



LEADING EMPOWERED TEAMS

**FOR AN AWESOME
CUSTOMER EXPERIENCE**

LEADER GUIDE



Service Quality Institute
The Global Leader in Customer Service

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Written by Harry Woodward, Ph.D & John Tschohl.

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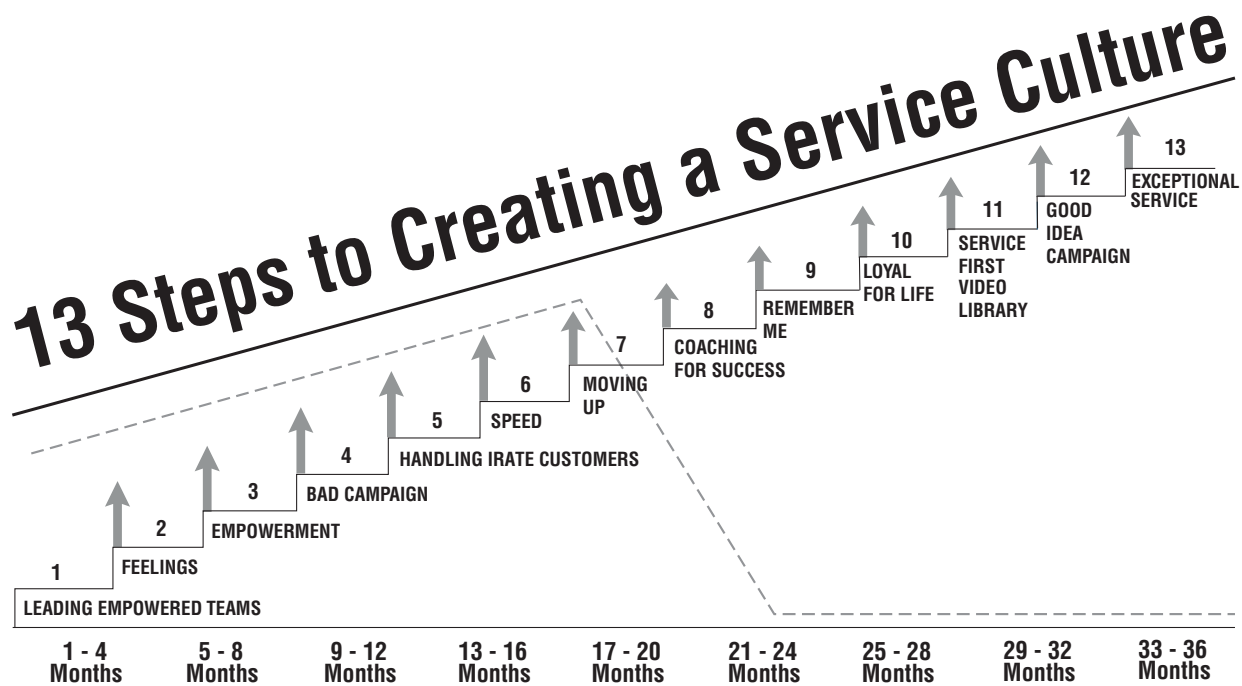
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LEADER INTRODUCTION

Foreword

Welcome to “Leading Empowered Teams for an Awesome Customer Experience (ACE).” You have been selected to help your team build a customer service culture. If you have never led a workshop before, you’re probably a bit nervous. That’s only natural. However, the material is well organized and easy to use. So relax. This leader guide will take you step-by-step through each phase of the learning process. Just follow the directions, and you will find yourself confidently leading your team toward service excellence.

As a leader you have three important responsibilities. One is to guide the participants through the workshop in a logical, orderly pattern, ending with the accomplishment of the workshop’s purpose.

The second is to encourage, and get participation when you and the group need and want it.

The third is to maintain control of the workshop... to keep it on track and on time.

Successful facilitation is a matter of being well prepared. In this introduction you will find information, helpful suggestions, and tools you can use to plan and prepare for the workshop. Read all the materials carefully to ensure you understand the concepts and principles of this learning system.

The Workshop

The approach of “Leading Empowered Teams for An Awesome Customer Experience” is unlike other learning systems. It is presented through a series of interactive modules that allow the participants to experience the concepts and principles necessary to lead an empowered workforce. Exceptional customer service has never been in greater demand and managers and supervisors will learn how to lead their teams by:

- *Setting Customer Experience standards*
- *Using coaching and feedback techniques to achieve desired behaviors*
- *Empowering all team members to meet customer needs*
- *Developing collaborative teamwork within the organization*
- *Educating + Enabling + Encouraging = “Empowered Collaboration” from Team*

To achieve the objectives of “Leading Empowered Teams for An Awesome Customer Experience,” training should be conducted in an organized, systematic way. However, the workshop should be relaxed, informal, and fun for you and your group. Best results will be obtained if the workshop is delivered in two consecutive day sessions. If necessary, the system can be facilitated in two non-consecutive day sessions or divided by modules to suit your training needs.

Leader Materials

This leader guide is a complete reference manual for conducting the workshop. Ease of implementation is assured through the following format features:

- *Scripting for each module is provided to you and is identified by text within a box.*
- *Answers, learning points, and directions are enclosed in parentheses and found directly below the scripted box.*
- *Transcripts of participant guide pages are included for easy reference and found in order of their implementation.*
- *Graphic symbols will flag activities that require use of flip charts or overheads.*

You will need for accessories two bells and a box of straws. These items will be used to demonstrate key learning points during the module activities.

Participant Material

The participant guide is designed to be used during the workshop. It consists of pages of text and/or activities that involve the group in the learning points covered in each module. As the group leader, you must emphasize to the participants the importance of using the material fully. Make sure each participant has his or her own manual, and encourage participants to write notes, highlight areas where they have questions, or underline passages which may have special meaning to them.

Each participant will receive a signed certificate of completion at the conclusion of the workshop. Make sure each member of the group receives a certificate signed by the appropriate individuals in your organization.

Achieving Excellence Through Customer Service, written by John Tschohl, founder of Service Quality Institute, is an added value for the workshop participants. As the definitive work on customer service, the book is companion reading for participants to gain insight into today’s need for service excellence. Hundreds of ideas within the book can be put to use immediately to build on the customer service strategy as a whole. No customer service library is complete without this valuable reference tool.

Additional copies can be obtained from your local bookstore or by calling Service Quality Institute. Bulk pricing is available.

The Art of Good Leadership

"Leading Empowered Teams for An Awesome Customer Experience" will have a powerful impact on the level of customer service your organization delivers only if it has the support and committed participation of you, your organization, and your fellow workers.

Demonstrate your interest and enthusiasm during the workshop by taking a leadership role that encourages open communication and active participation. You will find your relationship with your team improved by the frank, open approach of this learning system.

Make sure your group sees you not as an expert, but as a facilitator or coach to help the entire group explore the topics covered. Your job is to create an atmosphere of trust, teamwork, and focused action, the very skills you want your group to take back to their employees. The participants will retain more information when they get reinforcement and feedback from other participants, and when they relate the material to their everyday experiences.

Activities have been designed to encourage interaction within the group. To keep the interaction going, members must be guided toward group communication. This is especially important during the first stages of the workshop. Set the stage for an informal, give-and-take, non-threatening atmosphere. As the workshop progresses, involvement is usually not a problem. But until a natural comfort level is reached, it is important for you to go out of your way to make sure that everyone participates. Use the following techniques to ensure involvement:

- *Encourage everyone to speak candidly and freely.*
- *Call on a variety of participants to involve everyone in the learning process.*
- *Ask good questions.*
- *Practice good listening skills.*
- *Use adult education techniques and processes.*

Don't allow one or two members to dominate the group. This kind of manipulation threatens others. Communicate to the individual(s) that you would be happy to discuss the point(s) or topic(s) in further detail at the end of the session. Then remember to do so. Call on other participants and move the session along. If participants begin arguing, physically stand between the debaters so they cannot see one another. Then involve the entire group in the discussion by rephrasing the argument.

Finally, keep the workshop moving. Start on time and stop on time. Again, if participants seem to be spending too much time on certain topics, suggest further discussion at the end of the session. By maintaining a comfortable pace, you will keep the group alert and active. Good leadership requires you to stay on your toes—and a step ahead of your group.

Effective Questioning and Listening Techniques

“Leading Empowered Teams for An Awesome Customer Experience” is not intended to be presented through extensive lecture or directive. Instead, ask questions and let the participants do the lecturing through their answers. The participants will grasp the concepts and internalize the learning points more effectively when their emotions, as well as their intellects, are involved.

The best way to handle questions from the group is to answer with another question. Remember that the objective is to get the group to interact and learn from each other through discussion. Use the following guidelines for effective questioning:

1. **Ask open-ended questions; that is, questions which cannot be answered by a simple yes or no. Open-ended questions ask who, what, where, when, why, and how. The questions in this leader guide are examples of open-ended questions.**
2. **Ask questions of the group in general, a specific person in the group, or a team within the group.**
3. **Use certain key phrases, particularly during group questioning. For example, ask the group to:**
 - *Tell why something is important.*
 - *Analyze a situation.*
 - *Give an example or relate a story to illustrate a point.*
 - *Offer suggestions to solve a problem.*
 - *Explain how they feel.*
4. **Redirect questions by asking other members of the group if they have suggestions or solutions.**
5. **If you receive inappropriate responses to questions, respond by using phrases such as: “That’s a good response but not quite what I was looking for. Susan, how could you answer this question?” Keep the process positive.**
6. **If someone asks a question you cannot answer, do not panic. In some cases the best way to handle questions from the group is to answer with another question.**

When in doubt, if there is no response or the response is inappropriate, KEEP ASKING OPEN-ENDED QUESTIONS.

Interaction gives life to this learning system and personalizes the experience for the participants. Interaction also makes it more fun for you as a facilitator.

Listen carefully to what each participant is saying, and respond positively. In your role, you are responsible for pulling all the comments together and keeping the session moving along appropriately.

Preparing for the Workshop

Below is a summary of steps to follow for planning the effective implementation of "Leading Empowered Teams for An Awesome Customer Experience."

- *Announce the workshop in written form for specific dates, time and place. Invite your group in writing. A sample invitation is included within this section for your use. Hand-deliver the invitations, if possible and follow-up in person or with a phone call to build enthusiasm for the scheduled dates.*
- *Send the Achieving Excellence Through Customer Service book to all participants asking them to select and read one chapter of the book in preparation for the course.*
- *Select a meeting room where the group will be comfortable and free from interruptions.*
- *Study the leader and participant guides, including activities and practice situations prior to the workshop. The more familiar you are with all of the materials, the easier implementation will be for you and your group.*
- *Make sure you have enough participant materials for everyone in attendance. Each member of the group will receive a participant guide, the book, Achieving Excellence Through Customer Service, and a certificate of completion. Certificates will be filled out for each participant to include name, signatures of sponsoring individuals, and date of workshop completion.*
- *Make use of tent cards or table markers to personalize the event for participants, especially if you are unfamiliar with all members of the group.*
- *Secure one to two (depending on the size of your group) easels, flip charts, and markers for use during the workshop.*
- *Have PowerPoint projector or computer on hand.*
- *Have paper and pens on hand for participants.*

- *Have accessory items available for use during the appropriate activities.*
 - Achieving Excellence Through Customer Service
 - Masking tape
 - Flip chart and paper (one or two)
 - White board, if possible
 - Selection of colored markers (minimum of eight)
 - Two bells (with different pitch)
 - Straws (20 straws per group)
 - Post-it Notes
 - Certificates
 - Tent/name cards

- *In order that you may evaluate the effectiveness of "Leading Empowered Teams for An Awesome Customer Experience," a critique form has been included on page 91 of the participant guide for completion at the end of the workshop.*

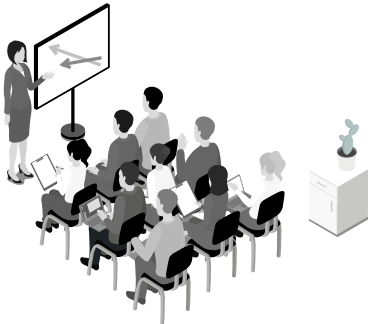
Audience Size

Up to 10 participants the ideal size for new leaders.
Up to 20 participants the largest recommended size.
21 or more participants requires experienced leaders.

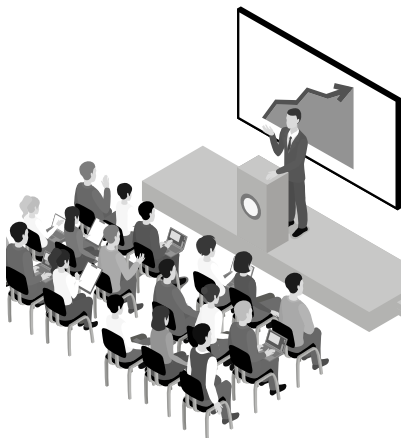
Seating Suggestions:



Small audience of 5 to 7 participants



Medium audience of 8 to 15 participants



Large audience of 16 to 30 participants

This Facilitator's Guide is a complete reference for conducting Leading Empowered Teams. Ease of implementation is assured through the following format features:

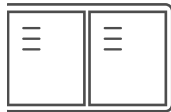
- *Scripting for each module is provided for you and is identified by passages of bold type font. Questions are provided to generate discussion.*
- *Answers, learning points, and directions are enclosed by parentheses and appear directly below the script/text. These examples are provided to lead the participants in the proposed direction only if they cannot generate ideas on their own. The Facilitator's Guide also contains directions for a variety of exercises.*
- *Transcripts of participant manual pages are included for easy reference and found in order of their implementation.*
- *Graphic symbols will flag activities. Key symbols will be found in the left hand margin of the Facilitator's Guide. These can be used as a visual reference. Key symbols are as follows:*



Flip chart



PowerPoint



Participant Manual



Review or Summarize



Blinding Flash of the Obvious



Individual Exercise



Pairs Exercise



Group Activity

There are 60 PowerPoint slides that are included to help you facilitate this program. They are numbered 1-60 by the PowerPoint icon on the section and page which they should be used. When you go the PowerPoint and click on the # the slide will have the content or activity that is to be done at that time in the session. Make sure you open the "Notes" section underneath the slide it will have additional remarks, tips or facilitating points to help you have a great session. Aon the top of the notes is the slide # and page # of the Leaders Guide

Rules for Practice Situations

You will be required to model five practice situations within this workshop. For best results, prepare before practice situations by choosing volunteers and creating a scenario to illustrate each practice situation.

Practice situations are as follows:

- *“Catching Somebody Doing Something Right”*
- *Confronting Non-Performance*
- *“Calling the Issue”*
- *Employee Interview*
- *Empowerment Support Interview*

Play it Straight

Encourage the participants to talk to each other as if in real conversation. They should not make comments to the observers or describe what they would say. They should just say it.

No Interruptions

The observers and other team members should remain silent during an actual session.

Right to Stop

No one is forced to continue in a practice situation. A player can simply stop at any time. As a leader, you too can stop the practice situation if it is getting off track. To prevent premature critique or debriefing before the participants have had a chance to accomplish their objective, no one else has the right to call a halt.

Right to Conference

Any participant or team member, with the exception of observers, may call for a conference. The purpose of a conference is to help the participant or team accomplish the objective.

Self-evaluation First

It is absolutely essential that the participants have the first opportunity to comment on their own performance. It is much more effective and desirable to acknowledge our own flaws than to hear about them from others.

Good News First

Every critique, even of oneself, should begin with what went well and proceed to suggestions for improvement. In your role as leader, be sure there is always some good news and encouragement in every debrief.

Sample Invitation

Use the following sample or devise an invitation of your own to invite participants to the workshop.

TO: (Participant name)

FROM: (Your name here) DATE: (Today's date)

RE: "Leading Empowered Teams for An Awesome Customer Experience ACE"

At (company name) we're committed to superior service for all of our customers. We know quality service requires a team of employees who are also committed and understand how to meet the needs of customers. You have a leadership role in delivering quality service.

To help you learn more about effective techniques and methods for building an empowered work team, I am pleased to invite you to "Leading Empowered Teams for An Awesome Customer Experience." You will be challenged, and yet, you will enjoy this interactive, fun (two-day or one-day) workshop.

In preparation for the workshop, a copy of *Achieving Excellence Through Customer Service* is enclosed. Please read one chapter in preparation for the workshop. Underline or highlight the key ideas that you learn from that chapter and identify two ideas that you feel (company name) can learn from it. If possible, read the entire book before the workshop begins. Please bring the book to the workshop.

We will meet on (days) at (time), at (place). I will call within the next week to confirm your attendance.

Sincerely,

(Your signature)

Timetable

TWO DAY WORKSHOP

DAY ONE

MODULE ONE:

Introduction 30 minutes

MODULE TWO:

An Awesome Customer Experience Defined 1 hour

MODULE THREE:

Service Points and Flash Points 50 minutes

MODULE FOUR:

Introduction to Leadership 50 minutes

MODULE FIVE:

Customer Experience Standards 20 minutes

MODULE SIX:

Feedback & Coaching 2 hours, 20 minutes

TOTAL: 5 hours, 50 minutes

Timetable

DAY TWO

MODULE SEVEN:

Empowerment Exercise*

Empowerment 3 hours, 30 minutes

MODULE EIGHT:

Managing Our Time

Tower Building

Teamwork

2 hours, 15 minutes

MODULE NINE:

Action Planning

1 hour, 5 minutes

TOTAL: 6 hours, 50 minutes

* *Alternate Activity: You are a consulting team tasked with taking empowerment at (company) to the next level. Using the concepts you've learned in Modules One through Five, please come up with your recommendations.*

Outline

ONE DAY WORKSHOP

MODULE ONE:

Introduction 30 minutes 8:35 – 9:05

MODULE TWO:

An Awesome Customer Experience Defined 1 hour 9:05 – 10:05
Break 15 minutes 10:05 – 10:20

MODULE THREE:

Service Points and Flash Points 25 minutes 10:20 – 10:45

MODULE FOUR:

Introduction to Leadership 25 minutes 10:45 – 11:10
(Best Leader Exercise –
Large Group Activity/Service
Quality Management Introduced)

MODULE FIVE:

Customer Experience Standards 20 minutes 11:10 – 11:30
(Parallel Lines Exercise)
Lunch 1 hour 11:30 – 12:30

MODULE SIX:

Feedback 1 hour, 10 minutes 12:30 – 1:40

MODULE SEVEN:

Empowerment 1 hour, 30 minutes 1:40 – 3:10
Break 15 minutes 3:10 – 3:25

MODULE EIGHT:

Teamwork 1 hour 3:25 – 4:25
(Tower Building)

MODULE NINE:

Action Planning 35 minutes 4:25 – 5:00

Outline

FOUR, HALF-DAY WORK SESSIONS

DAY ONE

Modules

One through Four

3 to 4 hours

DAY TWO

Modules

Five and Six

3 to 4 hours

DAY THREE

Module Seven

3 to 4 hours

DAY FOUR

Modules

Eight and Nine

3 to 4 hours

PowerPoint

PowerPoint #

MODULE ONE: INTRODUCTION

Leading Empowered Teams for An Awesome Customer Experience
Who Are You
Our Approach
Discovery Learning

Module Two: QUALITY SERVICE DEFINED

Who Gets to Decide
The Benefits of an Awesome Customer Experience
“Footprints”
Service Worker Attitudes
Creating Customer Comfort
Keep Your Hand on the Horse
Customer Comfort

Module Three: SERVICE POINTS AND FLASH POINTS

Moments of Truth
The Keys of Effective Quality Service
Shifting Impressions

Module Four: INTRODUCTION TO LEADERSHIP

Best Leader Exercise
Jack Welch
Definition of Leadership
Quality Management Model

Module Six: FEEDBACK

The Main Points of Feedback

Module Seven: EMPOWERMENT

Empowerment Definitions
Implementing Empowerment
Four Points of Empowerment
The Key to Empowerment
What if the System Won't Let Me Be Empowered?
Four Problems of Empowerment
Employee Interview
Jan Carlzon Quote
Mighty Dumb Play

Summary

Summary

READER'S COMMENT FORM

Service Quality Institute is always looking for ways to improve our existing learning systems. We greatly value feedback from customers on the leader guide and participant guide materials and how we can make them even better.

Service Quality Institute may use and distribute any of the information you agree to supply in any way it believes appropriate without incurring any obligation. You may, of course, continue to use the information you supply.

Please email to John@ServiceQuality.com or write your comments below, fold, tape ends together and drop in the mail to Service Quality Institute, 4656 Nine Oaks Circle, Minneapolis MN 55437 USA. We will send you 2 free John Tschohl books of your choice as a thank you. Let us know which books you want with free shipping.

COMMENTS:

NAME:

ORGANIZATION:

COUNTRY/CITY/STATE/ZIP:

PHONE: _____ Email: _____

MODULE ONE: Introduction

TOPIC	ACTIVITY	ESTIMATED TIME
Welcome	Discussion	10 minutes
Key Learning Objectives	Discussion	4 minutes
Action Plan	Discussion	1 minute
Review Achieving Excellence Through Customer Service	Discussion	13 minutes
BFO - Blinging Flash of the Obvious	Discussion	30 minutes

INSTRUCTIONAL OBJECTIVES

- *To welcome the participants and help them feel comfortable*
- *To overview the workshop*
- *To provide a service-related experience that will frame the central focus of the workshop*

MODULE ONE:

Introduction

WELCOME



Leader Text:

Welcome to “Leading Empowered Teams for An Awesome Customer Experience.”
My name is _____.
During this workshop we’ll be focusing on helping all of you develop your leadership knowledge and skills so that you and your team can deliver better service to our customers. We will accomplish this goal through main areas of service quality leadership. They are quality customer experience standards, feedback, empowerment, and teamwork.

To begin, let me address four basic questions and key learning objectives.

(Board the questions.)



Leader Text:

Who am I?
Why are we here?
Who are you?
How does it work?

(Provide a little more information and background on yourself if you wish.)

Leader Text:

We will have you introduce yourselves in a minute. But before that, let me address 'why are we here?'

We are here to learn how to lead a quality team, built around a service strategy—to help team members provide the best quality service they can. Remember that focus.

At first, we will talk about service and also define standards. These are necessary preliminaries to the core—the leadership skills. In other words, before we can address leadership, we have to have something concrete to lead.

In setting up the definitions and standards (which will take most of the morning) we will be drawing on the basic principles of leadership, creating a service culture and developing a service strategy.

Marc Benioff, Founder and co-CEO, Salesforce said, "I believe that every company and every individual – from new hires to those sitting in the corner office – has the potential to become a platform for change. Not only because it's the right thing to do, but also because in the future, success will demand it."

I have already introduced myself briefly, but...

Potential to become a platform for change. Not only because it's the right thing to do, but also because in the future, success will demand it."

(Tell a little more about yourself and explain what you want to get out of the program. Then, using your comments as a model, ask participants to introduce themselves.)



#3

Leader Text:

We're going to go around the room. I'd like each of you to tell us:

- Who are you?
- What do you do? (job title, duties, etc.)
- What do you want to get out of the next two days?

(Allow participants to introduce themselves. Keep track of the things they want to get out of the course.

Summarize their wants and move on to 'How does it work?')

Leader Text:

Finally, 'how does it work?' Specifically, how does the course work?

Our schedule will be as follows:

Morning break	at:
Lunch break	at:
Afternoon break	at:

Restrooms can be found (give directions).

(Cover any additional housekeeping details you wish, such as:

- *leaving the room for phones/messages*
- *coffee/soda availability*
- *smoking*

Explain the following:)

Leader Text:

Our educational approach is that of discovery learning.



#4

Leader Text:

Learning style of Leading Empowered Teams for An Awesome Customer Experience. ACE

1. Discovery awareness —We will involve you in experiences to allow you to get “aha’s.”
Learning below
2. Experiential Learning —We do this through exercises and questions. Sometimes the direction may not seem totally clear, but it will resolve itself.
3. Credit participants with having it inside them —In this process we want to draw out what you have inside of you.
4. Little lecture —There will be some lecture, but we’re not heavy on it.
5. Lots of activity and involvement —As stated, there will be a number of exercises, practice situations and small group work.
6. Flexibility Required. Can take any number of directions —Often we can take a direction, not totally planned, but one which the group wants to go in.

In general, we rely on you to:

- Participate fully
- Tolerate temporary ambiguity that may occur in the course of instruction.

One final note:

In this course we are going to be telling you things that may be different from what you have heard. We are also going to be asking you to do things which may seem odd or uncomfortable at first.

In this regard, we ask you to tolerate the ambiguity long enough to give the idea or procedure a fair shake. We think you will like the approaches we present, but they may take some getting used to at first.

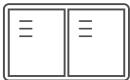
The purpose of this seminar is to stretch and learn; so let’s get going.

KEY LEARNING OBJECTIVES

Leader Text:

Now please turn to page 1 in your manual, and let's review the key learning objectives.

Transcript – Page 1



LEADING EMPOWERED TEAMS FOR AN AWESOME CUSTOMER EXPERIENCE

KEY LEARNING OBJECTIVES:



- *To define an approach for meeting the intellectual and emotional needs of customers*
- *To enable leaders to define superior quality service job standards and communicate them to employees*
- *To enable leaders to provide useful and continual feedback to employees*
- *To enable leaders to empower employees to meet and exceed the customer's intellectual and emotional needs*
- *To enable leaders to create an atmosphere of teamwork and collaboration*

ACTION PLAN

Leader Text:

You were given a copy of John Tschohl's book, *Achieving Excellence Through Customer Service*. We will be using parts of the book during the workshop. Please complete reading the book after the seminar to reinforce and expand on the ideas you will learn in this workshop.

Leader Text:

Let's review the chapter you selected and go over highlighted and key ideas. You were asked to identify two ideas that you feel our organization can learn from.

BFO —BLINDING FLASH OF THE OBVIOUS

Define BFO's —key points to emphasize in the course.



#6

Invite participants to supply their own BFO's as the course continues.

When you come to these points —make a “time out” or in effect, call special attention to the point —a kind of “read my lips” pause to let people know that this point is key. You may also choose to give a “reward” prize, or gift to the participant who contributes the highest number of BFO's. This can be fun and will create a special energy to the process.

Leader Text:

(Board the BFOs)

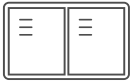


During the course of this workshop several key points, called BFO's, will be discussed.

A BFO, or “Blinding Flash of the Obvious” is defined as “gaining a new insight about something you already know.”

I'd like to involve you in a friendly competition. Whenever you hear a key point —or BFO —shout it out and I'll record it on a master list along with your initials. At the end of the workshop we'll discuss key points —or BFO's —covered, and give special recognition to whoever was able to identify the most. Pages 2 and 3 in your manual allow space for you to record the BFO's defined during the next two days.

(BFO Certificates or other forms of recognition may be awarded to the participant with the highest number of contributions. Results and discovery will be enhanced with greater involvement and maximum number of BFO's discovered. A book authored by John Tschohl would be a great incentive.)



Board BFO – “Blinding Flash of the Obvious”

Keep referring back to this page during session to review and update.

Transcript – Pages 2 and 3

BFO's –BLINDING FLASH OF THE OBVIOUS

- | | |
|-----|-----|
| 1. | 11. |
| 2. | 12. |
| 3. | 13. |
| 4. | 14. |
| 5. | 15. |
| 6. | 16. |
| 7. | 17. |
| 8. | 18. |
| 9. | 19. |
| 10. | 20. |
| 21. | 31. |
| 22. | 32. |
| 23. | 33. |
| 24. | 34. |
| 25. | 35. |
| 26. | 36. |
| 27. | 37. |
| 28. | 38. |
| 29. | 39. |
| 30. | 40. |