Hi, Trainer!

I've enjoyed working with Regal Medical to design your new engaging, behavior-changing customer service workshop. I created this Facilitator's Handbook to help you prepare for your training with very little time or effort, and to make sure you know precisely how to deliver the perfect session.

Your Facilitator's Handbook Discusses...

Thanks for choosing to partner with me for your new Regal Customer Service Training. Let's get started!

Myra Golden
Customer Experience Designer

Preparing for Your Seminar

Room Setup

The best setup for an interactive workshop is to seat your participants in clusters with around five to seven people at each table. Round, square, or rectangle shaped tables will work. What you're trying to achieve is getting your people into small groups for the learning activities and discussions you'll facilitate throughout the training.

Audio and Visual

I'm sure you've already planned for a protector and a computer to show your slides, but the event planner in me wants to cover all the details. Be sure to have a **projector, screen**, and the **slide deck** I've created for you.

You'll be showing a Welcome video I recorded for the training, so make sure you have **speakers** that will project in your training room.

Supplies Needed

- Handouts for each participant (I've provided handouts for you.)
- Index cards for a couple of learning activities. Three by five works nicely, but whatever size you have on hand is fantastic.
- Arrange for refreshments for participants (Optional, but nice!)

Customers - Who are they?

I use the word customer throughout this training. Customer is all-inclusive in your training. Co-workers, patients, providers, employees, bosses - any and everyone you interact with is a customer. **Near the beginning of your workshop, point out that customers are everybody.**

Customize Your Training

I've designed a comprehensive and engaging customer service workshop for Regal Medical Group. While the training is complete and ready to facilitate, I want you to feel entirely comfortable with the content, including the exercises and facilitation style. **You can, and should, customize the training to make it an excellent fit for Regal Medical, and your training style.** I suggest the following customization activities.

Slide Deck

Your slides are designed on our company template, using graphics we selected. I recommend you grab the content from the slides and place the points on a Regal Medical deck that includes your colors, logo, and brand font. **Note:** The images we used on the slides are licensed by Myra Golden Seminars, LLC and our license does not extend to our clients. Meaning, you'll want to replace the images with photos owned or licensed by Regal Medical Group.

Handouts

We created a basic handout package, merely black text on a white background. But you should take the workbook text and place it in the typical style of Regal Medical documents. Make it flashy, graphical and fun!

Content

I worked closely with Regal Medical to create a professional development experience that matched your specific objectives, and this workshop indeed delivers on each bullet point you asked me to train on. But, I want you to build upon the solid training I created for you.

Hold a Team Table Read to Further Customize

Gather everyone who will deliver this workshop and any stakeholders for this project, set aside two hours and walk through the training. Do what we call a "table read," where you talk through every module over the table. As you read through the training, make notes and changes that make sense, even if this means deleting sections or exercises and adding new teaching approaches. This is your training, and you should make it a tailored fit!

Developing Your Own Examples for Activities

After your table read as a team, pay particular attention to exercises and activities and look for ways to bring examples from Regal Medical into the training. You can add so much more value and engagement to your workshop by using your scenarios, things that I couldn't possibly know of.

Make Sure Your Deck and Handouts Reflect Any Changes

After your team has walked through the training and made changes, go back and sync up your slides and workbook to match your improvements.

Super Easy Facilitation Notes

I've done the heavy lifting for you by writing the content, creating the slides, and handouts, and by creating exercises, assigning small group leaders, and timing each module.

All you have to do is **run through the complete training in preparation at least a couple of times**, and then follow the notes to deliver a fantastic workshop. Let me walk you through the easy-to-follow teaching notes.

Two Parts to Each Section: PREPARATION and FACILITATION

I'm helping you facilitate this training by coaching you in a two-prong approach. Each unit's sections are Preparation and Facilitation. Here's what each focus is about.

Preparation

This section is just what the name suggests, preparation for the unit. Preparation components are:

DESCRIPTION
In one or two sentences I describe what the module is about.

SUGGESTED TIME
You'll know right up front how long it should take you to facilitate each module.

SLIDE(s)
This is a quick reference of slides used to support your unit visually.

WORKBOOK PAGE
This is a quick reference of handout pages that go with your teaching.

Facilitation

Anything in a GRAY box **is something you'll need say, do, or ask.** On the next page, I have the last unit in the training, the **Action Commitment/Close**. We'll use this last unit as an example to walk you through how each section is laid out.

→ See this example of facilitation notes on the next page.

ACTION COMMITMENT/CLOSE FACILITATION

EXPLAIN

As we wrap up, I'd like you to set goals based on what you've learned.

This box is telling you that you'll merely explain what's about to happen.

INSTRUCT

1. I'd like you to turn to one of your note pages and write down these three words: Start... Stop... and Continue.

2. Now, write down one thing you will START doing as a result of something you've learned in this training.

3. Next...what's one thing you commit to STOP doing? Perhaps you learned that something is holding you back from de-escalating intense interactions or communicating effectively with customers. Write down that one thing.

4. Finally, what's one thing you will CONTINUE to do? There are plenty of things you're already doing that help you deliver exceptional customer experiences at Regal Medical. Reinforce what you're doing well by writing it down.

When you see INSTRUCT, you're going into teaching mode. These are the main takeaways, and this is where your note-takers will jot insights down. Everything you INSTRUCT is also listed in the handouts.

SAY

This simple Start, Stop, Continue exercise is a fantastic way to capture your biggest takeaways, and it can help you apply what you've learned.

SAY is what you'll say to wrap up, emphasize a critical point, or even to introduce something new.

I've written out what you need to explain, instruct, and say, but you should speak in your own words and make all of your remarks natural and comfortable. Use my gray box points as a guide, not as gospel.

CPR Instructional Method

In my workshops, people have fun, and they're engaged. I get unusual engagement by using a method called C P R, and you'll facilitate your training using the CPR method, a training approach developed by Bob Pike.

I'll tell you all you about this 3-step method in a moment. But first, let's talk about why engagement in corporate training matters.

Adults in training workshops retain

- 10% of what they hear
- 15% of what they see
- 20% of what they see and hear
- 40% of what they discuss
- 80% of what they practice doing
- 90% of what they teach to others within 24 hours

I want Regal Medical employees to retain and apply the ideas and techniques I've designed for your training, and I want them to enjoy their experience in your workshops. And I know you want the same things.

Lecturing for two hours is going to tune your people out through boredom. So, we're going to get your employees discussing and practicing new techniques in small groups, and they'll even teach ideas to others in this workshop. Yes, in your workshop, employees will get to explain concepts to each other!

You'll get high-engagement through discussions, practice, and teaching using the CPR Method. So, let me walk you through the model.

Here’s the three-step cycle I use in all of my workshops, the same approach you’ll adopt:

- Content
- Participate
- Review

Content

In the first step, Content, you're introducing the concept you'll be teaching. You can creatively present content in any way you like. I've given material through a story, analogy, video clip, asking a question, and through mere instruction.

Participate

The Participate step is just what it sounds like – you’re getting your attendees to participate in the training. Participation can be a small group discussion, role-play, case study, game – anything that gets people engaged with the content you’re teaching.

The participation step, which occurs in almost every section of your training, is what makes the training day fly by for employees.

When your employees participate, they are fully engaged, energy in the room rises instantly, and they learn and retain more. A lot of the time, you get a little break during participation because employees are busy in the activity. You can use this time to prepare for the next item on the agenda or sip your coffee. ☺

Review

I like to switch up the way a section is reviewed. Sometimes I'll say, *"Go to your note page and write down two to three ideas you commit to adopting and applying."* I've asked people to circle the most important takeaways, and I've invited participants to stand up, find a partner and take two minutes to share their best ideas. Other times I quickly recap as a way to review.

When you use the CPR method in this training, and in every seminar you deliver, and I guarantee your participants will retain more, work more productively, and have more fun in your workshops!

The best part of CPR in this workshop is I've done all the work for you. Follow the Trainer's Notes, and you'll have high-engagement throughout the training.

13 Ways to Spice Up Your Training

- Give away things like candy, mugs or t-shirts for participation (answering questions, etc.)
- Have two or more trainers facilitate together
- Show YouTube clips relevant to your content
- Use humor (get them laughing)
- Tell a story
- Have participants role-play
- Facilitate a group activity
- Get participants moving
- Do an activity where participants have to use their phones
- Show a movie clip that makes a point in your training
- Hold a question and answer session
- Take a break
- Play music as people walk in or during breaks

Catchphrases

When I designed your training, I placed catchphrases throughout the modules. Catchphrases are like slogans - short phrases or taglines that are easy to remember, and they reinforce key message points. Your team gave me several catchphrases to use in this training. Here are the slogans we're using:

If you react, you lose.
Everyone is a customer.
Treat others as you would want to be treated.
Put yourself in the other's shoes.
Go the extra mile.

You'll find each of these catchphrases used in training, either in the content you teach or as part of a small group learning activity.

Make sure you emphasize the catchphrases because you can use them to reinforce your key points.

Here are some ideas to reinforce your catchphrases long past your training.

Vinyl banners
I recently created four catchphrases for a company in South Dakota. Ahead of my workshop, my client had huge vinyl banners printed at a local Office Depot, and the banners were posted in the halls and throughout the ballroom where we held the training.

Participants didn't know what the catchphrases were about until I introduced them in training. So, walking into the training and seeing the phrases added mystique. After the workshop, management moved the banners to the customer service department and hung them, where they will remain for several months.

Posters
I don't cart around huge vinyl banners when I fly to a city to facilitate training, but I do print the catchphrases on 8 1/2 by 11 bright colored sheets, and I hang the posters on the walls during my workshops. I usually print at least four to six copies of each tagline and then I pepper the room with the phrases in multi colors. The bright colored posters with short, bold slogans add interest and people tend to remember the catchphrases because they see them, discuss them, and I walk over to them and sometimes point when I refer to slogans.

Discuss
After your training, make a point to talk about the catchphrases. Use them in coaching discussions or staff meetings. The goal is to keep the catchphrases top of mind, so your employees are focused on delivering service based on the taglines.

Frequently Asked Questions

What's an ideal class size?

I'm asked this question a lot when clients bring me in to facilitate workshops. I've had super successful engaging presentations with audiences from 12 to 1,100.

Breaking large groups into small clusters around tables allows you to facilitate engaging activities that feel intimate. The same technique of dividing large groups into small clusters works with groups as little as twelve because three groups of four people are as effective as dozens of small groups.

So, to answer this question, I aim for a minimum of twelve per group with a room setup that allows breaking out into small groups, and I have no cap for maximum group size.

Why do you have so many group activities?

After participating in one of my interactive workshops, a client sent me this quote as thanks, ***"Tell me, and I'll forget. Show me, and I may not remember. Involve me, and I'll understand."*** – Tribe Unknown

This quote answers why I made your training so incredibly interactive. People will forget 90% of what you lecture to them. But what they participate in, they'll understand, retain, and hopefully apply.

Retention is a big reason for my engagement. But there's more. Group activities are fun for your participants, and time seems to fly by when people are involved. People enjoy interactive training more than a lecture, and they retain more.

Can I change things in the training?

This is your training, and you can do with whatever you wish! Change activities, speak in your voice, and add your own examples. Make this training as unique as your personal style in clothes. Do what makes you feel pleasant and comfortable.

Are your time targets set in stone?

My team and I did table-reads of your training and the time targets are reliable estimates, but the actual time depends on your facilitation style, how much time you dedicate to group activities, additions you may make, and your ability to manage the audience.

Let’s look at the factors that impact your training time.

Facilitation style
Some trainers speak swiftly and tend to get through the material fast. Other speakers, like me, tell lots of stories. Your style can significantly impact the length of this training, so be aware of this.

Group activities
I facilitated a de-escalation workshop last week for a team in Dublin, Ireland. Like I did with your training, I gave time targets for each small group discussion. I'd say, "You have 4-7 minutes for this activity." And consistently the groups asked for more time, usually 3 to 5 more minutes.

My Dublin team took the time to discuss ideas, peeling back layers and going deep. The discussions were productive and led to breakthroughs, so I let them continue. This negotiation of extra group time added about 25 additional minutes onto the training. I had to find ways to cut other things to make sure we wrapped up on time.

You may have workshops where groups go over on discussions, and some groups finish up lightning fast. You'll have to make decisions on the dime like I did to make sure you convey everything and still end on time.

Managing the audience
Often I've had a people who like to talk (a lot) in workshops, and if I'm not careful, this sharing can lead to uncomfortable dominance. Allow people to share, but be careful not to let one or two people take over. This will affect your time and the experience for participants.

What's with the way you assign group leaders for activities and do we have to do it?

I assign leaders for just about every small group discussion. Leaders are designated each time differently, and here's one example. *"The person wearing the most blue in your group will lead this discussion."*

I always designate a leader for discussions for two reasons.

First, **I don't want the same person to take the lead in every small group activity.** Self-starters and natural leaders will always get in the driver's seat if I leave this up to participants. But I want to distribute the discussion points evenly.

Second, **in some groups, no natural leader rises up, and in these clusters, people will waste several minutes figuring out how to get started.** Choosing the leader gets things moving quickly, and it keeps the leadership evenly distributed.

You do not have to assign group leaders using my method, or you can choose not to designate leaders at all. It's up to you!

Reach out to me with questions at 918-398-9368 or email me at myra@myragolden.com

Happy training!

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Myra