The 2004 Linkage Excellence in Management & Leadership Series

Learning to Lead

Facilitator Guide

Featuring Tommy Franks
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Introduction and Materials Required

Introduction

Welcome to the Linkage broadcast, Learning to Lead. This is the ninth of ten broadcasts in Linkage’s 2004 Excellence in Management & Leadership Series and features General Tommy Franks, former Commander of the US Central Command from July 2000 through July 2003. General Tommy Franks made history by leading American and Coalition forces to victory in Afghanistan and Iraq.

General Franks will relate his leadership experiences as he progressed through the ranks of the U.S. Army from private through four-star general to provide us with insights into effective leadership. As General Franks is fond of saying, “Leadership is management with personality.” In his presentation, he will provide examples of leadership in action and the traits, characteristics, and actions that effective leaders – in the military or not – are known for.

This guide was developed to help you make the most of the presentation with your audience or group. In this guide you’ll find:

- Background material to help add richness to your discussions.
- Activities for a variety of group sizes and of varying leadership levels. Depending on your unique audience (and your own facilitation capabilities), you may wish to modify these activities to better meet the needs of your group(s).
- Facilitation tips and techniques that you may find useful as you prepare to facilitate the pre- and post-broadcast discussions.

Use this guide and activities as they fit your needs. Before preparing for the broadcast, you will want to quickly preview this entire guide to determine how best to leverage the activities for your audience. Because this guide was designed for a variety of facilitation scenarios, it will likely include activities that may not exactly fit yours.

Conventions

The following conventions are used throughout this guide:

- Materials that are required will be listed in the left most column. Directions are provided in the middle column. Room for your notes is provided on the right side of the page.
- **SAY**: – The text following this direction is most effective if read verbatim. Note that most of the directions encourage you to use your own style and/or words.
- **ASK** – The text following this direction will usually have a question to ask as well as suggested answers. The answers are provided to help you lead the discussion and/or to ensure that the critical points are drawn out from the participants.
Materials: Pre-Broadcast Presentation

The following materials are required for the pre-broadcast presentation; you may wish to prepare the flip charts ahead of time.

- Agenda
- Flip chart markers
- Tape to post the flip chart pages
- Flip chart stand and paper
- Participant materials (one set per participant)
- Name cards (optional depending on your setting)
- Question Sheets to capture the questions that participants will want to ask General Franks during the final 30 minutes of the broadcast. See the second to last page in the participant guide for a sample Question Sheet.
- Pencils

Instructions for receiving the broadcast or Extended View will be provided separately.

Materials: Broadcast Presentation

Other than the materials listed previously for the pre-broadcast presentation, there are no additional materials required for this section if you are viewing the live broadcast. If you are viewing the broadcast via Extended View, you will need the DVD or VHS tape.

Materials: Post-Broadcast Program (Optional)

In addition to the materials listed previously, the following materials are required for the post-broadcast activities:

- Extra flip chart paper, markers, and tape to post the flip charts

Materials Written by or about Tommy Franks

While Tommy Franks has published but a single book – American Soldier (ReganBooks/HarperCollins, New York, 2004), it is a great read, filled with action and insight. The book reads like the General talks – frankly, honestly, and from the heart. The book is an authentic portrayal of General Franks from his youth, flunking out of college, and enlisting in the U.S. Army as a private, through his growth to one of the most respected and recognized military leaders in the world.

Because of his role in the military events in Afghanistan and Iraq, General Tommy Franks has figured prominently in current news. You may wish to refer participants to the following links
for additional information on General Tommy Franks. This list is included in the participant
guide.

- *Paula Zahn Now: Interview with Tommy Franks.* (Aired September 6, 2004.) For a
  rough transcript, see

- *Frankly Speaking: Ted Koppel Interviews Retired Gen. Tommy Franks About Iraq,*
  August 2, 2004. See

- *Q&A: The General’s War.* (Peter J. Boyer talks with The New Yorker’s Daniel
  Cappello about Franks’ career path and his political skill, the future of the American
  military, and covering the war from Doha, Qatar.) See
  [http://www.newyorker.com/online/content/?030630on_onlineonly01](http://www.newyorker.com/online/content/?030630on_onlineonly01).

- *Cigar Aficionado’s Interview with General Tommy Franks,* December 2003. See

- *Statement of General Tommy R. Franks, Former Commander of US Central Command*
  *Before the Senate Armed Services Committee,* July 9, 2003. See [http://armed-

You may also wish to visit the Tommy Franks website at [http://www.tommyfranks.com](http://www.tommyfranks.com).
Pre-Broadcast Program  
*(Optional)*  
*Suggested: 50 minutes*

<table>
<thead>
<tr>
<th>VISUALS/MATERIALS</th>
<th>TOPIC/ACTIVITY</th>
<th>TIME/NOTES</th>
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<tr>
<td></td>
<td>Welcome and Introductions</td>
<td>20 minutes</td>
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**NOTE:** General Franks will be speaking about his experiences as leader in the U.S. Army. While much of his presentation will focus on his most recent role as Commander of U.S. Central Command and his role in Afghanistan and Iraq, General Franks will draw from his simple upbringing and earlier experiences in the military to illustrate the growth and development of a leader.

Unlike many of Linkage’s presenters, General Franks is not an academic; he won’t list attributes or characteristics or competencies of effective leaders nor will he cite the latest survey results or leadership theory. He will speak from his rich and compelling experiences. In fact, you – and your audience – may find yourself so enthralled by the man and his demeanor, that you may miss key opportunities to extract and use in your post-broadcast discussions! Forewarned is forearmed!

1. **WELCOME** participants to the special, live broadcast in the 2004 Linkage Excellence in Management & Leadership Series featuring Tommy Franks.

2. **INTRODUCE** yourself. WRITE your name and title on a flip chart.

3. **EXPLAIN** the focus of the pre-broadcast program. **SAY:**
   - The pre-broadcast program will help you focus your thinking about leadership and your own leadership strengths and areas for development.
   - Participating in this live broadcast gives you the opportunity to hear and speak with General Tommy Franks, former Commander of the U.S. Central Command during one of the most trying times in U.S. history, and author of the best-selling book, *American Soldier*.
   - General Franks will use his experiences to show us:
     - How to turn managers into leaders.
     - How to exponentially increase overall organizational effectiveness.
     - How to empower our team to make decisions, take action, and assume responsibility.
4. **REVIEW** the Program Agenda (as a slide, flip chart, or handout).
   - Pre-Broadcast Discussion
   - Presentation by Tommy Franks
   - Q&A with Tommy Franks
   - Post-Broadcast Workshop (optional)

5. **EXPLAIN** the workshop ground rules:
   - Be committed to learning.
   - Be a critical thinker.
   - Listen actively and without passing judgment.
   - Respect and uphold confidentiality.

6. **EXPLAIN** general “housekeeping” (breaks, facility information, etc.)

7. If applicable, **DIRECT** participants to introduce themselves to a person they do not know and to ask the other participant the following questions:
   - What is your name?
   - What is your job/title?
   - How many years have you been in that role?
   - Consider military leaders, past and present. Who do you admire most? Why? What traits did they exhibit that you admire? What did they accomplish and why was that accomplishment significant?

   Depending on group size, participants can introduce their partner and share their most admired military leader.

   **OR**

   If the group members know each other well, you could ask participants to simply share their most admired military leader.

8. Flipchart the responses and label the flipchart **Admired Military Leaders**.
## Learning to Lead

### Facilitator Guide

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<th>VISUALS/MATERIALS</th>
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<tbody>
<tr>
<td><strong>PRE-BROADCAST ACTIVITIES</strong>&lt;br&gt;Readings and Activity/Discussion</td>
<td></td>
<td>30 minutes</td>
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9. **SAY:** General Franks is a success story that has roots in a simple upbringing in a simple town in Texas. Through determination and initiative – and the Franks trademark frankness and honesty – Tommy Franks rose through the ranks of the U.S. Army to assume one of the most powerful leadership positions in the world.

His lessons come not from books or school – he flunked out of the University of Texas – but from observing and replicating the actions of other great leaders, leaders whose names appear not in “the top 100 leaders list” but are buried in memories, duty records, and military reports.

Secretary of State, Donald Rumsfeld called General Tommy Franks “a soldier’s soldier.” In fact, he is a leader’s leader.

10. **ASK** participants to read (or review, if you provided this material as precourse work) the Pre-Broadcast readings in their participant guides. The first two readings are extracts from General Franks’ book, *American Soldier*, and serve to illustrate two of the many experiences that shaped Franks as a leader.

- **♦ A Leader’s Leader (pages 7-8)** – this reading highlights the importance of the leader’s loyalty to his or her “troops”.
- **♦ Being in Charge (pages 9-10)** – this reading highlights three main points: 1) being in charge doesn’t mean you know what’s going on, 2) an effective leader takes responsibility for the actions of his/her subordinates, and 3) people will work harder for you if you care for them as people.

11. **OPTIONALLY, ASK** participants to read (or review, if you provided this material as precourse work) Tommy Franks’ biography. This information may be beneficial in broadening the questions from a focus on Afghanistan and Iraq to one on leadership lessons.

12. **ASK:** How are the challenges Tommy Franks faced similar to those we face in business today? How are they different?

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Note: Depending on the time you have for pre-broadcast discussion you may wish to provide the participant guide ahead of time and ask participants to complete this reading before coming to the broadcast.

Note: You may wish to use these pre-broadcast readings as topics for discussion after the broadcast (Activity #2: A Leader’s Leader).
13. **DISCUSS** the challenges, which may include:

- Regarding loyalty: How does loyalty factor you’re your organization’s success? Are your employees REALLY your #1 asset? What do you do to build loyalty? How do you demonstrate loyalty to your employees?

- Regarding knowing what’s going on: How do you know what’s going on? How do you know that you’re ‘in the know?’ How do you stay in touch without micromanaging?

- Regarding the terrorism at the World Trade Center on 9/11/2001: As leaders, we sometimes are confronted with events or situations that we simply had not planned for. How we react and use the information to move forward is the hallmark of an effective leader.

- Regarding flunking out of the University of Texas: True development comes from wherever you can find it. While we can learn from reading and classes, much of what we know to be effective comes from the real world. Effective leaders continually self-assess; they take stock in themselves and their actions and then modify future behavior to become more like the leaders they envision.

- Regarding communication: Franks is honest and direct. He considers himself “independent and proud of it.” Agree with him or not, you are never left wondering what he means. Effective leaders speak plainly and honestly.

- Regarding decision making: “Being general, I’d discovered, meant gathering as much information – always in short supply – as possible, then making decisions. And living with those decisions. It meant using judgment.”

- Regarding planning: In planning for a possible invasion of Iraq, the Joint Committee first spent months outlining the goals of the invasion should the development of a plan ever be required. In other words, the goals dictated the plan. Effective leaders keep the goals always in the forefront of the organization.

14. **SUMMARIZE** key points from the above discussion.
### Question Generation

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<td></td>
<td>Question Generation</td>
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1. **EXPLAIN** that General Franks will be speaking for 60 minutes and then answering questions for the remaining 30 minutes of his broadcast. As such, it is critical that participants submit questions for consideration.

2. **ASK** participants to identify (in pairs or small groups) at least three questions they have for General Franks.

3. **RECORD** questions on a flip chart. Identify any redundancies and generate a list of questions for submission.

4. **NOTE:** As facilitator, you should collect these questions and submit them to Linkage on behalf of your group:

   Fax 1.877.892.0170 (from within U.S.)
   Fax 646.349.3661 (from outside U.S.)
   Email: leadership2004@linkage-inc.com
   Tel 1.800.489.8814 (from within U.S.)
   Tel 801.303.7412 (from outside U.S.)

   Encourage participants to submit any additional questions they would like either before or during the broadcast.
# Broadcast

95 minutes

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<th>VISUALS/MATERIALS</th>
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<tbody>
<tr>
<td></td>
<td><strong>INTRODUCTION TO BROADCAST</strong></td>
<td>5 minutes</td>
</tr>
<tr>
<td><strong>1.</strong> INTRODUCE the title of the broadcast, “Learning to Lead,” presented by General Tommy Franks.</td>
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<td><strong>2.</strong> EXPLAIN the focus and highlights of the program. General Franks use examples from his experiences in the U.S. Army to illustrate:</td>
<td></td>
<td></td>
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<tr>
<td>♦ How to turn managers into leaders.</td>
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<td>♦ How to exponentially increase overall organizational effectiveness.</td>
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<tr>
<td>♦ How to empower your team to make decisions, take action, and assume responsibility.</td>
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<td><strong>3.</strong> EXPLAIN methods for being an active participant:</td>
<td></td>
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<tr>
<td>♦ Listen actively to General Franks’ presentation. General Franks requests that you simply sit back and listen. As you listen to his points, apply his insights to your situation, your experiences in leading, and your experiences in developing leaders.</td>
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<tr>
<td>♦ Should you wish to take notes, there is space provided beginning on page 12.</td>
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<tr>
<td>♦ Use the Question Sheet on the next to last page of your participant guide to submit your compelling question(s) directly to General Franks.</td>
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<td>♦ Continue to create and submit questions – there is no limit to the number of questions you can submit for consideration.</td>
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<tr>
<td><strong>BROADCAST PRESENTATION</strong></td>
<td>90 minutes</td>
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Pages 12-15

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## Post-Broadcast Program
(Optional)  Suggested: 2-3 hours

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<tr>
<td></td>
<td><strong>INTRODUCTION TO POST-BROADCAST PROGRAM</strong></td>
<td>5 minutes</td>
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1. **EXPLAIN** that the Post-Broadcast Program will allow participants to:
   - Review the highlights of the broadcast.
   - Discuss the key learning and applications with colleagues.
   - Use the learning from the broadcast for personal action planning.

### POST-BROADCAST ACTIVITIES

| Activity 1: Self-Reflection and Discussion | 15 minutes |

1. Because this activity is general in nature, it is relevant for most audiences.

2. **ASK** participants to share their key learning and take-aways from the broadcast and Q&A portion by asking the following questions and discussing as appropriate:

   **Q**: What in General Franks’ presentation struck a special chord with you? Why?

   **Q**: How do General Franks’ lessons (and optionally those discussed in the pre-broadcast activities) relate to your role as leader?

   **Q**: Franks likes to state, “Leadership is management with personality.” Do you agree or disagree. Why or why not?

   **Teaching Points**: Franks views management as doing things right; leadership is doing the right things.

   Moreover, as Franks likes to quip, “You don’t manage a group of soldiers under fire up a hill.”

   Personality, therefore, is the composite of trust, integrity, vision, empathy, credibility, and other traits. Discuss the elements of “personality” as Franks may define the word.

   At the same time, some people may define personality as charisma and that **charisma** is a leadership requirement. This
is not the case. There have been many distinctions made between General Norman Schwartzkopf and General Tommy Franks. Both are effective leaders. Both have personality: Schwartzkopf – the charismatic leader and Franks – the quiet leader.

3. Encourage everyone to add to his or her participant guide as appropriate.

4. Go to the next chosen activity or the Final Activity: Action Planning.
Activity 2: A Leader's Leader

1. This activity is appropriate for individuals, or small and large groups.

2. **DIRECT** participants to turn to page 17 in their participant guides.

3. **READ:** Tommy Franks provides many anecdotal facets of effective leaders in his book and in the presentations he gives. Below are several anecdotes. Select from among them and draw lessons that apply to you in your leadership role.

   ♦ “You don’t manage a group of soldiers up a hill under fire. You lead them.”

   ♦ In speaking about the 9/11 Commission: “Spend less time worrying about what was and more time worrying about what we’re going to do next.”

   ♦ “When I was a private soldier, I would complain about the lieutenants. When I was a lieutenant, I’d complain about the colonels and when I was a colonel, I’d complain about those suckers ‘up there’ who were generals. All of a sudden, I realized that I had become ‘them’!”

   ♦ In discussions with President Bush after 9/11/2001: “We ought to put stuff in motion to be ready to do whatever it is we may have to do in order to protect the future.”

4. **DIRECT** participants to one of the following activities:

   ♦ If you are conducting this activity **individually**, select one or more of the above statements and outline how Franks’ experience or challenge is similar to an experience or challenge you are currently facing. Using insights from the presentation and knowledge of current events, identify how you might address your particular situation or challenge.

   ♦ If you are conducting this activity in **small multiple groups**, have participants form groups based on one of the four topics listed in their guides. Each group should discuss their interpretation of the statement and its application to them in their leadership role. Optionally, have the team report out.

   ♦ Regardless of the number of participants, you may wish to conduct this activity as a **single group**. As facilitator, you may wish to pre-select the one or two topics that may be most relevant to your group.

Note: You may wish to use the pre-broadcast readings as topics for discussion rather than the topics listed on pages 17-18 in the participant guides.
5. After everyone has reported out, **DISCUSS** the key learnings.

**ASK:** What did you learn in listening to others’ interpretations and the application of the statement to a situation or challenge they are currently facing?

6. Go to the next chosen activity or the Final Activity: Action Planning.
Activity 3: Your Authentic Self

1. This activity works especially well with small groups or individuals. In larger groups, participants may be more reluctant sharing.

2. **READ** the information on page 19 of the participant guide:

   Warren Bennis and Joan Goldsmith, in their book, *Learning to Lead* (Basic Books, New York, 2003), suggest that first and foremost “leaders are people who are able to express themselves fully. They know who they are, what their strengths are (and how to use them), and what their weaknesses are (and how to compensate for them). Their primary characteristic is authenticity.”

   As you have seen in the presentation (and in his book, if you read it), General Tommy Franks is nothing if not authentic.

   What is your authentic self? Who are you as a leader? What do you stand for? How do you show up to others? What do you believe in?

3. **SAY**: In your participant guide are four questions. First, identify the one or two traits – above all others – that define who you are as a leader.

   Then, spend a few minutes recalling experiences that shaped and molded you as a leader. Through these experiences, you became the leader you are today much as the experiences Tommy Franks lived shaped him into the leader he is today.

   Third, consider the strengths associated with the trait(s) you selected. List these strengths in your guides. Then ask yourself if you are demonstrating these strengths in your leadership actions. How might you further develop these strengths?

   Fourth, consider that each trait has both a positive side – a strength – and a shortfall. What are the potential shortfalls associated with your trait(s)? How can you diminish the impact of – or compensate for – this shortfall?

4. **DIRECT** participants to reflect on these questions and NOT respond immediately. Ask them to write in their guides who they are and what they stand for. Then:

   ♦ If you are conducting this activity in **multiple small groups**, ask participants to form small groups (3-5
participants) and share what they wrote in their guides.

- If you are conducting this activity as a single group, ask participants to share in the large group.

5. **DISCUSS** using the following questions to promote discussion and thought:
   - Describe your authentic self – who you are and what you are about/what you stand for.
   - How many of you feel that your followers know your authentic self?
   - What do you do – in your day-to-day actions – to stay true to your authentic self?
   - What challenges do you face in staying true to your authentic self? How do you overcome them?
   - How has your authentic self changed over the years?

6. Go to the next chosen activity or the Final Activity: Action Planning.
### Activity 4: Great Leaders

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
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<tbody>
<tr>
<td>1.</td>
<td>This activity works especially well with small groups or individuals. In larger groups, participants may be more reluctant sharing.</td>
</tr>
</tbody>
</table>
| 2.   | **READ** the information on page 20 of the participant guide:  
Great leaders provide us with glimpses of ourselves and what we can be. Great leaders illustrate – through their actions – the characteristics and traits to which we aspire.  
Pick two leaders – from this list or your own – and list their traits, characteristics, and actions that make them effective leaders. Then describe how you might build up those traits, characteristics, and ability to act in your self and in other developing leaders. |
| 3.   | **DIRECT** participants to select a leader to discuss and identify the traits, characteristics, and actions that exemplify that leader. Solicit opinions on the effectiveness of the leader and his/her traits, characteristics, and actions.  
Note: The goal of this exercise is to recognize the influence on public leaders in the formation of our own leadership behaviors. Similarly, how WE act as leaders will shape – for better or for worse – the behaviors of those who follow us. |
| 4.   | **FLIPCHART** the name of the leader and his/her characteristics, traits, and actions. You may wish to put a + or – in front of the trait, characteristic, or action according to the positive or negative effect of the trait, characteristic, or action. |
| 5.   | **REPEAT** the discussion for other leaders as appropriate. |
| 6.   | **SUMMARIZE** by saying: We recognize the influence on public leaders in the formation of our own leadership behaviors. Similarly, how WE act as leaders will shape – for better or for worse – the behaviors of those who follow us. |
| 7.   | Go to the next chosen activity or the Final Activity: Action Planning. |
**Final Activity: Action Planning**

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<tbody>
<tr>
<td>1. <strong>READ</strong> from page 22 in the participant guide: Your leadership competency development begins today. Picture yourself six months from now. You’re reflecting with a sense of pride and satisfaction on what you’ve accomplished since the broadcast. What one thing brings you the most pride?</td>
<td>15 minutes</td>
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<tr>
<td>2. <strong>DIRECT</strong> participants to individually complete page 22 in their participant guides.</td>
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<td>3. <strong>ASK</strong> for volunteers to share examples.</td>
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**Program Conclusion**

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<tr>
<td>1. Thank participants for investing this time in their own leadership development.</td>
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<tr>
<td>2. Encourage them to live up to their commitments and to help others lead in difficult times.</td>
<td></td>
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<tr>
<td>3. Remind them to complete a program evaluation form on the last page of their participant guide or complete the online evaluation form.</td>
<td>10-15 minutes</td>
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Facilitation Overview

The following pages explain Linkage’s beliefs about the fundamental principles of facilitation, and include brief reminders, tips, and techniques for before, during, and after the program facilitation.

The Seven Principles of Facilitation

1. **Be Courageous**

   The first priority for a facilitator is to let go of the need to be in complete control and acknowledge and accept that facilitation is about taking risks. Allowing yourself to go out of your comfort zone is critical to becoming a good facilitator. The following is a list of some of the challenges you may (and should) face as you facilitate:

   - Try new activities and topics.
   - Invite challenge and disagreement from your audience, in both the content and facilitation.
   - Embrace the complexity of your subject; acknowledge that you do not have all of the answers.
   - Acknowledge and face the challenges of a diverse audience (opinions, backgrounds, attitudes).
   - Challenge your audience in order to enhance their learning. Push individuals beyond their comfort zones by asking compelling and thought-provoking questions.

2. **Be a Role Model**

   As a facilitator you have a dual role: learner and leader. As a learner, you model participation and openness to learning. If you are open to enhancing your own learning experience by respecting participants’ knowledge and contributions, the audience will follow in kind. Your own energy, curiosity, interest in and enjoyment of the subject and in the participants should provide a strong example.

   The second type of model is the leader – the facilitator who “walks the talk.” For example, if you are facilitating a communications skills course, exemplify outstanding communication skills, particularly the specific skills that are the cornerstones of the program (e.g., use open-ended questions if you are presenting a module about their importance). Being a role model of this kind will earn you respect and credibility.

3. **Balance Flexibility and Responsibility**

   A key skill of exceptional facilitators is the ability to listen well, accurately read and interpret the needs of the participants, and make adjustments accordingly. Being both flexible and spontaneous will benefit both you and the audience. At the same time, you must deliver on your promise to meet the stated learning objectives within the timeframes of the program, as well as manage both time and your own reactions to challenging participant behaviors.
4. Make It Theirs

Value what participants bring to the program. Adult learners need and deserve to be respected for their life experience and knowledge. As a facilitator, encouraging participation and asking appropriately probing questions can open a wealth of resources for everyone in the room.

Linkage’s distance learning programs and skill-building workshops are designed to maximize participants’ input and sharing through discussion of workplace issues, paired and small group business simulations, case study analysis, skills practice, coaching and feedback, best practices sharing, and networking. Building on participants’ experience is a key component to a successful learning process. The best facilitators are adept at drawing this out and referring to it at appropriate points in the program.

5. Make It Yours

Your effectiveness is heightened when you connect with the material and personalize it so that you are fully comfortable and authentic in front of your group. This facilitator guide is not meant to be a script for you to memorize. Instead, our intent is to provide a guide to acquaint you with the program content, objectives, and activities to promote learning. When you are passionate about the content, you naturally foster learning and passion in others. The energy that you put into making the material yours by creating and using your own life experience and workplace examples will emanate to your audience and improve your facilitation skills immensely.

6. Focus on Application

When all is said and done, the participants need to take what they have learned and make it practical and useable in their daily work. Your role as a facilitator is to ensure that the content is understood and assimilated in a way that makes it compelling and relevant to the participants—engaging them to apply, practice, and experiment with new skills to improve/enhance their own and their organization’s performance. Linkage’s programs are designed with a substantial amount of skill-building practice and application. These should never be shortchanged. Throughout the program, it is critical for the facilitator to stress the applicability of all new content and learning.

7. Link It to the Business

This broadcast program does not occur in a vacuum. For all facilitators, it is critical that you have a solid understanding of how the training that you are providing connects with the business goals, performance objectives, and organizational challenges that your audience faces. We strongly recommend that you contact each participant prior to the program to better understand specific issues and motivations for participating in the program, as well as roles and levels of experience.

For internal trainers, the more you know about your organization’s business environment, strategy, systems, and culture, the more effective and credible you will be. Additionally, you should know how this single program aligns with the overall framework of any management or leadership training initiatives.
Before: Pre-Broadcast Planning

Preparing Yourself

Know Your Presenter

(This biography is also found in the participant guide on pages 23-25.)

Tommy R. Franks (born June 17, 1945) is a retired General in the United States Army, previously serving as the Commander-in-Chief of United States Central Command, overseeing American military operations in a 25-country region, including the Middle East. Franks succeeded General Anthony Zinni to this position on July 6, 2000 and served until his retirement on July 7, 2003. He was succeeded by General John Abizaid.

He was the U.S. general leading the attack on the Taliban in Afghanistan in response to the terrorist attack on the World Trade Center and The Pentagon. Franks also led the 2003 invasion of Iraq and the overthrow of Saddam Hussein and was commander-in-chief of the American occupation forces.

Franks was born in Wynnewood, Oklahoma but grew up in Texas, attending the same high school as Laura Bush in Midland. After trying his hand at the University of Texas in Austin, Franks realized that he was “too spoiled, unfocused, and immature to get much out of college” and that he “had a lot of growing up to do.”

In August of 1965, Tommy Franks joined the Army believing that “I wanted to get out in the world and do something real. And being a soldier was about as real as you could get.” After basic training in Fort Leonard Wood, Missouri, Franks received training as a crypto-analyst – a code breaker – in Fort Devens, Massachusetts. While finishing up crypto-analyst training, Franks applied for Officer Candidate School and appeared for his interview. At the conclusion of the interview, the interviewing First Sergeant reluctantly approved Franks’ request saying, “You’ll never be an officer worth a damn. But if you stick with it, you might make a hell of a sergeant one day.”

General Franks was commissioned a second lieutenant in 1967 as a distinguished graduate of the Artillery Officer Candidate School, Fort Sill, Oklahoma. After an initial tour as a battery Assistant Executive Officer at Fort Sill, he was assigned to the 9th Infantry Division, Republic of Vietnam, where he served as Forward Observer, Aerial Observer, and Assistant S-3 with 2nd Battalion, 4th Field Artillery. He also served as Fire Support Officer with 5th Battalion (mechanized), 60th Infantry during this tour.

In 1968, General Franks returned to Fort Sill, where he commanded a cannon battery in the Artillery Training Center. In 1969, he was selected to participate in the Army’s “Boot Strap Degree Completion Program,” and subsequently attended the University of Texas, Arlington, where he graduated with a degree in Business Administration in 1971. Following attendance at the Artillery Advance Course, he was assigned to the Second Armored Cavalry Regiment in West Germany in 1973 where he commanded 1st Squadron Howitzer Battery, and served as Squadron S-3. He also commanded the 84th Armored Engineer Company, and served as Regimental Assistant S-3 during this tour.
General Franks, after graduation from Armed Forces Staff College, was posted to The Pentagon in 1976 where he served as an Army Inspector General in the Investigations Division. In 1977 he was assigned to the Office of the Chief of Staff, Army where he served on the Congressional Activities Team, and subsequently as an Executive Assistant.

In 1981, General Franks returned to West Germany where he commanded 2nd Battalion, 78th Field Artillery for three years. He returned to the United States in 1984 to attend the Army War College at Carlisle, Pennsylvania, where he also completed graduate studies and received a Master of Science Degree in Public Administration at Shippensburg University. He was next assigned to Fort Hood, Texas, as III Corps Deputy Assistant G3, a position he held until 1987 when he assumed command of Division Artillery, First Cavalry Division. He also served as Chief of Staff, First Cavalry Division during this tour.

His initial general officer assignment was Assistant Division Commander (Maneuver), First Cavalry Division during Operation Desert Shield and Operation Desert Storm. During 1991-92, he was assigned as Assistant Commandant of the Field Artillery School at Fort Sill. In 1992, he was assigned to Fort Monroe, Virginia as the first Director, Louisiana Maneuvers Task Force, Office of Chief of Staff of the Army, a position held until 1994 when he was reassigned to South Korea as the CJG3 of Combined Forces Command and U.S. Forces Korea.

From 1995-97, General Franks commanded the Second Infantry (Warrior) Division, Korea. He assumed command of Third (U.S.) Army/Army Forces Central Command in Atlanta, Georgia in May 1997, a post he held until June 2000 when he was selected for promotion to general and assignment as Commander in Chief, United States Central Command.

General Franks’ awards include the Defense Distinguished Service Medal; Distinguished Service Medal (two awards); Legion of Merit (four awards); Bronze Star Medal with “V” (three awards); Purple Heart (three awards); Air Medal with “V”; Army Commendation Medal with “V”; and a number of U.S. and foreign service awards. He wears the Army General Staff Identification Badge and the Aircraft Crewmember’s Badge.

General Franks’ retirement was announced on May 22, 2003. Secretary Donald Rumsfeld had offered him the position of Army Chief of Staff, but he declined. On July 7 General Tommy Franks turned over command of Central Command to General John Abizaid.

General Franks lives with his wife, Cathy, in Tampa, Florida and speaks on his experiences, the lessons he learned, and –most of all – his love of his country.
**Know Your Topic – Learning to Lead**

Much has been written about leadership and a simple search in your library or on the Internet reveals a wealth of material on the subject. You may wish to focus your review using the following links:

http://www.pfdf.org/leaderbooks/l2l/spring99/bennis.html

http://www.bpubs.com/Management_Science/Leadership/

http://www.inc.com/guides/leadership_strat/20642.html

**Know the Context**

Consider how this material fits into participants’ individual goals as managers and/or leaders, how it connects to the organization’s goals and challenges, and how it might reinforce any internal management or leadership development programs or initiatives.

Determine how the information supports, complements, or reinforces any professional development seminars or management/leadership development programs or initiatives already existing within the organization.

**Practice Preparation**

Read the participant materials to gain a thorough understanding of what will be presented in the broadcast.

Read the facilitator’s guide:

- Identify key points.
- Familiarize yourself with all of the activities. Select the ones you will use.
- Prepare any needed flip charts.
- Identify any required audio-visual and/or technological tools.
- Practice your delivery.
- Contact Linkage, Inc. with any additional questions.

**Co-facilitation Guidelines**

Co-facilitation is optional, especially for a group of more than 25 people. Communicating and preparing with your co-facilitator before the program will help to create a cohesive and dynamic partnership. Consider exchanging some of the following information in a pre-program telephone or in-person meeting:

- Levels of familiarity, expertise, and comfort with the topic/content.
• Mutual understanding of your roles before, during, and after the program.
• The strengths you believe you bring to facilitating the program.
• The areas in which you feel you will need support.
• Your typical training/facilitation style.
• Specific objectives you have regarding the program or pre/post-program activities.

Preparing the Participants

Depending on how this broadcast will be used within your organization, you may want to consider some or all of the following ideas.

Contacting Participants

Call program participants before the program to introduce yourself and learn about their specific expectations and areas of interest with regard to the program content.

Offer assistance to the participants in completing the pre-broadcast activities. (See below.)

Pre-Work Options

Provide program participants with their participant materials at least two weeks prior to the broadcast.

• Point out the pre-broadcast activities that each participant is expected to complete prior to the broadcast.
• Stress the importance of completing these pre-broadcast activities for maximum participant learning from this professional development opportunity.
• Send participants related articles or business cases.
Contact Participants’ Managers (Optional)

As appropriate, discuss the program with each participant’s manager. Take this opportunity to fully involve the participants’ managers in this professional development process and stress the importance of their support in on-going learning. Suggest that managers discuss this professional development opportunity with their employees both before and after the broadcast.

The purpose of this discussion is to provide support for the learning and give program participants an opportunity to apply their learning in a positive atmosphere.

Preparing the Learning Environment

Flip Chart Basics

Creating:

- Title each chart.
- Use the 6x6 rule: No more than 6 words per line and no more than 6 lines.
- Keep letters 1”-2” high.
- Print.
- Use 2-3 colors per flip chart and change the color on each point to make the lines more distinguishable.
- Create all flip charts ahead of time (except the interactive ones).
- Use tape tabs to help you find a chart easily.

Using:

- Stand close, but don’t “hug” the chart.
- Talk to the audience, not to the chart.
- Use abbreviated symbols, like arrows, circles, and underlining, for ease of communication and for emphasis.

Posting:

- Pre-tear tape and place on back of flip chart stand.
- Post only the charts you need to refer to later.
Classroom Enhancers (if applicable)

- Props
- Posters (Models, Parking Lot, Best Practices)
- Program Road Map (Create a graphic representation of the program content and sequence.)
- Music (When appropriate, music can boost the energy in the learning environment, or it can be an enhancement during reflective writing activities. It can also be used during breaks to change the flow.)
- Relevant quotes
- Good food
- Kinesthetic objects (Small colorful items on each table can help learners to concentrate and stay focused.)
During: Facilitation Skills, Behaviors, and Techniques

Keys to Promoting Learning: The Seven Principles of Facilitation

1. Be courageous.
2. Be a role model.
4. Make it theirs.
5. Make it yours.
6. Focus on application.
7. Link it to the business.

Creating a Comfortable Learning Environment

Control distractors such as room temperature and lighting, pen tapping, sidebar discussions.

Set and maintain ground rules. Ask participants for any ground rules they would like to see established and set your own. Here are some suggested ground rules to consider:

- Be committed to learning – your own and everyone else’s.
- Be a critical thinker. Be rigorous with others in your speaking, listening and thinking. Don’t allow your need to be “nice” to get in the way of learning and effectiveness.
- Be an active participant. Share your thoughts, observations, questions, and feelings about the content and the program itself in order to forward the action and learning. The more you give, the more you’ll get. Turn your complaints into suggestions to enhance the learning environment – do not hold onto them.
- Listen actively and, to the best of your ability, without passing judgment. Be open to moments of confusion, discrepancy, dissonance, disbelief, and disagreement as opportunities for substantial learning for everyone.
- Respect and uphold confidentiality. Names, situations, and perspectives or opinion of the organization and its leadership may surface during the course. This information must remain in the room.

The Ragged Start

Some participants come early, while others may arrive late. Having an activity for people to focus on at their own pace is a way to begin the learning process while waiting for others. Below is a list of generic options for Ragged Start activities.

- Have a list of questions or quotations, related to the course topic, on a flip chart for participants to reflect on or post their responses.
Learning to Lead

Developing and Managing Participation

Facilitators need to be aware of who is talking too much and who is not talking enough—and this includes self-monitoring. Effective facilitators balance lecture and giving information with dialogue by drawing out the participants’ experiences, insights, and thoughts. Limit your own talking time to a maximum of 40%.

To encourage participation you can do the following:

- Ask open-ended questions that cannot be answered with a “yes” or “no” answer. (“What…?” “How…?” “Tell me about…” “Explain…”)
- Count to 10 after you have asked a question.
- Don’t ask too many questions in a row. Ask just one and wait. If there is no response, rephrase the question slightly or spontaneously ask table teams to discuss it briefly then report out.
- Use polling. Ask for a show of hands.
- Give verbal and nonverbal reinforcement to reward participation. (“I’m glad you brought that up. Thank you.” Nod, smile, write their responses on the flip chart.)
- Defer to the group whenever possible when asked a question. (“What do others think about …?”)
- Invite a participant to replace you in recording discussion comments or key points on the flip chart.
- Ask close-ended questions when necessary to limit participation or re-establish focus.
- Paraphrase lengthy comments in a concise way and link them back to course content.
- Ask other participants for their thoughts to balance participation or move the focus away from anyone who is beginning to dominate the discussion.
- Encourage use of a “Parking Lot.” Provide Post-it notes for participants and post a “Parking Lot” flip chart somewhere in the room, for thoughts, questions, and comments that are not directly relevant to the discussion at hand. Review this at the end of the program to generate ideas or resources.
Dealing with Challenging Behavior

- Know your own “hot buttons.” Be aware of your own points of vulnerability.
- Stay calm. Use body language that communicates a state of alert and relaxed openness.
- Check your understanding of other’s positions and perspectives and clarify your own perspective.
- Acknowledge participants’ points of view and value their concerns.
- Ask the group to give their feedback.
- Ask to discuss the issue in private or call a break if the “challenge” is not relevant to the group.
- Help people turn their complaints into action. Ask, “What might you suggest to change that/make a difference?”

Debriefing Basics

Effective debriefing improves the quality and quantity of discussion and learning for both the participants and the facilitator. The purpose is to surface the discoveries and insights (the “aha” moments) of the participants. Debriefing focuses attention on the participant’s experience, their thoughts and feelings, key learning points, and action steps for implementation/application. It provides participants with the opportunity to actively analyze their experience, become more engaged in their learning, and value their own unique perspective.

For any pre or post-program activities, your role as a facilitator is to structure and ask a set of probing questions and to actively listen. This is the participant’s time to share their thoughts – not yours. Consider yourself a guest, not an expert.

Ask open-ended questions. Examples include:

Comfort Level

- What was easy/difficult?
- At what point did it get easier/more difficult? Why?
- How comfortable were you doing _____?
- How did you feel doing _______?
- What was your biggest challenge?

Observation

- What did you notice/see happening?
• What surprised you?
• What did you notice about ______?

**Concepts**
• What principle did you discover?
• What did you learn/relearn?
• What do you most want to remember?
• What ideas or concepts are new to you?
• What connections did you make?

**Benefits/Applicability**
• What did you find most helpful?
• How was this useful?
• How would that be beneficial/applicable back on the job?
• How would that be beneficial to your employees/colleagues/customers?
• What tasks might be easier if these skills/tools were used?
• How could this help you?

**Giving Clear, Concise Instructions**
• Use simple sentences.
• Give step-by-step directions on the flip chart or on an overhead.
• Indicate the length of time participants will have to complete the activity.
• Speak clearly and audibly.
• Model or illustrate when appropriate.
• Check for understanding. Ask, “Who has the first question?”
• Review/Preview.
• Review key points at the end of each section.
• Let participants know what is next.
Running Skill Practices

Give very clear verbal instructions and use prepared written instructions (on a slide, flip chart, or a page in the participant guide).

Emphasize the value of practicing concepts versus talking about concepts theoretically.

When you listen, don’t be obtrusive or distracting. Sit or stand to the side and try not to make eye contact. The participants will be tempted to ask you if they’re “doing it right.” Discourage this temptation through your own body language.

Intervene only when you think that mistakes are being repeated or if the participant practicing the skill is truly stuck. Whisper a suggestion so as not to interrupt the flow of the discussion or dialogue within the skill building practice.

Look for what the learners are doing well and point it out after the activity is complete. Take notes if necessary in order to remember at least one point from each participant/skill user.

Evaluation Methods

Options:

Ask participants to share their thoughts on the day’s material and workshop. Record a list of +/Δ on a flip chart. The Delta symbol (Δ) represents change.

Ask participants to write an anonymous response to the following on a loose piece of paper or Post-It Note:

- What one moment today stands out most strongly for you?
- What is one issue or concern you still have that you would like to see addressed?
- What is one specific thing that would improve your learning experience before, during, or after the broadcast program?
After: Taking It Home

Post-Broadcast Program Options

1. Build into the program’s evaluations a specific question asking participants to record one personal commitment they are making as a result of the program. Consider sending personalized follow up emails to participants one month after the course. The email contains:
   - a thank you
   - a reminder of their personal commitment
   - an invitation to provide advice and coaching via the phone for up to 30 minutes

   The following is a sample letter:

   Dear NAME OF PARTICIPANT,

   Greetings!

   This is FACILITATOR NAME, the facilitator for the Linkage Excellence in Leadership & Management Series you attended on DATE. I hope you have found ways to apply the skills and tools you gained from the program to your daily work.

   I also want to remind you of the personal commitment you wrote on your program evaluation form. You wrote (EXAMPLE): “I’m going to recognize and reward at least three employees this week for the short-term wins that I identified in the course.” If you are willing to share, I’d be interested to hear how you are doing in relation to that commitment, and to the general content from the program.

   Finally, I welcome a phone call if you would like my coaching on any work issues related to our course work together. You can email me or call me at _______ to set up a call of up to 30 minutes.

   Best wishes,

   FACILITATOR NAME

2. Contact the managers of each participant to reinforce and transfer the learning of the participants. (Note: This should be done only with the explicit knowledge of, and agreement by, the participants ahead of time.)

3. Conduct a half-day learning session six to twelve weeks after the program for participants to regroup, reflect on, and recommit to effective daily performance.
4. Over a period of months, participants could receive additional resources to strengthen their skills, including:

- Selected products (tools, job aids, articles)
- Targeted communications (e-mail best practice tips, development suggestions, and research)
- Evaluation of the effectiveness of the Excellence in Leadership & Management Series program
Additional Resources

About Linkage

Linkage, Inc. is a global organizational development company that specializes in leadership development. Serving the public and private sectors, the Company provides clients around the globe with integrated solutions that include strategic consulting services, customized on-site training experiences, tailored assessment services, and benchmark research.

With a relentless commitment to learning, Linkage also offers a full range of conferences, institutes, summits, public workshops, and distance learning programs on leading-edge topics in leadership, management, HR, and OD. More than 100,000 leaders and managers have attended such a Linkage program since the Company’s founding in 1988.

Linkage is headquartered in Burlington, Massachusetts, with regional offices in Minneapolis, Atlanta, San Francisco, London, and Brussels. On two occasions, Linkage has been named to the Inc. 500, a list of the fastest-growing private companies in the United States.

We can be reached by calling 781-402-5555 or through our website at: http://www.linkage-inc.com/

Skill Building Public and On-Site Workshops, Certificate Programs, and Certification and Licensing

Linkage offers practical skill-building learning and development programs in the areas of management and leadership development, organizational development, human resources, and training and development. Our programs are based on cutting-edge research and deliver practical tools and methods for today’s organizational leaders.

Public Workshops: A variety of our public workshops are scheduled across the United States and Europe. A current listing of workshops, locations, and dates is available on our website.

On-Site Training: By combining the proven effectiveness of Linkage’s workshops with the convenience, customization, and travel cost-savings of holding workshops at your site, you can create the ideal learning experience for your leaders, managers, employees, and colleagues.

Certificate Programs: Certificate Programs are Linkage’s most comprehensive, focused, and diverse development programs. Linkage currently offers certificates in Organizational Development, Change Leadership, Leadership Development, HR Consulting Skills, Transformational Selling, and Coaching Leaders.

Certification and Licensing: Linkage certifies individuals to deliver our management and leadership learning programs, and then licenses the programs on an individual basis to certified individuals and their organizations.

Linkage’s Leadership Programs

Linkage’s approach to leadership is based on our belief that leaders need to be both learners and teachers. Leaders who learn are open to new possibilities and changes. Leaders who teach realize that communicating, coaching, and helping others is part of “what it takes.”
Best Practices Resources

To order any of these titles, contact Linkage Customer Service at 781.402.5555 or visit us on the Web at: http://www.linkageinc.com/products/

The Linkage Toolkit for Developing Leaders

Foreword by Jay Conger
Authors: Linkage Senior and Principal Consultants and Outside Thought Leaders

This toolkit is designed to provide managers and leaders at all levels of your organization with the right tools to become successful and effective. It provides practical advice, ideas, behaviors, assessments, skill-building activities, and methods for leading yourself and others in your daily work. It is an excellent resource to create common leadership practices and language across organizational boundaries within your company.

Best Practice Guidebooks—Linkage’s Best Practice Guidebooks for Teams, Process Improvement, and Tools

These self-directed, self-paced, practical guidebooks provide best practice tools, processes, and models needed to be an effective manager or change leader, improve processes, and enable teams. All processes, models, and tools have been integrated and implemented with positive measurable change at such organizations as Raytheon, Morton, Beatrice Foods, Ellerbe Beckett, GE Capital, Barclays Bank, and Volvo. The guidebooks have been effectively used by vice presidents, managers, supervisors, work team leaders, project managers, and other industry leaders across all major vertical industries.

Best Practice Handbooks—Best Practices in Knowledge Management and Organizational Learning Handbook

Foreword by Hubert Saint-Onge
Authors: Phil Harkins, Louis Carter, and Amy Timmins, Editors

Through in-depth “how-to” case studies, over 100 “take-away” exhibits, and research from the world’s foremost organizations, this best practice handbook provides practical, easy-to-apply training, models, tools, research and other essential elements for designing, delivering, evaluating and learning successful KM/OL programs. Included in the handbook are: Microsoft, AT&T, Hewlett-Packard, Shell Oil Company, Ernst & Young, the World Bank, Buckman Labs, Norske Skog Flooring and more! The “how-to” case studies define KM/OL lexicon, evaluate return on investment, explain how to create a business case for KM/OL, and detail all stages of the KM/OL process.

Best Practices in Organization and Human Resources Development Handbook

Foreword by Richard Beckhard
Authors: Louis Carter and David Giber, Editors
Linkage selected 17 best practice organization and HR development initiatives in all major industries, for organizations such as Johnson & Johnson, Kraft Foods, Media One Group, Xerox, Boeing, Sun Microsystems, Nortel Networks, SmithKline Beecham, ServiceMaster, Allstate Insurance, Cellular One and Westinghouse. The book covers 5 of the hottest management topics today: organization development and change, leadership development, recruitment and retention, performance management, and coaching and mentoring. Using a case study approach, top practitioners detail the models, tools, training, processes and other critical elements that have made these initiatives so successful. The book also features contributions from such organization and human resources development experts as Richard Beckhard, Warner Burke, Jay Conger, John Sullivan, Bev Kaye, and Ed Lawler. It is a rich resource for any manager, OD/HRD practitioner, student, or facilitator of change. Use this handbook to apply learnings from any Linkage workshop.

The Big Picture—A Systems Thinking Story for Managers

Author: Carol Zulauf

This is a story about Allan, a manager who starts off being very reactive and always “putting out the fires.” He gets rewarded for this type of behavior but in the process also alienates many of his direct reports and others in the organization. Slowly, he begins to learn more effective ways of interacting and incorporates the disciplines of systems thinking and organizational learning, to the huge benefit of himself, his colleagues, and his organization. Key Systems Thinking Principles, in addition to Action Learning Steps for Leaders, are provided at the end of each chapter for you to implement on your way to becoming more of a ‘big picture’ systems thinker!