literature, additional names were given to some of the generations (see Table 1). According to Twenge, Campbell, Hoffman, and Lance (2010), Veterans were born 1925-1945 but Berk (2013) determined that they were born 1922-1945. Even more distinguished were the years Williams and Page (2011) identified for this generation, 1930-1945, which they split it into two separate Depression generations. Deal, Stawiski, Gentry, and Cullen (2013) identified Baby Boomers as those born 1946-1963, but Hoskins (2010), along with Legas and Sims (2011), extended Baby Boomers'

birth year to 1964. For Generation X, Legas and Sims (2011) identified them as those born 1965-1980 but Demps II, Thornton, and Baker (2011) stated the birth years as 1966-1979. According to Berk (2013), Generation Y was born 1982-2003 but Hannay and Fretwell (2011) identified the period as 1982-1999. Individuals who had a birth year late in one generation and early in another were found to share characteristics of both generations; Van Der Walt and Du Plessis (2010) identified these individuals as *cuspers*. Disparities in the generational year spans highlighted the disagreement in the literature.

Table 1

Generations as Viewed by Authors in the Literature

<u>Authors/Researchers</u>	TRADITIONALISTS/ VETERANS (Ages 69-92)		BABY BOOMERS (Ages 50-68)		GENERATION X/ GEN XERS (Ages 34-49)		GENERATION Y/ GEN YERS (Ages 11-33)	
	Birth Yr	Other Names	Birth Yr	Other Names	Birth Yr	Other Names	Birth Yr	Other Names
Ahmad & Tarmudi (2012)	Pre 1945				1965-1980	13 th Gen. Echo Boomers Forgotten Gen. Invisible Gen.	1981-2000	Internet Gen. Millennials Second Baby Boom
Berk (2013)	1922- 1945	Silent Gen.	1946-1964	Me Gen.	1965-1981	Latchkey Gen. MTV Gen.	1982-2003	Entitled Gen. Millennials
Cekada (2012)	1933- 1945				1965-1980		1981-2000	Net Gen.
Deal, Stawiski, Gentry, & Cullen (2013)			1946-1963		1964-1979		1980-2000	Millennials
Demps II, Thornton, & Baker (2011)			1946-1965		1966-1979			
Hoskins (2010)			1946-1964		1965-1980			
Legas & Sims (2011)							1980-2000	Millennials
Twenge, Campbell, Hoffman & Lance (2010)	1925- 1945		1946-1964		1964-1980		1980-2000	GenMe Millennials
White (2011)	Pre 1945		1945-1964				Post 1980	Millennials
Williams & Page (2011)	1930- 1945	Silent Gen. Swing Gen.	1946-1964	Baboo Love Gen. Me Gen. Sandwich Gen. Woodstock Gen.	1965-1977	Baby Bust Latchkey Gen. Slackers Why Me Gen.	1977-1994	1 st Globals DotNet Echo Boomers Millennials Net Gen. Nexters Why Gen.

Despite disagreement with ages/years, there was agreement on the characteristics that shaped these generations and other defining events (Berk, 2013; Cekada, 2012). Many researchers agreed that Millennials grew up extremely comfortable with technology as a part of their daily lives, which was contrary to the two earliest generations (Cekada, 2012; Papp & Matulich, 2011; White, 2011). More Baby Boomers were working beyond retirement age as a surge of Millennials were entering the workforce (Daley, 2012). Physical limitations and slower cognitive processing did not prevent Veterans and Baby Boomers from learning with technology, but could have influenced training effectiveness (Heaggans, 2012). Papp and Matulich (2011) discussed the “trepidation with technology” that was characteristic of Baby Boomers (p. 2). However, Williams and Page (2011) discussed how Baby Boomers were becoming “more tech savvy,” for example with their use of online auctions (p. 4). This variability in the characteristics of the generations depicted a multigenerational mix of workplace learners that warranted this study.

Other age-related effects triggered attention with the discussion of generations and generational characteristics. All generations were subject to human developmental processes but the historical context shaping the experiences was unique to the generation (Martin & Gentry, 2011). These age-related effects were labeled as *cohort effects* (Martin & Gentry, 2011). One example of a cohort effect was assumptions shaped by the social and cultural events experienced by a generation (Gibson & Soderman, 2014). Additional examples were identified by researchers having strong relevance to classroom learning. Traditionalists viewed training as something that happened on the job with new skill

development benefitting the company rather than the individual (Kapoor & Solomon, 2011). Another cohort effect was that Baby Boomers viewed work ethic and face time with the utmost importance whereas skills were simply ingredients to success (Roodin & Mendelson, 2013). Generation X viewed skill attainment as a step leading them to the next job or promotion with work ethic ranking lower than skill attainment, whereas Millennials believed training was important, as was obtaining new skills that were able to relieve stressful situations, but they wanted to see immediate results (Gibson et al., 2010). These age-related cohort effects were attached to the generations in general, although they were not characteristic of each individual (Lyons & Kuron, 2013).

Davies, Chase, Good and Spencer (2010) presented different views on generational characteristics based on a study employing a survey and interviews about the technology experiences of college students and those who recently entered the workforce. The findings suggested that these Millennial students were more complex than what could be described by the Digital Native or other stereotypical label (Davies et al., 2010). The researchers found that educators and employers could apply technology as a strategy to guide younger generations in their career decisions. Additionally, the authors suggested employers and educators apply a “harnessing technology strategy” as a means of skill development using informal learning and improving productivity in the workplace for Millennials (Davies et al., 2010). Although this research from the literature targeted one generation, steps could be taken to recognize the role technology can play for workplace learning needs for four generations.

These authors also collected data from employers who hire these graduates. Several of the 10 companies were limiting their use of technology in communication and learning. They failed to use technology as a cross-generational learning tool to allow workers of one generation to be paired with someone of another generation such as partnering a Millennial with a Baby Boomer to facilitate use of technology in the classroom (Davies et al., 2010).

Gladwell, Dorwart, Stone, and Hammond (2010) completed a study that was designed to examine the similarities and differences in each generation's acceptance of organizational benefits to employees. The participants for this survey research were workers from three generations—Baby Boomers, Generation X, and Generation Y—who were members of a professional state recreation and park association. An online survey served as means of capturing information concerning "the importance of organizational benefits, level of satisfaction with the same benefits, and personal and professional demographics" (Gladwell et al., 2010, p. 1). The response rate was 14.3% with 191 of the 1,340 surveys returned; 90.2% of those represented workers for municipalities and counties. Nearly 50% of the respondents were Baby Boomers and the rest were Generation X and Generation Y respondents with no responses from any Traditionalists. Respondents placed different priorities by age on the importance of promotional opportunities, COBRA, retirement options, and other organizational benefits. The need for more professional development opportunities and provisions for fair salaries were reported as areas that all generations wanted more concentration by organizations. The mean for items in these areas had no values below 3 on a 3-point rating scale. This study

is reflective of research data collection by means of an online survey for gathering multigenerational workforce feedback which is relevant to the current research being conducted. This study by Gladwell et al. (2010) also depicted the capturing of generational perceptions of professional development which was another element relevant to the current study.

Technological advances, employee demographics, and financial pressures were driving the public and private sectors to transition traditional learning environments to e-learning environments or workplace learning that was technologically enhanced in some fashion (Wolfson et al., 2014). The diverse mix of the generations, as illustrated in Figure 1 summarizing data from the Bureau of Labor Statistics survey was accompanied with challenges in the workplace training classroom.

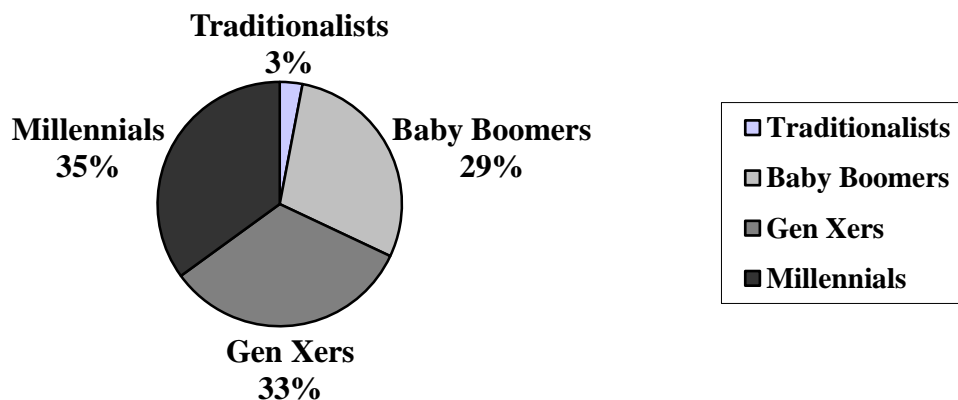


Figure 1. 2016 labor force statistics by generation. Adapted from “Labor Force Statistics from the Current Population Survey” by U.S. Department of Labor, Bureau of Labor Statistics, 2017. Retrieved from <https://www.bls.gov/cps/aa2016/cpsaat11b.htm>

Employees were encountering experiences in which some had coworkers from other generations who were the same age as their children or the same age as their parents within the same work environment (Duquette, Manuel, Harvey, & Bosco, 2013). Unlike in the past, generational mixing of employees at the same level in the organizational hierarchy was common (Roodin & Mendelson, 2013). For example, entry-level positions were previously typically held by those individuals in the Millennial age group while middle management consisted of Baby Boomers (Roodin & Mendelson, 2013). This age diversity across the organizational hierarchy presented an added challenge in the workplace. As pressures increased for workplaces to stay competitive with a skilled labor force, there was a greater sense of urgency for organizations to address the challenges associated with work-related attitudes toward technology and enhance the learning environment (Elias et al., 2012).

Formal and Informal Learning

Adult learning in the workplace (or workplace learning) was categorized as formal or informal. The formal learning was viewed as an organization's planned effort for improving worker performance which involved the worker attending training away from the job (LeClus, 2011; Schulz & Robnagel, 2010). Informal learning for the workplace occurred daily with examination of knowledge from experience and the learner's interaction with coworkers and the environment; Schulz and Robnagel (2010) described it as "on-the-job-learning" (p. 383). In a report from SHRM (2013), human resource professionals indicated they were using more technology in formal learning for employees in different organizations. This increase led to greater attention to factors

necessary to increase learner performance and learning success when technology was used.

Human resource professionals implemented e-learning as they used technology to retain, train, and develop employees. Employees of the city received professional development courses which included those created for managers who had to be trained to use the organization's self-service system. Both formal and informal learning made use of technology. Although informal learning did not have a learning process that was designed or determined by the organization, organizations were able to take steps to measure the effectiveness of workers' use of the technology involved (Choi & Jacobs, 2011). Daily activities that resulted in new knowledge, skills, or understandings without instructor-structured format were prone to be labeled as informal learning (Strimel et al., 2014). Informal learning lacked traditional delivery methods and learner outcomes. Examples were reading, listening to the radio, watching television, and using social media such as blogs, Facebook, Twitter, wikis (Strimel et al., 2014). There was usually no assessment attached to informal learning, but it could still be evaluated. Formal and informal tools were used for assessing informal learning (Strimel et al., 2014). Formal and informal learning were two interventions that organizations could leverage in the execution of workplace learning. Formal learning had learner outcomes and assessments built into the design (Mattox, 2012). The focus in this study covered investigating employees' attitudes toward technology used in their formal learning experiences.

Technology and Learning

Use of technology indicated that the classroom could be anytime and anywhere although it still had its place. In relation to adult learning, technology was defined as “a self-directed learning media that enables adults to access learning in a just-in-time, just-enough format under conditions of full learner control” (Knowles et al., 2015, p. 242). Examining how adults learn was the basis of the theory of andragogy—adults approach learning from the perspective of their life experience (McGlone, 2011). For example, for Generation X and Millennial adults, the Internet and similar forms of technology were always normal and natural parts of life (Walter, 2013). Life experience had the potential to create links between different generational cohort groups, their learning, and their use of technology.

Increasing use of various forms of technology continued to have a great influence on adult learning in the workplace. Some researchers contended that technology and learning preferences dictated the extent of use and possibly openness to mediums such as e-learning in classroom training (Purwanti, Rizky, & Handriyanto, 2013; Spottl, Schulte, & Grantz, 2012). Learning has been deemed to be most effective if methods were compatible with learning preferences of the learner including the use of technology in instruction (Renfro-Michel, O’Halloran, & Delaney, 2010).

Traditional and nontraditional forms of technology were characteristic of many workplace classrooms. Traditional technology or traditional instruction, as it was sometimes phrased, typically referred to instruction that was lecture-based, strictly face-to-face, using an overhead projector, and other dated examples of instructional

approaches (Kim, Bonk, & Oh, 2008). More current instructional application of technology involved use of the Internet, virtual simulation, video presentations, PowerPoint, whiteboards, and other types of e-learning (Berk, 2013). These technology examples were categorized as visual media, audio-visual media, and audio media. Nontraditional practices were widespread in the workplace learning environment as means to eliminate time and space barriers while including a more targeted focus on learner needs (Renes & Strange, 2010). They were just a few examples of the current trends that created the blended learning in classrooms where nontraditional technology worked together with traditional technology to create the learning experience.

One professional organization that was recognized for its leading authority in training and development including the use of technology for those in the field was the American Society for Training and Development (ASTD). The ASTD, as of 2014 now called the Association for Talent Development, was the largest professional association, with more than 40,000 members, dedicated to workplace learning and performance for those who develop talent in organizations. According to ASTD (2013), "Traditional instructor-led classroom training remained the most popular choice, accounting for 54 percent of the training hours available" for employees in the workplace (p. 30). In its annual *State of the Industry Report* based on feedback from participating employers, ASTD reported that technology-based learning and e-learning accounted for more than 39% of formal learning hours for employees in 2012 (ASTD, 2013) where formal learning was defined as being delivered using four primary methods: instructor-led classroom, technology-based, all online, and self-paced. With technology advancements,

the traditional classroom reliance on instructor-led training was decreasing while e-learning options were on the rise for employee training.

Preferences of the Generations

Van Volkom, Stapley, and Amaturio (2014) used a sample of 262 men and women aged 18 to 92 to study the divide that may exist among generations in the digital world. The research addressed the experiences of the 104 men and 158 women with the uses of technology, their feelings about the technology, and their perceptions of how user friendly they found the various types (mobile phones, computers, webpages, etc.). Participants completed a 43-item questionnaire that asked about their marital status, educational level, work status, ethnicity, type of technology usage, frequency of technology usage, level of frustration with technology usage, and social media usage.

Results supported the study hypothesis that the youngest age groups have a greater comfortability with technology in its various forms than the oldest adult age groups ($F(2, 258) = 36.13, p < .001$). These results also supported the hypothesis that greater anxiety would be prevalent with younger adults when they were without cell phones ($F(2, 257) = 18.23, p < .001$), but they were less likely to become frustrated with the use of technology ($F(2, 257) = 4.71, p = .01$). Based on their results, Van Volkom et al. suggested that organizations provide older workers with training in the use of new technology to retain them.

This literature review added a vivid description of the multigenerational workplace and its training needs. Baby Boomers preferred lectures and workshops, but Gen Xers preferred experiential and self-learning (Ahmad & Tarmudi, 2012). At the two

extremes, Veterans had a preference for printed training material and onsite demonstrations while Millennials were the digital natives with a preference for e-learning and collaboration via technology (Bennett, Pitt, & Price, 2012). The disagreement regarding the year range for each generation had relevance to the preferences previously identified in some instances. These generations were distinguished by their descriptions and learning needs. Training effectiveness could be positively affected by the implementation of strategies suited to each generation (Gibson et al., 2010). Using a blended mix of instructional delivery methods (computer simulation, DVDs, PowerPoint slides, web-based assessments, etc.) was promote a more influential learning experience for the participants (Lupshenyuk & Adams, 2009).

Multigenerational Learning

There were limited studies located on technology application in instructing multiple generations in the workplace classroom. Research was conducted by Lupshenyuk and Adams (2009) with the generations and various technologies applied in instruction. A quasi-experimental methodology was used to determine the optimal strategy from among four blended learning strategies based on a comparison of their learning outcomes. Online course materials, online courses, traditional instructor-led workshops, and e-books were the strategies assessed. A different blended learning strategy was used to develop management soft skills in each of four subgroups of the 200 research participants from a large Canadian corporation with 51% representing Generation X. Participants completed questionnaires including demographic information to determine their generational group and questions about their barriers to blended

learning. These were completed by study participants before, during, and after the training. The authors concluded from the results that blended learning could positively affect motivation to learn in the workplace, but more research was needed to determine the best blended learning method. Blended learning solutions must be designed with the knowledge that some learners perceive insufficient feedback, time management issues, and vague instructions as barriers to the blended learning strategies which can be discouraging to them (Lupshenyuk & Adams, 2009).

Berk (2013) addressed the presence of multiple generations in the workplace but argued that few researchers discuss best practices in technology application for adult learning in relation to the generational mix. In the academic workplace, Berk discussed the major gap that existed between the two older generations, Traditionalists and Baby Boomers, and the two younger generations, Gen Xers and Millennials. The younger generations grew up with the most modern technology trends while the older generations played “catch up” (Berk, 2013).

A survey research study was completed by Wen, Jaska, Brown, and Dalby (2010) to explore ways for managers to make effective selections of communication channels suitable for a multigenerational work environment. Although these researchers recognized the presence of four generations in the current workforce, their research targeted Generation X and Generation Y only. There were 205 survey respondents but only 136 were valid for the study's purposes with 58% and 42% of respondents in Generations X and Y respectively. Respondents completed an online survey consisting of three parts: demographics, general awareness of social media, and 5-point Likert scale

items measuring technology acceptance. Method and discussion sections for the study did not include reliability and validity information but this was referenced as an area for future research to improve the reliability and validity for the instrument (Wen et al., 2010).

The data collected were presented in graphs and analyzed with chi-square. Wen et al. (2010) found no significant differences for the two generations in perceptions of the ease in using traditional mediums (landline phone, fax, postal mail, and face-to-face), the perceived ease of technology-based media such as the cell phone, e-mail, instant messaging, and others, or for the ease of using computer and internet-based media for the two generations. However, individuals growing up with the influence of more advanced communication technologies had apparent differences from their counterparts in their skill sets for the use of these tools for communication (Wen et al., 2010). This study also supports the use of surveys for capturing generational perceptions pertaining to any type of technology usage in general.

Deyoe and Fox (2011) used a qualitative research approach to examine Millennials' characteristics for business strategizing and the reduction of generational conflict in the workplace. Interviews were conducted with company leaders holding titles such as manager, director, vice president, and owner. A breakdown of small, medium, and large was applied to the companies from various industries. Companies with less than 50 employees were categorized as small. Those with 50 to 500 employees were categorized as medium. Companies with more than 500 employees were categorized as large. Leaders were interviewed from four small-sized companies, six medium-sized

companies, and four large-sized companies for a total of 14 interviewees. The authors also hoped to find ways to minimize, or mitigate, generational conflict. Deyoe and Fox (2011) included interview questions about participants' familiarity with characteristics of Generation Y that differ from earlier generations; whether any Generation Y workers currently or previously worked for their company; their experience with any type of generational conflict among Generation X, Generation Y, or Baby Boomers, if any, and the contributing factors for it; as well as a strategy developed by the company to address this conflict, if any, and why it was effective. Findings suggested that generational conflict was a concern for all organizations and industries except the retail industry. Evidence suggested companies were failing to deal with the presence of generational conflict effectively and only a small number of companies were able to identify the strategies attributed to minimizing their generational conflict (Deyoe & Fox, 2011). The evidence clearly suggested that most companies were not dealing very well with generational conflict, and only a few larger companies actually have developed identifiable strategies to minimize generational conflict (Deyoe & Fox, 2011). Based on the interview results, there was emphasis on the need for employers to provide additional training and for organizations to show an interest in technology. The training is necessary for generations to understand one another and become more acclimated to technology usage in the workplace.

Other researchers have also investigated the workplace with several generations present simultaneously. Case studies involving interviews, surveys, and reviews of research papers were used by Helyer and Lee (2012) to explore the challenges and

benefits faced by those who educate and employ the multiple generational workforce. The research findings suggested that the combined effects of the age differences, variety of skills, and other differences should be recognized by employers and academia as a means for this type of diversity to enhance organizations and schools (Helyer & Lee, 2012). Studies of this nature shed some light on the multiple generations in the workplace and technology used in teaching them.

Research in Other Countries

There has not been much research conducted in the U.S. workplace on employee's instructional preferences in relation to the four generations, but researchers in several other countries have conducted research in this area. A telecommunications and information company in Indonesia seeking to align its competency development system with the needs and characteristics of its employees addressed instructional preferences across the generations (Purwanti et al., 2013). Researchers administered a survey to 30 employees from each generation. Survey results indicated a difference in instructional preferences across generations which resulted in minor changes to their competency development system. The researchers explained that Baby Boomers had a preference for problem solving and case studies in class, but they disliked online or web-based learning. The authors found that Generations X and Y were similar in their learning preferences with a desire for more activities included in the learning process (Purwanti et al., 2013).

Five organizations in the Australian rail industry were studied by Becker, Fleming, and Keijsers (2012) to determine how e-learning was being used and if there were age-related issues with its use. This qualitative case study with data gathered from

staff member interviews, observations, and organizational documents focused on the current use of e-learning in the Australian rail industry, future generational approaches with e-learning, and other age-related issues with e-learning. Results from interviewees supported the use of blended learning approaches as opposed to e-learning alone. Various worker characteristics such as learning preference, degree of computer use, and technology access were noted in conjunction with employee age in the interviews. Findings revealed that age was not the only factor to consider in implementing e-learning but generational differences needed to be recognized.

Becker et al. (2012) reported that e-learning provided adherence to policies, economical benefits, and limited work disruption. They added that more could be gained with increased application of e-learning by way of hands-on learning, learner engagement, and other higher-level options in many instances. Overall, blended learning approaches were identified as one solution for targeting learner preferences based on the needs for the several generations of learners.

Learning competence variables, including age, as predictors of informal learning success were investigated by Schultz and Robnagel (2010). Online survey results were based on responses from 470 employees of a German mail-order company. Results indicated that learners' ages coincided with the self-perceived competency level of the learners. Younger participants reported lower memory self-efficacy than the middle-aged participants and the older participants. The memory self-efficacy encompassed various problems related to memory in which the participants were asked to rate themselves. As noted in these studies, the multigenerational workforce and workplace learning with

technology have been areas of attention recognized by countries other than the US. The proposed study will address these variables within a U.S. workplace.

Implications

Results from this study had several prospective project options. Identifying perceptions of technology implementation in instruction from multigenerational learners in the current workplace training classroom would have been a way to assist in determining the customizations required for more effective technology application to meet the needs of Veterans, Baby Boomers, Gen Xers, and Millennials (Clark & Mayer, 2008). Employee feedback may be used to create a technology course topic. There was a second idea of a project focused primarily on blended learning instructional approaches for a supervisory curriculum with learner tasks customized to the generational preferences reflected in the study results. A final thought was the development of a program based on mobile learning that uses the partnership of employees in different generations to enhance learning success.

Research results from this study on generational attitude differences concerning technological approaches in instructional practices for the workplace classroom directed the focus of the project following this study. With blended learning approaches, learning can be evenly distributed using a format that caters to delivery methods preferred by each generational group. This type of flexibility built into instructional strategy can enhance learning success for the learner and demonstrate informed practice from the instructor in technology implementation.

Survey results represented a pooling of learner preferences for each generation from the sample which rendered useful information for a professional development project. This workshop was designed to target the needs of the generations as outlined in the survey feedback using blended learning approaches. The blended learning approaches would apply technology such as online preassessments, in-class online exercises, and/or online demonstrations. The workshop includes the facilitation materials for instructional approaches along with participant learning materials to achieve the blended learning.

Summary

As a teaching vehicle in the workplace learning environment, instructional strategies can meet the needs of the generations in modern classrooms by taking inventory of their attitudes and perceptions to determine the most appropriate instructional strategy. Because preferences vary by learner along with generations in general, this study would indicate if there is valid cause for steps to be taken in fostering a learning environment that suits the needs of all generations of learners. An approach such as the one applied in this study allowed for data to be captured from actual participants representative of the intended audience for the project based on the outcome of this study. Research can assist in identifying more effective approaches for multigenerational workplace learning. There is still much to be learned about employee preferences in the workplace classroom which leaves more research-based information to be desired by practitioners.

Section 2 will present the methodology for this research with its rationale. Included are explanations of the sampling strategy, data collection, and other relevant steps that support the goals in answering the research questions for this study.

Section 2: The Methodology

Research Design and Approach

This research was a quantitative study using survey research methods to collect data within a causal comparative design. This design was appropriate as “it allows determining the causes of differences that already exist” for the groups to be studied (Gokalp, 2013, p. 291). I used survey methods to collect data concerning the independent variable, generation, based on age group and the dependent variable, attitude, based on preferences toward technology application in the workplace classroom. Surveys are commonly used for data collection requiring feedback from a large volume of respondents while being easily administered (Couper, 2011). Current technology offers the ability to apply automation in the summary and analysis of data collected while maintaining respondents’ confidentiality with surveys (McPeake, Bateson, & O’Neil, 2014).

Setting and Sample

Public sector employees from various city government departments such as Buildings & Safety Engineering Environmental, Fire, General Services, Human Resources, Planning & Development, Police, and Water & Sewerage were the population in the study. This city had numerous worksites and offered professional development courses to employees at various locations. The target sample from the population was 300 employees of various ages holding various job titles selected through stratified random sampling by age and department. Participants consisted of city employees who completed the online survey by responding to all items to satisfy the necessary criteria for research

participation. I followed Walden University's IRB guidelines to protect the rights of the participants after receiving my IRB approval #03-31-16-0322500. The sampling method was selected to simplify the data collection process while ensuring broad representation across generations and city departments.

A power analysis calculation using G*Power (Faul, Erdfelder, Lang, & Buchner, 2007) with an alpha value of 0.05, a beta value of 0.95, and an effect size of 0.25 yielded a recommended sample size of 280. The G*Power Analysis, or power analysis, was used based on the fact that it is a highly regarded method to calculate sample sizes to avoid a study lacking participants or having too many (McCrum-Gardner, 2010). A preferred sample size of 300, exceeding the recommended sample size, was selected to allow for equal numbers of participants in each generation.

To obtain the target sample of 300 participants, an Excel formula for random number selection was used to select 900 potential participants from the employee roster. The email address was obtained for each employee. The goal was a minimum of 75 returned and completed surveys (a response rate of 33%) from each of the four generational subgroups. Survey completion was based on all survey items being answered by the participant. If fewer than 75 surveys were received from a generational group, a follow-up reminder would be sent to employees in that group. If more were received for any generation, only the first acceptable 75 responses received were used.

Instrumentation

The Media and Technology Usage and Attitudes Scale (MTUAS) was originally designed by Rosen, Whaling, Carrier, Cheever, and Rokkum (2013) as a tool to measure

attitudes toward technology usage among adults. The MTUAS consists of 16 statements employing a 5-point Likert scale that ranges from (1) *Strongly Disagree* to (5) *Strongly Agree*; see Appendix B. The respondents indicate to what degree they agree or disagree with each statement as a reflection of their attitude towards the different types of technology. The 16 statements for the survey correspond to the four subscales as follows: Positive Attitudes Toward Technology (1-3, 7-9), Anxiety About Being Without Technology or Dependence on Technology (4-6), Negative Attitudes Toward Technology (10-12) and Preference for Task Switching (13-16). I requested and received permission from Dr. Rosen for use of the MTUAS in this study.

Selection of this survey tool was deemed appropriate as it could render results that would be useful for targeting solutions to improve technology-based instruction (Graf, Viola, Leo, & Kinshuk, 2007). Researchers created the MTUAS to measure a wide range of current technology and media usage behaviors of people and to reflect various activities involving technology that could be used in the workplace classroom (Rosen et al., 2013). Training employees required that their learning practices be considered; therefore the optimal way that these individuals learn cannot be overlooked.

A survey of learner attitudes toward technology could measure learner perceptions of mediums implemented in workplace instruction. The MTUAS was also selected for this purpose based on its high reliability and validity and for the type of detail applied to the survey questions used (Rosen et al., 2013). The questions specifically refer to examples of technology that can be applicable to employees in the workplace. The MTUAS was ideal for capturing attitudes toward technology in workplace learning in this

study with its structure including specific types of items needed for answering the research questions.

The MTUAS was found to have high reliability and validity in a study that included two samples with a total of 942 participants (Rosen et al., 2013). To validate the four MTUAS subscales, factor analysis was used in addition to correlations with external measures to assess concurrent validity. Cronbach alpha values for the four attitudes subscales ranged from .80 to .87.

Data Collection and Analysis

Implementation of the Survey

The results were gathered from the survey data collected from August 12, 2016 through September 7, 2016. One follow-up message was sent during this period. The invitations, with a hyperlink to the survey, were distributed via email by the Information Technology (IT) Department to the sample of employees listed in a report created by a team in the HR Department. A total of 731 employees received the survey although it was originally planned for 900 employees. Reasons behind the change in the number of recipients are explained in the next section. The eligibility requirements included the employee's agreement to participate, specification of age, and completion of all items on the survey. There were no questions referencing other demographic data such as gender or work areas/departments.

The HRIS (Human Resources Information Systems) team created a requested report based on instructions provided from the researcher. This team was given instructions for the selection of a stratified random sample to be obtained using the

random number function in Microsoft Excel and year ranges for each group that were also provided. From the results obtained, a list of employees within the four groups would be created to include the first name, last name, and email address only. I was notified by the HRIS team that there were fewer than 225 employees represented in the Traditionalist generation. The City's overall population of Traditionalists employees fell below the minimum needed for the pool of participants. There were only 56 employees in the Traditionalists age group. The HRIS team followed the remainder of the directions as outlined. The IT Department received the report listing 731 employees as recipients of the survey. The 731 employees represented the generations with 225 in each group except the Traditionalists which consisted of 56 employees as shown in Table 2. The online survey included the consent form and the agreement to participate in the study. Participants in the survey were able to provide their consent by clicking a checkbox at the beginning of the survey.

Data Collection and Scoring

The employees in the sample received an initial communication via their work email. This contact included the purpose and description of the study, a request for participation, a confidentiality statement, information on how the data would be used, the voluntary nature of their participation if they chose to participate, and contact information. Respondents received the link with instructions for completing the surveys in the initial communication. Google Forms (Google, Inc., 2014) was used to administer the surveys online to ensure the anonymous submission of the surveys. The data collected included the birth year, selected as one of the year ranges provided (independent variable

for generation) and responses to MTUAS subscales (dependent variable). These represented a nominal variable and an ordinal variable respectively. The SPSS software was used to tabulate scores for each item, as well as calculate totals for the MTUAS Attitudes subscales, and an overall score from the surveys received. Descriptive statistics such as the means and standard deviations for the subscales of each generational group was used to perform calculations in addition to other statistical analyses.

Table 2

Survey Response Rate by Generation

Generation	Sent	Received	Response Rate
Traditionalists	56	10	1.37%
Baby Boomers	225	92	12.59%
Gen Xers	225	103	14.09%
Millennials	225	120	16.42%
Total	731	325	44.46%

Survey responses received in response to the email invitation exceeded the data collection goal. Date of response submission was the factor used to determine how responses would be included in the data analysis. Responses were listed in order of completion date. Once the goal of 75 responses was reached for a generation, the additional responses were removed so they would not be included in the data collection pool. This was done for each generation, with the exception of the Traditionalists.

There were 167 responses received from the initial survey and 158 received after the follow up. One reason for the limited initial response could be the fact that the initial email for the survey was distributed on a Friday afternoon. The follow up was distributed

earlier in the work week and during the morning part of the work day. Respondents indicated their date of birth by responding to a date of birth question and the remainder of the items in the survey addressed their technology preferences. Employee names, emails, and work locations were not requested or tracked for the survey.

Steps were taken to increase the response rate for the survey. Variables in a survey invitation email such as the sender, message length, and email subject line can influence participant response rate (Trespacios & Perkins, 2016). One step taken was ensuring that the invitation was sent from the HR Department's email account. However, my name, managerial job title, and contact information were provided in the email invitation. Use of this method was beneficial in substantiating the authority of HR which is recognized by employees and establishing the legitimacy of the survey. The subject line for the email was "HR Survey." Due to the provision of limited information and the likelihood of anonymity being lost can reduce participant response (Mueller, Straatmann, Hatrup, & Jochum, 2014), another step was informing employees of the background, purpose, and use of the survey within the initial email invitation. This resulted in a page-length or slightly more for the web-based survey invitation. According to Trespacios and Perkins (2016), longer survey invitations are likely to result in a higher response. They may be found to be more trustworthy as they leave the participant more informed.

Comparisons of Generations on MTUAS Subscales

There were four MTUAS subscales. The first subscale, Positive Attitudes Toward Technology, accounted for the following statements:

1. I feel it is important to be able to find any information whenever I want online.
2. I feel it is important to be able to access the internet anytime I want.
3. I think it is important to keep up with the latest trends in technology.
7. Technology will provide solutions to many of our problems.
8. With technology anything is possible.
9. I feel that I get more accomplished because of technology.

The second subscale was Anxiety About Being Without Technology or Dependence on Technology. The following statements represented this subscale:

4. I get anxious when I don't have my cell phone.
5. I get anxious when I don't have the internet available to me.
6. I am dependent on my technology.

The third subscale was Negative Attitudes Toward Technology. The statements for this subscale were the following:

10. New technology makes people waste too much time.
11. New technology makes life more complicated.
12. New technology makes people more isolated.

The fourth subscale was Preference for Task Switching. The statements for this subscale were the final four as follows:

13. I prefer to work on several projects in a day, rather than completing one project and then switching to another.
14. When doing a number of assignments, I like to switch back and forth between them rather than do one at a time.
15. I like to finish one task completely before focusing on anything else.
16. When I have a task to complete, I like to break it up by switching to other tasks intermittently (Rosen et al., 2013).

With the focus in this study on technology preferences of four generations of city employees who may receive workplace instruction, I proceeded in my analysis of the survey results. The research question for this study and associated hypotheses were:

Research Question. What are the differences among the four generations in employee attitudes toward technology use in the workplace classroom?

H₀: There are no significant differences among the four generations with respect to attitudes toward technology use in the workplace classroom as measured by the Media and Technology Usage and Attitudes Scale.

H₁: There are significant differences among the four generations with respect to attitudes toward technology use in the workplace classroom as measured by the Media and Technology Usage and Attitudes Scale.

Data Analysis

IBM SPSS software (IBM Corp., 2012) was used to calculate descriptive statistics as well as a one-way analysis of variance (ANOVA; Huck, 2012). This one-way ANOVA was used to determine if there was a main effect of generation (differences

among the four generations with respect to their attitudes toward technology as measured by the MTUAS). A one-way ANOVA was the correct statistical test for a design with one independent variable and one dependent variable. It allowed for testing of main effects (Johnson & Christensen, 2008). A significant main effect was followed by post hoc tests employing the Tukey HSD test to determine significant differences between groups.

Assumptions of ANOVA. The assumptions with the one-way ANOVA were as follows: (a) the samples are randomly selected from the population, (b) the samples are drawn from a population with a normal distribution, (c) the samples represent four separate groups (Traditionalists, Baby Boomers, Generation X, and Millennials) of adults who are independent of each other with no relationship, (d) the independent variables are categorical, (e) there is an equal number of values in the samples, and (f) the variances of the samples are homogeneous (Huck, 2012). Potential participants were randomly selected, but actual participants will be self selected. While ANOVA is robust with respect to normality of distributions (Huck, 2012), homogeneity of variance was tested using Levene's test, which was also available in SPSS. Levene's test is the most commonly used method for testing the assumption of homogeneity of variance (Gastwirth, Gel, & Miao, 2009). Based on the results displayed in Table 3, there was no violation of the assumption.

Table 3

Tests of Homogeneity of Variance

Subscale	<i>F</i>	<i>df1</i>	<i>df2</i>	Sig.
Positive Attitudes Toward Technology	.93	3	231	.43
Anxiety About Being Without Technology or Dependence on Technology	.51	3	231	.67
Negative Attitudes Toward Technology	.27	3	231	.85
Preference for Task Switching	1.30	3	231	.28

One-way ANOVAs were conducted including the four generations for each of the MTUAS subscales. This test was the next step in answering the research question of whether there are significant differences among the four generations concerning their attitudes toward technology. Only the Positive Attitudes Toward Technology subscale indicated significant results between groups as shown in Table 4, $F(3,231) = 6.11$, $p = .001$. Thus, the null hypothesis was rejected. Tukey HSD multiple comparisons indicated that the Traditionalist group was significantly lower than each of the other three generations with respect to positive attitudes toward technology.

Table 4

ANOVAs for Subscales by the Four Generations

Subscale		<i>SS</i>	<i>df</i>	<i>MS</i>	<i>F</i>	Sig.
Positive Attitudes Toward Technology	Between Groups	7.54	3	2.51	6.11	.001
	Within Groups	95.07	231	.41		
	Total	102.61	234			
Anxiety About Being Without Technology or Dependence on Technology	Between Groups	3.23	3	1.08	1.02	.39
	Within Groups	243.68	231	1.06		
	Total	246.91	234			
Negative Attitudes Toward Technology	Between Groups	6.46	3	2.15	2.56	.06
	Within Groups	194.51	231	.84		
	Total	200.97	234			
Preference for Task Switching	Between Groups	2.07	3	.69	.76	.52
	Within Groups	210.22	231	.91		
	Total	212.29	234			

Descriptive statistics for the subscales included an additional breakdown by generation with the sample, mean, and standard deviation indicated for each. The mean was lowest for Traditionalists with $M = 3.23$ and highest for the Gen Xers with $M = 4.14$ with the other two generations in between for the Positive Attitudes Toward Technology subscale. This provides another view of the significant difference among the generations that was found for that scale. The means calculated for the other subscales for all generations do not vary to as great a degree.

Differences were also evident with the Traditionalists ratings that were at least .5 lower than the other generations for items on the Positive Attitudes Toward Technology subscale as indicated in Table 5. Survey items with these lower ratings by the Traditionalists concerned keeping up with latest technology trends, the ability for technology to provide solutions to many problems, being able to accomplish more with technology, and new technology making life more complicated.

Table 5

Descriptive Statistics for Survey Responses by Generation

	Traditionalists		Baby Boomers		Gen Xers		Millennials	
	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>	<i>M</i>	<i>SD</i>
1. I feel it is important to be able to find any information whenever I want online.	3.90	1.10	4.32	.87	4.59	.68	4.48	.92
2. I feel it is important to be able to access the Internet any time I want.	3.60	1.07	4.45	.72	4.53	.79	4.44	.87
3. I think it is important to keep up with the latest trends in technology.	3.20	.92	4.27	.84	4.47	.79	4.31	.94
4. I get anxious when I don't have my cell phone.	3.00	1.49	2.93	1.34	3.48	1.19	3.16	1.23
5. I get anxious when I don't have the Internet available to me.	2.90	.99	2.99	1.19	3.07	1.19	3.12	1.21
6. I am dependent on my technology.	3.20	1.55	3.17	1.17	3.36	1.12	3.43	1.23
7. Technology will provide solutions to many of our problems.	2.90	.74	3.57	1.00	3.75	1.09	3.56	1.11
8. With technology anything is possible.	2.40	.84	3.24	1.15	3.49	1.06	3.45	1.20
9. I feel that I get more accomplished because of technology.	3.40	.84	3.93	.91	4.03	.93	3.96	.98
10. New technology makes people waste too much time.	2.80	.79	2.65	1.22	2.21	1.07	2.69	1.14
11. New technology makes life more complicated.	3.90	.74	2.41	1.03	2.23	.91	2.45	1.11
12. New technology makes people more isolated.	3.20	1.81	3.32	1.23	3.27	1.29	3.43	1.22
13. I prefer to work on several projects in a day, rather than completing one project and then switching to another.	2.30	.95	3.05	1.13	2.88	1.31	3.25	1.24
14. When doing a number of assignments, I like to switch back and forth between them rather than do one at a time.	2.80	1.48	2.93	1.13	2.73	1.28	3.03	1.22
15. I like to finish one task completely before focusing on anything else. ^a	2.70	1.06	2.92	1.04	2.73	1.12	2.75	1.07
16. When I have a task to complete, I like to break it up by switching to other tasks intermittently.	2.90	1.37	2.89	1.05	2.96	1.20	3.05	1.10

Note. 5 = Strongly Agree; 4 = Agree; 3 = Neither Agree Nor Disagree; 2 = Disagree; 1 = Strongly Disagree.

^aItem #15 was reverse coded with Strongly Agree = 1 and Strongly Disagree = 5.

There are possible reasons for the minute differences in generational preferences for instructional approaches with technology. As a reminder, the sample for the Traditionalist generation was extremely small with only 10 participants, while the other generations included 75 participants each. Another possible reason is that participants who completed the survey for this study needed to have a certain level of comfort with technology. Authors such as Van Volkom, Stapley, and Amaturro (2014) explained that advanced technology is becoming more prevalent in everyday life; this can influence individual preferences and acceptance as well, even for older generations who did not grow up with this level of technology. The survey items did not specifically reference examples of technology; participants completed the survey based on how they defined technology. These are factors that may have contributed to the differences in responses by generation.

Participants for the generations of Baby Boomers, Gen Xers, and Millennials felt that technology is required for solving most problems, getting more accomplished, and locating information as reflected with $M > 3.50$ for responses to those items on the survey. Responses reflected strong feelings favoring the importance of being able to access the Internet at any time for all generations ($M < 4.40$) except the Traditionalists ($M = 3.60$). Keeping current with the latest technology trends was important to all generations as indicated with $M > 4.00$ with the exception of the Traditionalists ($M = 3.20$). Generational preferences represented in the data illustrate a digital divide in the use of technology.

Assumptions, Limitations, Scope, and Delimitations

Assumptions

There were assumptions that helped set the direction for this study. One assumption was that most of the respondents had completed some form of professional development training provided by the city as a point of reference for their responses. Another assumption was that the employees who were randomly selected as participants had the equipment and access to computer workstations that were necessary to receive and respond to the communication for this study. Participants were expected to respond honestly. Finally, there was also the assumption that all respondents would have a common understanding of technology based on the context in the survey to include examples such as a personal computer, copier, mobile device, and others.

Limitations

Several limitations within this study were recognized and could be addressed in future research. Completion of the survey required study participants to have a minimal level of comfort with technology. Study results were based on the employees who submitted surveys with complete responses. Participants' attitudes toward technology were based in part on their use of technology during completion of various city-offered courses taught by different city instructors who had varying instructional styles and practices. These differences in experiences with technology in the workplace may have affected their responses. Employee perceptions and attitudes reflected in surveys were not the result of actual evaluation and analysis of instructional methods using technology.

The survey responses included an adequate representation of Baby Boomers, Gen Xers, and Millennials as indicated by the power test (McCrum-Gardner, 2010). However, there was not a large enough number of Traditionalists in the employee population to obtain a comparable sample size.

Scope and Delimitations

Data were gathered from employees from nearly 40 different city departments using stratified random sampling within one local municipality. The study was limited to one municipal organization. Age was the only demographic variable used to identify the generation of each respondent, although education and gender are often variables of interest in this type of research (Perl & Griffin, 2009). Motivation has also been recognized as a factor that affects learning success (Landers & Armstrong, 2015). Motivation for learning tends to vary among the generations of workers (Wolfson et al., 2014). However, motivation was not a variable included in this research study., Race/ethnicity, and job classifications were other demographics which were not variables in this study.

Collection of the data using an online survey was a delimitation in view of the fact this method did not include qualitative data that could be collected from interviews or answers to open-ended questions to provide more explanation about learner attitudes (Rosen et al., 2013). Another delimitation with this factor was that respondents who were not inclined to use technology may not have completed the survey.

Protection of Participants' Rights

A formal request was submitted to the Chief Information Officer for the city to obtain approval to conduct the study. Approval was requested from the Institutional Review Board of Walden University thereafter. This request informed the organization that participants' rights to privacy would be maintained and only aggregate data would be provided from survey results. In the request, I also asked for access to an employee email listing, explained that the participants in the study would receive written communication via email explaining the study, and stated that use of the online surveys would ensure the anonymity of participant responses. The rights of the participants were respected with the strictest confidentiality maintained throughout the process and adherence to the guidelines communicated to them in the initial contact.

The findings from this study led to development of training materials for the workplace classroom. These materials are discussed in the next section along with applicable customizations based on the recommendations of this study. Use of the materials serves to provide organizations and talent development professionals with an instructional approach representing generational preferences based on survey data obtained in order to render a more cohesive and effective workforce. Technology inclusion is preferred by the generations and targeted training materials can offer instruction for various technology uses to create the blended learning experience for multiple generations in the workplace.

Section 3: The Project

Introduction

In this study I investigated employees' attitudes toward technology used in their formal learning experiences. The project discussed in this section is a 3-day workshop targeting workplace employees in various age groups and it is entitled, *Leadership Skills for Managers & Supervisors*. Findings from the research results were applied to the development of customized instructional materials that target a generationally diverse audience of learners. It was designed as a face-to-face event with a facilitator and participants.

Training materials and content were structured to guide facilitators and provide skill development for a multigenerational audience of participants. The purpose of the workshop is to allow participants to understand the aspects of an effective leader, best practices demonstrated by successful leaders, and how they can master the competencies of effective leadership. The first goal is to define leadership and related competencies. This establishes the foundation for the beginning of the first day in the workshop. Recognizing the characteristics of successful leaders is the next goal of the workshop. After defining leadership, participants transition to recognizing what leadership looks like in practice. The next two goals are to discuss leadership challenges and build a toolkit of resources to address those challenges. This creates the workshop flow that helps the participants progress to examples of problems by discussing challenges after recognizing the characteristics of the successful leaders. With the discussion of the challenges and how to face them, participants walk through steps to build up their inventory of resources

in addressing challenges. The final goals encompass practicing steps for each participant's own leadership strategy and creating an action plan for leadership development. This segment allows for the facilitator to guide participants in making the connection of the learning points to areas in their own personal and professional development to be targeted on the last day of the workshop as they establish their personal implementation plan for doing it after the workshop.

All facilitation materials were designed to assist facilitators in training with a customized approach, using technology for multiple generations in the classroom audience. Facilitators are also advised to reference other resources if they do not have prior facilitation experience. Use of the materials is intended to prepare facilitators to address the preferences of each generation during the instruction for an effective workshop.

The project included several components of this 3-day leadership workshop, which are included in Appendix A. The components are a participant manual, a facilitator's guide, and a PowerPoint presentation. The participant manual consists of nine modules to be covered over the 3 days of the workshop. The manual cover captures a multigenerational group in a photo that represents the target audience of all adult age groups. After the table of contents and the workshop description, the first module sets the foundation of the course with the core of leadership as the opening topic. The next seven modules—in no particular order—take the participants on a journey to key areas that target essential skills for a leader. These areas include the leader's vision, communication, setting goals, ethics, and others. The final module concludes the

workshop with a summary. Following the modules and summary module is an action plan that allows participants to capture their most essential learning items from the 3 days and identify methods from their learning to transfer back to their jobs and in their personal lives. Learner-centered activities, exercises, a glossary, and references are included as additional resources to complement the learning experience.

The next component in the project is the facilitator's guide. It includes a table of contents, several checklists, directions for use of the guide, a workshop description, and a workshop outline for the 3 days based on an 8-hour timeframe for each day. The directions for use of the guide simply explain the purpose of the guide and the layout of the guide. The workshop outline provides a recommended timeframe for the flow of the topics throughout each day. A materials checklist is included to list all items the facilitator(s) will require for successfully presenting the workshop as detailed in the guide. The next checklist details steps the facilitator(s) can take to prepare the equipment, materials, and themselves for presenting the workshop.

Pages with the instructions for facilitation are arranged with the PowerPoint slides to be displayed in one column to the left and the facilitator instructions provided in the column to the right. Additional space on the pages was provided for facilitator notes. The instructions include what the facilitator should say and what should be done throughout the workshop.

A PowerPoint presentation is the final component of the project. The title slide for the presentation matches the participant manual cover with a photo of a multigenerational group of adults. The background for all slides is based on one design template. There are

nearly 100 slides used for presenting the workshop content throughout the 3 days. Graphics are included and the use of animation is encouraged but will depend on equipment availability for the facilitator(s). Consistent use of certain slides repeatedly indicates to the participants that it is the opening of a new module, the module objectives are being covered, or they will be doing a group activity.

Rationale

In an effort to provide an application of the study's findings, this was determined to be best served with a workshop. With the multigenerational workforce on the rise in the workplace classroom, there was a heightened need for instructional strategies to reflect this consideration (Bennett et al., 2012). Classroom instruction for the workplace is an ideal setting for implementation of this workshop, with a customized approach to an audience of multigenerational learners. As the generational shift in those who are receiving the training and instruction occurs, the strategies implemented needed to shift as well to coincide with the preferences of those receiving the instruction.

Organizations that leverage the generational differences with a strategic technology approach for training and development can experience a higher level of effectiveness and productivity (Amayah & Gedro, 2014). This project allows individuals and organizations to gain an understanding of the differences among generational preferences based on the findings in this study. Instructors are able to go to another level and put recommendations from this study into practice with the guided outline provided for the workshop project materials. Instructional strategies applicable to the digital divide can be derived from the project and foster social change.

Review of the Literature

Search Strategies

In the identification of relevant research, numerous strategies were applied. Various search terms and phrases such as *Baby Boomers, Gen Xers, Millennials, Traditionalists, instructional design, instructional strategies, learning design, learning materials design, professional development, technology and classroom instruction, and workplace instruction with technology* were used in obtaining the project resources that were gathered. Dogpile, Google, and Yahoo were the primary search engines outside of the Walden Library. Different databases including Google Scholar, ProQuest, Sage Journals, and ScienceDirect proved to be effective in the search as well. Following the trail of citation sources provided by the references found was another search strategy in this process.

Project Framework

Guiding theories established the theoretical and conceptual framework for the project components in this study. The generational theory by Strauss and Howe (1991) sets the framework for the design and development of the project components to align with generations and generational preferences. The authors define a generation as a group of individuals of the same birth year within a 20-year span sharing life events (Strauss & Howe, 1991). According to their theory, a person's view of the world and their value systems are shaped by their generation's first decade as age cohorts recurring in cycles. Limited use and lack of exposure to technology were characteristic of the Traditionalists

and Baby Boomers. Experiences of Gen Xers and the Millennials were just the opposite with the internet, mobile devices, and other advancements (Clark, 2017).

As mentioned in the findings from this study, younger generations have a strong preference for technology implementation in the classroom by virtue of it being a consistent element in everyday life. For this reason, use of an app was included with the opening of each module in the project. However, the Traditionalists indicated preferences that were slightly different as they were not as favorable toward technology use. The generational theory is applied in the design and instructional methodology for the exercises, facilitator's guide, handouts, participant manual, PowerPoint presentation, and the technology applications in the workshop.

There is consistent reference in the literature to the importance of Knowles' (1980, 1974) adult learning theory. The theory of andragogy comprises six assumptions of adult learning which tap into the view of learners, their growth potential, implications for teaching, social philosophy, and human relationships (Knowles, 1980, 1984). Andragogy is defined as "the art and science of teaching adults" (Knowles, 1980, p. 43). Knowles (2015) identified six assumptions as foundational to the design of adult learning programs:

- Self-concept: Maturing and moving from dependency to self-directing.
- Experience: A person draws upon their own experiences as a learning resource.
- Readiness: Attaining new knowledge is related to one's ability to cope effectively with real-life situations.

- Orientation: As one matures and learns new knowledge, there is a desire for immediate application.
- Motivation: Internal factors motivate one to learn as they mature.
- Need to Know: Before one learns new knowledge, they need to know the reason why.

Authors recognize these assumptions as integral to defining adult education, although some argue if andragogy should actually be considered a theory (Taylor & Hamdy, 2013). Application of Knowles' assumptions was evident in the exercises and activities for each module as facilitator instructed participants to share knowledge on certain topics, complete assigned tasks on their own, and complete an action plan. Andragogy remains as the most widely known and accepted theory to inform the practice for the design, implementation, and evaluation of adult learning activities.

To accompany the understanding of adult learning theory, program designers apply theories with an instructional systems design (ISD) approach as a means of achieving effective instruction (Noe, Clark, & Klein, 2014). ISD draws from andragogy but also theories such as behaviorism to promote a systematic process based on learning occurring with measurable outcomes and not haphazardly (Khalil & Elkhider, 2016).

Relevant process models contribute to the framework in this project. The technology acceptance model (TAM) explores the idea of using a measure that can predict the acceptance or adoption of technology by an end-user (Davis, 1985). A generic ISD model connects the theories above as it defines a five-phase process as the "analysis, design, development, implementation, and evaluation or ADDIE" model. The ADDIE

model uses the phases to define the learning, explain how it should happen, determine authoring and production of learning materials, test to see if they work, make changes, and assess the outcome (Branson, Wagner, & Rayner, 1977; Schlegel, 1995). The workshop was designed and developed based on this ADDIE model. Understanding these theories and models that have influenced instruction for years can result in better informed program design decisions for the practice with technology inclusion.

The literature review included viewpoints from authors in the areas of professional development, instructional design approaches for adult learning, and technology use with multiple generations. An increase in one generation as others remain present in the workplace provoked a question of whether workplace training approaches needed to be revamped to account for the change. As a result, research and studies were on the rise as educators and researchers sought answers. Authors such as Dwyer and Azevedo (2016) proposed the challenge of trying to prepare students to be employees in a workplace that does not exist. The workplace that did not previously exist was the one many organizations started encountering with the volume of all four generations working at the same time in the workplace. Training efforts were intended to support the workplace in its current state as well as the one that is to come based on the recipients of training.

Only a few discrepancies were found in relation to technology inclusion for training design with the generational cohorts. Sanchez, Kaplan, and Bradley (2015) conducted a mixed-methods study to gather data on the reviews of intergenerational programs using technology to connect generations. Results from their study revealed that,

from an intergenerational perspective, technology application can foster intergenerational learning and education but has the potential to impede intergenerational communication and understanding. A challenge reported by Gibson and Sodeman (2014) surrounds the ways businesses address the varying tech savvy or technology experience levels existing in the multigenerational workforce. They proposed the idea of reverse mentoring to combat obstacles to the issues of technology experience levels. Generation X and the Millennials have the personal computer and the internet as their popular technology, while the older generations—Traditionalists and Baby Boomers—have the radio and television as the most popular technology for their times (Anderson, 2015). Reverse mentoring could be a solution allowing for younger generations to share expertise in technology with older generations and older generations can share industry and/or organizational knowledge with younger generations (Woods, 2016).

Technological advances are becoming more evident as a driving force for demographic change in learning settings (Dixon, Mercado & Knowles, 2013). Baby Boomers and Traditionalists experienced more stability with technology while the other generations, especially Millennials have seen an explosion of technological advancements at rapid speeds in the workplace and elsewhere. Training methods in the classroom can address these issues by promoting blended learning and the combined work efforts of the varying age groups in group activities and partnering (Dixon et al., 2013).

Various elements have been recommended by researchers to create a blended learning experience. PowerPoint can be used with advanced features such as animation,

music, movement, and video for greater learner engagement based on work by Berk (2012). Use of any of these features with PowerPoint constitutes multimedia for a blended learning experience and it increases learner comprehension of message content (Berk 2012). Multimedia implementation by instructors for blended learning with multigenerational groups may also warrant mentoring amongst these learners as well as instructors of different generations to assist with advanced technology usage.

Gamification is one example of a mechanic that has proven to be successful as explained by Kemp, Patterson, and Williams (2014). Gamification is an approach with the use of gaming elements incorporated in the instruction for enhancing learners' engagement and motivation in an educational environment (Dichev & Dicheva, 2017). According to Heaggans (2012), special attention should be given to avoiding the use of certain technology jargon such as hypertext links or URLs so this was considered when referencing terms for websites and related terminology in the participant manual and handout materials. Researchers and authors have identified these tools, resources, and methodology for learning design, classroom engagement, and the effective implementation of technology for a positive blended learning experience with a multigenerational audience.

Preferences of adults in learning settings can be leveraged for achieving desired learning outcomes based on research findings. Papp and Matulich (2011) discussed how Baby Boomers have preferences for television, typewriters, telephone, and memos. Generation X have preferences for video games, personal computer, email, and CDs. Millennials have preferences for the web, cell phone, MP3s, and online communities

(Papp & Matulich, 2011). In the classroom, Traditionalists are shown to have a preference for lectures, expert presentations, and the printed book/hard-copy materials with face-to-face classroom instruction, according to Wiedmer (2015). Baby Boomers prefer printed book material and face-to-face classroom learning along with activities for group exercises (Wiedmer, 2015). Generation X and the Millennials vary from the others with preferences for technology-based learning with limited printed materials with high brevity (Mencel & Lester, 2014). The gaming element is welcomed as an aspect of training by all generations with its ability to add healthy competition (Kemp et al., 2014).

Project Description

Resources and Barriers

Resources are identified for the conducting the workshop. Talent development professionals such as trainers, facilitators, and presenters will conduct the workshop for the 3 days. The resources that are discussed can also be used by individuals given facilitation responsibilities for training and developing a group of individuals representing the four generations. Organizations must provide a workshop setting that is conducive to a learning environment that allows for the use of technology, completion of activities, and facilitation of the other learning modes included in the workshop based on the facilitator's guide. Technology tools are implemented in the workshop to support the learning experience. One is the Kahoot application (Plump & LaRosa, 2017) for learning and evaluation that can be used on a personal computer or a phone. However, the instructions given in the guide are based on use of the phone app. The personal computer is needed for displaying the PowerPoint presentation and certain web pages to be visited

during the workshop. Use of other technology resources can be useful additions to the workshop for enhancing blended learning and providing additional experience for the instructor. These essential resources are identified because they are integral for maximal learning to occur.

Even with the best planned courses of action, there may be potential barriers present. A barrier to this leadership workshop might be limited availability of trained and experienced staff to conduct the workshop. In this instance, the designated instructor(s) could be trained locally through organizations such as the American Management Association, American Society of Employers, Association for Talent Development, Dale Carnegie, International Society for Performance Improvement, or others where available. Another option is to partner with a local professional association or academic institution for training assistance to be provided in conducting the workshop at the organization.

There is the possibility of a barrier with type of technology available to the instructor and the participants which would simply require the instructor to review the facilitator guide and determine alternative options for the technology identified in the training materials. A potential barrier exists with regard to a potential lack of generations represented in the workshop or participants in a generation who may exhibit characteristics of a different generation (Young et al., 2013). In these instances, the instructor should use their best judgment and understand that each group behaves and responds differently and the generations reference guide is only a point of reference as explained in the facilitator's guide. Time is an example of an additional barrier that would require the instructor's best judgment for revision if altered to meet an

organization's needs or requests when 3 days of training will not work. Finally, a participant's attitude of resistance to technology and/or working with other generations may be present in the workshop and this would be a barrier (Clark, 2017). A personalized approach as an instructor taking on a role of change agent is recommended to understand the individual's viewpoint and determine if they can be persuaded to be receptive; a change of attitude is at the foundation of many training efforts.

Implementation

Workshop implementation can be completed with these suggested steps. Communication should be cascaded down from the department level promoting the workshop for current leaders, prospective leaders, and those interested in leadership roles in the workforce. The importance of the effectiveness of the program in supporting organizational goals should be stressed so that there is an understanding of the connection from this training initiative to improving the organization through the development of its workforce (Dwyer & Azevedo, 2016). One or two facilitators should be identified along with alternates in case of changes in availability. This should be done in advance to allow 3 weeks or more for facilitators to review the facilitator guide and other training materials along with completing the checklist items prior to conducting the workshop. A location for the workshop should be identified to accommodate 5-30 participants. A registration process should be designed for how employees will be registered if the organization does not already have a registration process in place for internal training. After conducting the workshop, the steps provided for the evaluation should be followed and reviewed for potential improvements to the program as determined by the instructional staff. These

proposed steps for implementation are suggested to help talent develop professionals conduct the workshop with room for flexibility as needed.

Roles and Responsibilities

Various roles with their respective responsibilities come into play with the implementation of professional development such as this leadership workshop for a multigenerational workforce. As the workshop designer, my role and responsibilities involve functioning as the provider of the templates for the training materials designs, responding to inquiries regarding the workshop, and ensuring materials align with the goals of the workshop. Participants in the planned workshop take on the role of students who need to attend the workshop prepared to learn about leadership with technology application, participate in the workshop, and evaluate themselves as a leader (Thoms, 2013). Participants take on responsibility for their own learning to some extent as adults who should be open to gain knowledge for application and ready to share their experiences when they attend the workshop. Instructors have the role of trainer, educator, coach, counselor, change agent, and consultant (Knowles et al., 2015). The responsibilities of instructors encompass following the facilitator's guide, effective classroom management, answering questions, providing feedback, achieving the learning outcomes, ensuring the effectiveness of the workshop setting, and researching current technology for the classroom. Supervisors make the decisions to approve employees to participate in training and supervisors may also be participants attending the training as they hold responsibility for promoting and supporting the transfer of learning for application on the job (Noe et al., 2014).

Organizations make the budgetary decisions to determine how much is invested in implementing what is required for the workshop. This includes costs for the workshop materials, equipment, location, facilitator work hours, employee hours away from work during training, and other related cost factors. This role for organizations is indicative of the importance they place on leadership development for their multigenerational workforce (Katz & Miller, 2014). Organizations also determine who will be the trainers given the role to facilitate the learning and the responsibility for ensuring the effectiveness of the training and the learning experience for the participants.

Project Evaluation Plan

Steps for conducting formative evaluation are a part of this project. An opening icebreaker facilitated by the presenter can serve as an informal preassessment as it encourages participants to tell the whole workshop group which movie or television show personality they relate to as a leader similar to themselves. In each module, there is an exercise in the form of a question that may include technology implementation such as Kahoot. After time is allotted for answering, the answer is given within the discussion that follows in relation to the module being covered at the time. Closing activities and exercises are completed at the end of each module to check for knowledge and allow for application of skills. These formative evaluation examples demonstrate that within each module, group activities and/or individual exercises are included for learner application and knowledge checks.

Summative evaluation methods for the workshop are included as well. With the use of technology as a strong segment in the instructional approach, the workshop goals

focus on defining leadership, recognizing leadership competencies, discussing challenges leaders face, building a toolkit of resources, practicing steps in establishing a leadership strategy, and creating an action plan for personal leadership development. A workshop evaluation is completed by participants at the end of the 3-day workshop. A leadership activity for group participation and an exercise for individual completion are done at the end of the workshop. Using these approaches allows for the instructor to measure outcomes based on the learning objectives (Taylor & Hamdy, 2013). For example, the leadership activity at the end with their groups will address the workshop goal of recognizing leadership competencies and discussing leadership challenges as they create a strategy to apply. The final action plan completed by participants will function as the summative evaluation for their self-reflection combined with ways to plan for skill application on the job. The action plan captures the individual learning encompassing all learning for the individual. Feedback on the workshop would be gathered from the participant evaluations to obtain their comments for application in improving the workshop.

The 30-day follow-up communication is an evaluation of the participant's performance on the job 30 days after the workshop. It will be sent to the participant's supervisor and returned to the instructor. Using these steps for evaluation renders multiple avenues of feedback for measuring outcomes, determining effectiveness, and making the necessary improvements.

Key stakeholders have a vested interest in the success of the workshop. The participants in the workshop, their instructors/facilitators, supervisors of the participants,

and their organizations are examples of these key stakeholders. Participants stand to gain skill enhancement, an effective blended learning experience, personal leadership development, and an appreciation for other generations in their workplace. The instructors conducting the workshop learn from the experience in facilitating instruction for a multigenerational audience and refining skills in technology inclusion for their instructional practice. For supervisors who have interests in the staff training and development, the workshop can support succession planning, and they have an opportunity to provide feedback to be used for improving the leadership workshop. Organizations have interests in their employees improving to perform better, service internal and external customers with higher quality, and employ a more engaged workforce who appreciate generational differences. Customers can be stakeholders with interests in the quality of end product and/or service they receive from a trained and unified workforce.

Project Implications

Implications arising from the project in this study should not be overlooked. In reflection on the research question, the project stemmed from an investigation of the differences among the four generations in employee attitudes toward technology use in the workplace classroom. Differences were found between groups in the analyses of the subscales using the ANOVA. With these results put into practice within the workshop, organizations can foster a forward-thinking training environment with technology that embraces multiple generations of workers rather than one generation. The leadership workshop has the potential of functioning as a catalyst to ignite increased technology

usage for self-development among workers of all ages who implement an action plan inclusive of technology. Organizations can promote this workshop as a training and development benefit that strives to keep current with modern technology for the performance and productivity of their workforce.

Each generation should be represented in terms of instructional classroom approaches as companies respond to the presence of the generations in the workplace. With the onset of more technological advancements, training approaches will be geared to Millennials (Gibson & Sodeman, 2014). Other generations will be expected to apply various strategies to advance their skills and become more adept to these technological approaches (Hoyle, 2017). Workers of all ages can gain an advantage with respect to more targeted training efforts that are not just geared to a one-size-fits-all approach. This may render a feeling that welcomes training with greater interest for technology inclusion. Work teams and organizations are able to capitalize on the opportunity with this workshop to build on employees' leadership capacities while integrating learning technology platforms that are included in the workshop.

A project like this Leadership Skills workshop would be designed as a virtual learning or e-learning experience inclusive of simulations and interactive case studies that could provide immediate automated responses to answer selections. E-learning is distinguished from blended learning by means of the blended learning involving a combination of multiple approaches for learning while e-learning is learning conducted via an electronic medium that is primarily the internet (Thoms, 2013).

Limited adjustments or considerations to older generations will be present following 2020 as a greater number of the Baby Boomers choose to finally retire (Schullery, 2013). This will leave a higher volume of job vacancies that Generation X alone cannot fill (Lewis & Wescott, 2017). Instructors should stay technologically current with their training strategies to address the current generational mix along with the next one soon to enter the workforce—Generation Z (Plump & LaRosa, 2017).

Section 4: Reflections and Conclusions

The purpose of this study was to examine the technology preferences of four generations of city employees who receive workplace instruction. A survey was used to determine if differences existed among the four employee cohorts: Traditionalists, Baby Boomers, Gen Xers, and Millennials. The research findings revealed a significant difference between preferences of the Traditionalists and the other three generations. Minor differences were present between the preferences for the Baby Boomers, Gen Xers and the Millennials. With the pending retirement of the older generation, the remaining three generations will permeate the workforce as technological advancements occur simultaneously in upcoming years. These findings were similar to discussion by Amayah and Gedro (2014) postulating minimal differences in work and motivation across generations.

Limitations and strengths of the project are outlined in this section.

Recommendations to address the limitations are provided as alternative approaches to this project. My knowledge attainment established the basis for the project which was derived from the study's findings and its potential for social change is also discussed. The final portion of this section follows with reflections on the project study's importance, implications, applications, and future research directions.

Project Strengths and Limitations

The project strengths are reflected by the facilitation items created for the workshop designed in response to the findings of this study. The three primary facilitation items are the facilitator's guide, the PowerPoint presentation, and the

participant manual. These items are designed for use by instructors with varying levels of facilitation experience with adult learners. Easy-to-follow instructions in the facilitator's guide make it very user friendly, with screenshots of the slides along with the references to the participant manual pages included. The facilitator's guide has a Generations Reference Guide with a user friendly table format for instructors to compare the differences among the generations and the recommendations for training approaches based on those differences. Overall, the workshop content is based on a blended learning approach to add the variety of instructional methods that falls outside traditional classroom methods (Thoms, 2013).

With the partially traditional structure of the workshop as a face-to-face and in-class interaction, learners can receive immediate feedback from the facilitator. The facilitator also has an opportunity to receive immediate feedback by observing learner responses during instruction. Successful facilitation of the workshop is not definite with these strengths alone because planning, preparation, and other steps must be taken by the facilitator in working toward the anticipated outcomes for the workshop each time it is conducted.

An added area of strength for this project is the workshop content. This project was designed to address research findings of the differences among the four generations in employee attitudes toward technology use in the workplace classroom. The workshop includes review of effective leadership qualities and specifically references those that relate to leading and training a multigenerational group in the classroom. This is outlined in the Generations Reference Guide located in the appendix of the facilitator's guide for

the workshop. It outlines a breakdown of the approaches recommended based on the minimal differences revealed from the findings in the study. A Generations Reference Guide of this type has universal usage because it can be applied to instructional approaches for any multigenerational group representing Traditionalists, Baby Boomers, Gen Xers, and Millennials.

Limitations are highlighted for the individual project elements as well. Although the workshop was designed for a multigenerational audience, it does not account for the unknown mixture of generations that may be present. For example, a workshop audience may be primarily Millennials with a few Baby Boomers and Traditionalists with no representation of the Gen Xers. In another instance, the workshop may be conducted with mostly Baby Boomers and Gen Xers while no other generations are present. This limitation is representative of the fact that the workshop instructions in the guide are based on an unknown variable—the group dynamics of the audience. The Generations Reference Guide covers only the four generations, so it may not be applicable to workplace settings with a generational diversity that includes new generations such as Generation Z referenced by Tulgan (2013) along with Williams and Page (2011) as the future evolves.

Facilitators need to work within the recommended timeframe provided in the facilitator's guide. Motivation for learning has relevance to workplace training (Mencel & Lester, 2014). Potential differences among the generations in their motivation for learning could be explored, but this project does not include components with significant emphasis on motivation.

Instructions provided in the guide do not take into consideration that many trainers facilitate training based on their preferred learning methodology and their own generational preferences (McGraw & Martindale, 2012). The facilitator's guide does not offer guidance on the added challenge of the facilitator being a member of one of the generations and providing instruction based on their generational preference which may also be a factor influencing technology and media adoption for training. Use of technology in the workshop with applications such as the Kahoot may be limited, although the applications offer extensive capabilities for instructional use which could be explored with a group of learners who welcome more extensive technology-based learning, although the facilitator's guide does not include instructions to this extent. Facilitators should be cognizant of their preferences when implementing the instructional approaches in the guide.

Recommendations for Alternative Approaches

Considerations can be given to alternative approaches for the proposed problem in this study. Changes in information exchange are occurring at a faster rate with more technology advancements altering many workplace functions (Stone, Deadrick, Lukaszewski, & Johnson, 2015). An issue of generational miscommunication could be determined as an alternate way of viewing the problem while strictly focusing on the information exchange across generations with use of technology. Prevalence of four generations in the training setting leading to generational conflict in workplace training may be a second alternative approach for the problem (Lewis & Wescott, 2017).

Alternatively, the problem could be defined as organizations failing to respond to the generational shift described by Woods (2016) based on the rapid and sudden shift of the Millennials outnumbering the Baby Boomers. Millennials must be groomed for leadership instead of just prepared to perform and produce in the workplace. One option for resolution is peer coaching where the focus is on talent development for employees despite their differences in age and technology preferences. Another option is a mentoring program which would allow for an employee in one generation to be mentored by an employee of another generation while learning to work together in teambuilding activities (Merriweather & Morgan, 2013).

A thematic initiative of “No Generation Left Behind” could be developed with an aim to ensure that the generations progress together in their skill building, development, and technology implementation. A more customized approach to the individual could be applied with or without the use of technology based on the generational preference. Generations can gain appreciation for one another as well as develop skills in a mentoring relationship (Wiedmer, 2015). Practices like these complement the generational differences and promote worker performance to the benefit of the organization and the employees.

Other alternatives could be implemented to target potential challenges with instructors lacking experience with the use of certain types of technology for providing instruction. Mobile and other on-demand solutions are options typically targeting only Millennials (Papp & Matulich, 2011). Workplace instructors could be trained in this approach to be geared to all generations including Millennials because many

organizations view Millennials as the generation to be the point of focus with their overwhelming population outnumbering the other generations in the workplace (Gibson & Sodeman, 2014). This generation has grown up with technology such as mobile devices as a regular part of their lives for communication. Millennials, also known as Generation Y, are increasing in the workplace due to their numbers and the slowly retiring Baby Boomers. As employees, they can offer diversity, their technology savviness, and recent education as benefits to the organization which would be worth the investment (Lewis & Wescott, 2017). Methods along these lines could be implemented to harness the strengths of the generations while realizing the unique competencies of each.

Scholarship, Project Development, and Leadership and Change

Scholarship

My journey throughout this process has broadened my perspective of my potential and capacity to excel at higher heights and deeper depths. The creation of the project components aided my awareness of four generations in the workplace and how materials can be customized to reflect their preferences. In addition, sharing recommendations and advising others on how to train as a reflection of what is preferred by a generation based on research instead of how to train based on what I am accustomed to doing has enlightened me. As researchers such as Clark (2017) explained that instructors like myself would likely be more inclined to instruct others based on their personal generational preference, but need to implement a multigenerational approach. Recognizing this became more apparent in this doctoral journey. I am more cognizant of the way communication must be varied for the generations as shared by Hillman (2014).

There was great expansion of my own technology exposure with the inclusion of software applications I had not previously used such as the Kahoot app. As I reflect on the start of my journey until now, I am amazed at my growth in critical thinking skills, knowledge transfer, and data analysis. I tackled the challenges I faced with how my study evolved, refining my study focus, the statistical analysis, which was not a strong area for me, and a few others. I came across an extensive amount of literature concerning the generations but there is a greater focus on Millennials because they are expected to take over as the dominant generation in the workplace as the Baby Boomers retire and move out of the labor force (Henkin & Butts, 2012). This research experience offered me ideas as I perform my role in project management and HR analytics.

The experience has caused me to have a new respect for researchers and the research process. I find myself transferring my research skills to my professional work, volunteer work, and community work. I did not realize prior to my study that the review of the literature adds an enhanced view of your own perspective and the direction you want to go in as a researcher. You can consider perspectives of what has been discovered on your problem, examine similar and opposing viewpoints, and attempt to fill gaps with completion of your research. I have found that at the heart of the research process is a structured approach to problem solving.

Project Development

As a project manager, the development of this project and the experience have been integral lessons for me. The workshop was selected due to the rate of change workplaces in the public and private sectors are facing with supervisors and managers

taking on direct reports who are a different generation from them (Becton, Walker, & Jones-Farmer, 2014). It is no longer rare to see Millennials supervising Baby Boomers, Gen Xers, or even Traditionalists. The development of this project was enlightening for me in recognizing the higher-level standards met in applying concrete research data to the creation and development of training materials. I was able to recognize more of my hidden biases stemming from my own generational preference as I worked on the materials development for the project. It was more apparent that the rationale is easier to argue when it is grounded in actual research efforts. The project items speak to the legitimacy of the research for the study.

Leadership and Change

Leadership and change are inherent in this project study. Not only is leadership a necessity throughout the research process, but it is crucial in reporting the research and supporting the change that may take place as a result of the research. I was required to exercise leadership in executing this research project as a visionary in creating a picture for the problem to be solved, a decision maker for the strategy and approach in the research, and a researcher in my literature review process in building my body of knowledge on the targeted topic and related subtopics. I developed my skillset in conducting a thorough literature review and organizing an effective process for doctoral work that allows me to apply project management principles from my current profession. I gained an appreciation for the research of others which helped to establish the course and pave the way for my research as I am reminded that research begins with staying focused on solving a problem and/or answering a question.

A picture needed to be created as I used the approach of expounding on how some researchers distinguished among the generations, along with defining what a generation is. The picture was created with statements of the questions to be answered with the presence of multigenerational learners in workplace classrooms and determining if differences existed in what they prefer for technology inclusion in instruction. Studies mentioned in this research worked in tandem to substantiate researcher views of the age ranges representing the generations, to highlight what some companies are doing to address learning for multiple generations, and to emphasize the relevance of technological advancements at the same time.

Because competencies related to research influenced my use and perception of the information, evaluation of strengths and weaknesses of research methodology for studies examined was necessary (Lysenko, Abrami, Bernard, Dagenais, & Janosz, 2014). The literature review revolved around directing the reader to what the research revealed about the presence of the generations in the workforce, characteristics of these generations, the results of research with learning trends affecting the generations, and the application of study analyses to practice.

Reflection on Importance of the Work

The differences revealed in the data can support informed decision making for workplace learning with the changing demographics of the workplace population. In many workplaces, management believes there is a need to respond to the different preferences of multiple generations in the workplace (Hillman, 2014). Stereotypes about the characteristics, behaviors, and preferences of Traditionalists, Baby Boomers, Gen

Xers, and Millennials, have been the driving force in decisions made within many organizations, as opposed to basing decisions and practices on tangible evidence (Becton et al., 2014). Results from this research can work to eliminate this problem. Decision making based on data would be beneficial to organizations that need to respond to the changing workforce and their development with the application of this study.

Analytics is a rising hot topic in the business world and the basis of it is informed decision making and strategizing based on concrete data. My current work role pertains to completing analytics which has allowed for crossover skills from my research study to be applied. Implementation of the project in this study can serve to empower organizations in taking a multigenerational approach to training with technology inclusion.

Implications, Applications, and Directions for Future Research

There are important implications stemming from this research and potential uses for the information. Implications for the positive social change branch into customized training strategies with technology that are conducive to a multigenerational workforce. One example is the use of technology implemented with the Kahoot app, which could easily expand into similar use for completing the workshop evaluation with the app instead of using paper, and inclusion of more self-directed learning elements within the modules. Employees and companies can benefit from the workshop with the technology usage as a tool for connecting the generations to reduce the digital divide. Instructional designers and presenters are able to apply knowledge of generational preferences in training methodology (Hillman, 2014; Mencl & Lester, 2014).

Managers and supervisors can benefit from participation in the program delivered in this project study. It can present a custom approach in alignment with generational learning preferences. A more developed workforce in the areas of leadership and technology will be reflected in the customer service and/or operations (Vining, 2011). For social change, this project affords organizations, talent development professionals, and employees in addition to other stakeholders the opportunities to stay on a track of technology-enhanced learning with the latest trends, and a thriving workforce with generational diversity without conflict.

Future research could determine if differences exist in motivation for each generation to learn based on the type of technology used in the workplace. Research could be conducted to respond to projected changes in employee demographics for workplace learning based on current technology trends. A mentoring program to prepare younger generations to supervise older generations using distance learning could be developed. An extension of this current study could be conducted to compare learning for the various generations of learners in blended learning courses. These directions create greater possibilities for informing the practice.

Conclusion

As workplaces continue to experience change in workforce demographics, they can take proactive steps in preparing for and responding to those changes. Organizations are influenced by the workforce changes as well as the individual employee. Employees in each generation should receive consideration for decisions in delivering technology-based instruction. As this study has shown, differences exist in the preferences from one

generation to another, but the few discussed for face-to-face instruction should be factors included in training design where those generations are present. Instructional staff functions in roles for the delivery, evaluation, and revision of the program developed from this study. Their roles are integral to positively influencing the learning experience of the four generations in the workplace learning environment.

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Appendix A: Project

Leadership Skills for Managers & Supervisors

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Leadership Skills for
MANAGERS & SUPERVISORS
FACILITATOR'S GUIDE



Leadership Skills for
MANAGERS & SUPERVISORS
◆————◆
FACILITATOR'S GUIDE

Written & Designed by
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Walden University
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Using This Facilitator's Guide

Use this Facilitator's Guide as an instruction manual for presenters facilitating this three-day workshop. Although previous facilitation experience is not required for the use of this guide, novice facilitators are strongly advised to read additional resources on the topics of supervisory skills and instructing a multigenerational group. The guide is designed for presenters who have basic facilitation skills which include prior experience facilitating to a group, experience following a facilitator's guide for training, providing instruction to a group of five or more, and have some knowledge of multiple generations in the workplace.

A checklist is included with a listing of all handouts, materials, and additional resources required in facilitating this workshop. There is a workshop agenda to give a recommended timeframe for each section, exercise, and activity. Additional use of technology is included with use of an app or software for enhancing learning and encouraging participation (see Appendix). To keep the workshop on schedule, the timeframes listed on the agenda are strongly recommended but deviations may occur depending on the group. Since groups can vary, facilitators should only use this guide information as recommendations. Monitor group activity closely to check for understanding. References used in gathering the content for the workshop are also included in this guide. Facilitators are reminded to always thank participants for sharing and participating in activities, discussions, and exercises.

Instructions provided in this guide assist facilitators in presenting this workshop with a customized approach to facilitating for multiple generations in the audience. This strategic approach is designed to cover four generations in the workplace classroom: Traditionalists, Baby Boomers, Gen Xers, and Millennials.

Instructions for facilitating will also reference the accompanying page number in the Participant Manual and the slide from the PowerPoint presentation that should be displayed as the content is presented. The following symbols will be used to indicate certain tasks as listed below.



Ask if there are questions



**Group
Activity/Discussion**

FACILITATOR'S EQUIPMENT/MATERIALS CHECKLIST

- 1) Leadership Skills for Managers & Supervisors Facilitator's Guide
- 2) Leadership Skills for Managers & Supervisors Participant Manuals
- 3) Leadership Skills for Managers & Supervisors PowerPoint Presentation
- 4) Projector & Screen
- 5) Laptop or PC
- 6) Flipcharts & Easels (per group table)
- 7) Markers, Pens & Pencils
- 8) Parking Lot (prepared on Instructor's flipchart for questions)
- 9) Workshop Sign-in Sheet(s) for Day 1, Day 2 & Day 3
- 10) Workshop Evaluation (paper copy or app version such as Survey Monkey)
- 11) Participant Handouts (see Facilitator's Guide Appendix)
- 12) Participant Name Tents or Name Badges (if applicable)
- 13) Instructor Business Cards (for attendees if requested)
- 14) Blank postcard (or index card) for each participant to be filled out at workshop ending as part of Action Plan
- 15) Treats/Giveaways for Class Participation (5 or more)
- 16) Technology device with internet access for each attendee if they do not have their own (iPad, mobile phone, tablet, etc.)
- 17) Deck of Playing Cards
- 18) (4) Puzzles (40-60 pieces)
- 19) App or software selected for online activities (polling, questions, surveys, etc.)
- 20) Polling and game questions uploaded to app or software
- 21) Cardstock Sheets for each participant
- 22) Can You Hear Me Now Activity Sheet
- 23) Ethics Case Studies Sheet (1 copy per group)
- 24) Stopwatch or Phone w/Stopwatch app
- 25) The Coaching Model Envelope w/Cards for the Steps per group
(see Facilitator's Guide Appendix)
- 26) Team In-Basket Items (see Facilitator's Guide Appendix)
- 27) 30-Day Follow-Up Communication to Supervisors (Email or Survey Monkey)
- 28) Generations Reference Guide
- 29) Other: _____
- 30) Other: _____

Additional Information: _____

FACILITATOR'S PREPARATION CHECKLIST

- 1) Confirm workshop location and time at training site
- 2) Complete site visit to workshop location at least one week in advance (if applicable)
- 3) Confirm seating capacity for all registered attendees
- 4) Obtain contact information for training site point of contact
- 5) Locate restrooms, break room(s), and emergency exits
- 6) Test PowerPoint presentation on equipment (projector, screen, laptop, etc.)
- 7) Test technology devices to be provided in workshop (if applicable)
- 8) Select app or software if something other than Kahoot! (www.getkahoot.com) will be used; Use www.kahootit.com for participants to respond to questions/items
- 9) Recommend reviewing online tutorials or videos (1-2 weeks in advance) to become familiar with the app or software if you have not used it previously
- 10) Set up Kahoot! account (or other game-based learning platform)
- 11) Test Kahoot! or other app/software to be used
- 12) Prepare flipchart for Icebreaker with list of items for attendees to share:
Name, Department, Seniority, Movie or Show w/Leader Example, Reason
- 13) Obtain Attendee Registration List
- 14) Determine 3-day break schedule to be used
- 15) Determine how groups will be assigned using cards; Sort card deck into 4-6 groups depending on the number of participants expected to attend;
See options below:
4 groups – Assign by suit
5 groups – Assign by face cards and numbers
6 groups – Assign by face cards, aces, even numbers and odd numbers
Note: Excess cards can be removed for the number cards
- 16) Review Generations Reference Guide
- 17) Other: _____

Additional Information: _____

Workshop Outline – Day 1

Timeframe	Topic
8:30 am – 8:35 am	Welcome, Logistics & Break Schedule
8:35 am – 8:45 am	Workshop Objectives & 3-Day Agenda Overview
8:45 am – 9:00 am	Icebreaker
9:00 am – 10:15 am	Module 1: Leadership at the Core
10:15 am – 10:30 am	AM Break
10:30 am – 11:15 am	Module 1: Leadership at the Core (cont.)
11:15 am – 12:00 pm	Module 2: It Starts with Vision
12:00 pm – 1:00 pm	Lunch
1:00 pm – 2:15 pm	Module 2: It Starts with Vision (cont.)
2:15 pm – 2:50 pm	Module 3: What Are You Really Trying to Say?
2:50 pm – 3:05 pm	PM Break
3:05 pm – 4:45 pm	Module 3: What Are You Really Trying to Say? (cont.)
4:45 pm – 5:00 pm	Wrap-Up & Summary Notes: _____ _____ _____ _____ _____

Workshop Outline – Day 2

Timeframe	Topic
8:30 am – 8:35 am	Welcome, Logistics & Break Schedule
8:35 am – 8:45 am	Workshop Objectives & Day 2 Agenda Overview
8:45 am – 9:15 am	Day 1 Recap: Opening Exercise
9:15 am – 10:15 am	Module 4: Goals in Mind
10:15 am – 10:30 am	AM Break
10:30 am – 11:10 am	Module 4: Goals in Mind (cont.)
11:10 am – 12:00 pm	Module 5: Ethics & Trust
12:00 pm – 1:00 pm	Lunch
1:00 pm – 1:50 pm	Module 5: Ethics & Trust (cont.)
1:50 pm – 2:50 pm	Module 6: Just My Style
2:50 pm – 3:05 pm	PM Break
3:05 pm – 4:45 pm	Module 6: Just My Style
4:45 pm – 5:00 pm	Wrap-Up & Summary Notes: _____ _____ _____ _____ _____

Workshop Outline – Day 3

Timeframe	Topic
8:30 am – 8:35 am	Welcome, Logistics & Break Schedule
8:35 am – 8:45 am	Workshop Objectives & Day 3 Agenda Overview
8:45 am – 9:15 am	Day 2 Recap: Opening Exercise
9:15 am – 10:15 am	Module 7: Coaching at Its Best
10:15 am – 10:30 am	AM Break
10:30 am – 11:15 am	Module 7: Coaching at Its Best (cont.)
11:15 am – 12:00 pm	Module 8: It Takes Two—Collaboration & Teamwork
12:00 pm – 1:00 pm	Lunch
1:00 pm – 2:25 pm	Module 8: It Takes Two—Collaboration & Teamwork (cont.)
2:25 pm – 2:50 pm	Module 9: Summary
2:50 pm – 3:05 pm	PM Break
3:05 pm – 4:10 pm	Module 9: Summary (cont.)
4:10 pm – 4:40 pm	Wrap Up & Action Plan
4:40 pm – 5:00 pm	Workshop Closing & Evaluations
	Notes: _____ _____ _____

Workshop Information

Workshop Description

Dynamic change in the current workforce continues to highlight the need for effective leadership along with changes in the nature of how we work. Companies know that leadership development is important and their programs for staff should reflect it. There are necessary competencies and behaviors at the core of leadership but not all leaders are able to identify and develop them.

This three-day workshop is designed to help participants understand what makes a leader, the best practices of successful leaders, and how to master the competencies of effective leadership. During this workshop, participants can discover a road map that includes steps, tools, and best practices for increasing self-confidence in one's leadership abilities. Participants will develop an action plan for continued growth in their path to leadership success even after this workshop.

Workshop Objectives

- ✓ Define leadership and related competencies
- ✓ Recognize the characteristics of successful leaders
- ✓ Discuss the challenges leaders face in today's workplace
- ✓ Build a toolkit of resources to address leadership challenges
- ✓ Practice steps in establishing a strategy for your leadership role
- ✓ Create an action plan for your personal leadership development

How Participants Will Benefit

- ✓ Recognize what a leader is and is not as they create their personal vision
- ✓ Develop their self-confidence in a leadership role
- ✓ Enhance their leadership abilities and reach greater potential
- ✓ Learn to capitalize on individual strengths to take teams to higher levels of performance

Who Should Attend

Those working in a leadership role or pursuing a leadership position

Guide for Workshop Day 1

Training Note

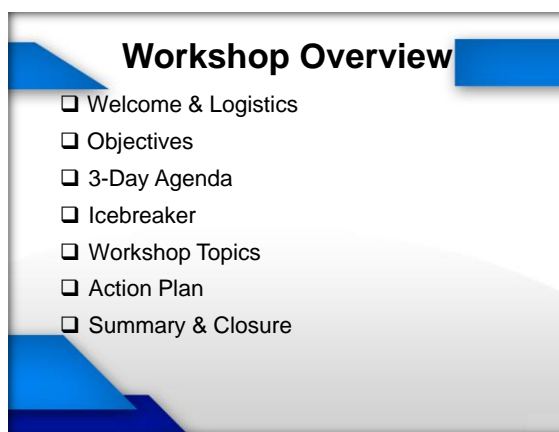
- + Greet attendees as they enter and ask them to sign the sign-in sheet
- + Welcome group and open workshop at scheduled start time
- + Distribute Participant Manuals and Day 1 handouts at seats or after workshop starts
- + Share a brief bio during welcome to provide background info about facilitator to



Leadership Skills for Managers & Supervisors – Slide 1

Talking Points

- ✓ Greet the attendees as first slide is displayed
- ✓ Give your name as the facilitator
- ✓ State the name of the workshop
- ✓ Ensure attendees have a manual and handouts
- ✓ Inform attendees that materials are theirs to keep
- ✓ Inform attendees that they should take notes in the manuals



Workshop Overview – Slide 2

Talking Points

- ✓ Display slide and ensure all attendees have a functional technology device
- ✓ Share the overview by stating the items on the slide to be covered before starting the first topic
- ✓ State that attendees should bring their materials back on each day of the workshop



Logistics

- Emergency Exits
- Schedule & Breaks
- Cell Phones
- Restrooms
- Parking Lot



Logistics – Slide 3

Talking Points

- ✓ Display slide
- ✓ Inform attendees of emergency exits
- ✓ Provide break schedule: AM, Lunch, and PM
- ✓ Ask for cell phones to be placed on silent mode
- ✓ Inform attendees of restroom locations
- ✓ State that some questions may be placed on the Parking Lot to be answered at a later time



Objectives

- Define leadership and related competencies
- Recognize the characteristics of successful leaders
- Discuss the challenges leaders face in today's workplace

Objectives – Slide 4

Talking Points

- ✓ Display slide and ask attendees to open their manuals to page 1
- ✓ State that these are the first three of the six workshop objectives

Objectives *cont.*

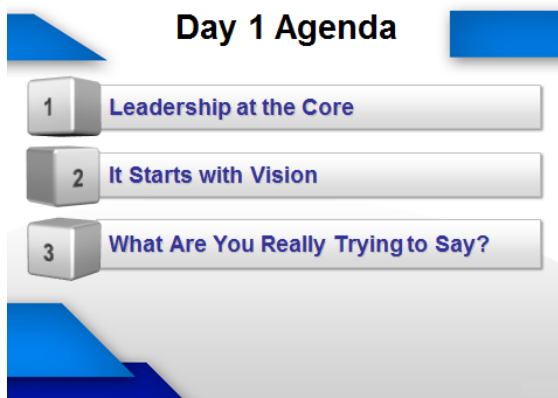
- Build a toolkit of resources to address leadership challenges
- Practice steps in establishing a strategy for your leadership role
- Create an action plan for your personal leadership development

Objectives cont.– Slide 5

Talking Points

- ✓ Display slide and state objectives
- ✓ Explain that all objectives will be met with a variety of instructional approaches such as discussions, group activities, and individual exercises
- ✓ State that now we want to see how the topics are broken up for each day

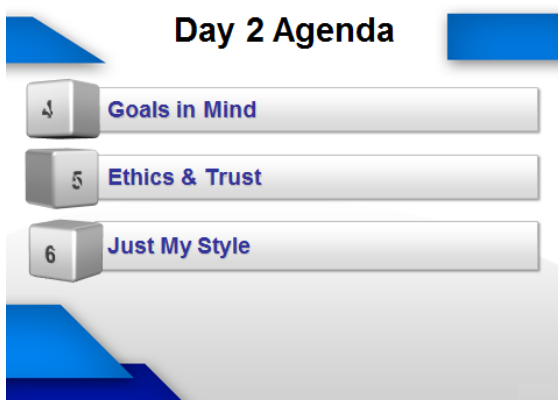




Day 1 Agenda – Slide 6

Talking Points

- ✓ Display slide and state the topics for Day 1
- ✓ Explain that these are core essentials for a leader



Day 2 Agenda – Slide 7

Talking Points

- ✓ Display slide and state the topics for Day 2
- ✓ Explain that after the core essentials we will move into areas concerning skills that relate to your interactions with others who follow your leadership



Day 3 Agenda – Slide 8

Talking Points

- ✓ Display slide and state the topics for Day 3
- ✓ Explain that the Summary will allow us to bring everything together
- ✓ Explain that the Action Plan sets the basis for targeted application of learning points from the workshop



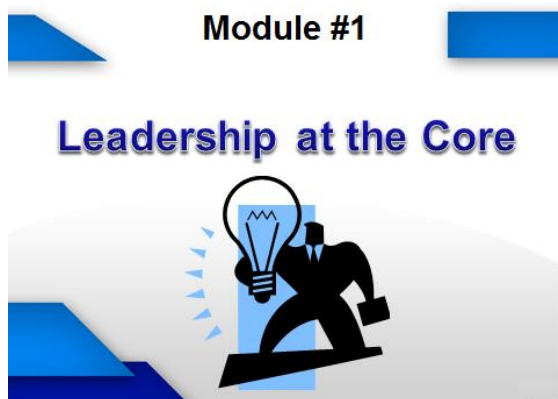
Icebreaker

Icebreaker – Slide 9

Talking Points



- ✓ State that we will get started with an activity to find out who we all are
- ✓ Ask each person to share the following with everyone as you call on them:
 - Name
 - Department
 - Seniority
 - Movie or TV Show (with a leader similar to them)
 - Reason for selection
- ✓ Share your own selection
- ✓ Thank everyone again for being in the session and sharing their information
- ✓ State that according to John C. Maxwell in *The 21 Irrefutable Laws of Leadership*, “Some people are born with great leadership intuition. Others have to work hard to develop and hone it. But either way it evolves, the result is a combination of natural ability and learned skills.” Are you ready to continue your learning with us today? Let us begin.
- ✓ Distribute card stacks to each group
- ✓ Inform participants that they should keep their card for the rest of the day in the workshop; It will be used to arrange them for various exercises

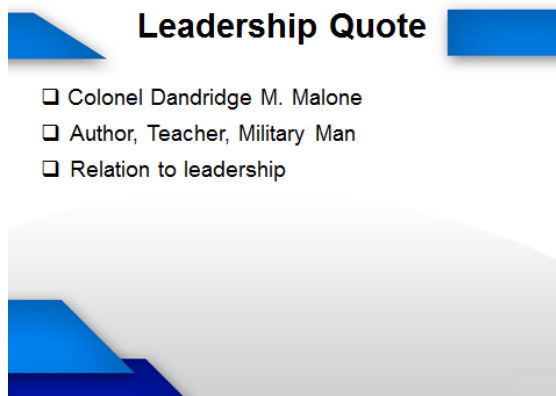
Module #1: Leadership at the Core**Module 1: Leadership at the Core – Slide 10**

Talking Points

- ✓ Display slide
- ✓ Introduce module by reading slide
- ✓ Inform participants that we want to find out the percentage of leaders in the room and we'll do this using Kahoot for our first polling question
- ✓ Give instructions for accessing app/software and have them go to Polling Question #1 and vote
- ✓ Allow time for voting and share polling results
- ✓ Explain that your responses are based on whether you consider yourself a leader as opposed to if you are or not
- ✓ State that we want to start our discussion with how we define leadership and how we recognize it

**Leadership Quote – Slide 11**

Talking Points



- ✓ Display slide and ask participants to turn to page 2
- ✓ Ask a volunteer to read the quote and tell about Colonel Malone from Google search if needed; Dandridge Mike Malone began as a private and worked his way up to the level of colonel in the US Army within 30 years. During that time, he earned college degrees and became a leading expert on leadership for the army in garrison (military outpost or body of troops stationed in a location) and combat.
- ✓ Now we want to take a look leadership and who we see as leaders

What Is Leadership?

- Who we recognize as leaders
- Qualities of effective leaders
- Leadership defined

What Is Leadership? – Slide 12

Talking Points

- ✓ Display slide and state that we want to write our own definitions
- ✓ Let attendees know that they are going to do two things
- ✓ Ask everyone if they had to define the term leadership for someone else, how would they explain it
- ✓ Instruct attendees to fill in their definitions on page 2 under 1.1



- ✓ After completing definitions, they should work in groups to complete 1.2 together; Can use technology devices to assist with identifying pictures if someone in the group knows how; Ask groups to work together to fill in five qualities for each person
- ✓ Have all groups select a spokesperson and report on results for 1.2; Go back to 1.1 and ask volunteers to share their definitions; Pick one to use for 1.3
- ✓ Instruct groups to select the most important leadership qualities from 1.2 and add them to 1.4 (page 3)
- ✓ Have groups share a few examples from 1.4
(If short on time, do 1.4 with the whole class)
- ✓ There are primary fundamentals that leaders must apply regardless of the situation and they may overlap with the qualities we just covered



Leadership Fundamentals

- Identifying leadership fundamentals
 - Communication
 - Trust
 - Vision
 - Innovation
 - Others???

Leadership Fundamentals – Slide 13

Talking Points

- ✓ Display slide and ask participants to turn to page 4
- ✓ Read slide
- ✓ Ask for other examples of fundamentals we look for in leaders; Have them reflect back on Exercise 1.4
- ✓ State that we look for these fundamentals in our leaders and our managers too but they are not the same
- ✓ Let's distinguish between the manager and leader before going deeper into the fundamentals
- ✓ Ask attendees to visit the voting poll you set up so they can answer the second question



Management & Leadership: Are They Different?

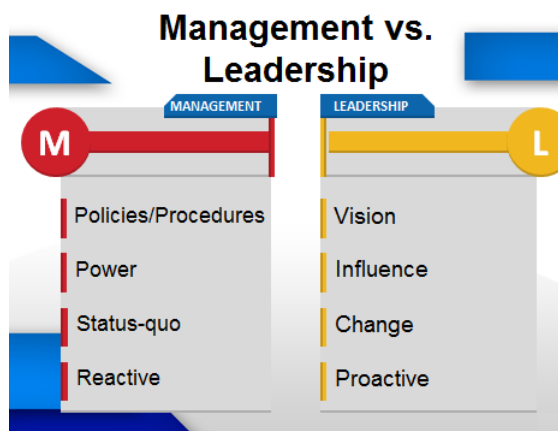
- Management and leadership are not synonymous
- Management controls or directs people to accomplish desired goals and objectives using available resources efficiently and effectively
- Leadership is the ability to influence and guide a group to accomplish a common goal

Management & Leadership: Are They Different? – Slide 14

Talking Points

- ✓ Display slide
- ✓ Read slide
- ✓ Explain that unlike management, leadership is not captured in a position or role. As an effective leader, people will follow you. However, as a manager, people work for you—effective or not. Here are distinctions that make this clearer.





Management vs. Leadership – Slide 15


Talking Points

- ✓ Display slide
- ✓ State that they can complete page 4 as we discuss this.
- ✓ Read slide
- ✓ State that a manager is managing their staff/team work in accordance with an organization's policies and procedures. The manager is empowered by the authority of their role. The manager is maintaining status quo to keep things in order and functioning and reacting to situations and circumstances when they arise.
- ✓ In leadership, a leader is selling their vision to their followers by their influence and motivating others to change if the situation warrants. The leader does not wait to act when something happens; they are the ones who prompt others into action.



Understanding the Difference

- Can be part of the same role
- Complement each other
- Should not be separated but serve different purposes



Understanding the Difference – Slide 16

Talking Points

- ✓ Display slide
- ✓ Inform participants that as we close this segment. . .
- ✓ Read slide
- ✓ State that understanding the difference is not enough. We must identify the skills and behaviors that can distinguish leaders from others including managers. That brings us to recognizing the importance of a competency.
- ✓ Ask participants to turn to page 5 and define competency

What Is a Competency?

- A Competency is . . .
 - An important skill needed to do a job
 - An ability to do something especially measured against a standard



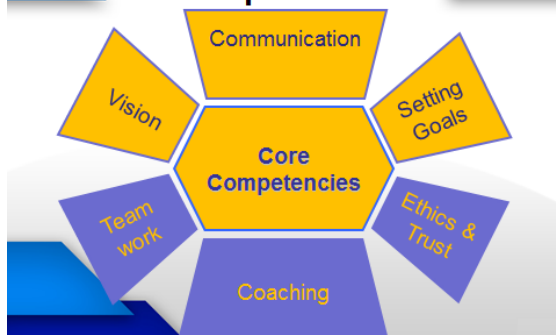
What Is a Competency? – Slide 17

Talking Points

- ✓ Allow time for completion of definitions before displaying slide
- ✓ Ask for 2-3 volunteers to share their definitions
- ✓ Introduce next slide by asking what are examples related to leadership
- ✓ State that we want to focus on six of them in this module



Leadership Competencies



Leadership Competencies – Slide 18

Talking Points

- ✓ Display slide
- ✓ Read slide
- ✓ Ask participants if they feel any important ones are missing and to share why; Allow 3-4 persons to share
- ✓ Explain that these are not the only ones but many of the key skills and behaviors demonstrated by effective leaders fall within these categories; In today's business climate, skills in change management, analytics, execution, organizational development, and strategic planning are in high demand for leaders
- ✓ Start that we will start with vision



Competency #1: Vision

- Realizing the vision
- Recognizing the importance of the leader's vision
- Communicating the vision
 - Timing
 - Method
 - Audience



Competency #1: Vision – Slide 19

Talking Points

- ✓ Display slide and have participants turn to page 6
- ✓ Discuss the content on the slide to emphasize the importance of vision for a leader
- ✓ Ask what the following persons had in common:
 - Alexander Graham Bell
 - Walt Disney
 - Benjamin Franklin
 - Elijah McCoy
 - Charles Drew
- ✓ If not stated, share that these were all individuals who had inventions that had to start with a vision of something that did not exist previously coming into fruition.
- ✓ Recap for everyone what each individual above invented: telephone, animation in film, bifocals, automatic lubrication device, and blood bank



Competency #2: Communication

- Determining what you need to communicate
- Recognizing your audience
- Utilizing your communication mediums appropriately
- Knowing what to say, when and to whom



Competency #2: Communication – Slide 20

Talking Points

- ✓ Display slide
- ✓ Explain that until a vision is communicated, it may be no more than a dream
- ✓ Read slide
- ✓ Share that communication only happens when there is successful interpretation of the message sent
- ✓ Ask participants how this competency can be connected to the inventors we just mentioned

Competency #3: Setting Goals

- Knowing what makes up a goal
- Being SMART about your goals
- Communicating the goal(s)
- Leading with goals in mind



Competency #3: Setting Goals – Slide 21

Talking Points

- ✓ Display slide
- ✓ Discuss how goals identify what the leader wants all to achieve
- ✓ Read slide
- ✓ Ask someone to explain how setting goals relates to the vision and communication

?

Competency #4: Ethics & Trust

- Being a person of integrity
- Doing the right things
- Aligning beliefs and actions
- Demonstrating that you are a person of character



Competency #4: Ethics & Trust – Slide 22

Talking Points

- ✓ Display slide
- ✓ Explain that the leader must be someone trustworthy; Someone who demonstrates integrity, character, and ability
- ✓ Read slide
- ✓ Relate ethics and trust back to vision, communication, and setting goals; These all require to begin with a leader that followers can believe in based on their demonstrated behavior and not just talk alone

Competency #5: Coaching

- Exhibiting a coaching mindset
- Leveraging strengths and identifying opportunities
- Guiding growth and development
- Overcoming challenges



Competency #5: Coaching – Slide 23

Talking Points

- ✓ Display slide
- ✓ Explain that on the road to achieving the vision as the communicated goals are met, there is always a need to develop people for the future
- ✓ Read slide

?

Competency #6: Teamwork

- Know what makes a team
- Shared agenda
- Dynamics of a team can be supported by effective leadership
- Benefits of collaboration with a team



Competency #6: Teamwork – Slide 24 Talking Points

- ✓ Display slide
- ✓ Explain that the leader should be the center and one who promotes everyone working together along with inspiring others to achieve; Collaboration is integral to successful work teams and not just good leadership alone
- ✓ Read slide
- ✓ Ask for examples of what the teamwork competency looks like in action for a leader highly skilled in this competency
- ✓ Share that we are getting ready to work in our teams to connect these competencies



Competencies in Action

- Knowledge, skills, and abilities
- Observable and measurable behaviors
- Life experiences
- Challenges with the competencies
- Development and growth

Competencies in Action – Slide 25 Talking Points

- ✓ Display slide
- ✓ Read slide
- ✓ State that these competencies are not only desired but expected to be demonstrated by effective leaders who perform and produce
- ✓ Encourage participants to capture closing notes on mobile/other devices or in Participant Manuals





Leadership in Action – Slide 26

Talking Points



- ✓ Display slide
- ✓ Inform participants that we are starting an activity using page 7 for capturing notes
- ✓ Assign groups using playing cards and the leaders
- ✓ Give directions as follows:
 - Each group will have a leader
 - Your task is to find an example of a leader in current news using your devices
 - Based on the content of the news article, identify examples of four of the competencies associated with the leader and what they are
- ✓ Allow 15-20 min for completion
- ✓ Ask groups to report on their results by sharing the following:
 - How did you approach the task?
 - Did everyone understand the goal? If not, how was this addressed?
 - Was there agreement?
 - Did leadership change at any point? When?
 - What were the challenges?
 - When did coaching come into play? If not all, why?
- ✓ Summarize exercise and state that we will spend time with each of the competencies now and take a deeper dive beginning with “Vision”



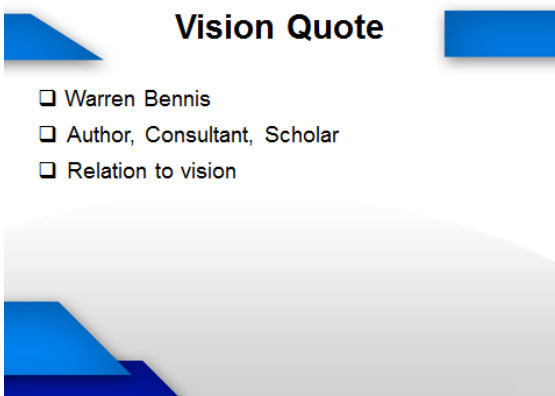
Module #2: It Starts with Vision



Module #2: It Starts with Vision – Slide 27

Talking Points

- ✓ Display slide and ask participants to turn to page 8
- ✓ Introduce module by reading slide
- ✓ Ask if anyone can tell us the smallest bird in the world. If not shared, state that it is the hummingbird is the only bird that can fly in all directions including backwards. However, it must rely on its strongest sense which is vision to function in a different way that complements its multidirectional flying capability (National Geographic, July 2017).
- ✓ State that the leader sees the “big picture” and fosters the development of a shared vision
- ✓ State that now we want to deal with the aspects that lead up to a leader with a vision



Vision Quote – Slide 28

Talking Points

- ✓ Display slide
- ✓ Ask a volunteer to read the quote
- ✓ Instruct participants to go to Kahoot! (or the poll app or site) to do the next question which is about Warren Bennis
- ✓ Share poll results after waiting for votes

Vision Quote

- Warren Bennis
- Author, Consultant, Scholar
- Relation to vision



Vision Quote – Slide 28 cont.

Talking Points

- ✓ Ask a volunteer to share background information about Warren Bennis and how he can be related to our discussion vision. Add the following if it is not shared:
Bennis was an author, consultant, professor, and veteran who wrote over 30 books. According to Steve Denning in an August 2014 Forbes article, “Warren epitomized the view of a leader as someone who not only made people feel that they’re at the very heart of things, not at the periphery, but actually put forward, and implemented, a vision of leadership in which that was a reality, not just a feeling.”

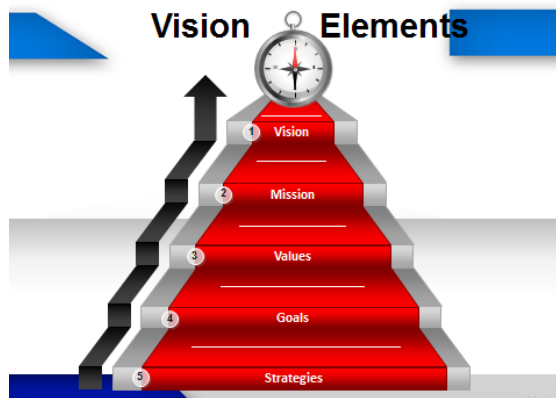


The Leader’s Vision – Slide 29

Talking Points



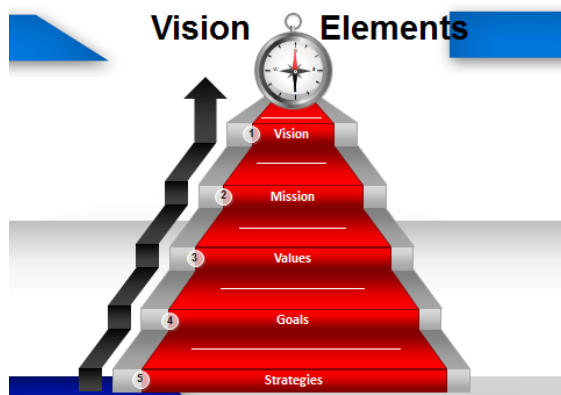
- ✓ Display slide
- ✓ Read slide
- ✓ We see the need to examine targets that make up a vision that will be powerful enough to inspire people
- ✓ State that now we want to deal with the aspects that lead up to a leader with a vision
- ✓ Instruct participants to complete the next app or online site question on vision
- ✓ Allow time for responses to be uploaded and share results; Explain that just about all answers could be acceptable but there are some elements that will drive our focus as we discuss vision



Vision Elements – Slide 30

Talking Points

- ✓ Display slide
- ✓ Read slide and share the three additional elements:
 - 1) Vision
 - 2) Mission
 - 3) Values
 - 4) Goals
 - 5) Strategies
- ✓ Ask participants to fill in elements on page 8
- ✓ Inform participants that they will work in groups to create descriptions for the elements
- ✓ Give the following instructions:
 - Assign one or more elements to each group to ensure that every element is assigned (the same element can be assigned to multiple groups)
 - Instruct groups to create a description for assigned topics and identify an example from a famous person or known company (e.g. mission defines what an organization is about or what they do; Example: Starbucks' company mission is “. . . to inspire and nurture the human spirit—one person, one cup, and one neighborhood at a time.”)
 - Each group should assign a spokesperson and notetaker
 - Use Section 2.2 on page 9 to capture information
 - Groups will have 10 minutes to create descriptions and identify examples



Vision Elements – Slide 30 cont.

Talking Points

- ✓ Allow each group to report their results; Provide positive feedback for each group's report



- ✓ State that we are ready to move into distinguishing between the vision and the mission though they are related.
- ✓ Explain that the vision is the picture of a preferable future while the mission is what you are doing to get there; We can have a personal vision as well as the vision of our organization; If one encounters a conflict between the two, there can be consequences that impact performance as a leader such as an inner conflict; When there is alignment in the personal vision and the organization's vision, it easier to act on the vision and get others on board
- ✓ Instruct participants to complete Section 2.3 on page 10 on their own
- ✓ Allow 15-20 minutes for completion and ask for a few volunteers to share what they wrote
- ✓ Now we are ready to take steps to put the vision into action



Step Up with Action – Slide 31

Talking Points

- ✓ Display slide
- ✓ Read slide
- ✓ Explain each step as follows:
 - Observe – Take a look at current state of operation and surroundings along with resources
 - Reflect – Go back to mission and values
 - Write – Put a vision for the future in writing
 - Speak – Share the vision with those who must be involved in making it happen
- ✓ State that we want to participate in a group activity on vision to close us out of this module



Vision in Action – Slide 32

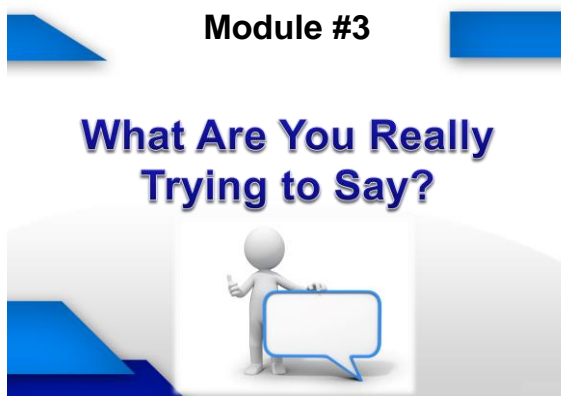
Talking Points



- ✓ Display slide
- ✓ Inform participants that we are starting an activity
- ✓ Assign groups and leaders using playing cards
- ✓ Give directions as follows:
 - Each group will have a leader
 - Leaders will come pick up their puzzle pieces and take them back to the group
 - Leaders cannot take the box cover which contains the full picture of the finished puzzle but they can return as often as they like to review it and return to their groups
 - Leaders will guide their group in completing the puzzle but they cannot do any work
- ✓ Allow 15-20 min for completion
- ✓ Ask groups to share feedback on the experience by completing page 11
- ✓ Summarize exercise and state that we ready to discuss how we share the vision and other aspects of communicating



Module #3: What Are You Really Trying to Say?



Module #3: What Are You Really Trying to Say? – Slide 33

Talking Points

- ✓ Display slide and ask participants to turn to page 13
- ✓ Introduce module by reading slide
- ✓ State that we have all heard the saying—"It's not what you say but it's. . ."; Communicating a message is not just about what you say or how but the recipient of the message is a key factor as well; A common tagline used by Verizon for advertising dealt with the heart of communication. What was it? Wait for responses.
Answer: "Can you hear me now?"
- ✓ Let's get into some communication basics and connect it to leadership



- John C. Maxwell
- Author, Coach, Speaker
- Relation to communication

Communication Quote – Slide 34

Talking Points

- ✓ Display slide
- ✓ Ask a volunteer to read the quote and tell about John C. Maxwell
- ✓ Share the following if it not mentioned:
John C. Maxwell is the author of numerous books who is a sought after coach, pastor and speaker on management and leadership. As a well-known leadership expert, one of his popular books is *The 21 Irrefutable Laws of Leadership*.

Communication Quote

- John C. Maxwell
- Author, Coach, Speaker
- Relation to communication



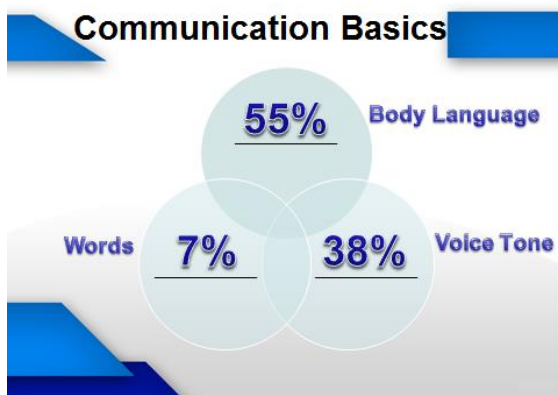
Communication Quote – Slide 34 cont.

Talking Points

He is also the founder of The John Maxwell Company (Maxwell, 1998).

- ✓ Explain that Maxwell promotes how communication is paramount to a leader's ability to connect.
- ✓ Instruct participants to go to the app or site for the next question about verbal & nonverbal communication
- ✓ Allow time for participant responses and then share the results
- ✓ Let's look at the actual percentages





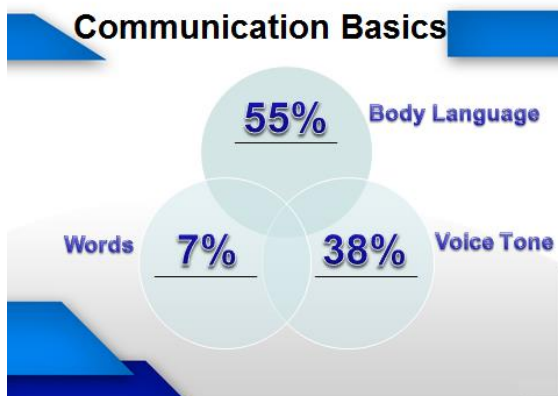
Communication Basics – Slide 35

Talking Points

- ✓ Display slide and ask participants to turn to page 13
- ✓ Share results of question from app
- ✓ Ask a volunteer to explain verbal and nonverbal communication along with how it applies to the slide content
- ✓ State that we must involve mechanics beyond the voice when we communicate. It is necessary to include action in our communication for any situation. Ask participants to give examples of these actions (Answers: body language, facial expressions, gestures, etc.). These reinforce our message and emphasize meaning for the recipient of the message. In your groups, you will identify examples of how we communicate.



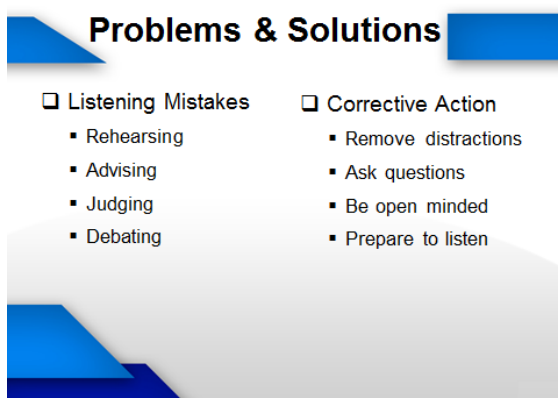
- ✓ Give the following instructions:
 - For the lower portion of Section 3.1 with the table on page 13, you will work in your groups.
 - Use the three categories of communication to list five examples for each category.



Communication Basics – Slide 35 cont.

Talking Points

- Assign a spokesperson and notetaker for the group.
- Allow 10-15 minutes for completion
- After completion, have groups report out
- ✓ Summarize the section by stating now that we know what is involved with communication, we want to look at the potential problems and ways to address them.



Problems & Solutions – Slide 36

Talking Points

- ✓ Display slide and ask participants to turn to page 14 for completion during this discussion
- ✓ Solicit volunteers to explain each mistake and the corrective action suggested for it
- ✓ We have discussed the mistakes and steps to take for corrective action with listening. Now we will take a look at the Stages of Listening.
- ✓ Instruct participants to go to the app or site for the next question which is the Stages of Listening





Stages of Listening – Slide 37

Talking Points

- ✓ Display slide
- ✓ Share results from responses to question on app
- ✓ Read slide
- ✓ Inform participants that the Stages of Listening can be filled in above the arrows on page 14 in their manuals
- ✓ Solicit volunteers to give descriptions of the stages as you review them
- ✓ Ensure the following is stated:
 - Receiving – hearing and filtering sounds
 - Understanding – Determine context and meaning
 - Remembering – Categorize and retain data
 - Evaluating – Critically assess or judge
 - Responding – Provide verbal and/or nonverbal responses
- ✓ Ask participants to take about five minutes to note ways to improve their listening skills. (Allow five minutes for completion.) Summarize Stages of Listening by stating that we often view listening as something so simple to do yet we experience great potential for errors. Increased awareness in our active listening can assist us in practicing more effective habits in listening as a learned process.





More on Communication – Slide 38

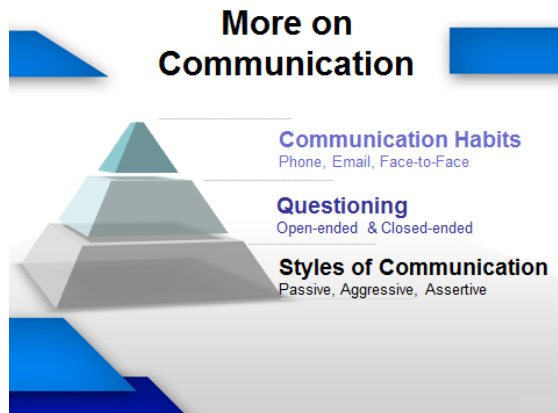
Talking Points

- ✓ Display slide and have participants turn to page 15
- ✓ Distribute a sheet of cardstock to each person
- ✓ Introduce slide by stating the following:
Leaders who optimize their communication skills can enhance their leadership style. Successful communication is dependent on the mind of the recipient. Before a leader can influence they must connect with people. Before they can connect, there must be communication.
- ✓ State that we will use a quick activity to get us started.



The activity is “Can You Hear Me Now?” (See Appendix for instructions to read)

- ✓ Ask teams to report tally of their points and announce the winner.



More on Communication – Slide 38 cont.

Talking Points

- ✓ State that as we move to the Effective Communication Habits, we will use 3.4 on page 15 to capture discussion. You will have two (2) minutes in your groups to identify as many effective habits that a leader should demonstrate in their communication for each category represented. Have groups place info on flipcharts. The participant with the lowest card in the group will be the spokesperson and the one with the highest card will be the notetaker (use voting process in the event of a tie). Give 1-2 of the examples below:
 - Phone: Use a professional or the organization’s designated greeting
 - Email: Use a signature with limited lines of info
 - Writing: Use proper grammar instead of slang
 - Face-to-Face: Maintain eye contact
- ✓ Allow two minutes and have groups report out. Close the activity by stating that we base our views and impressions of people largely on the way they communicate with us and others.



More on Communication – Slide 38 cont.

Talking Points



- ✓ Have participants turn to page 16. Ask participants what we do when we want to obtain information, confirm we are listening, or confirm we heard accurately. (Allow for responses) Explain that we ask questions for these reasons and more. State that there is an art to listening as we started to learn with the listening stages. There is also an art to asking questions. This is something lawyers, doctors, detectives, and others in certain occupations must develop as a skill in the art of asking questions. Due to our limited time on the topic, we will be addressing close-ended versus open-ended questions.
- ✓ Ask someone to distinguish between an open-ended vs a close-ended question. Inform participants that we will create our own questions to complete page 16. (If short on time, have participants complete page 16 on Day 2 for review; See Appendix for answers).



- ✓ State that the final communication topic is communication behavior of individuals. There are four styles commonly referenced for communication behavior that can be effective in communication strategy.



**More on Communication – Slide 38
cont.**

Talking Points

- ✓ Have participants take notes and share the following if not stated:
 - Passive Person: Lacks own opinion and puts needs of others ahead of their own; Allows others to boss them and make decisions for them
 - Aggressive Person: Attacks or ignores opinions of others and bullies others to get their way
 - Passive Aggressive Person: Appears passive but acts out anger in subtle, indirect ways
 - Assertive Person: Speaks openly w/respect for others





Communication in Action – Slide 39

Talking Points



- ✓ Display slide and read slide
- ✓ Ask participants to partner up for the final Day 1 activity. Inform participants that they will take turns asking questions. They can ask questions about the weather, work, family, vacations, books, etc. Let them know that they will have one minute to use the open-ended and closed-ended questioning techniques. Instruct the persons on your right to ask closed-ended questions for the first round and the other person will answer in an Aggressive manner. In the second round, they will switch roles and use other topics for the open-ended questions to be answered in two minutes as the respondent answers in an Assertive manner.

Communication in Action



Communication in Action – Slide 39 cont.

Talking Points

- ✓ Ask several attendees to share feedback on what happened.
- ✓ Summarize by stating assertive communication is the best way to communicate as it is characterized by a direct and honest approach. In most situations, assertive communication is more likely than any other style to lead to respectful and long-term relationships. A leader who is able to recognize their style of communication and work to develop their areas of weakness can strengthen their relationships.



Day 1 Summary

- Leadership Competencies
- The Leader's Vision
- Communication

Day 1 Summary – Slide 40

Talking Points

- ✓ Display slide
- ✓ Read slide
- ✓ Request participants to return playing cards received
- ✓ Confirm tally of each group's points received for the day
- ✓ Ask participants to capture closing thoughts for the three modules on their notes pages for future reference in their Action Plan.
- ✓ Close Day 1 of the workshop and remind participants to bring their manuals back for Day 2 of the workshop.

Guide for Workshop Day 2

Training Note

- + Greet attendees as they enter and ask them to sign the sign-in sheet for Day 2
- + Welcome group and start Day 2 at scheduled start time
- + Confirm attendees brought their manuals back for Day 2
- + If running short on time, group activities can be shortened or done as a class

Welcome to Day 2



Welcome to Day 2 – Slide 41

Talking Points

- ✓ Display slide
- ✓ Give overview for Day 2 by reading slide
- ✓ Review module titles from Day 1
- ✓ Introduce the Opening Exercise as a way to review Day 1 modules
- ✓ Distribute playing cards to each group with enough for each person to receive a card

Opening Exercise Day 2



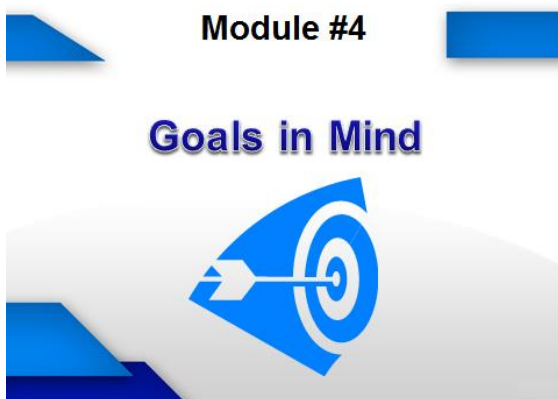
Opening Exercise Day 2 – Slide 42

Talking Points



- ✓ Explain that each group represents a new social media company (similar to Facebook, LinkedIn, Snapchat, Twitter, etc.)
- ✓ Inform groups which card will represent the company leader; Have groups select a spokesperson and notetaker
- ✓ Instruct each group to create the following within 20 minutes:
 - Company Name
 - Company Vision & Mission
 - Determine what strategy will be used to communicate the above
- ✓ Have groups report out

Module #4: Goals in Mind



Module #4: Goals in Mind – Slide 43

Talking Points

- ✓ Display slide and ask participants to turn to page 20
- ✓ Introduce module by reading slide
- ✓ Explain that there is a saying that if no one is following you, then you are just taking a walk. But if you are going somewhere and others are following you, then you are a leader. As a leader going somewhere, you need a predetermined goal to target what is to be achieved. State that as the leader of the workshop, you set goals which are the objectives of the workshop for example.



Goals Quote – Slide 44

Talking Points

- ✓ Display slide
- ✓ Ask a volunteer to read the quote
- ✓ Ask a volunteer to share background information about Henry Kissinger; If not stated, share that Kissinger is an American diplomat and political scientist. He served as the U.S. Secretary of State and the National Security Advisor under President Nixon and President Ford. He has numerous writings on international affairs, diplomatic history, and foreign affairs for which he is widely recognized for his influence in its shaping. He demonstrated his strength in strategizing which begins with understanding the importance of goal setting.

Goals Quote

- Henry Kissinger
- American Diplomat, Political Scientist
- Relation to goals



Goals Quote – Slide 44 cont.

Talking Points

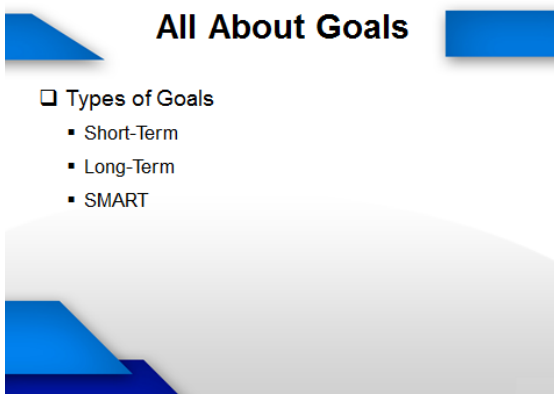
- ✓ Explain that a goal can be defined as a desired outcome or measurable end result to be achieved.



- ✓ Ask participants to identify types of goals in their groups and fill them in on page 20.
- ✓ Allow five minutes for completion.
- ✓ Have each group share two examples.
- ✓ Inform participants that we want to move the discussion into identifying the goal types.

All About Goals

- Types of Goals
 - Short-Term
 - Long-Term
 - SMART



All About Goals – Slide 45

Talking Points

- ✓ Display slide and ask participants to turn to page 20
- ✓ Introduce module by reading slide
- ✓ State that goals can generally be categorized as either short-term or long-term. Other types of goals have derived from them such as the S.M.A.R.T. goals.
- ✓ A short-term goal is something you want to achieve in maybe a year or less. They can be achieved in a day, a week, a month, etc.
- ✓ A long-term goal is something you want to achieve which may take longer than a year.
- ✓ In 1981, George Doran introduced S.M.A.R.T. goals in a paper he published. Short-term and long-term goals can be written as S.M.A.R.T. goals.



SMART Goals – Slide 46

Talking Points

- ✓ Display slide and direct participants to page 21
- ✓ Share results from app
- ✓ State that S.M.A.R.T. is the acronym for . . . (read slide)
- ✓ Ask a volunteer from each group to give a description of each element in S.M.A.R.T.
- ✓ Ask the class to vote if they agree with the description shared and move to the next element.
 - Specific – States exactly what will be achieved
 - Measurable – Quantifiable
 - Achievable – Seems attainable, within reach
 - Realistic – Can be done given resources available
 - Time-based – States when it will be achieved
- ✓ Let participants know that you will complete 4.3 together. Ask a volunteer to read each one and give an answer. (Correct Answers: Only #3, #5, and #6 are Yes).



Goal Setting in Action – Slide 47

Talking Points

- ✓ Display slide and ask participants to turn to page 22
- ✓ Have participants work in their groups to list three examples of each: Short-term goals and long-terms goals on page 20; Then they should list examples of S.M.A.R.T. goals on page 22

Goal Setting in Action

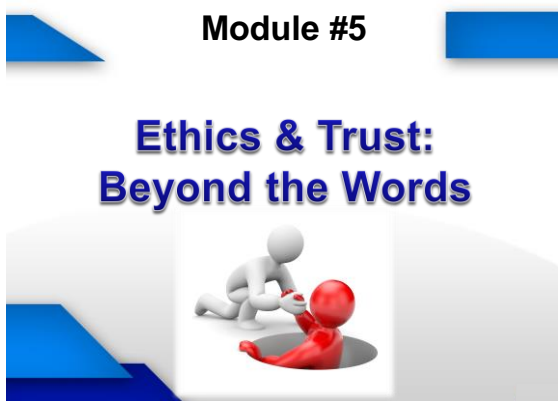


Goal Setting in Action – Slide 47 cont. Talking Points

- ✓ Summarize the module by stating that as a leader sets measurable goals and measures the achievement of them with the team, they are able to focus on what is most important. Leaders must model the behaviors they desire to see exhibited by their followers.



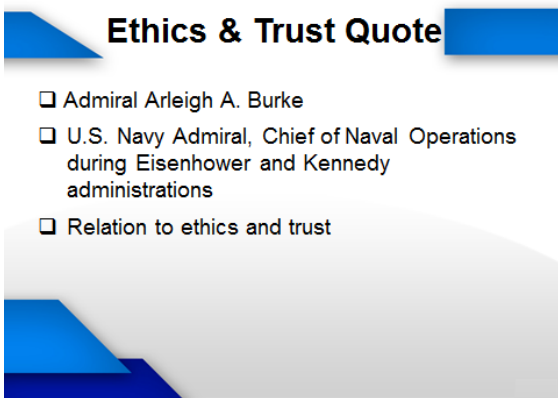
Module #5: Ethics & Trust: Beyond the Words



Module #5: Beyond the Words – Slide 48

Talking Points

- ✓ Display slide and ask participants to turn to page 24
- ✓ Introduce module by reading slide
- ✓ When you hear the words—“trust me,” are you more or less inclined to trust the individual? In many cases, the answer is—“it depends. . .” It’s about more than the words.



- Admiral Arleigh A. Burke
- U.S. Navy Admiral, Chief of Naval Operations during Eisenhower and Kennedy administrations
- Relation to ethics and trust

Ethics & Trust Quote – Slide 49

Talking Points

- ✓ Display slide
- ✓ Ask a volunteer to read the quote
- ✓ Ask a volunteer to share background information about Admiral Arleigh A. Burke. State the following if not shared: Arleigh A. Burke was a distinguished admiral in the U.S. Navy who served as Chief of Naval Operations. He was decorated as a war hero for combat against Japanese naval forces in World War II.
- ✓ As we examine ethics and trust in relation to leadership, we will discuss how the two are commonly intertwined and are integral to strong and effective leadership so we should start with defining them.



Ethics & Trust Quote

- ❑ Admiral Arleigh A. Burke
- ❑ U.S. Navy Admiral, Chief of Naval Operations during Eisenhower and Kennedy administrations
- ❑ Relation to ethics and trust

Ethics & Trust Quote – Slide 49 cont.

Talking Points

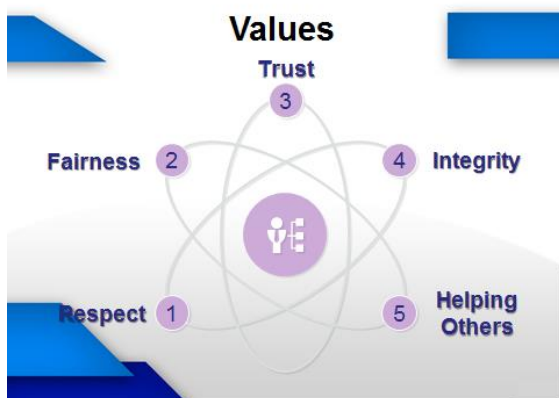
- ✓ Instruct groups to complete Activity 5.1 on page 24 and select a notetaker and a spokesperson
- ✓ Explain that we will be using a Mind Map
- ✓ State that we use it as a diagram that provides a visual image for how information is organized; It can show relationships among words, concepts, or items
- ✓ After completion of 5.1, each group should define ethics and define trust using the results from the Mind Map
- ✓ Allow 20 minutes for completion
- ✓ Have groups share their results; Ask why it can be useful to examine differences in our Mind Maps for ethics
- ✓ Inform participants that definitions similar to the following can be used:
 - Ethics – A set of principles of right conduct (according to thefreedictionary.com)
 - Trust – Firm belief in the integrity ability, or character of a person or thing; Confidence or reliance (according to thefreedictionary.com)

Ethics & Trust Quote

- ❑ Admiral Arleigh A. Burke
- ❑ U.S. Navy Admiral, Chief of Naval Operations during Eisenhower and Kennedy administrations
- ❑ Relation to ethics and trust

Ethics & Trust Quote – Slide 49 cont. Talking Points

- ✓ Explain that if we want to promote ethics and trust, we must practice it. As we practice it, we are leading by example with demonstration of the behavior to be modeled. This starts with self-awareness. We will review a sample Ethics Survey. You can complete this on page 25 or using the same app used for our questions.
- ✓ State that this survey can simply assist in increasing your awareness of your ethical behavior which can be indicated by the number of items for which you responded with “Yes.” The other items can help you identify where ethical practices may require more focus or even reexamination.
- ✓ Instruct participants to go to Kahoot! (or the poll app or site) for the next question about ethics and values



Values – Slide 50

Talking Points



- ✓ Display slide and ask participants to turn to page 26
- ✓ Share poll results after waiting for poll completion
- ✓ Ask someone to explain how values relate to ethics
- ✓ Read slide and state that these represent examples of values. They may be personal/company values.
- ✓ Give two examples of your own personal values as the facilitator (e.g. honesty, self-improvement, development); Explain that someone else may have a value as “Don’t get caught.”
- ✓ Ask participants to fill in their personal values on page 26 and their company values if known
- ✓ Summarize by stating that if there is not alignment, it can lead to conflict and inner struggle for a leader





Making Ethical Decisions – Slide 51

Talking Points

- ✓ Display and read slide
- ✓ Ask participants to fill in the steps from the slide on page 26
- ✓ Instruct participants to go to page 27 and answer the three questions
- ✓ Summarize by explaining that it is necessary to distinguish between competing choices while taking consequences into account when making ethical decisions.



Ethics & Trust – Slide 52

Talking Points



- ✓ Display slide
- ✓ Read slide
- ✓ Inform participants that the next activity will be a strolling buffet they will create for ethics and trust
- ✓ Assign each group a category:
 - 1) Challenges; 2) Benefits;
 - 3) Consistency; 4) Trust Builders;
 - 5) Other



Ethics & Trust – Slide 52 cont.

Talking Points

- ✓ Give the following instructions:
 - Label flipchart with category
 - Create a group name
 - Each group will have two minutes to fill in as many items as you can on the flipchart for the category without repeating what another group has listed; Indicate your group name next to each item you list
 - After two minutes, you will move to the next flipchart (clockwise in the room) when I notify you to “Switch” for each round change
 - Conduct rounds until each group has visited each flipchart
- ✓ Assign a volunteer to read each category
- ✓ Assign 10 points for each item (repeated answers receive 0 points); Tally points by group (wait until Day 3 if short on time)
- ✓ Summarize by stating that accessing a deeper level of personal awareness is strong factor in the path to effectively leading others as you build a relationship of trust as a leader.





Ethics & Trust in Action – Slide 53

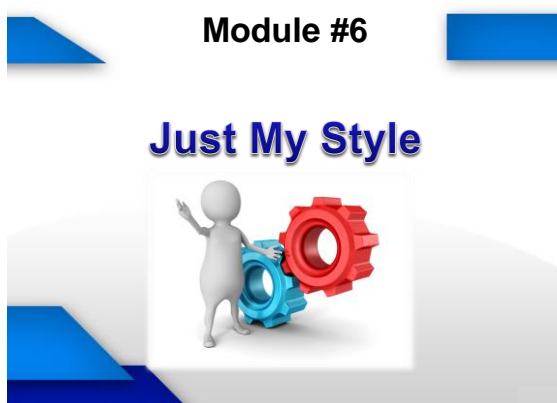
Talking Points



- ✓ Display slide
- ✓ Read slide
- ✓ Distribute one case study sheet to each group
- ✓ Assign each group a case
- ✓ Give the following instructions:
 - Read your case study
 - Determine the issue(s)
 - Identify the internal and external factors
 - Follow the “Steps for Making Ethical Decisions” to determine what you will do
 - Assign a spokesperson and notetaker
- ✓ Allow 20 minutes for completion
- ✓ Have each group report their decisions and explain the reasons
- ✓ Summarize by stating that challenging situations can drive good discussions on ethics in helping to determine the right thing to do, implement effective ethical action, or design an effective strategy for preventing future ethical obstacles.



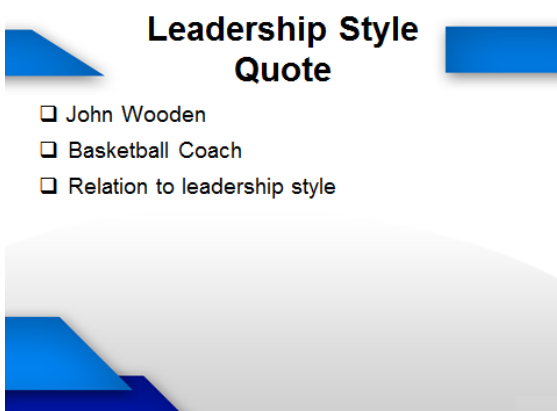
Module #6: Just My Style



Module #6: Just My Style – Slide 54

Talking Points

- ✓ Display slide and ask participants to turn to page 29
- ✓ Introduce module by reading slide
- ✓ In an article titled 7 Core Beliefs,* Dr. Travis Bradberry stated, “Employees are individuals, not clones.” He explained that mediocre leaders use the same method to motivate, reward, and teach all employees. Above average leaders treat others like individuals and respect them as such. They recognize that each person is different in their learning style and motivation. Dynamic leaders continue nonstop to understand what drives each employee and makes them tick as an individual. Let’s talk about another example of a great leader. (*From <http://www.talentsmart.com/articles/7-Core-Beliefs-Of-Great-Bosses-2147446696-p-1.html>)



Leadership Style Quote – Slide 55

Talking Points

- ✓ Display slide
- ✓ Ask a volunteer to read the quote
- ✓ Ask a volunteer to share background information about John Wooden.
- ✓ If not shared, discuss the following about John Wooden:
 - First to be honored in the Basketball Hall of Fame as a player and a coach

Leadership Style Quote

- John Wooden
- Basketball Coach
- Relation to leadership style



Leadership Style Quote – Slide 55 cont. Talking Points

- Had a record of 10 national championships
- Author who received Reagan Distinguished American Award and Presidential Medal of Freedom
- ✓ Display slide
- ✓ Ask a volunteer to read the quote
- ✓ Ask a volunteer to share background information about John Wooden.
- ✓ If not shared, discuss the following about John Wooden:
 - First to be honored in the Basketball Hall of Fame as a player and a coach
 - Had a record of 10 national championships
 - Author who received Reagan Distinguished American Award and Presidential Medal of Freedom
- ✓ As a coach and model for his teams, Wooden was able to influence his players through the strength of character he demonstrated. Character is something he viewed as an essential element for great leaders.

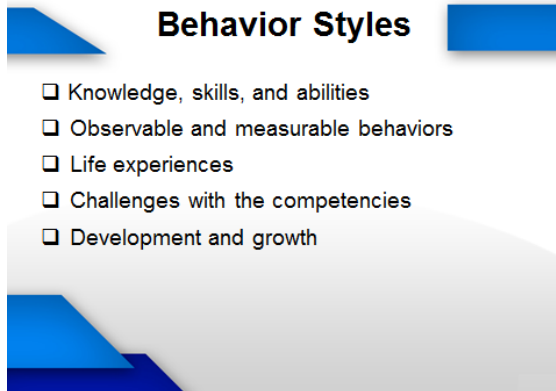




Why You Act the Way You Do – Slide 56

Talking Points

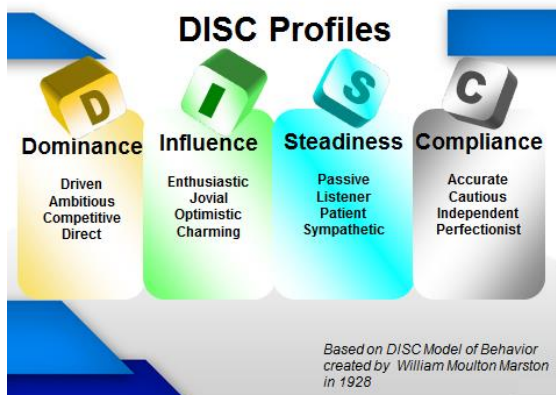
- ✓ Display slide
- ✓ Explain that leadership is not automatic as it must develop over time as a result of one's experiences and the conditioning of behavior. Behavior styles provide insight on understanding your influence with others, how they respond to you, and your perception of others (LaHaye, 1984). Habits, past experience, temperament, and motivation give insight to why you act the way you do.
- ✓ Read slide



Behavior Styles – Slide 57

Talking Points

- ✓ Display slide and have participants turn to page 30
- ✓ Read slide
- ✓ State that these are some of the factors that make us who we are and the type of leaders that interact with others in the manner in which we do. Many assessments of behavior have been created.
- ✓ Ask for examples (e.g. AcuMax, DISC, Myers-Briggs)

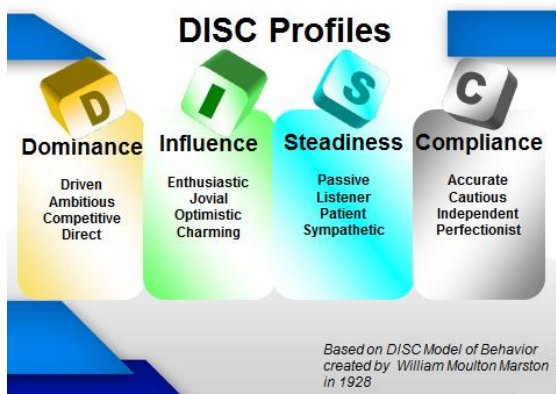


DISC Profiles – Slide 58

Talking Points

- ✓ Display slide and ask participants to turn to page 30
- ✓ Ask for volunteers to share additional DISC knowledge
- ✓ Read slide with descriptions of the profiles which are also the advantages of these behavior styles
- ✓ Share that we all have a combination of the four styles but we tend to exhibit behaviors that are most like one or two of them. Due to the length of the session, we will not be completing assessments to determine your style. However, there are a number of tools that allow you to do this.
- ✓ Lead discussion of **disadvantages** with each behavior such as:
 - Dominance: Intimidating, insensitive, impatient, demanding
 - Influence: Superficial, lacks detail, impulsive, irritating
 - Steadiness: Indecisive, passive, slow, sensitive
 - Compliance: Aloof, calculating, condescending, perfectionist





DISC Profiles – Slide 58 cont.

Talking Points



- ✓ Share the following hypothetical situation: You and your team must promote an idea for an employee team building outing to the rest of your team who happen to be one particular behavior style. What approach will you use to get them on board? These presentations will be a type of commercial.
- ✓ Give the following instructions:
 - Assign each group a behavior style to focus on for their approach (one per group)
 - Remind groups to refer to information previously discussed
 - Presentations should be five (5) minutes or less and each group member must participate
 - Allow 10 minutes for groups to prepare
- ✓ After 10 minutes, have each group present.
- ✓ Explain that the various approaches you shared for the different behavior styles equip us with a better understanding of ways to adapt to behavior styles which may be different from our own. We will use what you have shared from your groups for the next activity.



Behavior Style in Action



Behavior Style in Action – Slide 59

Talking Points



- ✓ Display slide and ask participants to turn to page 31 (If short on time, use this for the Day 3 Opening Exercise)
- ✓ Read slide
- ✓ Inform groups that we will use this for the closing activity on this topic.
- ✓ Assign Situation A, B, C or D to each group. Give the following instructions for the role play:
 - Read the situation assigned to your group
 - Review each behavior style from previous discussion
 - Determine how supervisors with each of the four behavior styles would respond in the assigned situation
- ✓ Summarize by stating, that leaders who are able to adapt their behavior style to meet the needs of their followers and the situations are more effective because they can grow from their experiences. Successful people understand themselves and the effects their behavior has on others.





Day 2 Summary – Slide 60

Talking Points

- ✓ Display slide
- ✓ Read slide
- ✓ Request participants to return playing cards received
- ✓ Confirm tally of each group's points received for the day
- ✓ Ask participants to capture closing thoughts for the three modules on their notes pages for future reference in their Action Plan.
- ✓ Close Day 2 of the workshop and remind participants to bring their manuals back for Day 3 of the workshop.



Guide for Workshop Day 3

Training Note

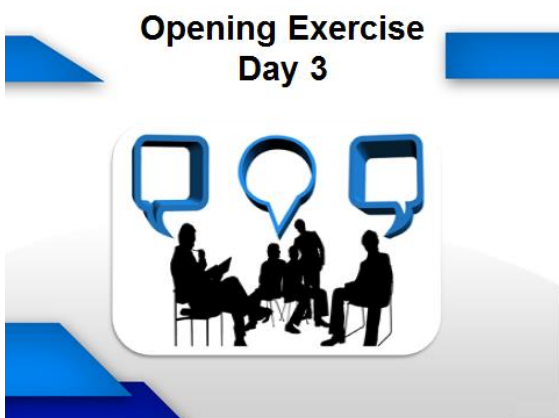
- + Greet attendees as they enter and ask them to sign in on sign-in sheet for Day 3
- + Welcome group and start workshop Day 3 at scheduled start time
- + Confirm that attendees brought their manuals back for Day 3



Welcome to Day 3 – Slide 61

Talking Points

- ✓ Display slide
- ✓ Give overview for Day 2 by reading slide
- ✓ Review module titles from Day 1
- ✓ Introduce the Opening Exercise as a way to review Day 1 modules
- ✓ Distribute playing cards to each group with enough for each person to receive a card

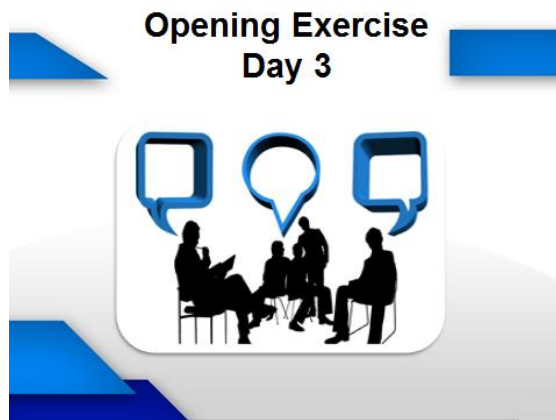


Welcome to Day 3 – Slide 62

Talking Points



- ✓ Display slide and have participants turn to page 31
- ✓ Give the following instructions:
 - Create a role play for the situation assigned to your group from Day 2; Use one behavior style example from the four responses prepared by your group



Welcome to Day 3 – Slide 62 cont.

Talking Points



- ✓ After 10 minutes, have each group present; Allow other groups to give feedback
- ✓ Explain that we have completed the topics on setting goals, ethics and trust in decision making and behavior styles which build us up to progress to the coaching module and the collaboration and teamwork modules.
 - Include the use of S.M.A.R.T. goal setting and making ethical decisions in your role play based on what was covered on Day 2
 - Take 10 minutes to prepare a role play that is no longer than 5 minutes

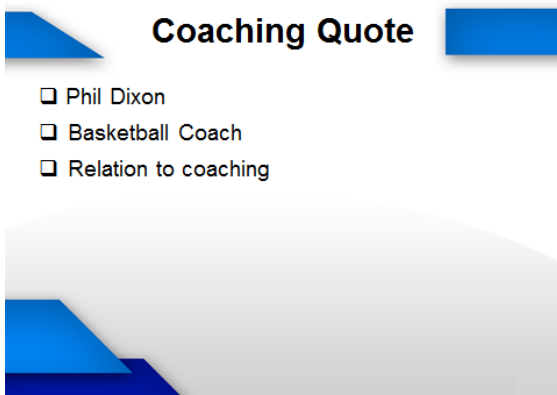
Module #7: Coaching at Its Best



Module #7: Coaching at Its Best – Slide 63

Talking Points

- ✓ Display slide and ask participants to turn to page 34
- ✓ Introduce module by reading slide
- ✓ State that an annual world poll by Gallup used dozens of questions to measure the happiness of individuals in over 140 countries. They concluded that factors that affect responses are physical health, social relationships/daily happiness, overall outlook on life, and others. (National Geographic, November 2017).
- ✓ Explain that coaching someone requires steps to be taken to understand what motivates them, what their desires are, and what makes them happy



Coaching Quote – Slide 64

Talking Points

- ✓ Display slide
- ✓ Ask a volunteer to read the quote
- ✓ Ask a volunteer to share background information about Phil Dixon
- ✓ If not shared, state that Phil Dixon was a gold medalist champion several times; Head Coach of the Mississauga Wolverines Youth Basketball Team in Canada

Coaching Quote

- Phil Dixon
- Basketball Coach
- Relation to coaching



Coaching Quote – Slide 64 cont.

Talking Points

- ✓ In the world of sports today, we are motivated and uplifted by the work and performance we see in the sports genre under the leadership of coaches such as Bill Belichick of the New England Patriots and Mike Krzyzewski of Duke University. It's no wonder that coaching has made its way into business acumen. It's the development of relationship into a partnership with goals identified to achieve certain outcomes resulting in performance improvement for the person being coached.



Coaches' Hall of Fame



Coaches' Hall of Fame – Slide 65

Talking Points



- ✓ Display slide
- ✓ Read slide
- ✓ Ask a volunteer to read the instructions for 7.1 and have participants complete it
- ✓ Give the following instructions:
 - Based on the persons identified in 7.1, ask participants to work in their groups to identify characteristics we look for in a coach.
 - Select a spokesperson and a notetaker for the group



Coaches' Hall of Fame – Slide 65 cont.

Talking Points

- Fill in the characteristics on the spokes of the star on page 35
- Instruct groups to take 15 minutes to complete both activities
- ✓ After 15 minutes, have each group share one person's responses for page 34 and three characteristics from page 35



Coaching Defined – Slide 66

Talking Points

- ✓ Display slide
- ✓ Read slide
- ✓ Explain that these and other characteristics are what we look for in a coach
- ✓ State that we want to go back to the top of page 35 and establish a definition along with descriptions
- ✓ Define “coaching” as a method of unlocking potential through directing, instructing and training a person or group of people, with the aim to achieve some goal or develop specific skills leading to maximum performance. Explain that other similar definitions can be used as well.



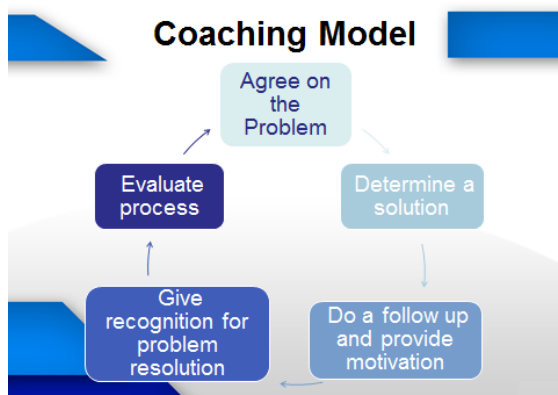
Coaching Defined – Slide 66 cont.

Talking Points

- ✓ State the following and ask participants to share additional items:
 - A coach gives: *their time, assistance in goal setting, feedback, recognition, etc.*
 - A coach needs to: *observe, encourage, facilitate, direct, etc.*



- ✓ State that we have defined coaching, described the characteristics, and discussed function of the role
- ✓ Explain that when the situation warrants due to performance issues, a coaching model should be applied
- ✓ Distribute the Coaching Model envelope to each group but instruct them to keep them sealed
- ✓ Inform participants that they will be given two minutes to open the envelope and place the steps for The Coaching Model in the correct order. They must explain the order they



Coaching Model – Slide 67

Talking Points



- ✓ Display slide
- ✓ Read slide
- ✓ Ask groups to share results
- ✓ Assign 10 points to group that had the correct order
- ✓ Ask each group to provide a description of one step
- ✓ First group describes the first step, etc.
- ✓
- ✓ After all steps have been covered, explain that the success of the model is contingent on a number of factors such as the relationship between the coach and the protégé along with the coach's knowledge of what motivates them.
- ✓ Discuss the GROW Model which is a popular coaching model as well: G=Goal, R=Current Reality, O=Options (or Obstacles), and W=Will (or Way Forward) but it lacks several added steps we are using
- ✓ We can highlight Maslow's Hierarchy of Needs which is a motivational theory that was introduced in 1943.
- ✓ Instruct participants to go to Kahoot! (or the poll app or site) to do the next question which is about Maslow's Hierarchy of Needs
- ✓ Share results after waiting for completion





Maslow's Hierarchy of Needs (Motivation) – Slide 68

Talking Points

- ✓ Display slide
- ✓ Read slide
- ✓ Discuss each level of the hierarchy by asking volunteers to share
- ✓ State that motivation is the catalyst for all behavior. An effective coach works to create an environment where individuals are able to motivate themselves. Other theories have been created to provide insight on motivation.
- ✓ Ask for examples of other theories that exist
- ✓ Maslow's Hierarchy of Needs begins with basic needs at the Physiological Level and needs at other levels are higher up. Various others have shared opinions proposing that the needs do not have to be met in this order.
- ✓ Using rewards and recognition for providing motivation and support for employees can be effective as well. Ask volunteers to share examples of when coaches would use them.
- ✓ Summarize by stating strong consideration must be given to the fact that a manager has employees with different skills, attitudes, and knowledge, which compares to an athletic coach who will always have different types of players. Both situations require the coach/manager to accept the challenge of molding the player while they accomplish their own goals.



Coaching in Action – Slide 69

Talking Points



- ✓ Display slide
- ✓ Read slide
- ✓ Introduce closing exercise for topic by informing participants that they will practice use of The Coaching Model
- ✓ Give the following instructions:
 - Partner up in groups of 2 or 3
 - Make the person with the highest card the coach; Other person(s) will be the protégé(s) being coached
 - Select one of the following tasks to use for the coaching exercise:
 - Tying a shoe
 - Making a paper airplane
 - Drawing picture of a house
 - Downloading an app
 - Accessing the web on a cell phone
 - Other options – allow for a different idea if approved
 - Coaches will model the task for the persons being coached
 - Protégés will perform the task
 - Coaches and protégés carry out the steps in The Coaching Model (allow 15 minutes prep)
 - Take notes on what happened
 - Groups should be prepared to report on any of the following:
 - What went well?
 - What was a challenge?
 - How can this benefit the coach, the protégé, and organization?

Coaching in Action



Coaching in Action – Slide 69 cont.

Talking Points

- What do you expect to work well with the model back on the job?
 - What do you foresee as a challenge in applying the model on the job?
 - What resources can you utilize to support you with the challenges?
- ✓ Request groups to report out in response to any of the above questions
 - ✓ Summarize by stating that the success of The Coaching Model depends on the commitment of those involved as well as other factors in the relationship—communication, trust, motivation, support and more. It will be what the parties involved choose to make it.



Module #8: It Takes Two—Collaboration & Teamwork



Module #8 – Slide 70

Talking Points

- ✓ Display slide and ask participants to turn to page 38
- ✓ Introduce module by reading slide
- ✓ State that in this last module before the summary module, we move into a topic where we have the opportunity to apply all previous topics.
- ✓ Share a story of your own that may be similar to the following: One of my favorite movies is “Armageddon” which stars Bruce Willis. The movie centers around a meteor that is en route to destroy the Earth. The government determines that only one person can save them and it’s Bruce Willis because he is the world’s best driller. When he receives the request and everything is explained to them, his response is that he is only the best because of his team. It is not him alone.
- ✓ Explain that only confident and secure leaders of integrity can truly admit that it is their team that enables them to be effective and capable of performing.



Teamwork Quote

- Ken Blanchard
- Author and Management Expert
- Relation to teamwork

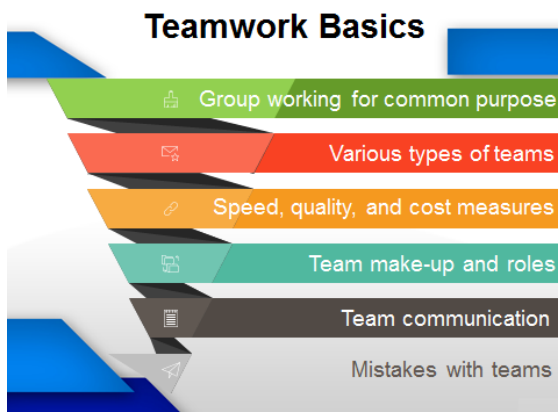


Teamwork Quote – Slide 71

Talking Points

- ✓ Display slide
- ✓ Ask a volunteer to read the quote
- ✓ Ask a volunteer to share background information about Ken Blanchard and how he can be related to our teamwork. Add the following if it is not shared: Ken Blanchard is best known as an author and management expert. He is a strong promoter of employee engagement. His business consulting services and powerful messages have made him a popular and sought-after leader for his expertise and influence.



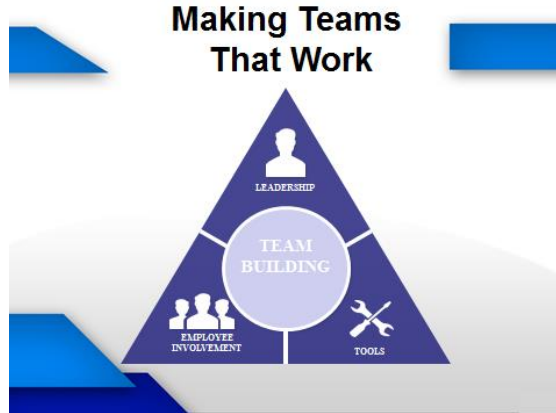


Teamwork Basics – Slide 72

Talking Points

- ✓ Display slide
- ✓ Read slide
- ✓ Ask participants to take 15 minutes to complete page 38 individually
- ✓ Request volunteers to share responses to page 38; Definition of team: A group of individuals working together for a common purpose, who must rely on each other to achieve mutually defined results
- ✓ Discuss some experiences in working with teams: Process improvement teams, special project teams, cleaning project teams, school teams, sports teams, game competition teams, etc.
- ✓ Explain that the leader should not be seeking power and control but collaboration from the team. No one person has all of the answers so the use of many individual contributions allows the leader to get more input. The leader must be the one to promote a culture of teamwork in the work environment if the team will function and operate effectively. Now we want to look at the details involved in making this happen. The leader must be the one to promote a culture of teamwork in the work environment if the team will function and operate effectively. Now we want to look at the details involved in making this happen.



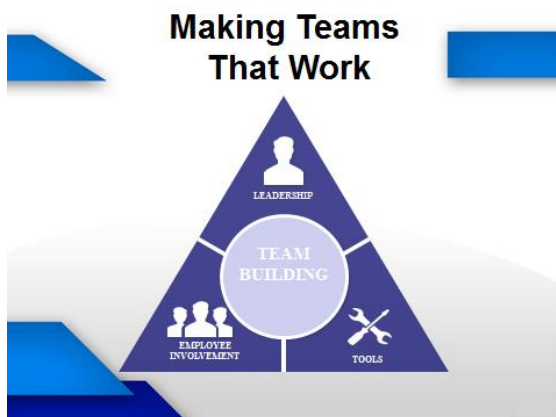


Making Teams That Work – Slide 73

Talking Points



- ✓ Display slide and ask participants to turn to page 39
- ✓ Read slide
- ✓ Ask if a volunteer can share their interpretation of this graphic
- ✓ Explain that we will do the group room tour again. Select three of the flipcharts to be labeled as Leadership, Employee Involvement, and Tools.
- ✓ Give the following instructions:
 - Each group will go to a flipchart and name as many items in the category as they can until the time ends and they are told to rotate.
 - Each group will have two minutes at each flipchart.
 - Groups will be based on the cards: odd numbers, even numbers, and face cards will be used for group assignment
 - Groups will move in the clockwise direction until each group has been to all three flipcharts.



**Making Teams That Work –
Slide 73 cont.**

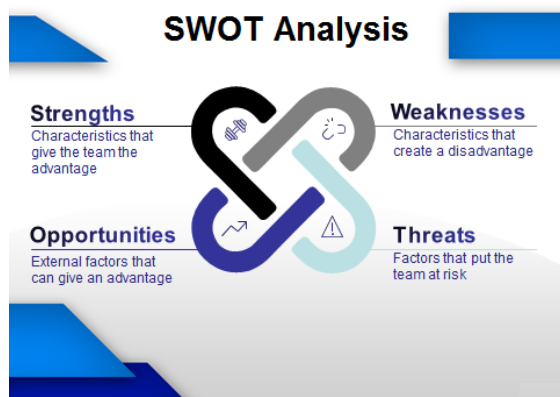
Talking Points

- Groups will fill in tasks for the leadership of the team, tasks for employee involvement or the team members, and tools used by the leader and the team.



- ✓ Conduct the activity starting with the timer set for the first 2-minute round.
- ✓ After completion of the activity, have a volunteer for each flipchart read the responses.
- ✓ Discuss brief descriptions of each example listed.
- ✓ Summarize by stating that we have had extensive discussion about different types of leader tasks and some of the resources such as the Vision Elements, Stages of Listening, S.M.A.R.T. Goals, and more. The next tool we will cover stands out from the others. It can be used in a variety of ways such as for a project, a team, or otherwise.



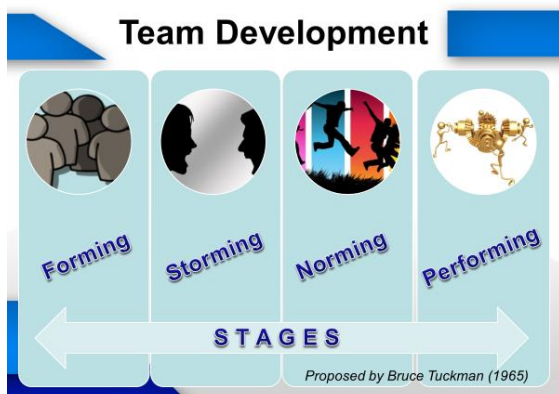


SWOT Analysis – Slide 74

Talking Points



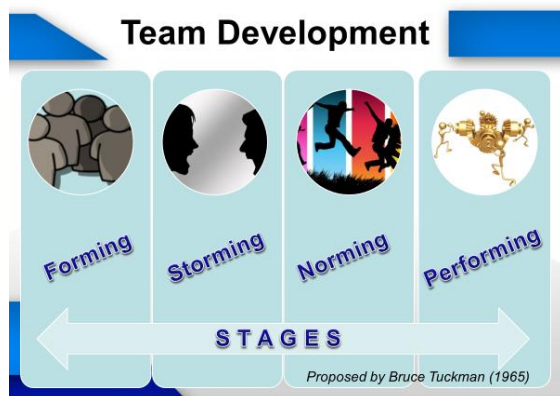
- ✓ Display slide and ask participants to turn to page 40, then Read slide
- ✓ Ask who has ever completed a SWOT Analysis by show of hands; Ask if they found it useful and why
- ✓ State that we have a team project coming soon and we need a SWOT Analysis to assess the team
- ✓ Request each team to take 25 minutes to prepare a SWOT Analysis on the flipchart. The team should assume that they have been assigned one of the following projects which they can choose for this activity:
 - Arrange workplace holiday event
 - Lead change management for new software
 - Establish a volunteer project for the department
 - Complete a process improvement project
- ✓ After 25 minutes, have groups report on results; If short on time, skip questions in lower portion of page 40
- ✓ Summarize by stating that with proper completion of this type of tool, leaders and teams benefit with the ability to capitalize on strengths, overcome weaknesses, exploit opportunities, and counter threats. It offers a well-rounded view of the leader and the team for leveraging.
- ✓ Instruct participants to go to Kahoot! (or the poll app or site) to do the next question which is about the phases of team development
- ✓ Share results after completion



Team Development – Slide 75

Talking Points

- ✓ Display slide and ask participants to turn to page 41
- ✓ Read slide
- ✓ Introduce topic by emphasizing that the formation of a group does not just happen. You may have worked with some wonderful teams but many of us can attest to the fact that they may not have started that way. (Share a personal experience by telling a story of a team formation.)
- ✓ Discuss how we can look at the four stages and recognize behavioral patterns of the team; Explain the following:
 - Forming – Uncertainty, goals and expectations unclear; Team talks a lot; Team members share opinions to get reactions; Leader creates positive atmosphere; Leader needs to be sensitive to team needing direction; Team members getting acquainted; Minimal work done
 - Storming – Conflict surfaces; Goals still unclear; Team members disagree; Some may pull for informal leadership; Leader must open up conflict and negotiate rules; Low output
 - Norming – Team commits to task; Conflicts worked out; Sense of belonging; Feel pleasure working together; Leader is listener, facilitator; Leader holds celebrations; Moderate to high output



Teamwork Development – Slide 75 cont.

Talking Points

- Performing – Functional team; Innovative team able to problem solve; Empathetic to one another; Communication flowing; Leader provides new direction; High output
- ✓ Share that knowledge of the stages can reinforce a leader’s ability to guide the team through the stages. The Performing Stage is not certain which prompts greater need for effective leadership.



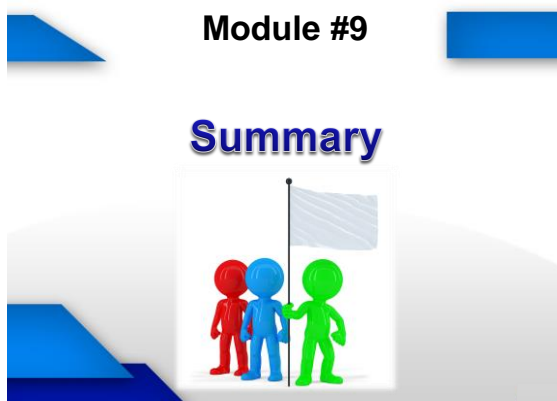
Teamwork in Action – Slide 76

Talking Points



- ✓ Display slide and ask participants to turn to page 42
- ✓ Read slide
- ✓ Introduce the activity by reading the directions on page 42
- ✓ Allow 15 minutes for completion
- ✓ Ask each group to share their team’s situation and the decisions made

Module #9: Summary



Module #9: Summary – Slide 77

Talking Points

- ✓ Display slide and ask participants to turn to page 44
- ✓ Introduce module by stating that we will summarize the previous modules in this segment
- ✓ State that we have now approached the final module to bring everything together. According to a Talent Development 2016 article, “Leaders grow fastest when given accurate, detailed, and actionable information about the gap between their current skills and future potential.” We have covered so much in these three days.



YOU Are the Leader – Slide 78

Talking Points

- ✓ Display slide and instruct participants to fill in the items from the slide on page 44; Tell them to skip “Leadership at the Core”
- ✓ Ask participants to turn to page 45
- ✓ Recap the modules that have been covered
- ✓ Explain that the Leader’s PRINT is an acronym for the following:
 - P – Plan your steps
 - R – Review work to be done
 - I – Implement the plan
 - N – Notify those involved
 - T – Train your team as needed
- ✓ Ask participants to explain how this could be useful

Summary Quote

- Lisa Haisha
- Counselor, Humanitarian, Researcher, Speaker
- Relation to leadership

YOU Are the Leader – Slide 78 cont.

Talking Points

- ✓ Instruct participants to complete page 45 with a partner; Allow 20 minutes for completion
- ✓ Ask 1-2 volunteers from each table/group to share responses for each letter

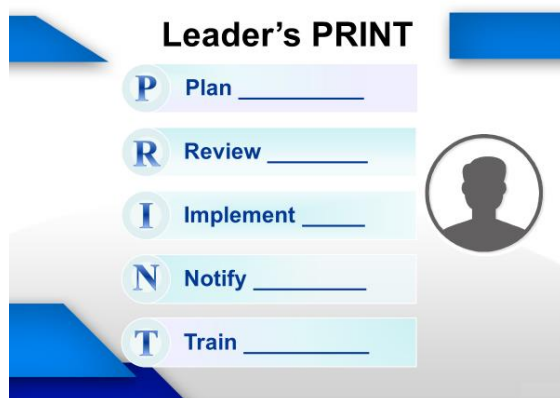
YOU Are the Leader



YOU Are the Leader – Slide 79

Talking Points

- ✓ Display slide and instruct participants to fill in the items from the slide on page 44; Tell them to skip “Leadership at the Core”
- ✓ Recap the modules that have been covered
- ✓ Explain that we want to take a few minutes to apply your Leader’s PRINT on the next slide



YOU Are the Leader – Slide 80

Talking Points

- ✓ Display slide
- ✓ Ask participants to turn to page 45
- ✓ State that the Leader's PRINT will be an exercise to help get them thinking about items for their Action Plan
- ✓ Explain that the Leader's PRINT is an acronym for the following:
 - P – Plan your steps
 - R – Review work to be done
 - I – Implement the plan
 - N – Notify those involved
 - T – Train your team as needed
- ✓ Ask participants to fill in the phrases on page 45
- ✓ Read the phrases again and allow time for participants to write them; Repeat them as needed
- ✓ Ask a different volunteer to explain how they can apply each phrase in the Leader's PRINT to the modules that have been covered over the three days; State that there are various ways to apply this just like there are various ways to look at one picture and see something different
- ✓ Provide the following example: As a leader, I want to plan the steps I take in communicating my vision to my team and the action taken to achieve it.
- ✓ Close this segment by stating that leadership is not a one-size-fits-all and that is one reason you have a Leader's PRINT but you must use it

Leader's PRINT


P Plan _____

R Review _____

I Implement _____

N Notify _____

T Train _____



Leader's PRINT – Slide 80 cont.

Talking Points



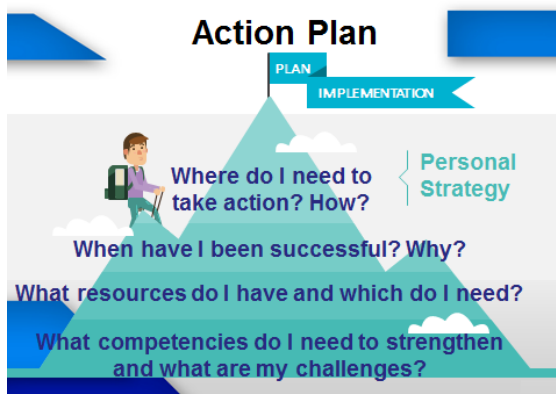
- ✓ Introduce the final activity
- ✓ Give the following instructions:
 - Each group will role play a situation
 - Every group member must participate
 - The role play must apply a skill from at least four (4) modules
 - Sample situations may include: 1) staff meeting; 2) supervisor and employee; 3) employee sharing problem w/co-worker; 4) customer and employee; and others.
 - Each group will have 20 minutes to prepare a 5-minute role play



- ✓ Allow 20 minutes for group preparation
- ✓ Have each group present for five (5) minutes each and Lessons Learned Exercise on page 46.
- ✓ Review directions with participants. State that they use this information to complete the Action Plan.



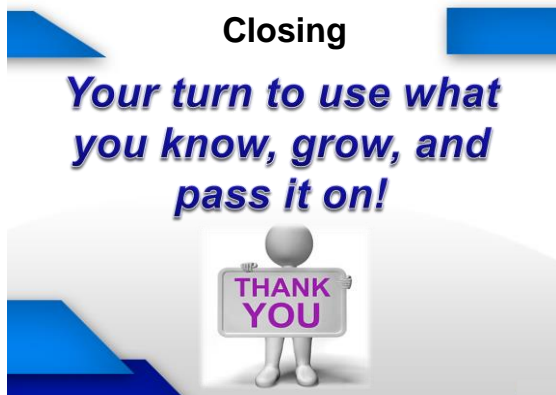
- ✓ Complete a final tally of group points for all three days and congratulate the winning team



Action Plan – Slide 81

Talking Points

- ✓ Display slide and ask participants to turn to page 48
- ✓ State that we are at the end of the course and at this time we will complete an Action Plan based on what we have covered in the workshop (if short on time, have participants complete on their own time)
- ✓ Review the items and questions on page 48 to ensure participants understand
- ✓ Allow 25-30 minutes for completion
- ✓ After completion of Action Plan, let participants know you would like to get their feedback



Closing – Slide 82

Talking Points

- ✓ Display slide
- ✓ Read slide
- ✓ Distribute postcards (or index cards) to all participants
- ✓ Have employees complete workshop evaluations (hard copies or app)
- ✓ Ask participants to address cards to themselves on one side and list the top three items they will work on within the next 30 days on the other side
- ✓ Inform them that the cards will be mailed to them after 30 days

Closing

***Your turn to use what
you know, grow, and
pass it on!***



Closing – Slide 82 cont.

Talking Points

- ✓ Close with the following statement or an alternative:
“I encourage everyone to use your enhanced knowledge and skills to continue working on mastering your leadership competencies based on your personal self-insight. Your development as a leader is also largely dependent on helping to promote the development of others around you.”
- ✓ Remind participants to refer back to their notes in their manuals
- ✓ Offer your contact information (business card, email, etc.)
- ✓ Inform participants that their supervisors will receive a 30-day follow-up survey to ask about their work performance since the training
- ✓ Thank participants for attending the workshop and tell them to enjoy the remainder of their day.

Action Plan

How do you plan to apply what you have learned from the workshop?

Vision: _____

Effective Communication: _____

Setting Goals: _____

Ethics & Trust: _____

Coaching: _____

What area(s) from the workshop will be your primary focus for the next 30 days?

Who will you use for your support network to measure your progress in those areas?

In what area(s) do you feel you need more training/development, if any?

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Appendix A: Kahoot! Questions & Items

Facilitator Instructions: Use Kahoot! or another game-based learning app or software to upload polling, survey, and learning items to be used during the workshop for participants to respond throughout various modules. Any app or software used should be set up and tested prior to conducting the workshop. All questions and items should be created and entered prior to conducting the workshop.

Item	Module	Category	Question/Item Format	Answer Options
1)	N/A	Survey	Are you functioning in the role of a leader?	Yes or No
2)	#1	Quiz	Colonel Dandridge Malone was best known for his leadership and service in the US Marines Corp.	True or False Correct Answer: False; He was in the US Army
3)	#1	Discussion	Which statement is false?	A. Management and leadership are the same B. Managers have workers and leaders have followers C. Managers have power and leaders have influence D. None of the above Correct Answer: D
4)	#2	Quiz	Which was not applicable to Warren Bennis?	A. Counselor B. Professor C. Veteran D. Writer Correct Answer: A
5)	#2	Jumble	Name three (3) basic elements that are integral to a vision.	A. Future B. Purpose C. Values Correct Answer: any answers

Item	Module	Category	Question/Item Format	Answer Options
6)	#3	Jumble	Create the equation to represent this statement for communication: “Voice tone% + words% + body language% = communication”	100%, 55%, 38%, 7% Correct Answer: 38% + 7% + 55% = 100%
7)	#3	Quiz	What are the Stages of Listening in the correct order?	A. Encoding, Selecting Medium, Transmission of Message, Receiving, Decoding B. Focusing, Interpreting, Analyzing, Remembering, Responding C. Receiving, Understanding, Remembering, Evaluating, Responding D. Selecting, Hearing, Understanding, Interpreting, Analyzing Correct Answer: C
8)	#4	Quiz	Which of the following is an example of a SMART goal?	A. Achieve 25% decrease in employee turnover by the end of current fiscal year B. Create a vision and share w/team soon C. Increase sales by 10% before reports are due D. Prepare a thorough and detailed proposal for executive team meeting Correct Answer: A.

Item	Module	Category	Question/Item Format	Answer Options
9)	#5	Survey	See Appendix B: Ethics Survey	N/A
10)	#5	Discussion	Which of the following is(are) true?	A. Ethics are beliefs of what is right or wrong B. Values and ethics are the same C. Values can be good or bad D. All of the above Correct Answer: A and C only
11)	#6	Jumble	Match each of the following sample characters to one of the DISC behavior profiles: Spiderman, Superman, Batman, Luke Skywalker	D – Dominant I – Influence S – Steadiness C – Compliance Correct Answer: I, C, D, S
12)	#7	Discussion	Which need in Maslow’s Hierarchy of Needs is the next level above Safety?	A. Esteem B. Physiological C. Self-Actualization D. Social Correct Answer: D
13)	#8	Jumble	State the order of the phases of team development.	Performing, Norming, Forming, Storming Correct Answer: Forming, Storming, Norming, Performing

Appendix B: Can You Hear Me Now?

Facilitator Instructions: Distribute a sheet of cardstock to each participant (or leave a stack of cardstock on each table with enough for each person). Explain that this activity is focusing on the importance of words, meaning of words to the recipient, and the relation to personal experience and memories. Share that the goal of the activity is for a person on your team to guess the song that is stated in other words (repeat words only once) but they only have 20 seconds. During that time, they will use a marker to write down their best guess on the cardstock in large letters. After 20 seconds, you will ask the participants to raise the sheet of cardstock to reveal their answers. Teams will receive 10 pts for each correct answer.

Inform participants that the order on their team will be as follows based on their card:

- Item #1: Participant w/Jack
- Item #2: Participant w/Queen
- Item #3: Participant w/King
- Item #4: Participant w/Ace
- Item #5: Participant w/10

Let them know that you will read a phrase and when it is their turn, they must guess the song. For example:

Phrase: “Employed for a Full Day”
 Answer: “Working 9 to 5”

Item	Phrase	Song
1)	A Difficult 24 Hours of an Evening	A Hard Day’s Night
2)	Step in the Indicated Manner	Walk This Way
3)	Continue Existing	Stayin’ Alive
4)	I Desire to Prance with Anyone	I Wanna Dance with Somebody
5)	Prison Home Music	Jailhouse Rock

Appendix C: Exercise—Open-Ended & Closed-Ended Questions

Facilitator Instructions: Have participants complete these items on their own. A variety of answers may apply. The answers below can be used if needed. Remind participants that closed-ended questions require a “Yes” or “No” response only. However, open-ended questions cannot be answered with a simple “Yes” or “No” response.

Question #1 Example: Employee requested to complete task

C: Can you submit the proposal by the deadline tomorrow?

O: What will you submit for the proposal tomorrow?

Question #2 Example: Inquire if your team of subordinates has questions

C: Does anyone on the team have any questions?

O: What questions do you have about this assignment?

Question #3 Example: Find out availability of an employee to attend a meeting

C: Do you have a staff member available to attend the status meeting?

O: Who will you request attend the status meeting to represent your team?

Question #4 Example: Ask about completion of a project report

C: Is the project report complete?

O: What additional information is required in order for you to complete the project report?

Question #5 Example: Obtain feedback on how an employee will correct a problem

C: Did you have a recommendation on what to do to correct this error?

O: What do you suggest that we do to correct this error?

Appendix D: Ethics Survey

(for Optional Upload to App or Software with Module #5)

1. Does your organization have a Code of Ethics? If not, skip to Question #4.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
2. Do you understand your organization's Code of Ethics?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
3. Do you ensure that your employees understand the organization's Code of Ethics?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
4. Do you clearly communicate your expectations for ethical practice to your employees?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
5. Do you hold your employees accountable for ethical standards?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
6. Do you make a conscious effort to be a role model for ethical behavior?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
7. Do you initiate discussions of ethical concerns?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
8. Do you consider ethical issues that may be relevant when making management decisions?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
9. Do you keep the promises you make?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
10. Do you use your authority strictly to fulfill your responsibilities and not for self-interest or to further the interests of family, friends, or associates?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
11. Do you explicitly acknowledge your employees' contributions to promoting ethical practice?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
12. Does someone hold you accountable for meeting high ethical standards?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
13. Do you seek advice on ethical issues from someone with ethics expertise or refer to published resources when needed?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
14. Do you apply a standardized process when making decisions on management issues with ethical implications?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
15. Do you explain the foundational values when you communicate your expectations for ethical behavior?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat

Appendix E: Ethics Case Studies

Case A

Your company has a new vendor for software. The vendor wants to host a kick-off event for the project team at an expensive restaurant with all of the expenses covered by them. This would not be in compliance with company policy. You are the new project leader. The team has informed you that the previous leader was flexible with company policy and found ways to work around them to keep the team happy. You do not want to offend the vendor or disappoint the team. What can you do?

Case B

A supervisor has received complaints about his treatment of his subordinates. He has been transferred a few times to different work areas with the same role. A situation occurred in which he berated and disrespected the department head in a staff meeting. He was reprimanded and suspended but returned to work in a new supervisory role. It is apparent that the organization is protecting him and does not want to terminate him. He is now your supervisor. You are a unit manager. You have had a couple of meetings with your new supervisor with no significant issues but you detected dissatisfaction from him with your work although you have never had issues in your prior 15 years with supervision. In the next meeting, he loses his temper and starts to bully you. What should you do?

Appendix F: The Coaching Model

Facilitator Instructions: Make copies of this page on cardstock or heavy paper. One copy per group is needed. Cut out the boxes with each step along the lines and place the card for each step in an envelope labeled as “The Coaching Model.” Ensure that an envelope is created with cards for each group.

<p style="text-align: center;">The Coaching Model</p>	<p style="text-align: center;">Give recognition for a problem resolution</p>
<p style="text-align: center;">Agree on the problem</p>	<p style="text-align: center;">Do a follow up and provide motivation</p>
<p style="text-align: center;">Determine a solution</p>	<p style="text-align: center;">Evaluate process</p>

Appendix G: Team In-Basket Items

Facilitator Instructions: Create copies of this sheet and cut the slips for the in-basket items to be distributed to groups. Place slips in a basket and allow each group to select one slip to complete for the activity. Explain that there is not a single solution or answer to address these cases. Groups should apply all of the factors from the module for each case below.

1) A new team member has been added to a training team. The training team must design customized training materials for new software to be implemented. The new team member has expertise with the software, but the other team members do not. The team is not very welcoming of the new member and they sometimes withhold information. The team member is trying to ignore the mistreatment and perform to the best of her ability despite the obstacles and resistance. The team supervisor is not much better in terms of her treatment of the new team member. What would you do if you were the new team member?

2) You are a board member with a professional association and you have been serving on this board for three years. The board members have decided to plan a conference for 200 attendees. You are the leader for this project. This is a \$75,000 project which will require participation from all board members. There are nine board members and five are new to the board, including the board president. Although everyone agreed to the project, only several members are actively involved and you have 90 days remaining until the conference takes place. What would you do?

3) Two teams must work together for a process improvement effort with the FMLA (Family Medical Leave Act) administration for employees. One team is experienced in process improvement efforts and the other team is experienced in handling the FMLA administration. The teams must come together for this effort. The supervisors for the teams feel that the combined team needs help in coming together. You are the leader of the new combined team. What five things should you do first?

4) The HR Department initiated an employee engagement team to help boost employee morale, plan activities, and coordinate special events. The team started with 15 volunteers. However, only four team members have remained active for the three extremely successful events that followed. One of the Chief HR Officers is the leader of the team and would like to invite more employees to return to the team. The team does not want to invite more members for fear of the group dynamics changing for the worse. The team wants to wait until they have completed a few more events and have fully established the team because it has been in place less than one year. What should the leader do?

Appendix H: Follow-Up Email to Participants' Supervisors

Facilitator Instructions: Send the content below via email (or Survey Monkey) to participants' supervisors after 30 days following the 3-day workshop. The purpose of this communication is to help determine if there has been a learning transfer with a change in behavior demonstrated on the job by the participants. This change in behavior should reflect improvement in the areas covered in the workshop.

Note: This communication can also be created for completion in Survey Monkey.

Email Message:

This is a follow-up communication to the Leadership Skills for Managers & Supervisors 3-Day Workshop. We are asking you to provide feedback on your employee's work performance for the last 30 days following the workshop. Thank you in advance for your feedback and response within two (2) weeks from today.

Please respond to the following:

- 1) Do you supervise an employee who completed the Leadership Skills for Managers & Supervisors 3-Day Workshop? Yes or No

- 2) My employee demonstrates leadership that reflects:
 - a. Vision being communicated to their subordinates Yes or No
 Explain: _____

 - b. Effective communication via email, phone, and face-to-face Yes or No
 Explain: _____

 - c. Ability to set S.M.A.R.T. goals Yes or No
 Explain: _____

 - d. Ethical decision making and communication of values (personal and/or organizational) Yes or No
 Explain: _____

 - e. Ability to adjust behavior style for improved team interaction Yes or No
 Explain: _____

 - f. Ability to coach subordinates as needed Yes or No
 Explain: _____

g. Initiates team development efforts to promote team effectiveness Yes or No




Explain: _____


h. Use of resources to improve their own leadership growth and development Yes or No

Explain: _____

Appendix I: Generations Reference Guide

Facilitator Instructions: Use these tips and strategies for facilitating groups with the generations below represented.

Generation	Characteristics	Training Suggestions
 <p>Born Before 1946</p>	<p>Like formality and structure Feel training should connect with organization's goals and happens on the job Like informational learning Make good mentors Had radio as primary technology Accustomed to traditional classroom Need tangible recognition</p>	<p>Use their knowledge and experience Ease learners into non-traditional methods with assistance as needed Give them opportunities to mentor Allow for slower cognitive processing due to decline with age Offer certificates, prizes, gift cards, etc. for recognition</p>
 <p>Born 1946 – 1964</p>	<p>Accept authority figures Feel training leads to promotion and higher pay but need face time Like transformational learning Had TV and microwave as primary technology Accustomed to traditional educational methods Need perks, position, and prestige for recognition</p>	<p>May be dependent on educator Include books, manuals, and/or presentations Use data and evidence-based approaches Provide competition (may use gamification) Recognize achievements</p>
 <p>Born 1965 – 1980</p>	<p>Have casual approach to authority Feel training makes them more marketable Like situational learning Had Nintendo, PC, and handheld devices as primary technology Receptive to e-learning Give and receive feedback</p>	<p>Have a tendency for self-directed learning Include multi-media Use case studies and practical applications Give immediate and direct feedback Provide frequent use of Q&A</p>

<p>Millennials</p>  <p>Born 1981 – 2000</p>	<p>Not as respectful of authority as others</p> <p>Feel training should be self-directed</p> <p>Like informal, incidental learning</p> <p>Had Wii, Xbox, internet, and intangibles for primary technology</p> <p>Need and welcome mentoring</p> <p>Receptive to multimedia in classroom</p>	<p>Limit use of excessive text</p> <p>Use latest technology options</p> <p>Give opportunities to be mentored</p> <p>Give clear direction and immediate feedback</p> <p>Promote collaboration with technology</p>
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Leadership Skills for **MANAGERS & SUPERVISORS**



Leadership Skills for
MANAGERS & SUPERVISORS



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Walden University
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About This Workshop

Use this Participant Manual as a guide for participants attending the three-day program. Activities and exercises are included and will be facilitated by a workshop facilitator who will provide additional instructions for participants. Additional resources and materials will be provided to participants during the course of this workshop as well.

Workshop Description

Dynamic change in the current workforce continues to highlight the need for effective leadership along with changes in the nature of how we work. Companies know that leadership development is important and their programs for staff should reflect it. There are necessary competencies and behaviors at the core of leadership but not all leaders are able to identify and develop them.

This three-day workshop is designed to help participants understand what makes a leader, the best practices of successful leaders, and how to master the competencies of effective leadership. During this workshop, participants can discover a road map that includes steps, tools, and best practices for increasing self-confidence in one's leadership abilities. Participants will develop an action plan for continued growth in their path to leadership success even after this workshop.

Workshop Objectives

- ✓ Define leadership and related competencies
- ✓ Recognize the characteristics of successful leaders
- ✓ Discuss the challenges leaders face in today's workplace
- ✓ Build a toolkit of resources to address leadership challenges
- ✓ Practice steps in establishing a strategy for your leadership role
- ✓ Create an Action Plan for your personal leadership development

How You Will Benefit

- ✓ Recognize what a leader is and is not as you create your personal vision
- ✓ Develop your self-confidence in a leadership role
- ✓ Enhance your leadership abilities and reach greater potential
- ✓ Learn to capitalize on individual strengths to take teams to higher levels of performance

Who Should Attend

Those working in a leadership role or pursuing a leadership position

Module 1: Leadership at the Core

“The very essence of leadership is its purpose. And the purpose of leadership is to accomplish a task. That is what leadership does--and what it does is more important than what it is or how it works.”

- Colonel Dandridge M. Malone

1.1 Exercise: Leadership Defined

Fill in your own definition of leadership.

How do you define leadership? _____

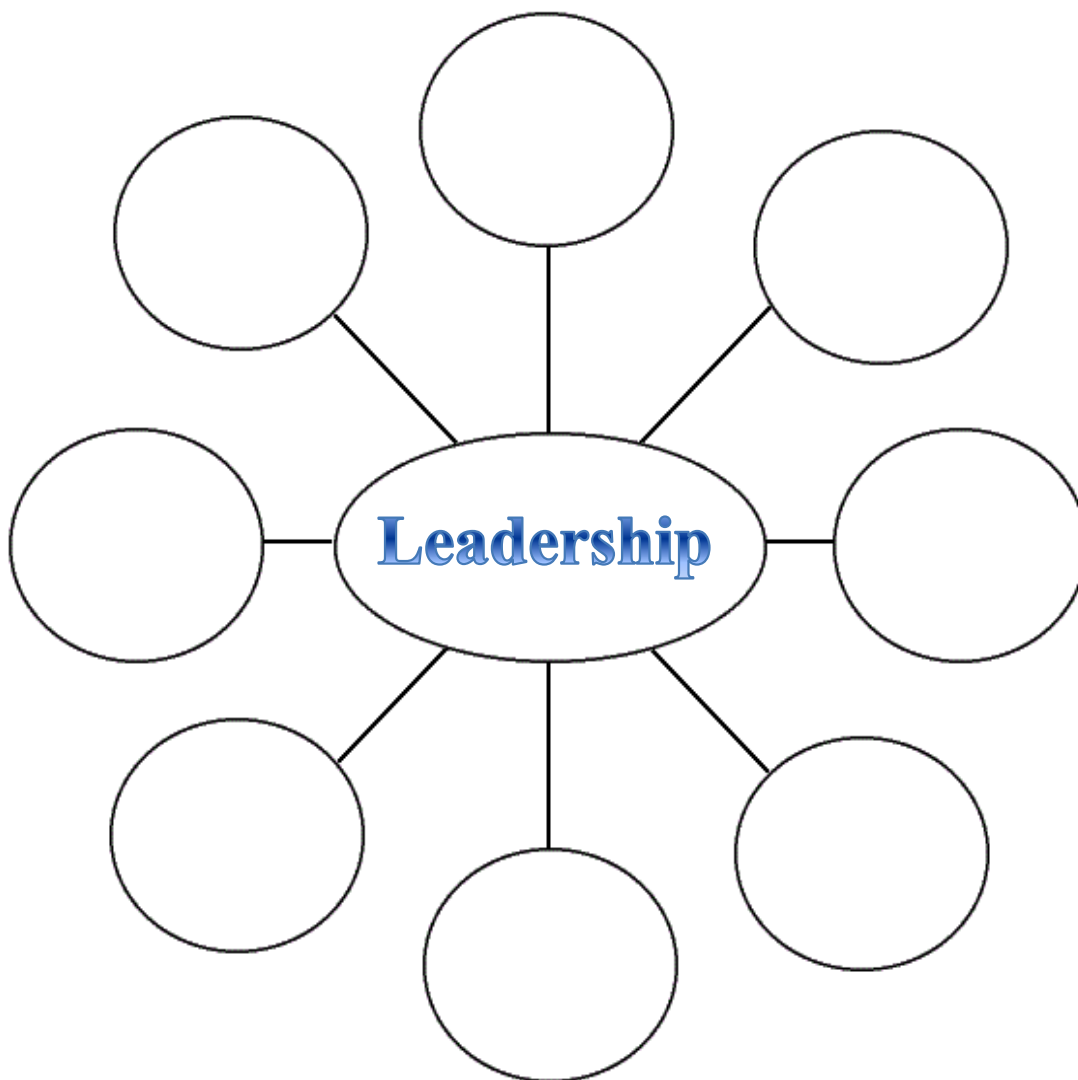
1.2 Group Activity—Familiar Faces of Leadership

Who do we recognize as leaders?

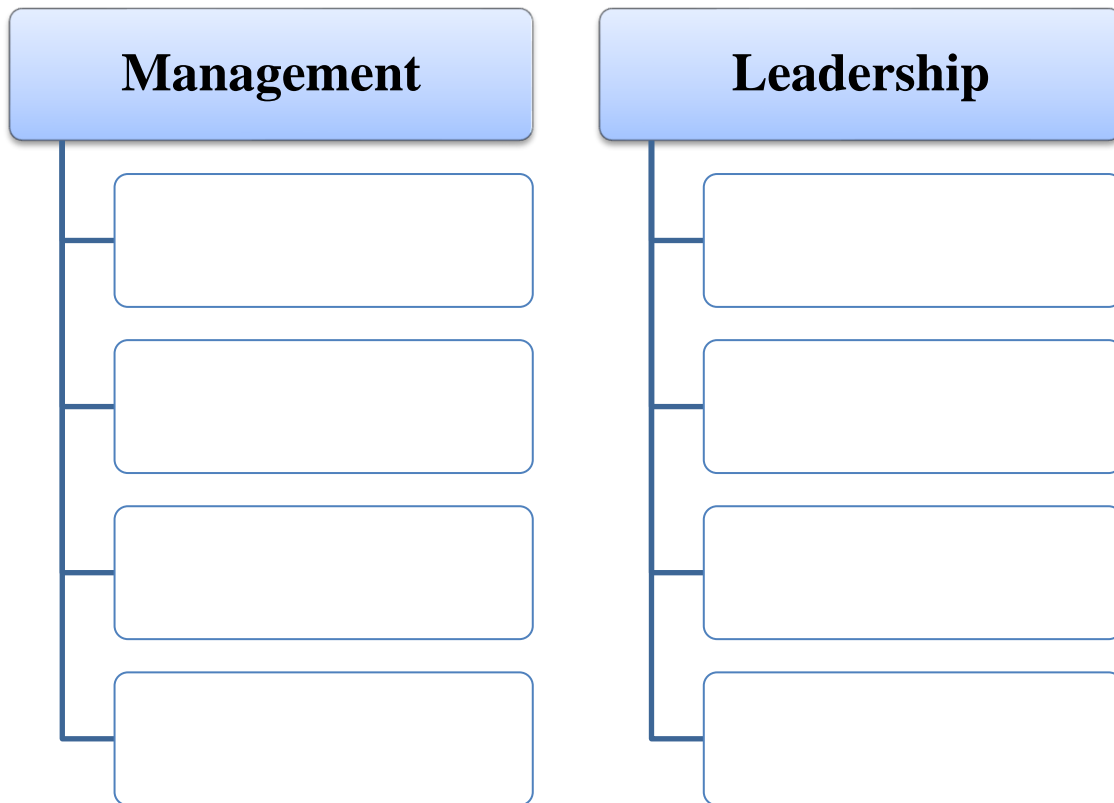
Famous Leaders				
				
Qualities				
1)	1)	1)	1)	1)
2)	2)	2)	2)	2)
3)	3)	3)	3)	3)
4)	4)	4)	4)	4)
5)	5)	5)	5)	5)

1.3 Working definition of Leadership _____

1.4 Group Activity: Characteristics of Effective Leaders



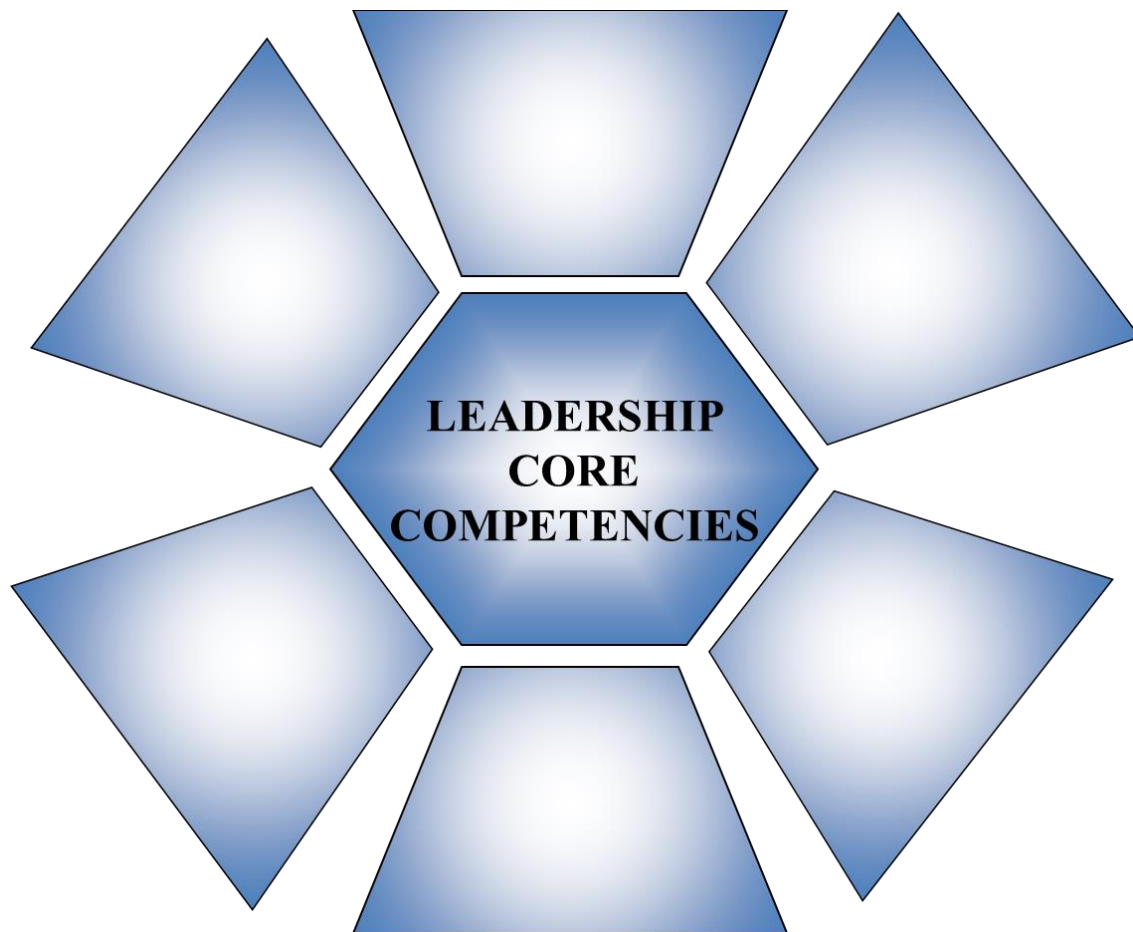
1.5 Management vs. Leadership



Notes _____

1.6 Leadership Core Competencies

A competency is _____



Notes _____

1.7 Group Activity: Competency Discussion

Competency #1:

Competency #2:

Competency #3:

Competency #4:

Competency #5:

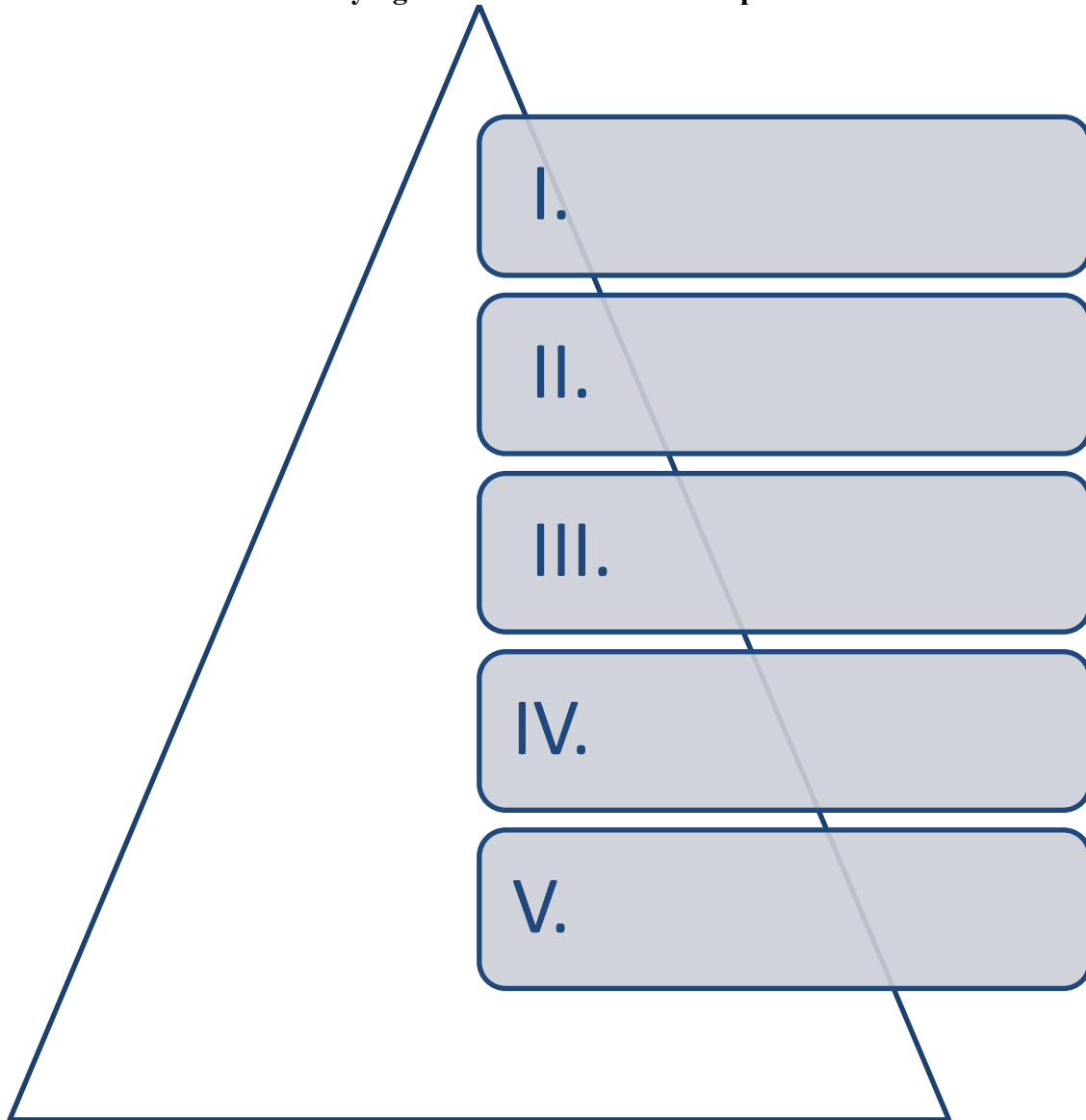
Competency #6:

Module 2: It Starts with Vision

“A new leader has to be able to change an organization that is dreamless, soulless and visionless ... someone's got to make a wake up call.”

- Warren Bennis

2.1 Let's start with identifying the elements that build up to vision.



2.2 Vision Elements Descriptions

I. _____

II. _____

III. _____

IV. _____

V. _____

VI. _____

VII. _____

<p>Vision Statement:</p>

2.3 Exercise: Vision & Mission

Explain the difference between a vision and a mission. _____

What is your personal vision? _____

What is your company's vision? _____

Steps for Vision in Action

Step #1: Observe _____

Step #2: Reflect _____

Step #3: Write _____

Step #4: Speak _____

2.4 Group Activity: Pieces of the Puzzle

Follow the directions to be provided by the facilitator. Answer the questions below after the activity.

Activity Questions

How did this exercise relate to leadership? _____

How was the leader identified? _____

What was the vision? _____

How was the vision communicated? _____

How did the team respond to the leader? _____

What challenges did you face? _____

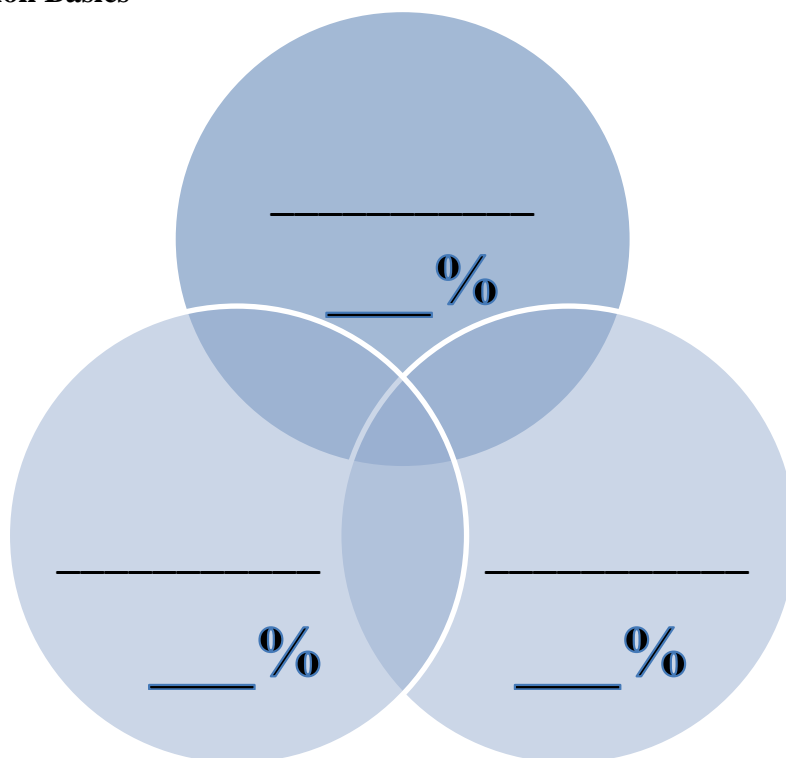
What steps did you take to address those challenges? _____

Module 3: What Are You Really Trying to Say?

“If you want to get your message across, you have to learn how to communicate in someone else’s world.”

- John C. Maxwell

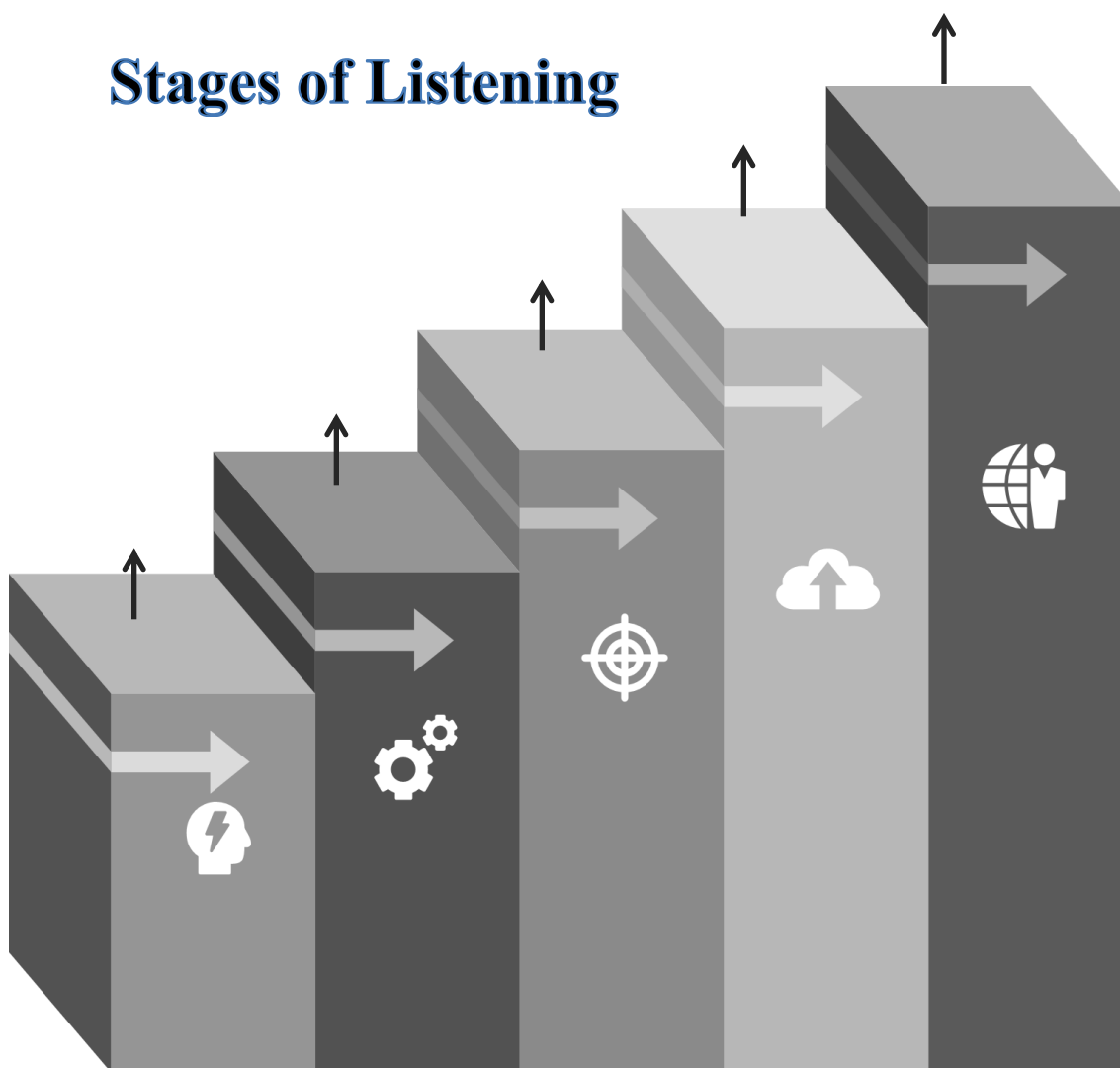
3.1 Communication Basics



3.2 Communication Problems & Solutions

Listening Mistakes	Corrective Action

Stages of Listening



3.3 Group Activity: Can You Hear Me Now?

Follow the directions to be provided by the facilitator.

3.4 Effective Communication Habits

Phone	Email/Writing	Face-to-Face
<hr/>		
<hr/>		
<hr/>		
<hr/>		
<hr/>		

3.3 Exercise: Open-Ended & Closed-Ended Questions

Question #1 Example: Employee requested to complete task

C: _____

O: _____

Question #2 Example: Inquire if your team of subordinates has questions

C: _____

O: _____

Question #3 Example: Find out availability of an employee to attend a meeting

C: _____

O: _____

Question #4 Example: Ask about completion of a project report

C: _____

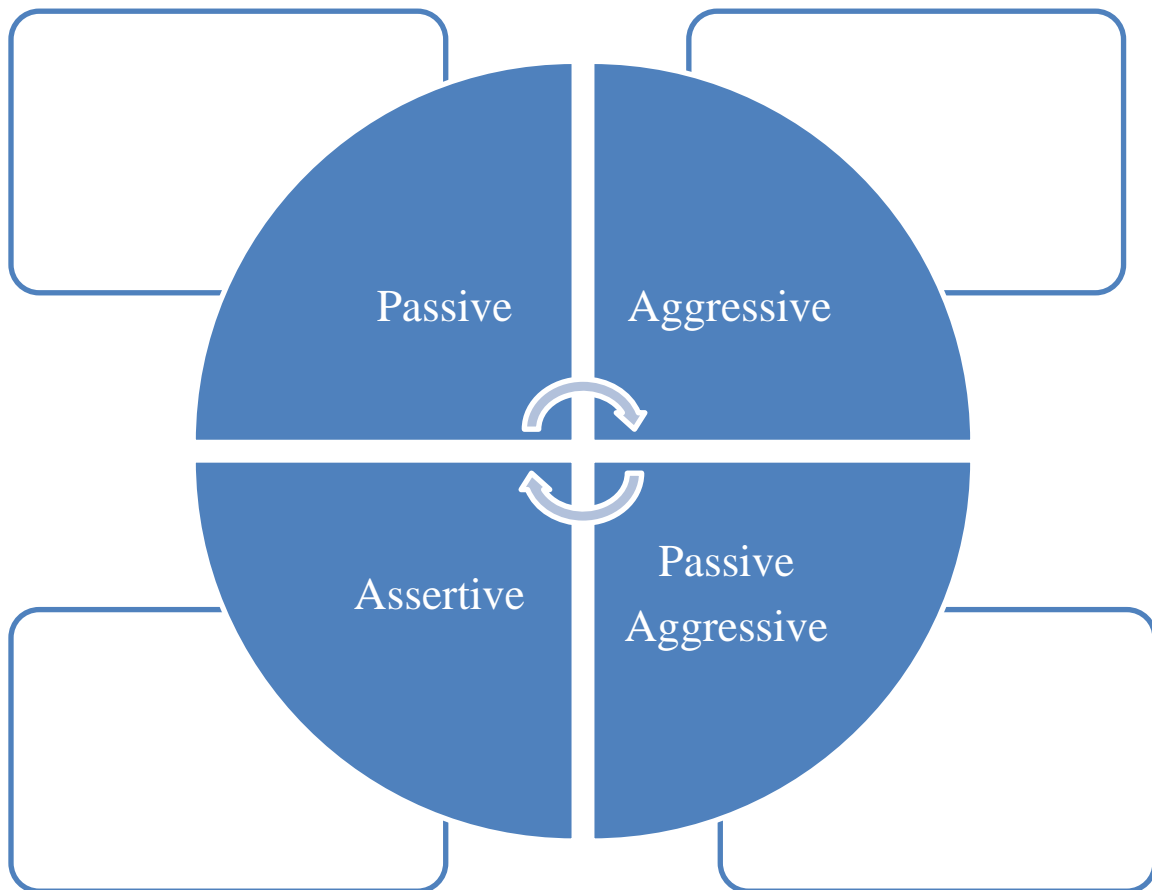
O: _____

Question #5 Example: Obtain feedback on how an employee will correct a problem

C: _____

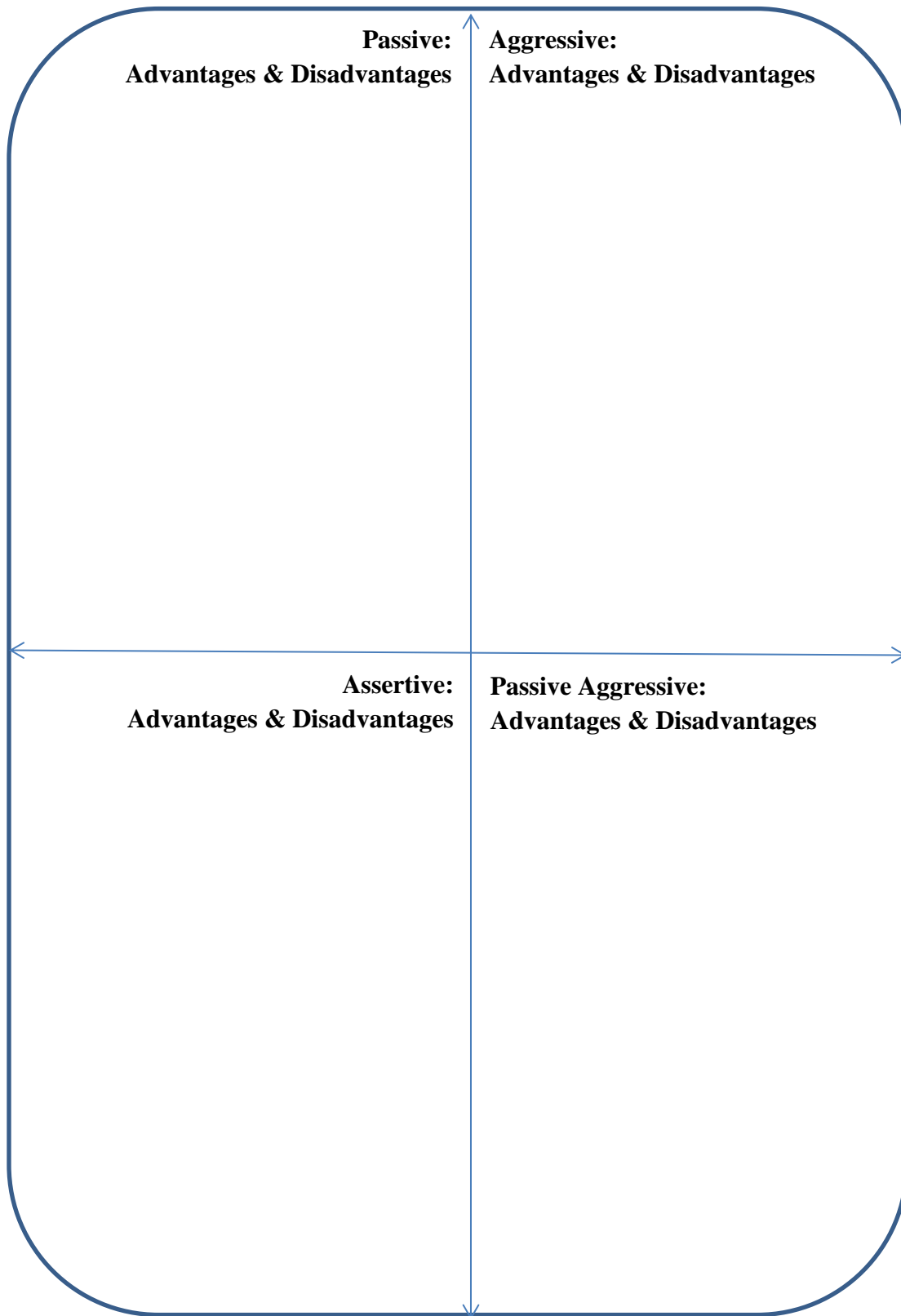
O: _____

3.4 True Grit



Examples:

[Empty space for writing examples]



Module 4: Goals in Mind

“The task of the leader is to get his people from where they are to where they have not been.”

- Henry Kissinger

Goal defined: _____

4.1 Types of Goals



Short-Term Goals	Long-Term Goals

4.2 S.M.A.R.T. Goals

Use the example below to fill in each element of a S.M.A.R.T. in the space provided.

Example: Complete and submit the proposal by September 2018 for a new Employee Recognition Program to be implemented by HR for 90 employees.

Specific	Measurable	Achievable	Realistic	Time-based

Specific _____

Measurable _____

Achievable _____

Realistic _____

Time-based _____

4.3 Exercise: Be S.M.A.R.T. About Goal Setting

Write Yes or No to indicate if each item below represents a S.M.A.R.T. goal.

1. _____ Prepare an amazing PowerPoint for the staff meeting
2. _____ Identify some other options and forward a plan
3. _____ Gather a team and complete the site visit to the meeting location before July 1
4. _____ Solicit good content for the department newsletter
5. _____ Update the webpage with content from all divisions by the 15th of each month
6. _____ Present the findings in a report at the first managers' meeting next quarter
7. _____ By midweek, implement the policy revisions

Use the space below to rewrite the goals above if needed.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

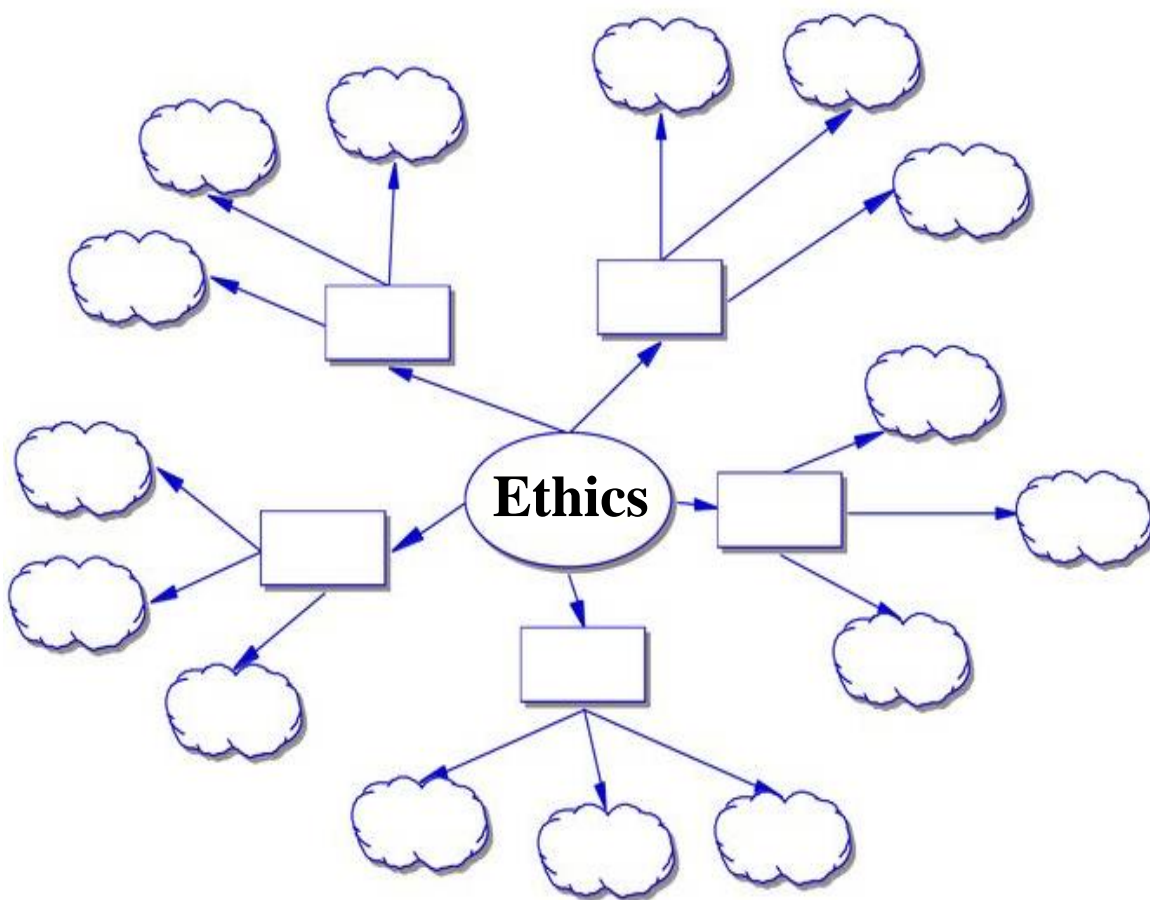
7. _____

Module 5: Ethics & Trust: Beyond the Words

“Leadership is understanding people and involving them to help you do a job. That takes all of the good characteristics, like integrity, dedication of purpose, selflessness, knowledge, skill, implacability, as well as determination not to accept failure.”

- Admiral Arleigh A. Burke

5.1 Group Activity: Mind Map



5.2 Exercise: Ethics Survey

Think about your current or most recent leadership role and respond to the questions below by checking the appropriate box to the right.

1. Does your organization have a Code of Ethics? If not, skip to Question #4.	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
2. Do you understand your organization's Code of Ethics?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
3. Do you ensure that your employees understand the organization's Code of Ethics?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
4. Do you clearly communicate your expectations for ethical practice to your employees?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
5. Do you hold your employees accountable for ethical standards?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
6. Do you make a conscious effort to be a role model for ethical behavior?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
7. Do you initiate discussions of ethical concerns?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
8. Do you consider ethical issues that may be relevant when making management decisions?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
9. Do you keep the promises you make?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
10. Do you use your authority strictly to fulfill your responsibilities and not for self-interest or to further the interests of family, friends, or associates?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
11. Do you explicitly acknowledge your employees' contributions to promoting ethical practice?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
12. Does someone hold you accountable for meeting high ethical standards?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
13. Do you seek advice on ethical issues from someone with ethics expertise or refer to published resources when needed?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat

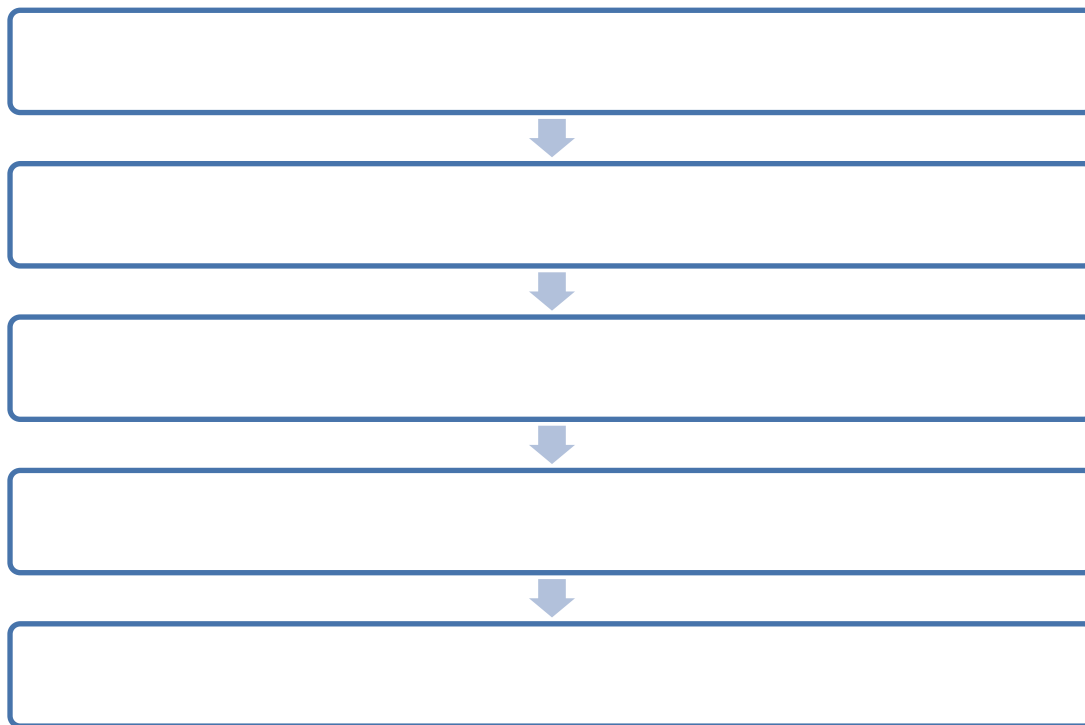
14. Do you apply a standardized process when making decisions on management issues with ethical implications?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat
15. Do you explain the foundational values when you communicate your expectations for ethical behavior?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> Somewhat

5.3 Values: Yours, Mine, Ours

My Values	Our Values	Company Values
1.	1.	1.
2.	2.	2.
3.	3.	3.
4.	4.	4.
5.	5.	5.

5.4 It's A Matter of Ethics

Steps for Making Ethical Decisions

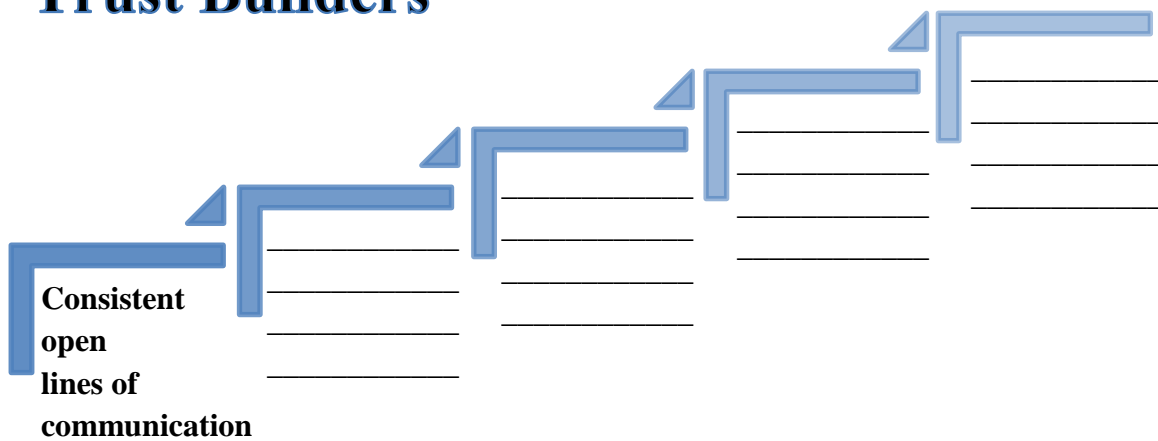


What are potential challenges to following the steps? _____

What are the benefits to following the steps? _____

Who will benefit when the steps are followed consistently? _____

Trust Builders



5.5 Group Activity: Ethics Case Study

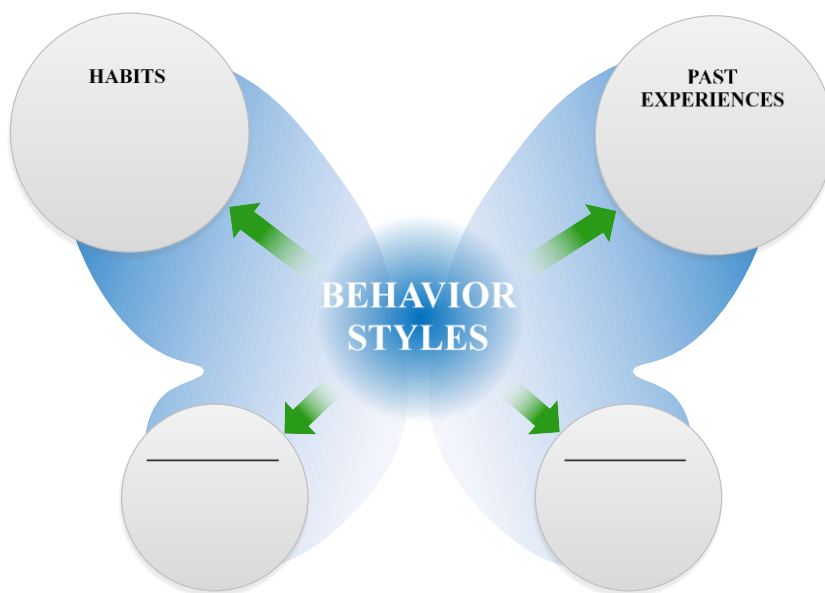
Follow the directions to be provided by the facilitator.

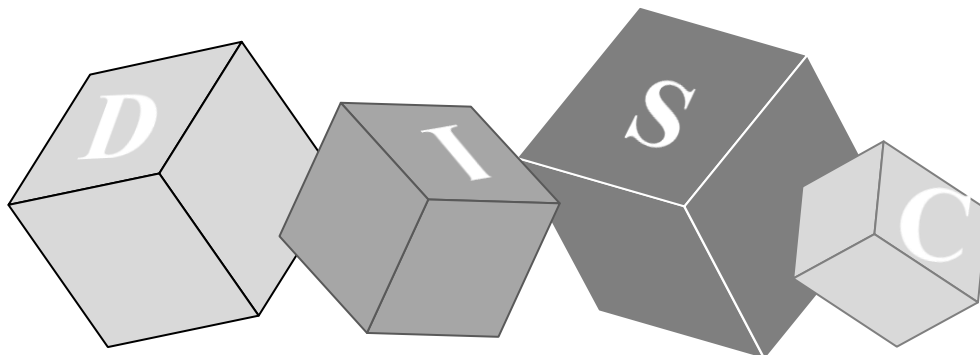
Module 6: Just My Style

“The most powerful leadership tool you have is your own personal example.”

-John Wooden

6.1 Why You Act the Way You Do



6.2 Four of a Kind—Behavior Styles

D	I	S	C

6.3 Group Activity: Behavior Styles Ideas Exchange

Follow the directions to be provided by the facilitator.

6.4 Group Activity: Behavior Styles Role Play

Situation A – An employee questions the supervisor about moving the due date for an assignment up by two weeks.

How might the following types of supervisor behavior styles respond to the situation?

D _____

I _____

S _____

C _____

Situation B – A work team cannot decide among four ideas suggested by the different team members and a decision must be made in one hour.

How might the following types of supervisor behavior styles respond to the situation?

D _____

I _____

S _____

C _____

Situation C – Two new employees have joined the team and the supervisor must share the vision for the project with them. One of the employees was previously a supervisor who has returned from retirement.

How might the following types of supervisor behavior styles respond to the situation?

D _____

I _____

S _____

C _____

Situation D – The supervisor neglected to mention the name of the employee who solved a problem that kept the project on hold for one week and another employee mentions it to them.

How might the following types of supervisor behavior styles respond to the situation?

D _____

I _____

S _____

C _____

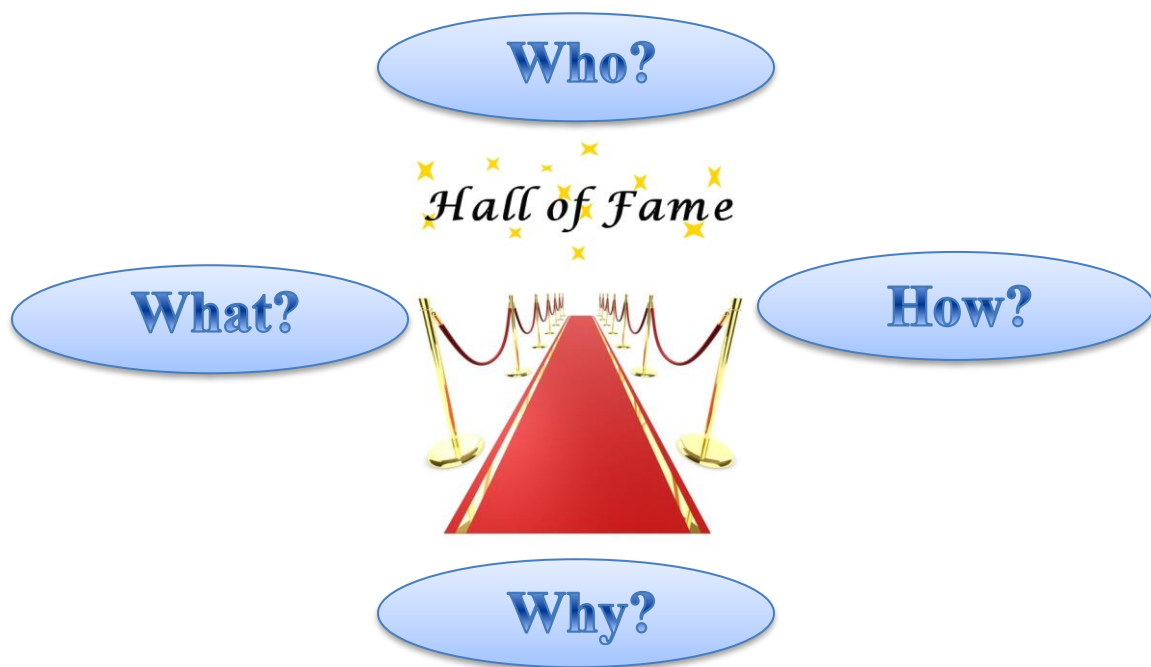
Module 7: Coaching at Its Best

“Probably my best quality as a coach is that I ask a lot of challenging questions and let the person come up with the answer.”

- Phil Dixon

7.1 Coaches Hall of Fame

Think about someone who functioned as a coach for you based on their advice, feedback, encouragement, motivation, and/or support in a situation or at an event. Share your coach story with a partner.



7.2 Coaching Defined and Described

Fill in characteristics of a coach below.

Patient

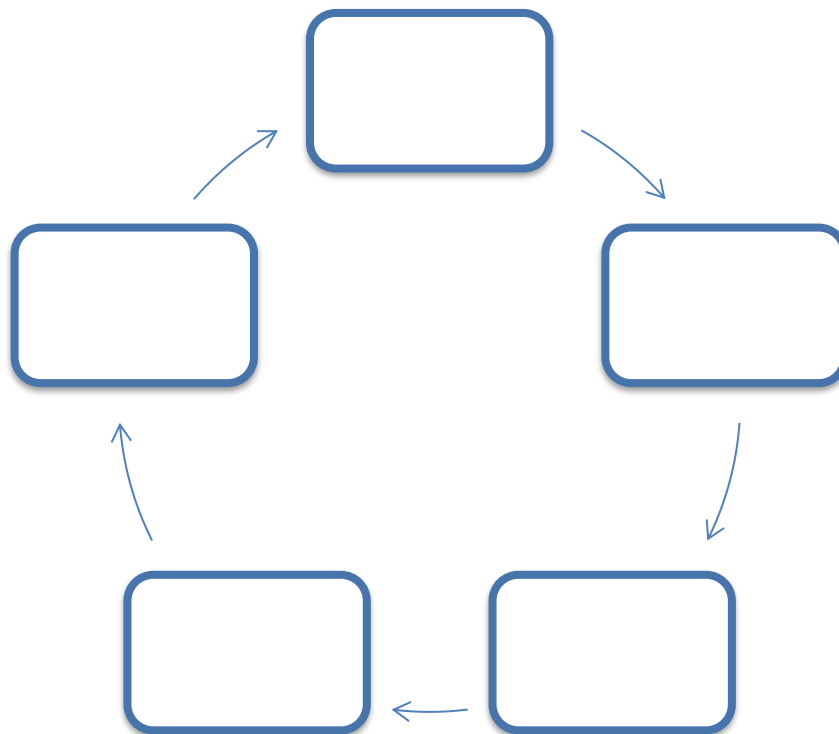


A coach is _____

A coach gives _____

A coach needs to _____

7.3 Exercise: A Model of Coaching



Notes _____

7.4 Group Activity: Coaching in Action

Follow the directions to be provided by the facilitator.

Module 8: It Takes Two—Collaboration & Teamwork

“None of us is as smart as all of us.”

-Ken Blanchard

8.1 Team Basics

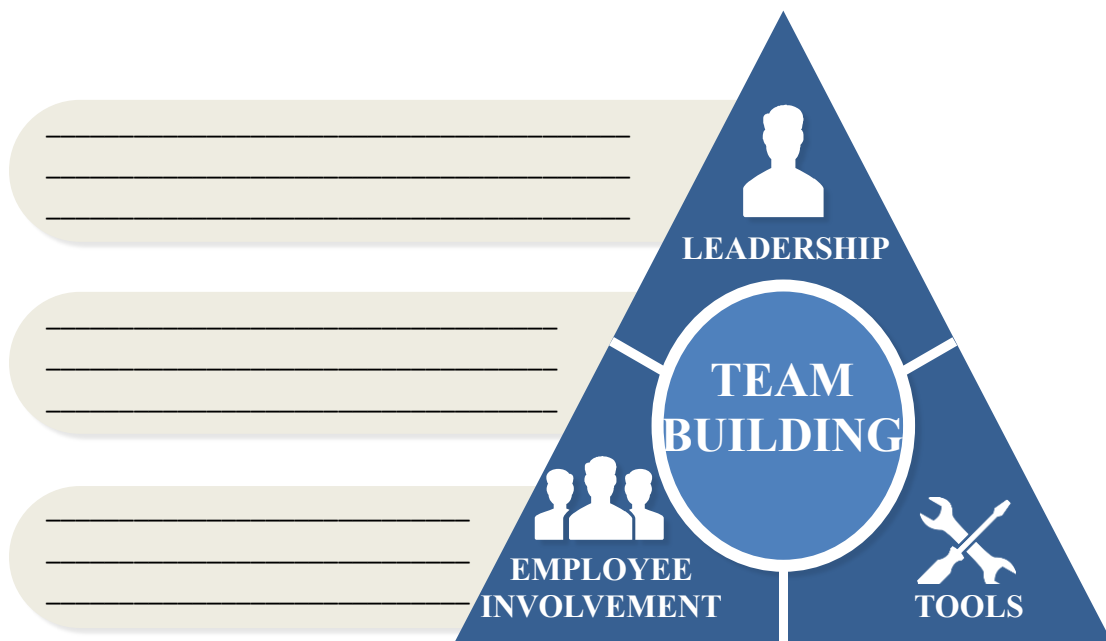
A team can be defined as _____

What teams have you seen perform very well? _____

Identify characteristics of high performing teams. _____

What are common mistakes made by teams? _____

8.2 Making Teams that Work



Examples		
Leadership	Employee Involvement	Tools
1. Facilitate Team Meeting	Think Tank	SWOT Analysis
2.		
3.		
4.		
5.		
6.		
7.		
8.		

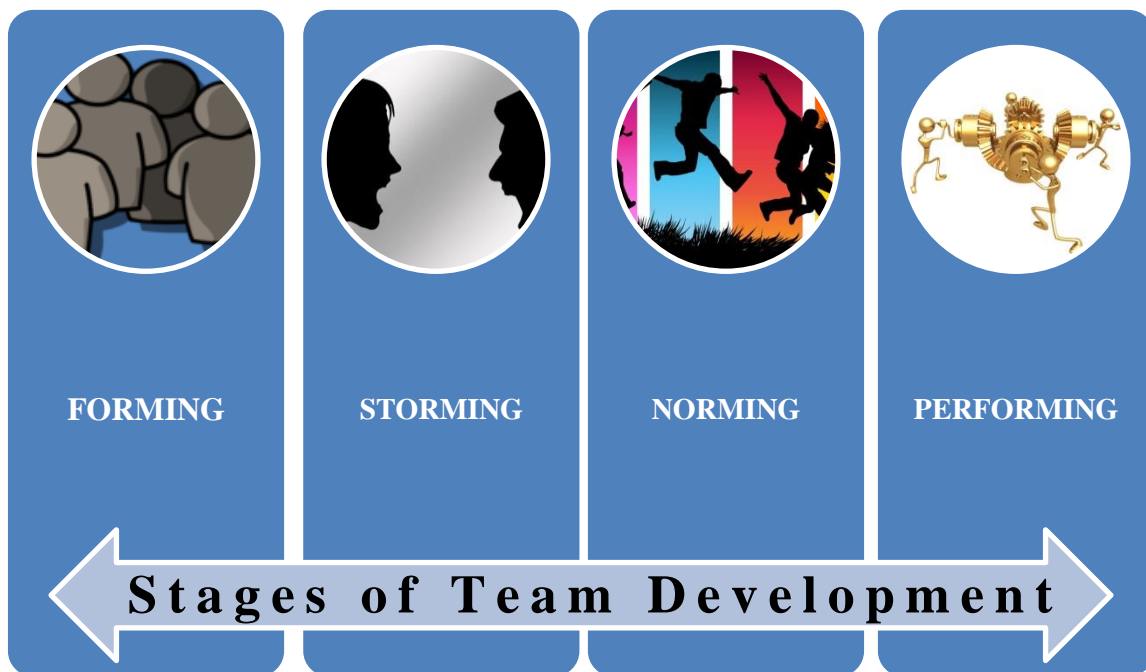
8.3 Group Activity: Team SWOT Analysis

<p>STRENGTHS</p> <ul style="list-style-type: none"> • • • • • • • 	<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> • • • • • • •
<p>WEAKNESSES</p> <ul style="list-style-type: none"> • • • • • • • 	<p>THREATS</p> <ul style="list-style-type: none"> • • • • • • •

SWOT

<p>1. What is the purpose of the SWOT Analysis?</p> <hr/>
<p>2. How can recognizing your team strengths help you?</p> <hr/>
<p>3. What can be done about the weaknesses?</p> <hr/>
<p>4. How should the team address opportunities?</p> <hr/>
<p>5. How does the team identify threats?</p> <hr/> <hr/>

8.4 Team Dynamics



Proposed by Bruce Tuckman 1965

Forming _____

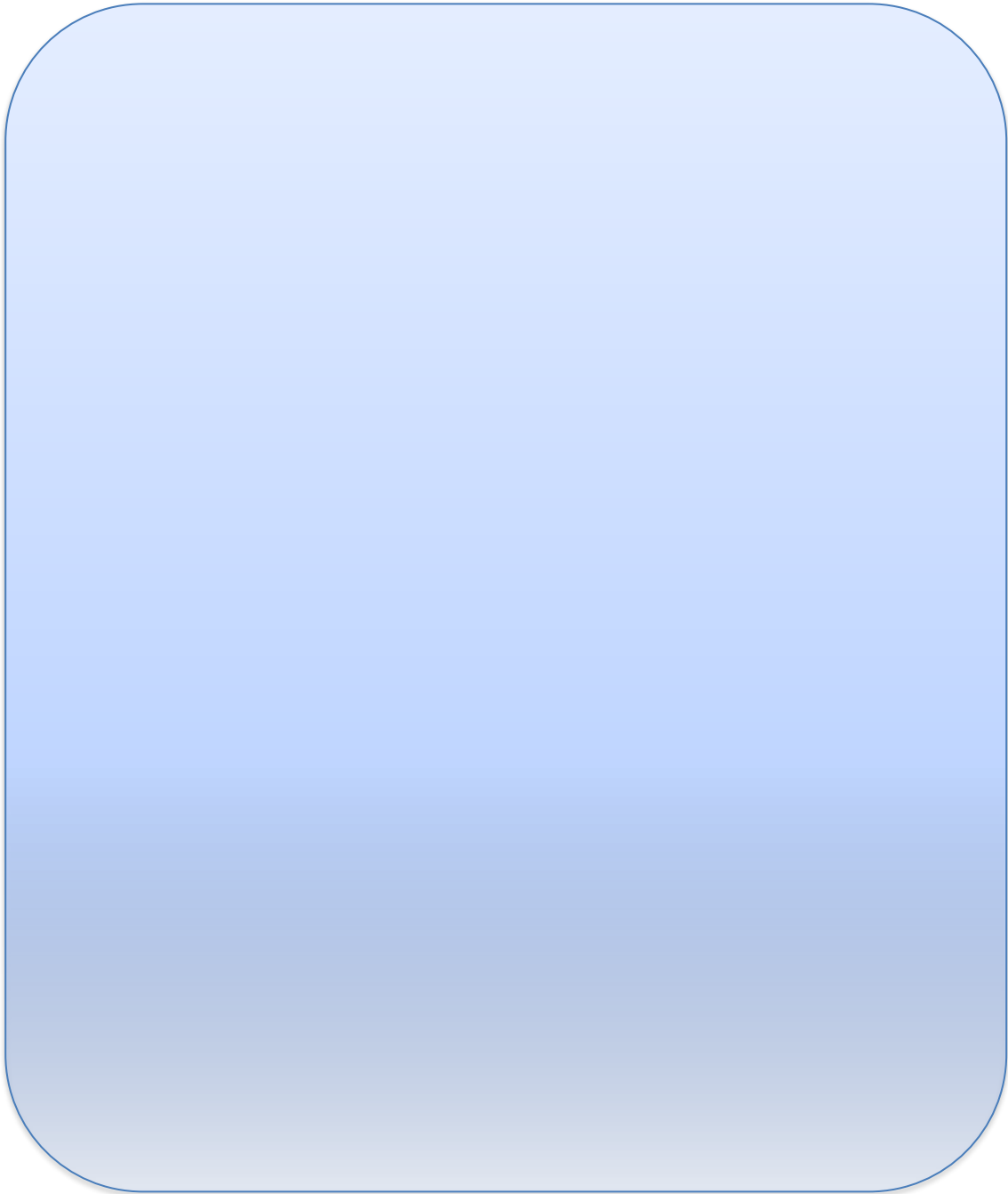
Storming _____

Norming _____

Performing _____

8.5 Group Activity: Team In-Basket Items

Your team will receive slips of paper specifying scenarios to be resolved. Work with your team members to prioritize, make the decisions needed, address the work challenges, respond to the time deadlines and pressure in order to complete the workload.

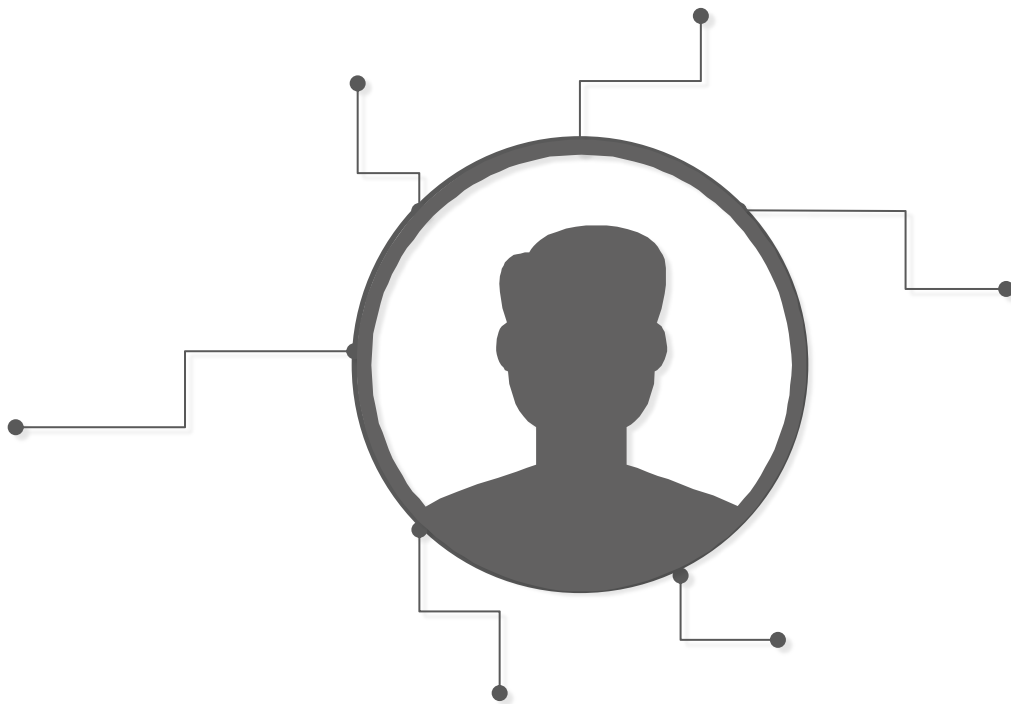


Module 9: Summary

“Great leaders don’t set out to be a leader. They set out to make a difference. It’s never about the role—always about the goal.”

-Lisa Haisha

9.1 YOU Are the Leader



Notes _____

9.2 Leader's PRINT

P

R

I

N

T

9.3 Lessons Learned

Module	Learning Point	SMART Goal	Strategy
#1	Leadership at the Core		
#2	It Starts with Vision		
#3	What Are You Really Trying to Say?		
#4	Goals in Mind		
#5	Ethics & Trust: Beyond the Words		
#6	Just My Style		
#7	Coaching at Its Best		
#8	It Takes Two-- Collaboration & Teamwork		

Action Plan

How do you plan to apply what you have learned from the workshop personally and/or professionally?

Vision: _____

Effective Communication: _____

Setting Goals: _____

Ethics & Trust: _____

Behavior Style: _____

Coaching: _____

Collaboration & Teamwork _____

Who will you use for your support network to measure your progress in those areas?

In what area(s) do you feel you need more training/development, if any?

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Appendix B: Attitudes Subscales of Survey

Directions: Please indicate your response to each of the following statements.

	STRONGLY AGREE	AGREE	NEITHER AGREE NOR DISAGREE	DISAGREE	STRONGLY DISAGREE
1. I feel it is important to be able to find any information whenever I want online.	5	4	3	2	1
2. I feel it is important to be able to access the Internet any time I want.	5	4	3	2	1
3. I think it is important to keep up with the latest trends in technology.	5	4	3	2	1
4. I get anxious when I don't have my cell phone.	5	4	3	2	1
5. I get anxious when I don't have the Internet available to me.	5	4	3	2	1
6. I am dependent on my technology.	5	4	3	2	1
7. Technology will provide solutions to many of our problems.	5	4	3	2	1
8. With technology anything is possible.	5	4	3	2	1
9. I feel that I get more accomplished because of technology.	5	4	3	2	1
10. New technology makes people waste too much time.	5	4	3	2	1
11. New technology makes life more complicated.	5	4	3	2	1
12. New technology makes people more isolated.	5	4	3	2	1
13. I prefer to work on several projects in a day, rather than completing one project and then switching to another.	5	4	3	2	1
14. When doing a number of assignments, I like to switch back and forth between them rather than do one at a time.	5	4	3	2	1
15. I like to finish one task completely before focusing on anything else.	5	4	3	2	1
16. When I have a task to complete, I like to break it up by switching to other tasks intermittently.	5	4	3	2	1