CORE TRAINING SERIES

Coaching and Team–Building

Instructor Manual

December 1998
Revised December 2001

Table of Contents

Introduction

These Instructor Notes contain information about conducting the Coaching and Team Building Core Course. The course is designed to last 3 ½ days and is made of sixteen modules of varying lengths of time.

The course outline and schedule are models. Instructors should adapt the training to meet participants' specific learning needs. If the course agenda is modified, objectives are changed, or sequence of training is rearranged, these items should be shared with participants at the beginning of the course, and changed in course materials, if possible.

Course goal

This goal of this training is to provide necessary knowledge and skills for quality assurance coaches to facilitate teamwork, and provide competency-based just in time training.

Course objectives

Specific learning objectives are listed by module, and can be found in the reference manual. They also appear in one of the first slides in each module in the participant manual.Organization of the Instructor Notes

Participant selection

This course assumes participants already have knowledge of QA, and will be acting as coaches to QA teams. If using these materials, participants must be able to read, write, and think in English, as there is a great deal of recording and reporting required to successfully achieve course objectives.

Evaluation

Course evaluation

- Daily free-form feedback about what to continue and what to change
- Daily review of course expectations
- End-of-course feedback form – a sample is provided at the end of this manual

Participant evaluation

- Daily written evaluation questions, organized by module Evaluation Questions
  - Evaluation questions for each module are located in the next section titled "Evaluation." They are to be copied and distributed at the end of each module or at the end of each day, whichever is most appropriate for your course. Alternatively, you may assign the questions as homework to be returned the next morning. This option would allow participants to read the Reference Manual to help them answer the questions. You should debrief the evaluation questions during the Opening sessions.
- Trainer observation during exercises and course work
- Exercises which include self- or peer-evaluation criteria

- Completion of Action Plan (to apply the skills learned in this course in the workplace)
- Successful completion of Training Workshop, which entails presence and participation in class

Trainer and materials evaluation

- End-of-course feedback form - a sample is provided at the end of this manual

Agenda and Course Overview

An agenda is included as well as the purpose and objectives for each module. However, instructors may make modifications to meet time constraints, facility requirements, or the learning needs of specific audiences.

Preparation Needed for Each Module

Preparations needed to conduct the training are stated at the beginning of each module. This preparation includes:

Review of Reference Manual

A space is provided to write the page numbers of corresponding background information contained in the Reference Manual.

Materials, Supplies and Equipment

The Instructor Notes will specify the materials, supplies and equipment needed for the module. Note that newsprint, an easel, marking pens, and masking tape are needed for each session. Remember to bring general items such as paper and pens, depending on the facility needs.

Exercise Preparation

Each exercise and resource sheet to be used is listed as well as specific instructions of what is needed to prepare for each exercise.

Room Arrangement

It is recommended that participants sit at round tables in even numbers (4 to 6 people per table) facing the front of the room. This arrangement allows for small group interaction to occur as well as provides space for participants to work individually or in pairs.

Course Outline

The right-hand column of the Instructor Notes contains the key concepts and instructions for the exercises. The left-hand column contains:

- Main headings of each presentation. These heading correspond to the main headings in the Reference Manual.
- Time allotted to the presentation.
- Space for instructors to write additional notes or instructions.

Handouts

Most materials which participants need for exercises are included in the Participant Manual. However, the Instructor Notes contain some handouts to be copied and given to each participant. These handouts are not to be seen by the participants prior to use, and thus are not included the Participant Manual.

Tips for Instructors

This course is competency-based and uses interactive training techniques. It builds knowledge and skill throughout the course, with later lessons dependent on satisfactory attainment of the objectives of prior lessons. You need to pay attention to creating a positive climate for learning, and should evaluate participant attainment of objectives throughout the course. If you have any questions about how to perform as a trainer in this type of training, review the materials in Module 5, or get additional information from the QA Project's Training of Trainers core curriculum.

The exercises have been used in other training, but they may be new to you. We recommend that you practice each exercise with a small group of people (3 to 4 will be sufficient) prior to presenting the exercise to your class in order to get feedback that will enhance your confidence and competence in delivering the content.

The value in doing the exercises comes only when you prepare the participants during the introduction to the activity and summarize the activity afterwards to reinforce the learning. Without adequate introduction and summarizing, participants may be left questioning the point of the exercise.

Ample time has been allotted for the exercises because adult learners must relate new learning to previous experience. However, in some cases, we suggest a very brief time allotment because additional discussion is unnecessary and may keep you from completing the module.

Formation of "Training Teams"

Participants may form groups of 4 to 6 members and work together as a "training team" during the course. In this case, it is likely that the "training team" will experience some of the stages of team development - forming, storming, norming, performing, and closing. You may need to intervene to support their development as a team, in much the same way you are teaching them to intervene in a team's QA work.

Alternatively, you may decide not to have "training teams." Instead, throughout the course, you may change the composition of the groups. Also, some participants may have come together to the training as an existing team and may continue as the training team for this program. Even with these teams, you need to pay attention to their stage of development and support their work so they can be effective.

Members of each "training team" or small group will take turns being the team leader, recorder, time-keeper, and coach facilitator/trainer.

Sample Agenda

Day 1		Day 2		Day 3		Day 4	
8:00 – 9.00	Welcome/ Overview / Introduction	8:00 - 8:30	Review/Preview	8:00 - 8:30	Review/Preview	8:00 - 8:30	Review/Preview
		8:30 - 10:15	M4: Coach as Facilitator	8:30 - 9:30	M9: Making Decisions	8:30 - 9:30	M14: Developing Action Plan
9:00 10:45	M1*: Working in Teams			9:30 - 10:30	M10: Enhancing Creativity	9:30 - 11:00	M15: Facilitation Workshop
10:45 - 11:00	Break	10:15- 10:30	Break	10:30 - 10:45	Break	11:00 - 11:15	Break
11:00 - 12:00	M2: QA Coach	10:30 - 12:30	M5: Coach as Trainer	10:45 - 12:15	M11: Managing Conflict	11:15 - 12:30	M16: Training Workshop
12:00 - 1:30	Lunch	12:30 - 1:30	Lunch	12:15 - 1:30	Lunch		
1:30 - 5:00	M3: Communication Skills	1:30 - 2:30	M6: Understanding Team Roles	1:30 - 2:30	M12: Change	12:30 - 1:00	Review, Feedback, Summary, and end of course feedback
		2:30 - 3:00	M7: Establishing Team Climate	2:30 - 3:30	M13: Communicating with the Organization		
		3:00 - 3:15	Break	3:30 - 3:45	Break		
	Includes time for Break	3:15 - 5:15	M8: Effective Meetings	3:45 - 4:45	Preparation time for Training Workshop		
5:00 - 5:30	Review, Feedback, and Evaluation	5:15 - 5:45	Review, Feedback, and Evaluation	4:45 - 5:15	Review, Feedback, and Evaluation		

* M1 = Module 1

Sample Agenda

Day 1		Day 2		Day 3		Day 4	
8:00 – 9.00	Welcome/ Overview / Introduction	8:00 - 8:30	Review/Preview	8:00 - 8:30	Review/Preview	8:00 - 8:30	Review/Preview
		8:30 - 10:15	M4: Coach as Facilitator	8:30 - 9:30	M9: Making Decisions	8:30 - 9:30	M14: Developing Action Plan
9:00 10:45	M1*: Working in Teams			9:30 - 10:30	M10: Enhancing Creativity	9:30 - 11:00	M15: Facilitation Workshop
10:45 - 11:00	Break	10:15- 10:30	Break	10:30 - 10:45	Break	11:00 - 11:15	Break
11:00 - 12:00	M2: QA Coach	10:30 - 12:30	M5: Coach as Trainer	10:45 - 12:15	M11: Managing Conflict	11:15 - 12:30	M16: Training Workshop
12:00 - 1:30	Lunch	12:30 - 1:30	Lunch	12:15 - 1:30	Lunch		
1:30 - 5:00	M3: Communication Skills	1:30 - 2:30	M6: Understanding Team Roles	1:30 - 2:30	M12: Change	12:30 - 1:00	Review, Feedback, Summary, and end of course feedback
		2:30 - 3:00	M7: Establishing Team Climate	2:30 - 3:30	M13: Communicating with the Organization		
		3:00 - 3:15	Break	3:30 - 3:45	Break		
	Includes time for Break	3:15 - 5:15	M8: Effective Meetings	3:45 - 4:45	Preparation time for Training Workshop		
5:00 - 5:30	Review, Feedback, and Evaluation	5:15 - 5:45	Review, Feedback, and Evaluation	4:45 - 5:15	Review, Feedback, and Evaluation		

* M1 = Module 1

Questions for Module 1: Working in Teams

1. List 5 characteristics of effective teams.

1. _____

2. _____

3. _____

4. _____

5. _____

2. List and describe 5 stages of team development.

1. _____

   _____

2. _____

   _____

3. _____

   _____

4. _____

   _____

5. _____

   _____

3. Give one example of the need for team building. Think about what you learned from the Zin Obelisk as you answer this question.

_____

_____

_____

Questions for Module 2: QA Coach

1. Describe the three main roles of a QA Coach.

1. _____

2. _____

3. _____

2. Describe one advantage and one disadvantage of being an *external* coach.

Advantage: _____

Disadvantage: _____

3. Describe one advantage and one disadvantage of being an *internal* coach.

Advantage: _____

Disadvantage: _____

4. As a coach, what you would say to a team leader about the need to negotiate and agree on your respective roles?

_____

_____

5. As a coach, on what topics would you and a team leader seek agreement?

_____

_____

6. How does the role of coach change over time? Provide a specific example.

_____

_____

Questions for Module 3: Communication Skills

1. Describe three factors that enhance effective communication.

1.

2.

3.

2. List 5 behaviors that demonstrate active listening.

1.

2.

3.

4.

5.

3. Describe two types of feedback and an appropriate situation for each type of feedback to be given.

1.

2.

4. Describe a common block to communication and how it stops communication from occurring or continuing.

Questions for Module 4: Coach as Facilitator

1. **Define facilitation in your own words.**

   _____

   _____

   _____

2. **Imagine yourself in a team meeting and everyone is talking at the same time. Say what words you would use or questions you would ask, using the 4-step approach to group process intervention.**

   _____

   _____

   _____

3. **Choose one facilitation guideline and describe a possible situation in which you would keep this guideline in mind.**

   _____

   _____

   _____

4. **What are your strengths that will enable you to be an effective coach?**

   _____

   _____

   _____

Questions for Module 5: Coach as Trainer

1. **Describe competency-based, just-in-time training in your own words and describe when you would use it as an intervention.**

   _____

   _____

   _____

2. **List 3 things you would do in the role of coach as trainer to create a positive team training climate.**

   1. _____

   2. _____

   3. _____

3. **What are the three key steps to complete to ensure that just-in-time training is _relevant_ and _competency-based_?**

   1. _____

   2. _____

   3. _____

4. **When presenting new information and skills what are the three components to be sure to include in your presentation?**

   1. _____

   2. _____

   3. _____

Questions for Module 6: Understanding Team Roles

1. Describe a specific responsibility of team members who assume each of the following team roles.

Team leader:

Recorder:

Time Keeper:

Facilitator:

Trainer:

2. Describe two team support roles and describe how each role contributes to the team's work.

1.

2.

Questions for Module 7: Establishing a Positive Team Climate

1. **Choose one of the conditions that contribute to a positive team climate and describe how you would ensure that condition will be achieved.**

_____

_____

_____

2. **Several questions were suggested to help you assess team climate. How do you plan to use this set of questions with a team you will be working with?**

_____

_____

_____

Questions for Module 8: Conducting Effective Meetings

1. State the four types of meeting objectives and give an example of each type.

1.

2.

3.

4.

2. Develop an agenda for an upcoming team meeting you are planning to have.

3. What should be discussed during the evaluation of a meeting? Give examples.

4. Give an example of the difference between an assertive statement and an aggressive statement. Provide another example of the difference between an assertive statement and a non-assertive statement.

Questions for Module 9: Making Decisions

1. List and describe the four stages of decision making.

1. _____

2. _____

3. _____

4. _____

2. Choose one decision-making method and describe its advantages and disadvantages.

Method: _____

Advantages: _____

Disadvantages: _____

3. Describe a challenge to decision making and how you plan to overcome this challenge.

_____

_____

_____

4. What will you do or keep in mind as you are building a team's ability to make decisions by consensus?

_____

_____

_____

Questions for Module 10: Conflict Management

1. Is conflict positive or negative? Explain your position.

_____

_____

2. What are four sources of disagreement? Give an example of each.

1. _____

2. _____

3. _____

4. _____

3. Define each conflict management style and describe a situation for which each style would be appropriate.

Avoiding

_____

Accommodating

_____

Competing (Win/Lose)

_____

Compromising

_____

Collaborating or Problem-Solving (Win/Win)

_____

4. Describe the four steps in a positive approach to resistance.

1. _____

2. _____

3. _____

4. _____

Questions for Module 11: Change Management

1. In what ways do QA teams affect change in an organization?

_____

_____

2. List and describe the four stages in the cycle of change.

1. _____

2. _____

3. _____

4. _____

3. Think of an example of a team that is experiencing a change. Describe the change and suggest an appropriate facilitation or training intervention.

_____

_____

4. Using the example in question 3, discuss how an innovator might respond to the change. Discuss how a resister might respond to the change.

Innovator: _____

Resister: _____

5. Choose an example of a change you would like a team to plan and implement in your organization. Outline the steps necessary to plan and implement the change. (use the other side of the page if needed).

_____

_____

_____

_____

Questions for Module 12: Enhancing Creativity

1. **Choose two blocks to creativity that you have experienced and describe ways each block may be eliminated.**

Questions for Module 13: Communicating with the Organization

1. Sketch a storyboard that would communicate the work of a team of which you are a member.

2. What is the purpose of creating a storyboard?

_____

_____

_____

_____

3. Complete *Exercise 13: Making a Presentation.*

Welcome – Overview – Introductions - Open Day 1

Equipment, Materials, Supplies

❑   Participant and Reference Manuals

❑   Participant materials – notepaper, pen, nametag, name tent, etc.

❑   Newsprint, Easel, Marker pens, Masking tape

❑   Evaluation Questions for Modules 1 - 3, one set of questions for each participant

Objectives of this session

During this session, participants will:

- Describe the course agenda
- Explain the course objectives
- Explain the use of the course materials
- Recognize and restate information about the instructor and other seminar attendees
- Discuss their expectations for the seminar
- List ground rules for classroom and course activities
- Explain the purpose of module evaluation sheets

Room Arrangements

Round tables should be set up with six chairs placed in a semicircle around each table facing toward the front of the room. Another table of any shape should be placed in the front of the room for the instructor(s). An extra table may be placed at the back of the room to hold miscellaneous items and provide a space for observers to sit.

At each participant seat, place necessary materials including the Participant and Reference Manuals, a name tag or name tent (whichever is preferred), paper, pen / pencil, etc.

Newsprint / easel should be set up so the instructor can use it.

Topic / Time / Materials	Content / Activities
Welcome	**DISPLAY** the course title (on a newsprint page or with overhead).
5 min	**WELCOME** participants as they come in the room.
OV 1-1	**INTRODUCE** yourself (and other instructors and observers if present) with general information about who you are, where you come from and express your eagerness to work with the group.

Course overview

OV 1-2 through 1-8

5 min

DISCUSS the course goals and interactive, performance – based design. Refer to the introduction section of the Participant Manual as needed.

DISCUSS that learning objectives are found in the reference manual and will be discussed at the beginning of each session.(There is no need to review learning objectives – that will be done in daily previews).

DISCUSS the organization of content into 3 areas – concept development, skills development, and application

Expectations / Introductions

30 min

Newsprint / easel / markers

EXPLAIN to participants that they will do an exercise which will accomplish two things: introduce themselves to each other, and find out what expectations people have of the course.

- Pair off participants, instructor(s), and any observers who will be staying for most of the course.
- Instruct them to interview each other for a 7 minutes, finding out information such as: who they are, where they are from, what position they hold, why they are at this course, and their major expectations of the course. It may help for them to answer "what do I expect to get out of this course?" or "what do I expect to be able to do as a result of attending this course".
- Instruct each person to introduce the other person in the pair with a summary of the information they learned (should take no longer than 1-2 minutes for each person, or you will exceed the time).

RECORD expectations on newsprint.

- If expectations are similar, seek permission from the person expressing the expectation to combine it with already posted information.

After all introductions are done, and expectations are posted, **SUMMARIZE** this activity by comparing these to the course objectives included in the introductory section of the participant manual. Note which expectations will be addressed and which will not be addressed in this course. Offer alternative ways to address expectations that will not be met in the course.

POST the expectations list – you will review them during the course to see if expectations are being met.

Ground Rules

5 min

Newsprint / easel / markers

BRAINSTORM with the large group about ground rules (norms) for classroom and course conduct.

RECORD ground rules on newsprint.

POST the ground rules and keep them visible in the classroom

Logistics	**PREVIEW** the daily schedule, noting start, break, lunch and closing times.
5 min	**DISCUSS** venue issues (where is lunch, restrooms, how to get messages) local transport issues, lodging issues, money issues. May form committees of class members to address these things. May circulate an address list.
Orientation to Materials	**ORIENT** participants to the reference and participant manuals.
	DISCUSS methods of participant evaluation
5 min	**DISTRIBUTE AND DISCUSS** today's evaluation sheets (Modules 1 – 3). You may choose to allow participants to decide whether these will be completed and handed in at the end of the day, or taken home as homework. If the latter, you need to devise a plan for reviewing them..
Reference and Participant Manuals	
Evaluation Sheets for Modules 1, 2, 3	
Official opening	If needed, schedule official opening within this time frame or adapt schedule as needed.
Preview Day 1	**PREVIEW** the subjects to be covered today, for Modules 1 – 3.
5 min	• Module 1 – Working in Teams • Module 2 – QA Coach • Module 3 – Communication Skills
Transition	**ASK** if there are any questions before moving on to Module 1.