

CRM *learning*

PRESENTS

POSITIVE DISCIPLINE

How to Resolve Tough Performance Problems
Quickly...and Permanently

LEADER'S GUIDE

*Leadership is the art of getting someone else to do what you want done
because they want to do it*

– Dwight D. Eisenhower

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BACKGROUND

INTRODUCTION

For most supervisors and managers, having to discipline employees is the worst part of their jobs. It is an uncomfortable process they would rather avoid. So it's not surprising that many of us either act emotionally when disciplinary problems arise, or find ways to avoid dealing with them. Either reaction creates more problems than it solves.

There is a better way to handle disciplinary issues, based on the organization's need for top-level performance by all employees. When discipline is approached in a logical, positive framework focused on bringing performance up to par, the emotion can be taken out of the equation and real improvement can be made.

And, in cases where improvement does not result from a disciplinary meeting and further action is required, it can be related to the clear standards you have set with the employee. Positive Discipline is a more effective and less emotional way to meet your real goals – improved performance throughout your department.

Note: Formal disciplinary procedures are not covered in this workshop.

HOW THIS WORKSHOP EXPLORES THE CONCEPT OF POSITIVE DISCIPLINE

CRM Learning's *Positive Discipline* workshop provides the video and workshop resources to present a focused, thought-provoking session on this vital topic. Supervisors and managers will develop new skills to help their employees meet performance goals. Participants will analyze current situations in their own work environments and develop ways to solve disciplinary problems in a positive, performance-oriented framework. They will discuss their issues and develop new strategies, keeping their approach consistent with existing organizational guidelines and standards.

Every workplace is different, but the relationships between employees and their supervisors, and between employees and the organization as a whole, are based on a fundamental requirement: wages are traded for performance. When performance is not

TRAINING DESIGN OVERVIEW

The *Positive Discipline* workshop package includes a structured training design to support a 2.75 to 3-hour workshop experience.

- The **video** presentation illustrates the problem of workplace discipline and a series of steps managers can take towards a positive solution.
- This **Leader's Guide** provides an introduction to the Workshop and a Presentation Script to help facilitate it. Workshop activities and structured discussions help participants explore their own beliefs and tactics around the issue of discipline and develop skills to provide positive discipline when required.
- **Participant Workbooks** (10 copies) provide worksheets for completing the activities and space for notes.
- A **PowerPoint** presentation on CD-ROM includes slides to support the scripted presentation.
- The kit includes **10 copies of the book** *Positive Discipline: How to Resolve Tough Performance Problems Quickly...and Permanently* by Eric Harvey and Paul Sims.
- A **Job Aid** (10 copies) provides rapid access to some of the key points and strategies covered in the workshop.

CUSTOMIZING YOUR PROGRAM

Your specific needs and circumstances should determine the workshop agenda. Customize the presentation by supplementing, replacing, rearranging or removing components.

- Modify activities and discussions to meet your objectives.
- Add information and examples from your own workplace.
- Modify the PowerPoint presentation to add information tailored to your organization or procedures.

LEARNING POINTS

Learning Points for the workshop are listed below:

1. Show how a punishment approach to disciplinary problems is counterproductive.
2. Explore and practice the steps in using positive discipline.
3. Use the proven strategy of positive discipline to intervene, solve, and prevent disciplinary problems in your own departments.
4. Encourage employees to take personal responsibility for their behavior.

WHO SHOULD ATTEND?

CRM Learning's Positive Discipline workshop is designed for managers, supervisors, and other staff responsible for managing their fellow employees.

Note: The design of the workshop assumes that all participants are from the same organization.

Workshop material should be presented in a group setting where the responses of others can be shared. We recommend limiting the group to no more than 12-16 participants to promote active discussion of the workshop topics.

Positive Discipline may be used as a self-study program, although such use will require additional effort on the part of your organization to introduce and prepare the materials.

WHEN TO USE THIS PROGRAM

As with any training activity, a clear purpose for using the program will encourage participation and follow-through.

Use the Positive Discipline Workshop as:

- The core content for a new approach to performance discipline.
- A refresher for management and supervisory staff.
- One component of a management or leadership development program.

TRAINING DESIGN

The workshop agenda runs from 2.75 to 3 hours, depending on the length of discussion and the use of the optional activities. We encourage you to add or remove activities from the overall plan to meet your specific needs or time constraints.

TRAINING AGENDA

Workshop Segment	Handout	Duration (min)
Workshop Introduction <ul style="list-style-type: none"> • Workshop Purpose • Objectives, Ground Rules and Logistics • Participant Introductions 	Worksheet A	10 minutes
Activity 1: Redefining Discipline <ul style="list-style-type: none"> • Participants define discipline as it relates to employee performance • Positive Discipline concept introduced • Introduce 5-step process 		10 minutes
Activity 2: Video Presentation <ul style="list-style-type: none"> • Video Introduction • Positive Discipline Video 	Worksheet B	25 minutes
Activity 3: Video Review <ul style="list-style-type: none"> • Group discussion of video concepts 		10 minutes
Activity 4: Identify the Problem <ul style="list-style-type: none"> • Discuss concepts of desired performance, actual performance, and gaps • Review how closing this gap is the purpose of discipline • Individual Activity: Reviewing a past disciplinary issue 	Worksheet C	15 minutes
Activity 5: Analyze the Problem's Severity <ul style="list-style-type: none"> • Reasons for gauging severity • Four actions to take to analyze problem severity • Partner or small group 	Worksheet C	5 minutes
Break		10 minutes
Activity 6: Discuss the Problem <ul style="list-style-type: none"> • Need for discussion • Role-playing activity on disciplinary discussion skills 	Worksheet D, E	30 minutes
Activity 7: Document the Discussion <ul style="list-style-type: none"> • Value of documentation • Requirements for documentation 	Worksheet F, G	10 minutes
Activity 8: Follow Up to Monitor Results <ul style="list-style-type: none"> • Value of follow-up in the overall process • Group discussion of follow-up ideas 	Worksheet H	15 minutes
Optional Activity: <ul style="list-style-type: none"> • Review of organizational policy for formal discipline 		15 minutes
Workshop Summary		5 minutes
Total Estimated Time 2 hours, 45 minutes, or 3 hours with optional activity		

PREPARING FOR A SUCCESSFUL PROGRAM

CRM's *Positive Discipline* workshop can be facilitated by your organization's trainers or human resources professionals. The video, activities and discussions are structured to allow presenters maximum flexibility while exploring the main points of the content.

REVIEW THE MATERIALS

The *Presentation Script* is designed to take you through the workshop step-by-step, with the information you'll need to present a dynamic, well-organized program. Your key role is to guide the participants through the activities and discussions to provide them with concrete benefits from the workshop session.

We suggest that you review each activity, plan the questions you will ask and the statements you will make, and practice your presentation before the session.

The Workshop kit includes all the materials you'll need to run the program:

- The **Positive Discipline videotape/DVD** presents the core content.
- The **Presentation Script** in this Leader's Guide provides step-by-step instructions for introducing activities, leading discussions, and making transitions between the video, group discussions, and activities.
- The **Participant Workbooks** should be distributed during the session.
- **PowerPoint slides**, included on a CD-ROM, can be used to highlight key discussion points.
- 10 copies of **Positive Discipline: How to Resolve Tough Performance Problems Quickly...and Permanently** by Eric Harvey and Paul Sims.
- 10 copies of the **Job Aid**.

CRM recommends that you review the materials several times before presenting the workshop.

- Preview the video to see how the workshop concepts are demonstrated.
- Review the other materials in the workshop kit. Study the *Presentation Script* and *Participant Workbooks*.
- Make notes in the *Presentation Script* about situations in your organization that you can use as examples.

KNOW YOUR PARTICIPANTS

Before the workshop begins, learn as much as you can about the participants, their positions in the organization, their work environments and their current departmental priorities or issues.

USING THE PRESENTATION SCRIPT

Each time you present the Positive Discipline workshop you will become more comfortable with the content and format of the training. We recommend that you follow the Presentation Script closely your first time through. Then, as you become familiar with the flow of activities, make changes in the presentation to fit your group and the available time.

The activity headers on the left side of each page in the Presentation Script will help you run the workshop.



SAY

Deliver the suggested information in a casual style. Modify the statements as needed to fit your participant group and workshop focus.



ASK/DISCUSS/INSTRUCT

Ask the participants the indicated question(s), or pose questions similar to those listed. Discuss the material with the group and encourage them to share their opinions, or instruct participants to follow directions.



SLIDE

Slide icons indicate when a PowerPoint slide should be used. You may want to print these slides and hand them out to the participants for note taking.



FLIPCHART

Write the information on a flip chart or white board. If you are using a white board rather than a flip chart, ask someone in the group to write down comments from the white board before they are erased.



VIDEO

Show the video.



NOTE

These icons indicate suggestions to help you conduct an activity. These statements are not presented to the participants.



WORKSHEET

Refer the participants to one of the worksheets to complete an activity.

CREATE AN EFFECTIVE LEARNING ENVIRONMENT

GROUP SIZE

A group size of 12-16 participants is preferred to generate in-depth discussion. Activities call for work as partners, or in discussion groups of 3-4 people each.

INVITATION MEMO

Send an invitation memo to all participants about the topic and the purpose of the workshop, along with time and place information, several weeks ahead of the workshop.

Note: If your intent is to focus on a specific departmental or organizational challenge related to this topic, suggest in the invitation that participants come to the workshop prepared to discuss this issue.

TRAINING ROOM

Use a training room that is quiet, comfortable, and far enough away from the participants' offices to prevent distractions.

Drinking water should be available in the room. Other refreshments (e.g. coffee, soft drinks, juice) are, of course, desirable.

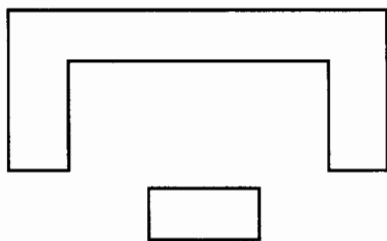
Ask participants to leave their cell phones and pagers off. Explain that they will have time during the break to check for messages.

If the workshop is to extend over a lunch break, plan in advance for food to be brought in, or allow enough time for participants to leave the session for lunch.

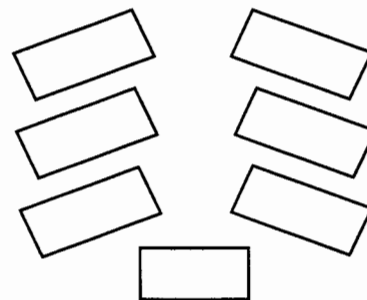
DESKS AND FURNITURE

Participants will need a surface they can write on when working on the activities. Be sure that each participant has plenty of room to sit and work comfortably.

Tables or individual desks should be arranged so that everyone can clearly see the videotape and the front of the room. A U-shape arrangement is ideal; a chevron arrangement also works well. Avoid a standard classroom-style seating arrangement if possible.



U-Shaped Seating



Chevron Seating

WORKSHOP CHECKLIST

Use the following checklist to make sure all pre-class setup has been completed prior to training.

1. Pre-Class Communication with Participants

- Several days in advance of the workshop, send a reminder memo confirming location, time, and workshop purpose, along with the request to bring information about current issues. Sending a reminder to each participant's supervisor is also advised.
- Let participants know in advance that use of cell phones and pagers will not be allowed during the workshop, except during breaks.

2. Set Up A/V Equipment

- Clean the white board and make sure markers are on hand. If you prefer, substitute a flipchart for the white board.
- Be sure the VCR or DVD player is working properly. If you are using the DVD version, the DVD menu should be set to Start.
- If you will be using the PowerPoint presentation, load it on your PC and set up the position and focus of the projector.
- Avoid tripping hazards by taping all electrical cords to the floor or moving them out of the way.
- Check the operation of the room's air conditioning, heating, and lighting.

3. Training Materials

- Pens/pencils, note pads.

4. Classroom Requirements

- Table tents for participant names.
- Drinking water and glasses.
- Tables and chairs arranged for clear viewing of the screen and the facilitator.

5. Behind the Scenes

- Refreshments should be ordered and scheduled.

6. Post-Session Follow-Through

- With participants' permission, summarize and distribute key ideas generated during the workshop that focus on specific organization issues.
- Offer others outside the session an opportunity to view the video.
- Be available to consult with your organization's management or leadership about the ideas discussed in the video, and how they can be applied to any ongoing organizational issues.