

Sample Proposal

New Supervisor Training Program

Provided by
Resource International

Your Company Logo



To
Your Name
Manager,
Your Company
Address
City, State. Zip
Phone:
Email:
Web:

From
Stephen Haslam,
Robert Pennington, Ph.D.
Resource International
6119 Bankside Drive
Houston, TX. 77096
Phone: 713-305-1812
Fax: 713-779-6537
Email: Stephen@resource-i.com
Web: www.resource-i.com

Contents

KEY ISSUES TO ADDRESS, KEY SKILLS TO DEVELOP	3-4
NEW SUPERVISOR TRAINING: A 4-DAY SERIES WITH 2-DAY FOLLOW-UP .	4
PILOT PROGRAM RECOMMENDED.....	4
RI TRAININGS	5
NEW SUPERVISOR TRAINING SERIES: OVERVIEW	6
NEW SUPERVISOR TRAINING SERIES: DESCRIPTIONS	7-13
FOLLOW-UP PROGRAMS	14
RI TRAINERS AND BACKGROUND	14
PROGRAM FEES	15
MATERIALS FEES.....	15
TRAINING RECOMMENDATIONS - CURRENT SUPERVISORS	16
TRAINING RECOMMENDATIONS - TRAINING ALL EMPLOYEES	16

New Supervisor Training Program

The following proposal concerns the development and delivery of a training program for all new supervisors of Your Company by [Resource International](#) (RI). Also included are training recommendations for managers, current supervisors, and employees to receive relevant versions of the materials proposed for new supervisors.

Valuable input should be gathered in preparation for a more targeted proposal from a series of individual interviews with selected members of Your Company's leadership suggested by your management. The purpose of these interviews would be to educate RI consultants as to the Your Company's training needs for new supervisors, as well as assist RI in customizing the program design. This proposal assumes the creation of a four-day, one day a week training format, and recommends a pilot program to gain feedback from current supervisors.

KEY ISSUES TO ADDRESS

Working with Your Company's management, a survey should be developed to gather feedback from current managers and supervisors to identify current training needs for supervisors as well as what they would have liked to have received in training before they became supervisors. From the above interviews and survey results the following issues and skills might be identified that would be addressed within the recommended training.

Key Issues to Address with New Supervisors

- How to integrate into the entrenched culture and survive resistance to you and your authority.
- How to handle the challenge of maintaining authority and building personal friendships with employees.
- How to motivate people to want to show up for work.
- How to motivate individual initiative and personal responsibility with respect for following procedures and regulations.
- How to develop the judgment to know when to follow written procedures and when to adapt.
- How to give clear instructions and verify recipient's understanding.
- How to give performance feedback to employees that motivates them to want to improve.
- How to mediate and resolve most employee disputes.
- How to set goals, monitor behaviors and progress, and connect these things to performance feedback and organizational Success-o-Meters.
- How to manage your own stress while managing the stress of others.

Sample Skills to Develop (based on survey responses from supervisors)

- Dealing with difficult people
- Dealing with conflict
- How to discipline and correct performance
- Communication skills
- Stress Management
- Coaching versus counseling
- Setting staff expectations & conducting performance appraisals
- Team building, Problem-solving and decision-making
- Listening Skills
- Motivating and recognizing employees
- Delegating
- Mentoring

NEW SUPERVISOR TRAINING: A 4-DAY SERIES WITH 2-DAY FOLLOW-UP

This proposal recommends an initial series of four one-day training programs for new supervisors to address the key issues and skills outlined above. Any current supervisors who need basic skills development may also attend this training along with new supervisors. This program series can be presented in a format of either four consecutive days, or once a week for four weeks. The once a week format provides additional advantages of less interruption of work with more opportunities to practice the materials presented.

In addition to the four-day training outlined below, RI recommends two follow-up sessions; one after three months and another again six months after the new supervisor training series is completed. Whether each followup session is a half-day or a full day should be determined based on the evaluation of the initial pilot program. More is written about follow-up days on page 14.

PILOT PROGRAM RECOMMENDED

RI recommends that the initial four-day training be presented as a pilot program. This could be accomplished by scheduling a combination of key managers, current supervisors, and new supervisors who could give input that would help continue customization of the program. RI would then work with Your Company's HR department to further customize the training before presenting it to other new supervisors.

RI TRAININGS

All RI training programs are highly interactive with entertaining and insight-filled presentations (approx. 30% of scheduled time), together with dyad and small team discussions and practical application of techniques to real life situations (approx. 70% of scheduled time).

Though the content in RI's programs is based on decades of academic study and research, RI's presentation style is deliberately jargon-free and communicated in a common-sense, down-to-earth manner that produces immediate practical results (sample video at: < <http://www.resource-i.com/INPvideointro.html> >.

RI's program design and training approach is based on the application of the Concerns Based Adoption Model*. CBAM hypothesizes that in the process of adopting any specific change (becoming a new supervisor) employees go through predictable levels of concern, i.e., concern for Self, concern for Task and concern for Impact. Most training only teaches Task concerns (What am I expected to do?). In order to succeed, a training program must also address "how will this affect me and my career?" (Self) and, "What difference will this really make?" (Impact). Utilizing a discovery learning approach based upon the predictions of CBAM, RI's program have been consistently rated for 25 years as "the best program I've ever taken" and, "I wish my spouse and boss could have taken this course."

* < <http://www.resource-i.com/cbam.html> >

NEW SUPERVISOR TRAINING SERIES

OVERVIEW

DAY ONE MANAGING STRESS IN SUPERVISORY RELATIONSHIPS

Section One Successfully Managing the Stress of Change..... 7
Section Two Turning Worries Into Action Plans 7
Section Three Coaching, Counseling, and Managing 8

**DAY TWO IT’S NOT PERSONAL:
Understand Why People Behave The Way They Do**

Section Four Understand Yourself 9
Section Five Understand Others 9

DAY THREE SUCCESSFUL WORK RELATIONSHIPS

Section Six The Martial Art of Communication 10
Section Seven Turning Conflict Into Success 11

DAY FOUR PERFORMANCE EVALUATIONS AND PROBLEM SOLVING

Section Eight Performance Evaluations..... 12
Section Nine Problem Solving..... 13

TWO FOLLOWUP DAYS (TBD)..... 14
Three Months
Six Months

Program Descriptions & Objectives

DAY ONE: MANAGING STRESS IN SUPERVISORY RELATIONSHIPS

Section One Successfully Managing the Stress of Change

Program Description

Supervisors need to know how to recognize, intervene and, where possible, prevent employee stress. Different people show stress in different ways, so what is a stressful reaction to one person is a norm for another. There are still generalized levels of symptoms that include negative thoughts and worry, emotions, behavior habits, and physical symptoms. A supervisor or team leader needs to be aware of the negative effects of stress on work performance, and know when employees are showing changes in their norms.

Of the eighteen topics surveyed, supervisors rated stress management as the fifth most important. In this program supervisors will learn to understand and handle their own stressful reactions that result from their change to being a supervisor, as a first step in becoming effective at supervising others,

Section One Objectives

Participants will be able to

- Recognize three sources of stress (personal, environmental, organizational).
- Categorize symptoms of stress on four levels (mental, emotional, behavioral, and physical).
- Practice a variety of techniques to calm body, emotions, and mind.

Section Two Turning Worries Into Action Plans

Program Description

Everyone knows that positive thinking is more productive than negative thinking. But everyone still worries. We may not be able to stop worrying, and it may not even be wise to do so. But we can learn to turn this negative habit in a positive direction to achieve productive results. That's what being proactive is all about.

Worry could be seen as a signpost pointing in a direction you don't want to go. Learn to point the signpost towards the Positive Opposite Possibility[®] and you will discover how to turn worries into action plans.

Through an entertaining application of the Bag Person Syndrome[®], each participant has the opportunity to explore a specific worry from his or her own life. Each participant will use a four-step process to transform his or her worry into a goal, and then develop an action plan to reach that goal. Results reveal powerful insights into how to overcome habitual and often unconscious fears and create practical actions for success. Participants learn to distinguish when to act, when to plan, and when to just go ahead and worry!

DAY ONE, continued**Section Two Objectives**

Participants will be able to:

- Be aware of how negative thoughts produce negative emotions, which produce ineffective behavior and results.
- Be aware of the harmful physiological stresses caused by worry.
- Recognize and identify the difference between reality and fantasy in regards to any worry.
- Transform a worry into a Positive Opposite Possibility[®] - which then becomes a desirable goal.
- Create multiple and specific actions for moving from present reality towards the newly defined goal.
- Learn how to turn a negative thought into a positive possibility – and believe it!
- Identify when help is needed, and how to get it.

Section Three Coaching, Counseling, and Managing Program Description

Supervisors are taught to distinguish between a manager's job of coaching - where the employee needs direction specifically related to job performance, and recognizing the need for a manager to refer the employee to an EAP counselor for guidance. Supervisors will explore how to help stressed employees feel understood, without giving permission for inappropriate behaviors or inadequate work performance. This is a key but difficult line to walk - being understanding without being permissive, and giving constructive feedback for poor work performance without seeming abusive. Subsequent sessions will present additional techniques to assist supervisors in their dual roles of directing and coaching employees.

Section Three Objectives

Participants will be able to:

- Understand differences of coaching, counseling, and managing.
- Build understanding without promoting a permissive atmosphere.
- Give performance feedback by (a) linking constructive behaviors to positive outcomes, (b) redirecting off-task behaviors, and (c) correcting disruptive behaviors.
- Identify and encourage employees to utilize company EAP resources.
- Understand the authority issues that come with being a supervisor

Day One Materials

- Manual
- Three audio CDs: Successfully Managing the Stress of Change, Balanced Relaxation, Turning Worries Into Action Plans,
- Set of six laminated reminder cards.

DAY TWO: IT'S NOT PERSONAL - UNDERSTAND WHY PEOPLE BEHAVE THE WAY THEY DO

Sections Four & Five: Understand Yourself and Others

Program Description

Everyone has customers, co-workers and family who become difficult to deal with from time to time. One reason is our own unconscious habit of (1) feeling uncomfortable, (2) making negative judgments (about them, or course!) and (3) taking it all personally. Unfortunately, you can't control your initial, habitual negative reaction to anyone or anything. Fortunately, you can control your next response, often leading to the possibility of more positive results.

Participants will learn how to apply the recommendations of the Myers Briggs Type Indicator system to improve their skills as a supervisor. Using his or her own MBTI raw scores, each supervisor will better understand his or her own strengths and develop strategies to improve as a leader. RI takes a unique approach to the MBTI that avoids putting each person into one of the MBTI sixteen stereotypes but rather works with the eight raw scores that are unique to the individual. Supervisors will learn how to develop strategies that increase effectiveness, job productivity, cooperation, and job satisfaction of each employee who will be a direct report.

With humor and practical down-to-earth examples, participants experience the inescapable realization that people's behavior is never personal - even when they mean it to be! A self-scoring [Discovering Diversity Profile](#) can be included.

Objectives - Sections Four and Five:

Participants will be able to:

- Integrate in the entrenched culture, survive resistance to authority.
- Handle the challenge of maintaining authority and building personal friendships with employees.
- Recognize the tendency to 1) feel uncomfortable, 2) make a negative judgment, 3) take it personally, 4) react automatically.
- Suspend negative judgments and respond respectfully and constructively to inappropriate behaviors.
- Use the MBTI and Discovering Diversity Profile to
 - Understand their personal and professional assets.
 - Develop greater awareness and acceptance of the strengths of others that are different than theirs.
 - Adapt their own behavior to help others improve performance and achieve results.
 - Show how diverse behaviors can cause misunderstandings and conflict.
 - Match conflict resolution style to behavior of others.

Day Two Materials

• Manual • MBTI • Discovering Diversity Profile

DAY THREE: SUCCESSFUL WORK RELATIONSHIPS

Section Six The Martial Art of Communication

Program Description

When change increases, especially unexpected or undesirable change, stress increases. With increased stress comes increased tension in relationships, increased misunderstandings and miscommunications. Fortunately employees can be prepared to deal with this increased conflict in their work relationships.

The Martial Art of Communication[®] is a unique approach to resolving conflicts and misunderstandings by reducing people's resistance to your point of view. Using principles of the martial arts that turn conflict into success, four simple and practical models give you leverage to motivate and influence others with sensitivity and firmness.

When conflict occurs an emotional wave hits most people, causing them to forget any communication skill! But the participants of this seminar series will have the tools not only to deal with that habitual emotional wave but the most effective communication tools available.

Section Six Objectives

Participants will be able to:

- Reduce other people's resistance to your point of view.
- Clarify misunderstandings with three simple questions.
- Step out of The Cycle of Conflict[®] to produce collaborative agreements on action steps.
- Overcome 50-90% of all disagreements (that are based on misunderstandings).
- Learn how to use the power of understanding to build leverage for overcoming conflict.
- Use Five Levels of Clear Communication[®] to structure messages effectively[®] (1. Facts; 2. Thoughts/Opinions; 3. Emotions; 4. Meaning/ Importance/Priority; and 5. Actions/Expectations).
- Use the Five Level Interview[®] technique to clarify messages usually left "in between the lines" of what is actually said, in order to avoid potential misunderstandings.
- Communicate clearly when emotional without suppressing or "dumping."
- Communicate in a way that builds understanding and commitment to agreed upon action.

DAY THREE, continued**Section Seven Turning Conflicts into Success****Program Description**

This program builds on *The Martial Art of Communication* with two fundamental models for giving clearer, firm feedback and directions, and for building agreements that everyone involved will support. Participants will practice using The Five Levels of Communication[®] as an active listening tool to clarify “hidden meanings,” and combine it with the Feedback Sandwich[®] to give clear, constructive feedback and directions. They will also use The Six Stages of Supportive Agreements[®] to address the following objectives:

Section Seven Objectives

Participants will be able to:

- Use The Feedback Sandwich[®] technique to express thoughts, feelings, priorities, and expectations clearly and without blame.
- Give constructive feedback by presenting opinions and expectations objectively while focusing on improving behavior, not on passing judgment.
- Give clear instructions and verify recipient’s understanding.
- Use Six Stages of Supportive Agreements[®] technique to build agreements that both parties will support.
- Resolve 50-90% of most disagreements and avoid or clarify misunderstandings.
- Negotiate by creating the kind of understanding that builds trust and leverage.
- Use a six-stage process to develop the *skill of timing* – when to listen and when to speak.

Day Three Materials

- Manual
- 2 Audio CDs: The Martial Art of Communication, Constructive Feedback
- Set of six laminated reminder cards.
- Three month access to three modules of Internet-based training: High Impact Communication.

DAY FOUR PERFORMANCE FEEDBACK & PROBLEM SOLVING

Section Eight Performance Feedback

Program Description

Getting and giving performance feedback is like going to the dentist. Everybody dreads it, even if laughing gas is used. Most managers think their job is done when they levy their judgment and fill out the forms. It is usually administered more like discipline as a punishment, so employees resent it and managers hate to be required to give it. An important trick to reducing resistance to this necessary task is to get employees involved in an ongoing process so that it's not like pulling teeth.

Managers need to involve employees in connecting the employees' professional and personal goals to the organizational expectations. The manager's challenge is to see what is required to succeed in the position, recognize what needs to change in the person's behavior, understand what is realistically possible, and then figure out how to get people to exceed those realistic possibilities -- and do this without losing final authority! It's easier said than done.

Section Eight Objectives

Participants will be able to:

- Use a group process to establish a positive work environment that invites giving and receiving feedback.
- Involve all employees in setting positive expectations for tasks and work relationship behaviors.
- Use a step-by-step process to help employees build positive habits.
- Motivate people to want to show up.
- Give performance feedback that motivates employees to want to improve.
- Integrate techniques from previous sessions to:
 - Set performance goals.
 - Monitor and assess performance.
 - Redirect off-task behaviors and correct misbehaviors.
 - Use The Feedback Sandwich technique for giving constructive feedback.
 - Use Predictive Index information to identify and leverage an employee's behavioral strengths for successful coaching.
 - Help employees align productive behaviors with personal and professional goals, and with team/ department and organizational goals.

DAY FOUR, continued**Section Nine Problem Solving****Program Description**

Understanding is the key to effective communication. Analysis is the key to effective problem solving. To solve problems in teams a supervisor must integrate effective communication techniques with models for problem analysis. When understanding others, the communication is broken into parts such as the five levels of communication. In solving problems the problem is also broken into parts. This can be done in many ways, but the most basic was defined in the 1960s by Fred Fostmire as the *S-T-P Model of Problem Analysis* (Situation, Target and Proposal).

Teams work with a problem solving method that combines the S.T.P. Problem Solving model, the Five Levels of Communication, and a four-step process that is loosely based on the Myers Briggs Type Indicator Problem Solving sequence. Each team will use a worksheet to prepare proposals/suggestions/solutions for case studies of challenging situations they will face in their day-to-day work.

Section Nine Objectives

Participants will be able to:

- Distinguish between three potential elements of conflict when resolving problems with employees and customers: facts, values/priorities, & solutions.
- Use the Five Levels of Communication to guide employees and customers in resolving problems.
- Develop the judgment to know when to follow written procedures and when to adapt.
- Motivate employees to balance individual initiative and personal responsibility with respect for following procedures and regulations.

Day Four Materials

- Worksheets
- Audio "Performance Feedback"

FOLLOW-UP PROGRAMS

It is recommended that Your Company consider offering two additional follow-up programs, at three months and again at six months following the basic four-day training program. The purpose of these follow-up programs would be to:

- Facilitate increased peer support among Your Company's supervisors,
- Deepen participants' understanding of program concepts and models,
- Provide structured opportunity to practice use of program tools and techniques,
- Provide training in additional topics,
- Provide open-ended opportunities to address inevitable difficulties and celebrate unexpected successes,
- Build a culture of continual learning and improvement.

Assignments would be presented during the four-day training session that would extend throughout the following six months, focusing supervisors on applying new tools, recording the results, and gathering feedback about challenges and successes. Such a design extends the training from a four-day to a six-month experience. This process can increase the learning experience exponentially and establish an ongoing learning culture in supervisors work habits.

The week in between each of the initial four-day program does provide for practice with a short opportunity to review and discuss at the beginning of the 2nd, 3rd, and 4th days of training. However, participants who realize there is a time of accountability three and six months after their initial training will be more likely to utilize specific tools and techniques presented. The first four weeks gives them time to absorb the material. The next six months allows them time to develop the habit of continual learning and improvement.

Ideally, RI recommends full day follow-ups in order to present new material and also to deepen participant application of program materials. But practically, once supervisors are into their roles, only half-day sessions might be possible. A full day creates 1) more importance in the minds of participants to the follow-up sessions, 2) twice the time to reinforce program content, and 3) the opportunity to present new material.

RI TRAINERS AND BACKGROUND

A Brief History: http://www.resource-i.com/about_history.html

References: http://www.resource-i.com/about_reference.html

Biographical Information: <http://www.stephenhaslam.com>
<http://www.robertpennington.com>

PROGRAM FEES

Initial Customization Interviews and Survey	\$2,500
Training Fees	\$2,500/day
(Training fees discounted 20% on volume >10days/yr to \$2,000/day)	
4 Days (\$8000) + 2 Follow-up Days (\$4000) = \$12,000	

MATERIALS FEES*

Each participant will receive the following materials, accumulated one training day at a time:

- Six Audio CDs - \$60
- Twelve laminated reminder cards - \$12
- Manual with four inserts and sections - \$50
- MBTI and Discovering Diversity Profile - \$20
- Three-month access to four web-based trainings - \$30.

Total: \$172/person
(\$120/person if Your Company reproduces the manual)

MATERIALS REVIEW

Day One Materials

- Manual
- Three audio CDs: Successfully Managing the Stress of Change, Balanced Relaxation, Turning Worries Into Action Plans
- Set of six laminated reminder cards.
- Access to internet-based training module: Successfully Managing The Stress of Change

Day Two Materials

- Manual
- MBTI and Discovering Diversity Profile

Day Three Materials

- Manual
- Two Audio CDs: The Martial Art of Communication, Constructive Feedback
- Set of six laminated reminder cards.
- Three month access to three modules of Internet-based training: High Impact Communication.

Day Four Materials

- Manual
- Audio "Performance Feedback"

TRAINING RECOMMENDATIONS

In addition to the training series for new supervisors, the following recommendations are presented for consideration in the training of current supervisors and new-hire and current employees.

TRAINING RECOMMENDATIONS FOR CURRENT SUPERVISORS

While current supervisors may have already received training on some of the topics included in this proposal, it would be very beneficial for them to learn and use the same specific models and techniques that the new supervisors will learn. Additionally, as many of the topics presented in this training series may be identified in a proposed survey of current supervisors as to training they would like to receive *now* to be more effective. These could include; how to discipline and correct performance, dealing with difficult people, dealing with conflict, stress management, teambuilding, coaching vs. counseling, conducting performance appraisals.

Therefore RI recommends that a pilot program be scheduled to include selected current supervisors who can help evaluate the proposed four-day program along with the two follow-up days. With their feedback a customized training can be developed for current supervisors that includes the most relevant information, and may be presented in a shorter time period for more convenient scheduling.

TRAINING RECOMMENDATIONS ALL EMPLOYEES

RI also highly recommends that all employees be exposed to the following topics and techniques that will be presented to their supervisors: [Successfully Managing the Stress of Change](#), [Turning Worries into Action Plans](#), [the Martial Art of Communication](#), and [Turning Conflict Into Success](#), and [It's Not Personal: Understand Why People Behave the Way They Do](#). It is recommended that these programs be included in the new employee training as well.

These topics could be addressed through a variety of formats, such as

- Half-day “stand alone” trainings
- A series of 1.5-2 hour training sessions
- Web-based training programs
- Video based training programs (train-the-trainer program available for some topics)

RI trainers would like to work with the Your Company’s HR department to design a delivery format that will fit best for the scheduling and budgetary requirements of the your employees.