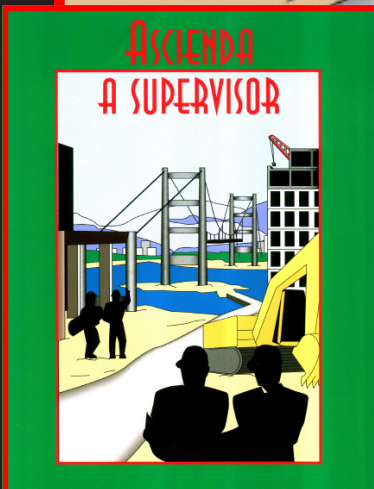


Stepping Up To Supervisor



Leader's Guide

This Leader's Guide can also be used with *Ascienda a supervisor* © 2002, a Spanish translation of the 1st Edition of *Stepping Up To Supervisor*.

Note: This copy is a draft — originally created July 2017, revised at various dates in 2018/2019 and date stamped Aug 6, 2019.

These green sidedbars are **edit notes**, placed at various points in the manuscript to show intent and to mark a few items or issues that need further development or review.

1/6/2020: many of these edits have already been done & are shown in this prototype.

It's not the final draft — a few minor edits remain to be done. But it's 99% functional now, and it shows what to expect when the final version is completed.

These edit notes will be deleted from the final file.

LEADER'S GUIDE

for

STEPPING UP TO SUPERVISOR © 2019

AND ASCIENDA A SUPERVISOR © 2002

Ideas, skills, and techniques for new construction supervisors and people who want to become a supervisor

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ISBN: 1-56067-501-? Printed in the United States of America

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Add a **Reference Note** here to explain the placement of pages v/ vi/vii as links to the TOC from the book. "Preparing a workshop plan involves extensive review of topics in the book. Pages v/vi/viii present the Table of Contents from the *Stepping Up To Supervisor* book to make look-ups easier for review & reference. See also the chart on page 85." TBD

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45 Topics in Burgundy are covered on *Leader's Guide* pages 15-68

4 Topics in Green are covered as Alternate Topics on *LG* pages 69-72

30 Topics in Black are not covered in this *Leader's Guide*. See page 81: How to Create a *LG* page...
page numbers in this *Leader's Guide*

B means that topic includes a small group breakout activity

page numbers in *Stepping Up To Supervisor* 5th edition © 2019

TOPICS COVERED IN THIS LEADER'S GUIDE

Review/adjust page #s. **done 2/1**

Need to cover more topics from Part 2 in the LG. **Consider:**
2.06 w breakout re ease; effect
2.07 w breakout re top 3 priorities
2.08 w breakout re strategy & why
2.10 w breakout re top 3 priorities
2.18 w breakout re TBTalk topics
2.23 w breakout; get help here
2.27 w breakout re 3 have, 3 don't
Use some to expand to 3 hr sessions. Cover others as Alternate topics. **done 1/20/19**

As presented in this prototype draft, this *Leader's Guide* can also be used with *Ascienda a supervisor*, a © 2002 Spanish translation of the 1st Edition of *Stepping Up to Supervisor*. However, I don't plan to revise *Ascienda a supervisor* to include the new content I'm adding in the 5th edition of *SUTS*. *Ascienda* (the © 2002 book & checklist) will survive as freestanding print products only until the current 2K inventories are gone — and then the © 2002 book will be available only as a free PDF. Revise the SP checklist as a freestanding print item? Maybe.
The revised *SUTS Leader's Guide* which is called out here in various Edit Notes will be made generally available only as a free download. A few Print copies may be available for special situations, but I won't print or carry a significant inventory of printed copies.

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PART 3: Dealing With Special Situations continued

Review/adjust page #s. **done 2/1**

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45 Topics in Burgundy are covered on *Leader's Guide* pages 15-68

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page numbers in this *Leader's Guide*

B means that topic includes a small group breakout activity

page numbers in *Stepping Up To Supervisor* 5th edition © 2019

USE THIS BLANK PAGE FOR NOTES

“Final” Prototype
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Introduction

How to Use *Stepping Up To Supervisor*

This *Leader's Guide* for *Stepping Up To Supervisor* presents outlines for three workshops — with options for expanding each of them:

- 1 session @ 190 minutes, ~3 hours total;
- 2 sessions @ ~180 minutes each, ~6 hours total;
- 3 sessions @ ~200 minutes each, ~10 hours total.

Actually, *Stepping Up To Supervisor* can be used in three ways.

- ① **Use *Stepping Up* as part of a workshop.** You can build a workshop around *Stepping Up To Supervisor* — using 1, 2, or 3 workshop sessions to supplement the results people get from working through the book on their own between the sessions:
 - » introduce or emphasize key topics covered in the book;
 - » prompt discussions on how the ideas, skills, and techniques can be applied to the daily work and current projects that people in the class are involved with; and
 - » provide a forum where new supervisors and potential supervisors can learn from each other by sharing their problems, solutions, opportunities, and experiences.

This *Leader's Guide* is modular, so each workshop session can run from 60 to 200+ minutes. It's possible to select a series of activities that creates a customized workshop as short as 1 hour or as long as 10+ hours — whatever fits the training situation and the needs of the people in the group.

- ② **Use *Stepping Up* as a self-study book, but also organize or encourage discussions among the people who are working through the book.** Use *Stepping Up To Supervisor* as a self-study book. Then also organize or encourage people to get together for informal discussions on the topics they're learning about. This approach, which falls somewhere between self-study and a workshop, has two important benefits: (1) people can learn by helping each other anticipate and solve problems and by passing on ideas that work; (2) people who get together for discussions will likely spend more time studying, thinking about, and applying the topics covered in the book — a win/win.

Special Note. For a customized edition, most of this Intro section (especially p 1-11) will be significantly edited to match up with the custom content & specs.

This **Leader's Guide** provides objectives, timelines, and step-by-step guidelines for leading 49 workshop activities. You can choose which topics you want to cover.

The time blocks shown for individual activities are tight. You can lengthen them, but you probably can't shorten them.

Remember: if you pick up the pace to hold to a schedule, you may risk leaving some people behind.

INTRODUCTION

If you set up a workshop that doesn't cover the whole book, **point out:** each person in the group can use the book's self-study format to work thru any topic that's not included in the workshop itself.

The **Flipchart format** is inexpensive & useful — as long as instructor air travel is not required. Even if a whiteboard is available, flipcharts have a unique advantage: an instructor can prep them in advance, then reveal each one as appropriate.

Edit this topic to reflect the evolution from transparencies to other projection media. **done**
8/1.20/19

It's probably a luxury, but it's very helpful if you can have a copier in the corner of the room: the Class Registration List; a really good Six Day Look Ahead Schedule; impromptu handouts; something a class participant brings in to share with the group.

Easy, direct eye contact for you and every participant is essential! Don't set up long tables in rows — "cafeteria" style. Use one of the typical room set-ups described on page 82.

If the room set-up isn't OK when you walk in the door, ask the first few arrivals to help you move it around. (Actually, this can work as sort of an ice-breaker.)

③ Use *Stepping Up* as a self-study book without classes, organized discussions, or other additional arrangements. *Stepping Up To Supervisor* is designed as a self-study book. It can be used successfully by one person and without any interaction with others. Just buy the books, distribute them to new and potential foremen, and follow up from time to time by encouraging them to work through the book and complete an **Action Plan**.

The self-study approach works in situations where it's not feasible to get people together for classes or informal discussions — either because of logistics or because there's *some* interest in supervisory training but not enough to support the time and expense required for classes or organized discussions.

Some companies and organizations use all three approaches to reach supervisors and potential supervisors in various specific situations.

Hardware You'll Need

The basics: a flipchart and a set of markers; masking tape so you can remove flipchart pages and tape them to the wall for reference.

Highly recommended: projection hardware and a screen for showing the three visual aids that are provided on pages 75/77/79 of this *Leader's Guide*. Be sure to check out the hardware before class.

How to Set Up the Room

A successful workshop is driven by spirited discussion that involves every participant. People often learn more from each other and by expressing themselves than they learn from an instructor or a book. The room set-up must promote interaction and lively discussion, and you'll accomplish this if you *make people feel comfortable*.

- Everyone must have easy, direct eye contact with everyone else. Seating should be U-shaped or at round tables — and if you use round tables, don't fill the whole perimeter of the table; seat people in semi-circles that face the middle of the room.
- Everyone must have a good writing surface — a table or a school-arm chair. If you use school-arm chairs, try to get a couple of lefties.
- Everyone must have elbow room — at least 3 lineal feet if you're seating people at tables. **Remember:** these are construction people who are used to working outdoors; don't cramp them.
- Orient chairs so they face away from the door to minimize distractions from people who come and go or pass by the door.

Your Pre-Flight Checklist

- ❑ One copy of *Stepping Up To Supervisor* is on hand for each person in the class — plus, if appropriate, a copy or two of *Ascienda a supervisor*, the Spanish edition of *Stepping Up*.
- ❑ The room is set up and checked out to ensure the set-up is OK; temperature, lighting, a table for your materials, name card tents.
- ❑ Arrangements are made and confirmed as necessary for parking, building access, room key, break supplies, etc.
- ❑ Flipchart, flipchart markers, and masking tape are on hand.
- ❑ Projection hardware for visual aids and a screen are set up — the hardware connection works OK and there's a spare bulb.
- ❑ Copies are ready: workshop agenda, housekeeping rules, class registration sheet; feedback forms, name card tents and markers, a few extra pens/pencils.

Visuals (old title was “Overhead Transparencies”)

Overhead transparency masters, suitable for making Visuals on a copier, are provided on pages 75/77/79 of this *Leader's Guide*.

- **Visual #1: Six Day Look Ahead Schedule (filled out example).** Use this Visual of the filled-out form on *Stepping Up* page 25 to walk participants step-by-step through the development of a Six Day Look Ahead Schedule. See **Topics 1.20/1.21**.
- **Visual #2: Six Day Look Ahead Schedule (blank).** You can use this Visual of the blank form on *Stepping Up* page 27 to create an example that specifically fits the group — or to let someone in the class show his Six Day Look Ahead Schedule to everyone else. See **Topic 1.21**.
- **Visual #3: The Four Fundamentals.** A new supervisor has hundreds of thoughts swirling through his head; use Visual #3 to *focus* participants on the four fundamentals when you introduce them in **Topics 2.01/2.02**. Use it again when you discuss each fundamental:
 - » **Topic 2.03** (Fundamental #1, page 32 in *Stepping Up*);
 - » **Topic 2.09** (Fundamental #2, pages 38 in *Stepping Up*);
 - » **Topic 2.16** (Fundamental #3, page 50 in *Stepping Up*);
 - » **Topic 2.25** (Fundamental #4, pages 64 in *Stepping Up*).

If you do two or three sessions, have Visual #3 on the screen as participants arrive for Session 2 and Session 3.

Check out the room in advance so you know you're not going to walk in on a nasty surprise. Remember: your ability to handle a problem is often related to the amount of time you have to solve it.

For each session, arrive at least 30 minutes before the start time. Plan to stay 30 minutes after the session is over. This is your prime time to be available for questions, and these informal conversations will help to make class discussions flow more freely — and if someone is having trouble catching on to workshop topics, you can use this time to bring them up to speed..

For a customized edition, this section will be revised to cover whatever projection media XYZ plans to use. If PowerPoint, perhaps a topic titled “How to Create Your Own PowerPoint Presentation” (eg suggested page #s from the *SUTS* book to turn into PPs). Whatever...it should also cover class sites that don't support projection media and suggestions for creating flipcharts of selected pages.

Follow-up Note: Change the Transparency section to **Visuals** & cover PowerPoints, TR & flipcharts. Also cover expected customer classroom site formats. Review & edit all TR mentions thruout the *LG* to edit for this change — perhaps substituting **VM** (Visual Masters) for TR. **done 8/1.20/19**

Make visuals of other pages from *Stepping Up To Supervisor* — especially if you feel you can use them to encourage participation.

Leading a Workshop: The Basics

Adult Learners

Be aware that some people in the class may not have good reading skills. Do your best to find out who these people are — without calling attention to them or embarrassing them.

When you form small groups for discussion, try to match up poor readers with good readers who can help them keep up with the pace of the class.

Don't allow either the good readers or the poor readers to form an isolated group.

There are advantages to having people from a crew form a group, but when presenting a 2 or 3 session workshop, consider scrambling the groups at least once.

Make this commitment as clear and detailed as a commitment a jobsite supervisor gets from a sub or supplier. Set an example.

Most construction foremen are involved in supervisory training because they want to be there. They're generally eager to learn, but for many of them, school wasn't exactly fun and games the first time around. Remember these basic principles.

- **Respect.** Respect their time. Respect their field knowledge. Respect their mixed feelings of excitement and vulnerability as they undertake new and challenging responsibilities.
- **Promote respect.** No power plays, no put-downs among participants. You might have to remind the class that this isn't a cable News & Opinion show where talking heads max their air time by shouting each other down. Make sure what everyone says is respected — even if it's dead wrong.
- **Maximize participation.** Make sure everyone is heard — and, more important, make sure everyone *feels* that it's OK to talk. Encourage and draw out anyone who hangs back.
- **Never . . .**
 - » embarrass or ridicule anyone, even if it's someone who's giving you a hard time or someone who makes an off-base comment.
 - » BS your way through a question if you don't know the answer. Turn the question back to the class. If that doesn't work, say you don't know but you'll find the answer and get it to them (say when — and never fail to keep that commitment).

Participation, Enjoyment, and Buy-in

The success of every workshop is directly related to the quality and amount of participation by the people who attend it. The same people who are in the room to learn are also often the best resource for ideas, answers, and war stories that make the learning real. *Guide* the discussion — don't dominate it, don't force it. If you're talking more than 20 percent of the time, you need to insert some techniques that increase participation. Use open-ended questions to do that. See pages 12/13 for examples.

Remember: the real value of this workshop shows up on the jobsite through *Action Plans that are carried out*. It's important for participants to "buy in" so the *effect* of what people learn breaks the *Five & Five Rule*: most training is forgotten within 5 miles or 5 minutes after the workshop benediction — whichever comes first.

Preparation

- Go through the Pre-Flight checklist and handle any exceptions.
- List all **Housekeeping Rules** and make copies for distribution so you don't have to use much class time to read and explain them.
- Make up a **Class Registration Form** to pass around during Session 1 so you can have a class list with contact information — without using class time to get it.
- Make complex flipcharts in advance — or at least prepare the basic structure so all you have to do during a class discussion is fill in “answers” and class responses.

Complex flipcharts. Avoid trying to create an entire flipchart on the fly as you present a topic. Your visual won't look very good, and the time it takes while the class sits there and watches you muddle thru can kill the momentum of a discussion.

Make flip charts in advance, then post them when you want every one to focus on key points.

What! No Projection Hardware?

If there's no **projection hardware** at your workshop location, we suggest that you go to FedEx Office and get enlargements made of **Visual #1**, **Visual #2**, and **Visual #3** and use these visuals to present the **Six Day Look Ahead Schedule** and **The Four Fundamentals of Supervision**. Tell FEO to make a high-res copy first, then make the enlargement from the copy. If possible, make these enlargements 2-color like the Visual masters.

Presenting This Workshop at a Jobsite

The 3-hour session time blocks for this workshop are designed to make jobsite delivery workable. A supervisor can get his crew started, step away for a three-hour workshop, then catch up with them before lunch (morning workshop) or quitting time (afternoon workshop).

If necessary, you can trim a jobsite workshop to 2:30 or 2:45 to make this work — either by tightening up individual activities or deleting one or two of them. Just make sure you track thru all the side-effects of the changes you make on the flow of the workshop.

Follow-up

If participants leave the workshop, return to the jobsite and do things the same old way, all you've done it to shake a bowl of Jello. The workshop will have more impact if there is follow-up to reinforce what people have learned and the *application* of what they've learned.

Ask if people in the group want to continue to get together every now and then. If there's interest, set up a meeting within 30 days — no later or people will “break contact” with the workshop and each other. Encourage this follow-up meeting, but don't force it. Just follow the group's lead, and they'll find a level that works for them.

At the end of Session 1, copy or circulate the filled-out **Class Registration List** so participants can pick up each others' phone and e-mail contact information. Encourage them to talk with each other about what they're learning in the workshop. Put your name, phone and e-mail on the list, and tell the class when it's OK to contact you.

Creating Your Own Customized Workshop

Three Basic Agendas

This *Leader's Guide* presents agendas and detailed guidelines for three workshops:

- **One session:** ~180 minutes, 3 hours total. This agenda is shown on page 15, and the guidelines are presented on pages 17-24. Three hours is a minimum — the time blocks shown for individual topics are tight. You can lengthen them but you probably can't shorten them.
- **Two sessions:** ~180 minutes each, 6 hours total. The two-session agenda is shown on page 25, and the guidelines are presented on pages 27-40.
- **Three sessions:** ~200 minutes each, 10 hours total. The three-session agenda is shown on pages 41/42, and the guidelines are presented on pages 43-68.

How to Extend a One-Session Workshop Beyond Three Hours

If you're presenting a one-session workshop and have more than three hours available, here are strategies for using the additional time. Choose the combination that will have the most impact for your workshop group.

- Add **Topic 1.01: Anticipating the Challenge Ahead** (*Stepping Up* page 8) which is outlined on page 30 of this *Leader's Guide*. Insert it between the Overview and Topic 2.01 in the one-session agenda. Allow **10 minutes** for Topic 1.01.
- Expand **Topics 2.03, 2.09, and 2.16** to 15 minutes each. This will allow more time to cover Fundamentals #1, #2, and #3, and it will provide the same time blocks to this sequence on the Four Fundamentals as in a multi-session workshop. Add **15 minutes** to the cumulative total to expand these three topics.
- Extend **Topic 1.20: Six Day Look Ahead Schedule (continued)** so each participant has an opportunity to fill out a Six Day Look Ahead for his current project. Insert this extension before Topic 3.22 in the one-session agenda. Allow at least **20 minutes**, 30 minutes if possible, for extended Topic 1.20.

Guidelines for 46 activities written, but not yet allocated to sessions to increase session time from 2 → 3 hours. TBD, after which 3-session agenda will be ~10 hours. **done**
2/2/2019

If you lengthen a topic, be sure to record the new time allowance for that topic — and also adjust the cumulative time for that topic and all topics that follow in that session.

- Add one or two activities from the **Special Situations** outlined on pages 61 - 67 of this *Leader's Guide*. Insert these activities where they fit best in the topic flow, before Topic 3.22, **Action Plan**. Allow time as suggested in each topic outline (**10-30 minutes**).

Using the Three-Session Workshop Agenda to Select Topics for a Customized Workshop

We can't promise that this will work on every computer system — namely yours — or with every word processing program, but try opening two windows: one with this *Leader's Guide* PDF file and the other with your WP software. Then go to the detailed guidelines for **A Three-Session Workshop** on *Leader's Guide* pages 43 - 68 and cut & paste — add, delete, change the topic order, etc — to create your own customized agenda and *Leader's Guide*.

If this works out, you'll probably have to fool around some with the formatting until your finished *Leader's Guide* is easy to read and refer to when you're in front of the class. But, this method for building an agenda is probably more efficient than the old 3 x 5 *Index Cards on the Kitchen Table* method, and when finished, you'll have a customized, professional-looking *Leader's Guide* that you can easily revise for other workshop situations.

A Few Things We've Learned About Customizing a Workshop

Workshop Plan Summary. First determine the total workshop length, then choose the session frequency and session length. Now you're ready to pick specific dates and set up a workshop calendar. Your best approach is to obtain or look up all the relevant local calendars and cross off the dates that won't work. Then run this plan by your instructors and one or two contractors or organizations who normally send people to attend. If you have to schedule third-party meeting space, you'll need to check that availability also.

Seasonal Factors. With a few variations, the seasonal "appetite" for construction training is parallel to your local school calendar, especially early fall and winter (thru March). It's unwise to schedule a workshop that competes with school vacations — and avoid Friday nights.

Other seasonal times to avoid: Sunday | Monday | Thursday Night Football; all playoffs; Monday holidays; religious holidays; mid-December thru year end; opening day for hunting or fishing season; local events that invite massive attendance or screw up commuting.

The chart on page 85 shows how topics are added to turn the 1-session agenda into a 2-session or 3-session workshop. It also shows which topics include small group breakout sessions.

INTRODUCTION

Check school calendars to minimize evening conflicts as best you can; eg Friday nights during football season.

Special Note: I've changed the basic session length from 2 hours to 3 hours. That transition is complete & agendas in this prototype are presented as 3-hour sessions. The guidelines for each topic presented in this prototype are complete — and I've reviewed and adjusted page number references which were totally scrambled by the movement of topics and the transition to 3-hour sessions. Page number citations must be done with manual look-ups. I'll have another "human proofreading" to do the last "tuckpointing" edits before freezing the FINAL file.

Of course, all of this will fall into place during the creation of a customized edition from this generic version of the *Stepping Up* book & *Leader's Guide*. That project will be based on a fresh set of each customer's content & format specs.

Evening & Saturday Classes. Most workshops are scheduled outside the normal workday, and most people must commute to the workshop location, then commute home. Keep this in mind when setting the start time, finish time, and the day(s) of the week to meet.

Also take into account: the longest drive-time commute; workday fatigue; time for a meal; the need for a short break to switch gears from working to learning.

Session Frequency. Once or twice a week is best; many instructors feel that twice a week with a day or two between sessions allows enough time for "homework" and absorption while also maintaining continuity: Monday / Wednesday; Tuesday / Saturday; Wednesday / Saturday.

Session Length — 3 hours recommended Minimum. Every workshop has an overhead: cost, time, and trouble — especially time. Commuting to and from the workshop location; switching gears; getting a quick dinner before an evening class. Don't expect much "buy in" to workshop ideas or jobsite impact if you bring people together, then send them home after an hour or two.

Session Length — 4 hours recommended Maximum. The workshop agendas presented in this *Leader's Guide* can be adequately covered, at a reasonable pace, in 3 hours. 4 hours is a maximum length and must have enough stretch breaks and breakouts to keep everyone loose. A Saturday morning workshop session can run up to 4 hours, but make sure the coffee / soda / snack supplies are generous.

Shortening & Lengthening Time Blocks. First the reality: the time blocks shown for individual activities are tight — you can lengthen them, but you probably can't shorten them. Here are three ways to lengthen a time block:

- Simply allow a few more minutes to discuss a specific topic.
- Allow breakout groups to have more time for their small-group discussions.
- When you start a breakout, tell each group to appoint a Note-taker and a Reporter. Then say: ***When we come back together, I want each Reporter to tell us how you defined the problem. Then give us a 1-minute summary of your solution and the reasons behind it.***

Keep in mind that this will extend this topic by 1-2 minutes per group — plus the time for follow-up discussion. It's usually better to do all of the presentations first, then open it up to comments. Otherwise, Group 2, 3, 4 etc will become afterthoughts and their presentations deflated. And, they'll be tempted to launch into their solutions when commenting on Group 1's presentation.

As the Group 1 Reporter finishes his remarks, say: *Let's hold up on comments until we hear what each group has to say. Then we'll talk about the plus and minus points of each solution.*

Remember: an important part of a workshop is the chance to practice the **eight-step problem solving process** (*Stepping Up* page 76). These small-group discussions provide an opportunity to **sort out** the symptoms, define the **real** problem, come up with a **range** of workable solutions, then **choose** one.

The Concentrated Workshop Format. For various reasons — usually related to cost-saving or time-saving efficiencies — some workshops are presented in a concentrated time. For example: all-day Saturday. There are advantages and disadvantages to this format. Here are some of the plus factors:

- People are often more rested, fresher and better fed on Saturday morning than when they arrive at 7pm on a week night.
- Saturday morning commuter traffic is often lighter; people are less likely to be late — or to skip a meal to arrive on time.
- Daytime Saturday sessions avoid competition with live and televised events that are scheduled for evening prime time.
- A Saturday session is less affected by latecomers and absentees who can't leave the jobsite until they've handled a carryover issue that must be resolved by 7am the next workday morning.
- A Saturday session of any length has more flexibility for its finish time. This allow vigorous and worthwhile discussions to run longer. It enables impromptu breakout groups to continue a discussion — in the meeting room or off-site in a social setting. And it allows an instructor of offer one-on-one conversations with people who have special interests or specific critical situations.

And here are a few drawbacks to watch out for:

- A Saturday session inevitably cuts into leisure time and family time for both instructors and participants.
- An all-day Saturday workshop extends that work week to “six days on the jobsite”.
- Some supervisors use Saturday morning to handle carryover issues mentioned above. These follow-up cell phone calls can interrupt the flow of a Saturday workshop.
- The workshop topics you'll cover will be new and unfamiliar to most participants. Some people may have difficulty absorbing that much at the pace an all-day session moves. This will be especially true for anyone who feels challenged — for whatever reason — by new supervisory responsibilities.

Point out this topic so groups can refer to the 8-step process for problem solving. If an opportunity comes up to focus on sorting out the symptoms to identify the Real Problem — emphasize it. And mention the Acid Test.

- If workshop is delivered as a concentrated one-day session, there's no opportunity to try out new ideas, skills, and techniques on the jobsite — then bring back results for class discussion. There's less time to reflect on "How am I going to apply my new Action Plan?"

Class Size. The success and value of a workshop comes from class participation, especially in the full-class discussions and breakout groups. It's difficult to have a vigorous discussion with less than 6 or 8 people. Many of them are not experienced supervisors — they're people who are "stepping up" and some of them don't arrive at the workshop with much real-world experience under their belt.

And, the breakout approach only works if you can have at least two or three breakout groups — with a minimum of three persons each. Four is better. **Recommendation:** class size minimum is 8 — and try to hold out for 10.

Maximum class size is affected by the physical arrangements (room size; tables/chairs; support hardware), the instructor's ability and willingness to handle a large group; and — most important — the effect of class size on discussions and the workshop timeline. The effect of these factors is more acute on a workshop with longer sessions (3:00+).

A group of 30 or more is simply too large for everyone to participate in discussions; either some people will be left out or the timelines won't hold. The workshop may also tilt toward excessive lecture. To an extent, an instructor can use breakout groups to minimize the negative effect of a large class, but if he chooses to have groups make presentations (with follow-up discussion), timelines will be difficult to maintain.

It requires much more instructor energy and stamina to handle a large class. **Recommendation:** class size maximum is 25 — and 20 (to then split up into four or five breakout groups) is better.

The First 15 Minutes. First impressions count! The way you handle the **Introduction** — especially the pace you set and the way you encourage participation — will set a pattern for the workshop. Be organized, relaxed, upbeat, and in control.

By the time the first break is over, a class will often form an opinion on the instructor's credibility and the workshop itself. If it's a three-session workshop and that opinion is negative, it will be a looooooong 9-10 hours, and attendance will likely drop off for Sessions 2 and 3.

Recommendations: minimum class size is 8 — and try to hold out for 10. Maximum class size is 25 — and 20 is better.

About Reading Aloud. Whatever you do, **do not have someone read the book aloud.** That's deadly — and some people are very fearful about reading aloud, especially in front of peers. Just tell the class to read to themselves, then look up when they're finished.

The Challenge. Don't be shocked or dismayed if someone in the class decides to "test" your knowledge or your authority during the first hour of a workshop. If this happens, stay cool. Resist the temptation to swat him down or treat him like a heckler in a night club.

Instead, turn his remarks back to the group: *Well, what do the rest of you think about this?* If his comments are off-base, the group will usually handle it. And, a response from peers is far more effective than an argument with The Guy In Front of the Class.

A Final Note on Your Workshop Plan

Remember — your purpose as a workshop instructor **is not** to force feed a "maximum package" of ideas, skills, and techniques in a specific amount of time. Your role — and your goal — is:

- to *present* — clearly and precisely — a set of new ideas, skills, and techniques;
- to *confirm* that participants understand what you've presented thru group discussions, small group activities, "homework" assignments, and short presentations that participants make to their peers;
- to *enable* each participant to **apply** these ideas, skills, and techniques by preparing a personal Action Plan;
- if possible, to *encourage* participants to try out an idea, skill, or technique in an actual jobsite situation, then report the results to the workshop class for analysis and discussion;
- to *cause each participant to "buy in"* to the ideas, skills, and techniques presented and discussed in the workshop.

A note about custom editions. Over the past 20 years, I've created custom editions of *Stepping Up To Supervisor* for the UBC and for several large contractors — the book, *Pocket Checklist and Leader's Guide*. Each project started with the customer's marked copy of the current edition of the book — then we made edits, topic expansions and deletions, title changes. I created some original content and they furnished some pages — for each customer, we created a unique project that matched up with their training situation. The cost for a custom edition is surprisingly reasonable: a fixed fee to create the master file, then unit costs that are similar to the *Stepping Up* price schedule — adjusted, if necessary, for page count. If a project like this might fit your program, send me an email (wilmck3@aol.com) and we'll talk about the possibilities.

INTRODUCTION

This section on how to prompt more effective discussions is adapted from *Meeting Skills for Leaders*, by Marion E. Haynes. Used copies are available from Amazon for \$5. For more information, see page 99.

Observe the group as they gather for class. You'll probably notice that some are natural leaders — or just more talkative than others. Call on them first to get a discussion started, — but don't let the "talkers" crowd out others, especially those who hold back.

Thruout this *Leader's Guide*, texts for questions or statements you present to the class are shown in *this type font and color*.

Stepping Up discussions are always lively. If you have time, you can extend most activities by using these ideas and techniques. The book and *Leader's Guide* can support a multi-session workshop of up to 10+ hours total.

For more information on extending sessions beyond three hours, see the sidebar notes on pages 47 and 56 and How to Extend a One-Session Workshop Beyond Three Hours on page 6.

Using Open-ended Questions to Prompt More Effective Discussions

- Ask for feelings and opinions.
 - » *What do you think about....?*
 - » *What's your reaction to...?*
 - » *How does this make you feel?*
- Paraphrase what is said.
 - » *What I'm hearing you say is...Do I have it right?*
 - » *Do you mean that...?*
- Draw out people who hang back from participating.
 - » *Tom, how do you feel about this?*
 - » *Chris, how would this affect your crew over on the XYZ Project?*
 - » *You seem a little skeptical, Larry. How do you see it?*
- Ask for a summary.
 - » *We've heard a lot of good ideas on this. What's the one thing you need to remember every time?*
 - » *If you wanted to capture these ideas in a Tweet, what would you say?*
- Ask for clarification.
 - » *I'm not quite following you, Ted. What would you do if...?*
 - » *There's a good idea in there somewhere, but it's not quite coming through. Can someone else take a shot at it?*
- Ask for more detail.
 - » *How so? Tell us more.*
 - » *What else should you keep in mind?*
 - » *Who can take this a step farther?*
- Ask for examples.
 - » *What are some other examples of this kind of problem/opportunity/situation?*
 - » *How do you handle this with your crew, Juan?*
 - » *How do they do this over at XYZ Company? (or XYZ Project)*
- See if there's a consensus.
 - » *Before we move on, how many of you agree that...?*
 - » *OK, taking everything you've said into account, who would rather work for Joe? Who would rather work for Harry?*

- Take a quick & dirty survey. Make a list, then vote.
 - » *How many of you have worked on a project for a full month without a lost-time accident? Three months? Six months? A year? Longer?*
 - » *Everybody's got good ideas on this and we've got a long list. What are the three most important points to remember?*
- Ask for **Action Plan** ideas.
 - » *Now that you know what to do, how would you go about it on your project?*
 - » *If this happened on your project, what would you do? How would you go about it?*
 - » *Okay, you talked the talk. How are you gonna walk the walk?*
- Do a "go around."
 - » *Let's go around the table on this; everyone vote "yes" or "no" and give us a one-sentence reason.*
 - » *Let's go around the room and have each person point out a trait of a successful supervisor...or a trait of supervisor who will fail.*
- Call a pause, pose a question, count to 20, then resume.
 - » *That really puts you between a rock and a hard place — either you cut corners or you blow the schedule. Think about it for a minute.....Now, what are the trade-offs?*
 - » *Take a minute and think about all we've said.....How do you feel about the situation? Relieved? Angry? Determined?*
- Share your feelings, then invite others to jump in.
 - » *When I see something like that on a jobsite, I feel really good. How about you?*
 - » *I'm feeling a little frustrated right now. How do the rest of you feel?*
- Change the time frame.
 - » *Looking ahead, what would you need to watch out for?*
 - » *What are some possible long run consequences of this action/behavior/decision?*
- Switch the focus from **what** to **how** or **why**.
 - » *How → Action Plans. Why → introspection & underlying logic.*
 - » *Now that you know what to do, how can you do this on your project?*
 - » *Why is this important? Why would you do it that way?*
- Switch the **what** focus to the opposite view.
 - » *What are the risks, the trade-offs, the counter-arguments.*

re Logical Operations: see note on page 99 sidebar & make sure these two sidebars are consistent.
 ISBN-13: 978-1418864897. New prices \$12+ but many used dealers @ AMZ show \$5.

Change to a simple credit line if Crisp titles are deleted from the Reference page. Direct to AMZ?

Some instructors announce during the Introduction:
 "It's your participation that makes this class go. On the other hand, if it's your turn to talk and you really don't have anything to say, it's OK to just say PASS — and you don't have to explain anything. We'll just keep it moving along, and you can jump in when you're ready."

Workshop Management Checklist and Housekeeping Rules

- Administrative: registration, payment, attendance requirements, name tags, name cards (tents)
- Class meeting schedule: dates; starting/ quitting times
- Punctuality: no waiting for latecomers; the workshop starts and ends on time
- Your “office hours” — when you’ll be there to handle questions
- Site arrangements: parking, building and room access, smoking areas
- Clean-up: clean shoes before entering the building; everyone help straighten up the classroom before leaving
- Locations: rest rooms, vending machines, coffee and snack supplies
- Breaks: it’s OK to get up and move around and to quietly tend to personal breaks as necessary, but return to the group ASAP; we’ll take some 1-minute stretch breaks, but we don’t have time for any 10-minute breaks where everyone leaves the room
- Interruptions & distractions: turn off cell phones — or put them on vibrate only; try to limit your calls to emergencies only, and leave the room immediately if a conversation is necessary
- Workshop pace: brisk, but not so quick that questions or discussion are inhibited; get right to the point, but make sure the pace doesn’t leave some people behind; pay attention to each person and do your best to engage everyone in class discussions and activities
- Clearly communicate your expectations about each workshop participant’s responsibilities:
 - » respect everyone
 - » 100% focus on the topic at hand
 - » openly share knowledge, experiences, and feelings
 - » work through Part 2 and Part 3 of the book between sessions so you’re prepared to participate (re 2-session and 3-session workshops)
 - » read the book cover-to-cover; work through *all* of the exercises — including the ones we don’t cover in class
 - » ask questions; be curious; think about *What If...?*
 - » listen to what others say! contribute your ideas!
 - » it’s OK to say “Pass” if you don’t want to answer a question — or for any reason — and you don’t have to explain yourself
 - » relax; have fun; meet people; extend your network

Workshop Agenda

Session 1

- Opening Remarks and Introductions
- Overview of *Stepping Up To Supervisor*
- Topic 2.01 /2.02: The Four Fundamentals (p 30-31*)
- Topic 2.03: Fundamental #1, Demonstrate Your Authority By Setting Reasonable Standards and Limits (p 32)
- Topic 2.09: Fundamental #2, Get Results Through Your Crew (p 38)
- Topic 2.16: Fundamental #3: Make Safety, Quality, and Productivity Part of Every Plan, Every Decision, and Every Day (p 50)
- Topic 2.25: Fundamental #4: Become a Confident and Respected Leader (p 64)
- Topic 3.03: “Killer” Mistakes (p 75)
- Topic 3.11: Staying Positive and Overcoming the Blahs (p 88)
- Topic 1.20: Six Day Look Ahead Schedule- detailed presentation (p 24/25)
- Topic 3.22: Action Plan (p 107)
- Closing

* = page numbers in *Stepping Up To Supervisor* 5th edition © 2019

Re: Certificate forms on pages 89/91. You'll need to prepare these certificates in advance for presentation at the end of Session 1.

Be sure to have a few blank forms from p 91 on hand so you can include people who were not on the advance registration list. Get a volunteer from the class who has good lettering skills to fill in the blanks.

USE THIS BLANK PAGE FOR NOTES

Special Note. This *Leader's Guide* prototype presents guidelines for 46 topics, fully edited to match up with the generic 5th edition of the book. Each session in the 1/2/3 agendas now stands @ 3 hours, expanded from 2 hours. The 3-session workshop is now 10 hours.

I've extended many activities by adding small group breakout sessions — which will create physical movement (stretch breaks) & increase participant engagement (buy-in).

Each of the new topics in Parts 2 & 3 has potential for a strong, engaging workshop activity.

I'll do another review of all activities which reference safety, quality & productivity to tell the Instructor to point out the consistent priority given to safety, ie as

**Safety|Quality|Productivity
&
safety|quality|budget|schedule.**

For a customized edition we'll edit the book, the Pocket Checklist, and the *Leader's Guide* to create a **unique customized edition** — which will fit XYZ's specs in content and in format. The *Leader's Guide* will cover all classroom and location specs that XYZ will use to deliver supervisory training.

Workshop Objectives, Schedule & Details

Basic Plan for Session 1: Introduce the topics covered in *Stepping Up To Supervisor*; get people “into” the book and “into” the class discussion by working through a few exercises and discussing them; present the **Four Fundamentals** of construction supervision; introduce the **Six Day Look Ahead Schedule** and make sure that everybody understands how to use it; highlight and review selected topics from Part 3 (pages 73-99*); get people started on compiling an **Action Plan**.

Note: If you have more than 3 hours available, see page 6 of this *Leader’s Guide* for ways to expand this one-session outline.

Opening Remarks & Introductions. Welcome everyone to the workshop; introduce yourself and tell your organization’s name or construction industry affiliation.

- Tell people: **Pair up and do a 60 second interview with each other; name, company, current job title, current project, # of years in construction, a couple of items of personal interest.** If there’s an odd number, form one group of three.
- Appoint somebody to keep track of the # of years in construction as **each person gets 30 seconds** to introduce the person they interviewed. Keep it moving — this activity is only 15 minutes!
- At the end, ask the tally keeper how many total years of construction experience is in the room. **Point out: We have X years of construction experience in this room. None of us has all the answers, but here in this group we have a lot to draw on — so, for the next two hours we need everybody to pitch in and contribute and make this workshop really worthwhile.**
- Distribute copies of the workshop **Agenda**; pass out copies of workshop **Housekeeping Rules** or guidelines and **point out** any that you feel need special attention.

Book Overview (p 3/4, etc*). Tell everyone to turn to page 3.

- Summarize the key points from the Introduction; review the Table of Contents. **Point out: Action Plan sidebar** (page 13); **Action Ideas form** (107); **photocopy masters** (113-121); **Checklists** (125-136); **Attitude Checklists** (138-145); **Reference Books & Websites** (146); **Index** (149-152); and the **Pocket Checklist**.
- **Point out: We’ll use this book today for information and you’ll fill out some of the worksheets in it. You can also use it as a self-study book to cover additional topics, now and later. Highlight key ideas; make notes. Make it your book.**

This 3-hour, one-session workshop outline includes selected activities taken from the three-session workshop presented on pages 41-68. If you have more than three hours available, see How to Extend a One-Session Workshop Beyond Three Hours on page 6.

* = page numbers in *Stepping Up To Supervisor*

15 minutes (0:15)

Objective: *break the ice*; get people to talk; encourage participation; pass out the workshop agenda and review workshop housekeeping rules.

30 seconds max! The pace of this activity sets the pace for the workshop. If you have more than two hours for this session, you’ll probably use some of the extra time here — but “do the math” and don’t let it run on & on.

5 minutes (0:20)

Objective: *point out and preview* what’s in the book; participants will understand how to use the book — during the workshop and after it’s over.

A ONE-SESSION WORKSHOP

10 minutes (0:30)

Objective: *participants will understand that it's necessary to "take charge" and they'll know three sources of power that can enable that transition.*

Topic 1.14: Taking Charge (p 20) Tell everyone to look over page 20. Allow about 5 minutes for this, then begin a discussion **Note:** The fill-in blanks at the bottom of page 20 are for their notes on how these sources of power may play out in their personal situation.

- Ask: *What sources of knowledge power can help you "take charge" in your start-up as a supervisor?*
- Ask: *What sources of position power can help you "take charge" in your start-up as a supervisor?*
- Ask: *What sources of personality power can help you "take charge" in your start-up as a supervisor?*
- Ask: *What's often the cause when a supervisor goes off on a "power trip" during the start-up of a new supervisory role?*

The answer you're fishing for: *probably a feeling of vulnerability — about a personal shortage of knowledge power, position power, or personality power. Remedy: a realistic self-assessment, followed by action to eliminate or minimize that vulnerability. This is not easy to do.*

15 minutes (0:45)

Objective: *participants will learn about factors that can affect their "take charge" image and will understand and analyze how their words and actions may affect the image they project. They'll identify areas where their words and actions may not match up.*

Topic 1.15: Presenting a Strong, Effective Image (p 21) Tell everyone: *Look over page 21 and check the boxes that apply to your personal situation.* Allow a minute or two for this, then start a discussion.

- **Point out:** *Your image is a combination of your WORDS and your ACTIONS — as viewed by your crew and others.*
- Ask: *How do your words affect the image you project?*
- Then ask: *How do your actions affect the image you project?*
- **Point out:** *The greatest risk to the strong, "take charge" image you want to project — is any situation where your words and your actions don't match up.*
- Ask: *What are some situations you must watch out for to avoid a mismatch between your words and your actions?*
- Ask: *What can you do to avoid or minimize this potential problem?* Listen for and reinforce **systematic approaches** (regular tool box talks; Monday morning meetings; Friday afternoon meetings). **Point out:** *You'll get better long-term results from systematic approaches than from one-shot actions.*

Topic 2.01/2.02: The Four Fundamentals (p 30/31). Tell everyone to turn to page 30 and show visual **Visual #3**. Ask: *What are the four fundamentals that every successful construction supervisor must master?* Get responses from four different people and write them on a flipchart. Once the flipchart is complete, tape it to the wall where everyone can see it.

5 minutes (0:50)

Objective: present the four fundamentals.

Topic 2.03: Fundamental #1: Demonstrate Your Authority By Setting Reasonable Standards and Limits (p 32). Tell everyone to turn to page 32 and allow 2-3 minutes to skim the page.

10 minutes (1:00)

Objective: participants will understand Fundamental #1 and how to apply it; help people anticipate and deal with possible difficulties or resistance.

Note: Whatever you do, **do not have someone read the book aloud.** That's deadly — and some people are very fearful about reading aloud, especially in front of peers. Just tell the class to read to themselves, then look up when they're finished.

While they're reading, wander around and note whether people have filled in the "Standard and Limits" blanks at the bottom of the page. Show **Visual #3** and ask:

- **What are the most important standards and limits you'll have to establish?** Make three lists on a flipchart:
 - » Standards (for work performance)
 - » Standards (for behavior)
 - » Limits (on behavior)
- Choose 1 or 2 items from each list and ask: *How will you do it? What difficulties or resistance might you encounter? How will you deal with them? What do you have going for you that will help?* Encourage everyone to contribute ideas and observations from their own personal experiences and current jobsite situations.

Topic 2.09: Fundamental #2: Get Results Through Your Crew (p 38).

10 minutes (1:10)

Tell everyone to turn to page 38 and allow 2-3 minutes for them to skim pages 38 and 39. Show **Visual #3** and **point out:** *You don't use a tool belt or need a tool box to do these tasks.* Then ask:

Objective: participants will understand Fundamental #2 and how to apply it; help everyone understand how they must think and act differently.

- *As a supervisor, how do you have to think differently?*
- *How do you have to act differently?*
- *If you can't do it all yourself, how do you get results through your crew?* When you review the four ▼ points on page 38, be sure **communication** is mentioned. **Point out** the bold-faced sentence on dealing with productivity gaps on page 15.
- At the end of this topic, tell everyone to stand up and take a **One-Minute Stretch Break** — but **don't let the group break up and leave the room** or you won't get them all back for 10-15 minutes, your schedule will be shot, and the workshop will lose momentum.

A ONE-SESSION WORKSHOP

10 minutes (1:20)

Objective: participants will understand Fundamental #3 and how to apply it; help everyone develop personal standards for quality, safety, and productivity.

Topic 2.16: Fundamental #3: Make Quality, Safety, and Productivity Part of Every Plan, Every Decision, and Every Day (p 44). Tell everyone to turn to page 44. Allow 3-4 minutes for them to skim pages 44-47, then show **Visual #3** and ask:

- **What are the standards for quality and how do you achieve them?** (Refer to page 58.)
- **What are the standards for safety and how do you achieve them?** (Refer to page 51.)
- **What are the standards for productivity and how do you achieve them?** (Refer to page 59.)
- **Check your watch.** The workshop should be at the 1:20 mark when you finish this topic. **But, if you're running behind, keep it to yourself.** There's nothing to be gained by making a comment. But if you are running behind, you'll either need to pick up the pace or know that the workshop will run longer than the stated finish time — and deal with disclosing that fact according to the specifics of the situation.

10 minutes (1:30)

Objective: participants will understand Fundamental #4 and how to apply it.

Topic 2.25: Fundamental #4: Become a Confident and Respected Leader (p 52-57). Tell everyone to turn to page 52 and look over pages 52-57. Allow 5 minutes, then show **Visual #3** and ask:

- **Everyone knows you have to become an effective leader to be an effective supervisor, but how do you do that?** This question might be met by a few moments of silence, but let it sink in. The discussion will take hold.

15 minutes (1:45)

Objective: participants will understand "killer" mistakes and how to prevent them.

Topic 3.02: "Killer" Mistakes (p 65). Tell everyone to turn to page 65 and allow them a minute to look it over. Then ask:

- **Can anyone tell us about a project that "went sour" because of one of these "killer" mistakes? How could it have been prevented?**
- **After some discussion, ask: Does anyone have some other "killer" mistake that's important enough to add to this list? How can you prevent this mistake?**

Topic 2.10: Earning Your Crew's Respect and Keeping It (p 39) Tell everyone: *Look over page 39 and check the ideas that are likely to be helpful to you for earning your crew's respect. Not popularity, but respect.* Allow about 5 minutes for this, then **split up into small groups**.

- Tell the groups: *These are six really good ideas, but it's hard to keep six things in mind all the time. Discuss these ideas and choose the two ideas that your group would give top priority. Why? What key factors do you need to keep in mind to make each idea work?*
- Allow about 5 minutes to do this, then open a discussion by asking each group to report its choices, reasons, and key factors. Then talk about priorities and trade-offs and ask about special situations where one approach would probably have the most effect.
- To wind up this discussion, ask: *What are common factors in all your efforts to earn your crew's respect?* (Replies you're fishing for: they're based on **action**, not talk; they demonstrate a **positive attitude**. Allow a minute, and if you don't hear these two replies, put them out there yourself.)
- At the end of this topic, tell everyone to stand up and take a **One-Minute Stretch Break** — but **don't let the group break up and leave the room** or you won't get them all back for 10-15 minutes, your schedule will be shot, and the workshop will lose momentum.

20 minutes (2:05)

Objective: participants will review ideas for earning their crew's respect and analyze which ideas will be most effective. They'll understand that respect is earned thru action, not talk.

A ONE-SESSION WORKSHOP

25 minutes (2:30)

Objective: participants will know their four basic safety responsibilities and understand that safe jobsites are created and maintained thru systematic, pro-active safety programs. They will outline a 5 minute Tool Box Talk.

You may want to create a flipchart — in advance — that lists these topics. This visual reference will help keep groups on track as they prep their Tool Box Talk.

Topic 2.18: A Safe Jobsite for Your Crew and Others (p 51) Tell everyone: *Look over pages 51 and 52 — and look up at me when you've finished.* Allow 5+ minutes for reading this topic since it's a 2-page text. The "look up at me" instruction will signal when to proceed.

- Review a supervisor's four basic safety responsibilities, listing them on a flipchart*. Then ask:
 - > **Who sees that this range of safety responsibilities is much broader than you thought it would be?** (This show of hands will indicate how much the class needs to learn about their safety responsibilities — which may affect the time you allocate to topic 2.18.)
 - > **Point out** and make notes on a flipchart*:
 - » *Safe jobsites are created and maintained thru systematic, pro-active safety programs.*
 - » *A comprehensive safety plan will focus on three different approaches to jobsite safety hazards: eliminate the; reduce them; avoid them.*
 - » *Proper safety gear and pro-active safety training are essential if you and your crew are to avoid accident and injury.*
 - » *Your Safety Director is a resource, but you and the one who is responsible for Job 1, Job 2, Job 3 and Job 4.*
 - » *Make sure every crew member knows where you stand on safety — that's it's part of every plan, every decision, and every day.*
 - » *Communicate about safety to your crew repeatedly and be consistent in what you say.*
- **Split up into small groups** and tell the groups: *Your task now is to outline a 5 minute Tool Box Talk by creating a flipchart that list the key points you'll cover. Pass out blank flip charts and assign each group a topic from this list:*
 - > *get 5 topics from a Safety Director*
 - > *get 5 topics from a Safety Director*
 - > *get 5 topics from a Safety Director*
 - > *get 5 topics from a Safety Director*
 - > *get 5 topics from a Safety Director*

Allow 10 minutes for groups to prep a presentation and create a flip chart, then have each group post their flipchart and give a one-minute summary of their key points.

- To wrap up this topic, **point out** this sidebar on page 52:
 - > *Never forget that your attitude “speaks” so loudly that it overpowers anything you say — and this applies to safety more than anything else. Your attitude will be unmistakable if you:*
 - » *talk about hazards;*
 - » *show concern for the safety of your crew;*
 - » *act decisively whenever you discover unsafe practices;*
 - » *encourage crew members to report any potential hazards to you ASAP;*
 - » *never back down by cutting corners on safety to make the budget or beat the schedule.*
 - > *The bottom-line responsibility for safety is yours — the safety of your crew and the safety of others who pass thru your work area.*

Topic 3.11: Staying Positive and Overcoming the Blahs (p 62). Tell everyone to turn to page 62 and allow them a minute to look it over. **Point out:** *Staying positive isn’t always easy — but you have to do it. Here are some ideas that may help.*

- Ask: *Who has used one of these techniques? How did it work for you?*
- After several people have shared their results and experiences, ask: *Does anyone have a new technique to add to this list?*

Topic 1.20: Six Day Look Ahead Schedule (p 24/25). The Six Day Look Ahead Schedule is probably the most difficult topic in this book. In this topic, you’ll introduce the Look Ahead Schedule and work through an example. Then, encourage each participant to fill out a Six Day Look Ahead Schedule for his current project sometime before the start of the next week.

- **Point out:** *Many supervisors use this kind of tool to plan the activities of their crew and keep the work under control.* Tell everyone to refer to the completed example on page 25 as you show **Visual #1** (LG page 57) and walk them through steps ① through ④.

10 minutes (2:40)

Objective: *participants will understand how to keep a positive mental attitude.*

20 minutes (3:00)

Objective: *introduce the Six Day Look Ahead Schedule; make sure everyone understands it clearly enough to do an SDLAS on their own.*

A ONE-SESSION WORKSHOP

5 minutes (3:05)

Objective: encourage everyone to make using an Action Plan a daily practice.

5 minutes (3:10)

Objective: find out if people want any follow-up meetings; recognize participants and send everyone away with a word of encouragement.

Topic 3.22: Action Plan (p 107). Point out: *The time you've spent in this workshop will only have practical value if it affects your daily work at your jobsite. Your Action Plan is the best way to accomplish this.*

- Ask: *Has anyone ever tried to implement some Action Plan ideas?*
- Ask: *How did it go and what did you learn from the experience?*
- Ask: *How can you keep a steady flow of action ideas coming?*

Closing. Point out the **Review** on pages 100-106. *If you work thru all the topics in the book, these questions are an excellent review of its ideas and skills. Each question is cross-referenced to the page that contains the answer.* Then ask if people in the group want to continue to get together every now and then. If there's interest, set up a meeting within 30 days — no later or people will "break contact" with the workshop and each other. Facilitate and encourage this follow-up meeting, but don't force it. Just follow the group's lead, and they'll find a level that works for them.

Copy or circulate the filled-out **Class Registration List** so participants can pick up each others' phone and e-mail contact information. Encourage them to talk with each other about what they've learned in the workshop. Put your name, phone and/or e-mail on the list, and tell the class when it's OK to contact you.

Pass out the **Workshop Feedback Form** and ask everyone to fill it out and either give to you or leave it on the table at the front of the room.

Thank everybody for coming to the workshop. Pass out workshop certificates and recognize participants — **and do this personally** — one by one, with eye contact, a smile, a handshake, and a word of encouragement.

This concludes the one-session workshop.

Workshop Agenda

Session 1

- Opening Remarks and Introductions
- Overview of *Stepping Up To Supervisor*
- Topic 1.01: The Challenge Ahead (p 8*)
- Topic 1.03: Copy a Successful Supervisor (p 10)
- Topic 1.04: What Kind of Supervisor Do You Choose to Become? (p 11)
- Topics 1.07 - 1.09: Your Attitude About Safety...Quality...Productivity (p 14)
- Topic 1.20: Six Day Look Ahead Schedule - detailed presentation (p 24/25)
- Topic 1.21: Six Day Look Ahead Schedule - personal plan (1.20 continued)
- Topic 3.22: Action Plan (p 107)
- Preview Part 2 (p 29)

Session 2

- Topic 1.21: Six Day Look Ahead Schedule – Review personal plan (p 24/25)
- Topic 2.01/2.02: The Four Fundamentals (p 30/31)
- Topic 2.03: Fundamental #1, Demonstrate Your Authority By Setting Reasonable Standards and Limits (p 32)
- Topic 2.09: Fundamental #2, Get Results Through Your Crew (p 38)
- Topic 2.16: Fundamental #3: Make Quality, Safety, and Productivity Part of Every Plan, Every Decision, and Every Day (p 50)
- Topic 2.25: Fundamental #4: Become a Confident and Respected Leader (p 64)
- Topic 3.02: “Killer” Mistakes (p 75)
- Topic 3.11: Staying Positive and Overcoming the Blahs (p 88)
- Topic 3.22: Action Plan (p 107)
- Closing

* = page numbers in *Stepping Up To Supervisor*

USE THIS BLANK PAGE FOR NOTES

“Final” Prototype
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Workshop Objectives, Schedule & Details

Basic Plan for Session 1: Introduce the topics covered in *Stepping Up To Supervisor*; get people “into” the book and “into” the class discussion by working through a few exercises and discussing them; introduce the **Six Day Look Ahead Schedule** and make sure that everybody understands how to use it; highlight and review selected topics from Part 1 (pages 7-26*); get people started on compiling an **Action Plan**; preview Part 2.

Opening Remarks & Introductions: Welcome everyone to the workshop; introduce yourself and tell your company name or construction industry affiliation.

- Tell people *to pair up and do a 60 second interview with each other; name, company, current job title, current project, # of years in construction, a couple of items of personal interest.* If there’s an odd number, form one group of three.
- Appoint somebody to keep track of the # of years in construction as **each person gets 30 seconds** to introduce the person they interviewed. Keep it moving — this activity is only 15 minutes!
- At the end, ask the tally keeper how many total years of construction experience is in the room. **Point out:** *We have X years of construction experience in this room. None of us has all the answers, but here in this group we have a lot to draw on — so, for the next two hours we need everybody to pitch in and contribute and make this workshop really worthwhile.*
- Distribute copies of the workshop **Agenda**; pass out copies of workshop **Housekeeping Rules** or guidelines and **point out** any that you feel need special attention.

Book Overview (p 3/4, etc*). Tell everyone to turn to page 3.

- Summarize the key points from the Introduction; review the Table of Contents. **Point out:** **Action Plan** sidebar (page 13); **Action Ideas** form (107); **photocopy masters** (113-121); **Checklists** (125-136); **Attitude Checklists** (138-145); **Reference Books & Websites** (146); **Index** (149-152); and the **Pocket Checklist**.
- **Point out:** *We’ll use this book today for information and you’ll fill out some of the worksheets in it. You can also use it as a self-study book to cover additional topics, now and later. It’s yours — highlight key ideas; make notes. Make it your book.*

This two-session workshop outline includes selected activities taken from the three-session workshop presented on pages 41-68. This two-session workshop is six hours total.

15 minutes (0:15)

Objective: *break the ice; get people to talk; encourage participation; pass out the workshop agenda and review workshop housekeeping rules.*

30 seconds max! The pace of this activity sets the pace for the workshop. If you have more than two hours for this session, you’ll probably use some of the extra time here — but don’t let it run on & on.

5 minutes (0:20)

Objective: *point out and preview what’s in the book; participants will understand how to use the book — during the workshop and after it’s over.*

* = page numbers in *Stepping Up To Supervisor*

A TWO-SESSION WORKSHOP • SESSION 1

10 minutes (0:30)

Objective: *get everyone thinking about what's ahead as a supervisor; identify common challenges.*

10 minutes (0:40)

Objective: *participants will identify traits of successful foremen.*

10 minutes (0:50)

Objective: *participants will identify common mistakes new foremen make & how to avoid them.*

10 minutes (1:00)

Objective: *participants will focus on attitude and its effect on the three key elements: safety, quality, and productivity.*

Special Note: Don't let the group break up and leave the room or you won't get them back for 10-15 minutes, your schedule will be shot and the workshop will lose momentum.

Topic 1.01: The Challenge Ahead (p 8). Tell everyone to read page 8. Allow 3-5 minutes to Read it and fill out the list at the bottom of the page.

- Ask: **Who can tell us about the challenges you identified?** List the responses on a flipchart. Do a "go around" to get something from every participant on this. See what the common responses are.

Topic 1.03: Copy A Successful Supervisor (p 10). Tell everyone to look over page 10 and make notes about successful supervisors they've known. Allow 5 minutes to do this.

- Ask various participants to tell the traits they identified, and list them on the chalkboard or a flipchart.
- **Point out:** *The group was able to come up with a more extensive list than any one person did. This shows how you can learn from each other — even if many of you are not experienced supervisors.* Encourage everyone to discuss the topics in the book with each other in between sessions and after the workshop is over.

Topic 1.04: What Kind of Supervisor Do You Choose To Become?

(p 11). Tell everyone: *Look over the two lists in the box on page 11, add a couple of items to each list, then identify three mistakes to avoid.* Allow 5 minutes for this, then ask:

- **What did you add to the list of traits for a successful supervisor? What did you add to the failure list?** List responses on a flipchart.
- Ask: **What are the most important mistakes that you plan to avoid?** List the ideas people offer, and follow up by asking: **How will you do this?** List responses on a flipchart.

Topics 1.07 - 1.09: Your Attitude About Safety...Quality...Productivity (p 14). Tell everyone to read pages 14 and 15. Allow 5 minutes for this. Some people might not be able to read it all in 5 minutes — but you have to keep things moving. But notice who they are. You may need to give them some extra attention during or after the workshop.

- Ask: **What effect can your attitude as a supervisor have on the safety of your crew? On the quality of the work your crew puts in place? On your crew's productivity?** Then ask: **What's your priority? Safety...Quality...Productivity — what can you do?**
- At the end of this topic, tell everyone to stand up and take a **One-Minute Stretch Break.**
- End the stretch break by saying: **You'll notice we've skipped over some pages in the book, but remember that this is a self-study book, and I encourage you to work through the rest of the pages in Part 1 on your own sometime during the next couple of days. I promise you, it'll be worth your time.**

Topic 1.14: Taking Charge (p 20) Tell everyone to look over page 20.

Allow about 5 minutes for this, then begin a discussion **Note:** The fill-in blanks at the bottom of page 20 are for their notes on how these sources of power may play out in their personal situation.

- Ask: *What sources of knowledge power can help you “take charge” in your start-up as a supervisor?*
- Ask: *What sources of position power can help you “take charge” in your start-up as a supervisor?*
- Ask: *What sources of personality power can help you “take charge” in your start-up as a supervisor?*
- Ask: *What’s often the cause when a supervisor goes off on a “power trip” during the start-up of a new supervisory role?*

The answer you’re fishing for: probably a feeling of vulnerability — about a personal shortage of knowledge power, position power, or personality power. **Remedy:** a realistic self-assessment, followed by action to eliminate or minimize that vulnerability. This is not easy to do, but it’s very worthwhile to do sometime over the last weekend of every month — especially in your first few months as a supervisor.

Topic 1.15: Presenting a Strong, Effective Image (p 21) Tell everyone: Look over page 21 and check the boxes that apply to your personal situation. Allow a minute or two for this, then start a discussion.

- **Point out:** *Your image is a combination of your WORDS and your ACTIONS — as viewed by your crew and others.*
- Ask: *How do your words affect the image you project?*
- Then ask: *How do your actions affect the image you project?*
- **Point out:** *The greatest risk to the strong, “take charge” image you want to project — is any situation where your words and your actions don’t match up.*
- Ask: *What are some situations you must watch out for to avoid a mismatch between your words and your actions? If “pressure to cut corners on safety or quality when the heat’s on to hit budget and schedule targets” doesn’t come up — put it out there yourself.*
- Ask: *What can you do to avoid or minimize this potential problem?* Listen for and reinforce **systematic approaches** (regular tool box talks; Monday morning “heads up” meetings; Friday afternoon “review” meetings). **Point out:** *You’ll get better long-term results from consistent, systematic approaches that anticipate tough situations than from one-shot actions after something gets off track.*

10 minutes (1:10)

Objective: participants will understand that it’s necessary to “take charge” and they’ll know three sources of power that can enable that transition.

15 minutes (1:25)

Objective: participants will learn about factors that can affect their “take charge” image and will understand and analyze how their words and actions may affect the image they project. They’ll identify areas where their words and actions may not match up.

A TWO-SESSION WORKSHOP • SESSION 1

20 minutes (1:45)

Objective: participants will review standards and limits re discipline used by supervisors they've worked for and their effect on the results achieved. They'll identify the top most important standards and limits they will put in place and the mistakes they'll try to avoid.

Topic 207: Establishing Discipline (p 36) Tell everyone: Look over page 36. Make notes under each of the four paragraphs. Allow about 5 minutes for this, then split up into small groups.

- Tell the groups: Review and discuss your notes, then compile two profiles: standards and limits re discipline. Be specific, with examples — but cite only your first-hand experience, not jobsite chatter.
 - » the best supervisors you've worked for — their limits and the results they achieved;
 - » the worst supervisors you've worked for — their limits and the results they achieved.
- Allow about 5 minutes to do this, then open a discussion:
 - » Considering all these positive and negative examples. What are the top 3 standards and limits you'll put in place as a supervisor?
 - » What are the top 3 mistakes you'll try to avoid as you put your standards and limits in place. List the replies on a flipchart.
- To wind up the discussion, **point out:** As a supervisor, you'll have specific goals for the work your crew is to put in place — safety quality, budget, and schedule. They will be challenging, measurable targets — and you can expect that they will be tracked, probably daily or weekly. You'll have resources to achieve these goals, and your most important resource is your crew.

The purpose of your standards and limits is not to enforce some sort of parental role on your crew — it's to keep each one of them focused on actions that will achieve these goals. That's what it means to establish discipline.

When you get home tonight, take a look ahead to **Fundamental #2: you must get results thru your crew.** It's on page 38.

20 minutes (2:05)

Objective: participants will understand "killer" mistakes and how to prevent them.

Topic 3.02: "Killer" Mistakes (p 65). Tell everyone to turn to page 65 and allow them a minute to look it over. Then ask:

- Can anyone tell us about a project that "went sour" because of one of these "killer" mistakes? How could it have been prevented?
- After some discussion, ask: Does anyone have some other "killer" mistake that's important enough to add to this list? How can you prevent this mistake?

Topic 1.20: Six Day Look Ahead Schedule - detailed presentation

(p 24/25). The Six Day Look Ahead Schedule is probably the most difficult topic in this book. In this topic, you'll introduce the Look Ahead Schedule and work through an example. Then, working in small groups, each participant will fill out a personal Six Day Look Ahead Schedule for the upcoming week.

- **Point out:** *Many supervisors use this kind of tool to plan the activities of their crew and keep the work under control.* Tell everyone to refer to the completed example on page 25 as you show **Visual #1** (LG page 61) and walk them through steps ① through ④.

Topic 1.21: Six Day Look Ahead Schedule - personal plan (p 24/25).

Ask: *Who is already familiar with a Six Day Look Ahead Schedule?* (Remember who these "Look Ahead experts" are.) If you hear a few moans, assure everyone that once they work through this tool in small groups, they'll get the hang of it.

- Split up everyone into small groups of 4 or 5, and make sure the "Look Ahead experts" are spread out among the groups. Pass out copies of the blank Look Ahead Schedule form on LG page 63, one for each person. Tell the groups: *Each of you is to create a personal Six Day Look Ahead Schedule for the upcoming week, using this blank form — which is also in your book on page 27 and pages 115/116/117.*

Note: moving around to form into groups works as sort of a stretch break, so you don't need to announce one.

- Allow at least 20 minutes, but no more than 25 minutes for this group work, then pull everyone back together and ask: *By working through this form, what did you learn about what's coming up next week on your project? Are you more ready now than before you completed the Six Day Look Ahead Schedule? How so?*
- You may want to use **Visual #2** (the blank form on *Stepping Up* page 27) to create an example that specifically fits the group or to enable one of the participants to show his Six Day Look Ahead Schedule to everyone else. The Visual #2 form is on page 77 of this *Leader's Guide*.

20 minutes (2:25)

Objective: *introduce the Six Day Look Ahead Schedule; make sure everyone understands it clearly enough to do an SDLAS on their own.*

30 minutes (2:55)

Objective: *participants will understand the Six Day Look Ahead Schedule tool and apply it to their current project.*

Note: If you have more than three hours available for Session 1, you may want to allow more time for Topics 1.20 & 1.21 on the Six Day Look Ahead Schedule.

Or you can add one or two topics from the ten **Special Situations** topics outlined on pages 61-67 of this *Leader's Guide*. Insert these topics just before Topic 3.22, Action Plan. Allow time as suggested in each topic's outline (10-30 minutes).

A TWO-SESSION WORKSHOP • SESSION 1

5 minutes (3:00)

Objective: *prompt everyone to start compiling ideas for an Action Plan.*

5 minutes (3:05)

Objective: *preview Part 2; exchange phone and e-mail contact info.*

Re: Certificate forms on pages 81/83. You'll need to prepare these certificates in advance for presentation at the end of Session 2. Be sure to have a few blank forms from p 69 on hand so you can include people who were not on the advance registration list. Get a volunteer from the class who has good lettering skills to fill in the blanks.

Topic 3.22: Action Plan. Ask: *Has anyone tried out any action ideas they've listed so far on their Action Plan (page 107)?* Pause for replies, then follow up: *I encourage you to write down ideas, skills or techniques you think you can use on your current project or in your daily work.*

- **Point out:** *This workshop will only have an impact on your success as a supervisor if & when you apply what you've learned to your day-to-day work on your jobsite!*

Preview Part 2 (p 29) Tell everyone to turn to page 29, and allow a minute for people to look over the list of topics covered in Part 2.

- Then move ahead by making a few remarks about Fundamental ① (page 32), but don't prompt a discussion. Repeat this preview for Fundamentals ② (page 38), ③ (page 50), and ④ (page 64).
- Tell everyone: *Work through Part 2, pages 29-72, before our next session. Answer the questions and do the exercises. Read it with a pencil.*
- **Point out:** *As you can see, this workshop moves fast and we cover a lot of topics. You'll get a lot more out of it if you read through the book as self-study between sessions. Highlight key ideas and make notes. Then you'll really be ready to pitch in on the discussions and activities — and we can spend more workshop time on discussions and activities and less time on reading. Bring along any questions that you come up with as you work through Part 2.*
- Copy or circulate the filled-out **Class Registration List** so participants can pick up each others' phone and e-mail contact information. Encourage them to talk with each other about what they're learning in the workshop. Put your name, phone and/or e-mail on the list, and tell the class when it's OK to contact you.

This is the end of Session 1. Whew!

Basic Plan for Session 2: Make sure everyone understands each of the **Four Fundamentals**; continue to encourage everybody to develop an **Action Plan**; **point out Special Situation** topics in Part 3 that participants can read and work thru as self-study.

Topic 1.21, Six Day Look Ahead Schedule - Review personal plan

(p 24/25) As people are arriving for class, encourage a discussion of their personal Six Day Look Ahead Schedules. To start Session 2, review and reinforce the Six Day Look Ahead Schedule by asking:

- *Who used the Six Day Look Ahead Schedule since we last met?*
- *How did it help you supervise the work? the people? tools and equipment? important safety and quality issues?*
- *What changes or adjustments did you make as the days went by?*
- *Did you feel that you had the work under control? How so?*
- Before starting Topic 2.02, ask: *Who had a chance to work through most or all of Part 2 in the book? Who had a chance to work through some of the pages in Part 2?* This will give you some insight into how much self-study is going on and how prepared people are for today's session. If only a few people have worked through Part 2 on their own, you'll need to allow some time today for people to read, and you may have to skip one or two activities. If you think you might have to skip something, decide in advance what it will be.

Topic 2.01/2.02: The Four Fundamentals (p 30/31). Tell everyone to turn to page 30 and show **Visual #3**. Ask: **What are the four fundamentals that every successful construction supervisor must master?** Get responses from four different people and write them on a flipchart. Once the flipchart is complete, tape it to the wall where everyone can see it.

10 minutes (0:10)

Objective: review the Six Day Look Ahead Schedule; reinforce jobsite application of workshop ideas and skills.

5 minutes (0:15)

Objective: present the four fundamentals.

15 minutes (0:30)

Objective: participants will understand Fundamental #1 and how to apply it; they will anticipate and learn how to deal with possible difficulties or resistance.

15 minutes (0:45)

Objective: participants will understand Fundamental #2 and how to apply it; help everyone understand how they must think and act differently.

Topic 2.03: Fundamental #1: Demonstrate Your Authority By Setting Reasonable Standards and Limits (p 32). Tell everyone to turn to page 32 and allow 2-3 minutes to skim the page.

While they're reading, wander around and note whether people have filled in the "Standard and Limits" blanks at the bottom of the page. Show **Visual #3** and ask:

- **What are the most important standards and limits you'll have to establish?** Make three lists on a flipchart:
 - » Standards (for work performance)
 - » Standards (for behavior)
 - » Limits (on behavior)
- Choose 1 or 2 items from each list and ask: **How will you do it? What difficulties or resistance might you encounter? How will you deal with them? What do you have going for you that will help?** Encourage everyone to contribute ideas and observations from their own personal experiences and current jobsite situations.

Topic 2.09: Fundamental #2: Get Results Through Your Crew (p 38).

Tell everyone to turn to page 38 and allow 2-3 minutes for them to skim pages 38 and 39. Show **Visual #3** and **point out: You don't use a tool belt or need a tool box to do these tasks.** Then ask:

- **As a supervisor, how do you have to think differently?**
- **How do you have to act differently?**
- **If you can't do it all yourself, how do you get results through your crew?** When you review the four ▼ points on page 38, be sure **communication** is mentioned. **Point out** the bold-faced sentence on dealing with productivity gaps on page 15.
- At the end of this topic, tell everyone to stand up and take a **One-Minute Stretch Break** — but **don't let the group break up and leave the room** or you won't get them all back for 10-15 minutes, your schedule will be shot, and the workshop will lose momentum.

Topic 2.16: Fundamental #3: Make Quality, Safety, and Productivity

Part of Every Plan, Every Decision, and Every Day (p 44). Tell everyone to turn to page 44. Allow 3-4 minutes for them to skim pages 44-47, then show **Visual #3** and ask:

- **What are the standards for quality and how do you achieve them?** (Refer to page 58.)
- **What are the standards for safety and how do you achieve them?** (Refer to page 51.)
- **What are the standards for productivity and how do you achieve them?** (Refer to page 59.)

15 minutes (1:00)

Objective: participants will understand Fundamental #3 and how to apply it; help everyone develop personal standards for quality, safety, and productivity.

New Topic 2.19: Safety: Direct and Indirect Costs (p 53) Tell everyone to look over page 53. Allow a minute for this, then start a discussion.

- Ask: **Who can tell us about the direct costs from a safety incident that occurred on a jobsite you worked on? A jobsite security situation?** Allow a couple of minutes for these two queries. Save most of your time on this topic for a discussion of indirect costs.
- Then ask: **Who can tell us about the indirect costs from a safety or security incident that occurred on a jobsite you worked on?** Invite war stories; ask about details. Most situations that come up will be about safety incidents, and you may have to probe to learn about a security situation. Some safety incidents may have had traumatic consequences.

See **Special Note** sidebar on this point.

This discussion may run for 10+ minutes. Let the details sink in and **point out:** *The indirect costs of a safety or security incident can be 3x to 20x or more than its direct costs. Many indirect costs are accompanied by various costly side effects. Some indirect costs, especially human costs, have a "ripple effect" that reaches people who weren't directly involved. Some safety incidents can result in permanent disability or can lead to PTSD symptoms.*

20 minutes (1:20)

Objective: participants will learn that a safety or security incident can have both Direct and Indirect costs — and that Indirect Costs can be many times greater than Direct Costs. They'll identify a wide range of Indirect Cost examples.

Special Note: it's possible that the discussion of a safety incident may prompt a participant to have a troublesome flashback. If you notice this happening, make sure that person gets support from others. If they leave the room, send another participant with them to ensure that they're OK.

20 minutes (1:40)

Objective: participants will prepare and present a Safety/Security Action Plan for one of the activities on their Look Ahead Schedule.

New Topic 2.20: Safety/Security Action Plan (p 54) Tell everyone to look over pages 54-56. Allow 3-4 minutes for this, then **point out:** *You are the key factor in your crew's safe performance of their work on your project. Note paragraph 2 on page 54: the words "you" and "yours" appear 5x!*

- Take a few minutes to review **The Top 10 OSHA Violations in the Fiscal Year 2018** on page 54/55. **Point out:** *All ten of these violations were up in 2018 over 2017 — some by 1 or 2% but also some by 20%...25%...30%!*
- **TBD; get Safety Director help w outline, details, examples**
- placeholder text
 - » example
- placeholder text
 - » example
- placeholder text
 - » example

Topic 2.25: Fundamental #4: Become a Confident and Respected Leader (p 52-57).

Tell everyone to turn to page 52 and look over pages 52-57. Allow 5 minutes, then show **Visual #3** and ask:

- *Everyone knows you have to become an effective leader to be an effective supervisor, but how do you do that?* This question might be met by a few moments of silence, but let it sink in. The discussion will take hold.

10 minutes (1:50)

Objective: participants will understand Fundamental #4 and how to apply it.

Topic 2.10: Earning Your Crew's Respect and Keeping It (p 39)

Tell everyone: *Look over page 39 and check the ideas that are likely to be helpful to you for earning your crew's respect. Not popularity, but respect.* Allow about 5 minutes for this, then **split up into small groups**.

- Tell the groups: *These are six really good ideas, but it's hard to keep six things in mind all the time. Discuss these ideas and choose the two ideas that your group would give top priority. Why? What key factors do you need to keep in mind to make each idea work?*
- Allow about 5 minutes to do this, then open a discussion by asking each group to report its choices, reasons, and key factors. Then talk about priorities and trade-offs and ask about special situations where one approach would likely have the most effect.
- To wind up this discussion, ask: *What are common factors in all your efforts to earn your crew's respect?* (Replies you're fishing for: they're based on **action**, not talk; they demonstrate a **positive attitude**. Allow a minute, and if you don't hear these two replies, put them out there yourself.)
- At the end of this topic, tell everyone to stand up and take a **One-Minute Stretch Break** — but **don't let the group break up and leave the room** or you won't get them all back for 10-15 minutes, your schedule will be shot, and the workshop will lose momentum.

20 minutes (2:10)

Objective: participants will review ideas for earning their crew's respect and analyze which ideas will be most effective. They'll understand that respect is earned thru action, not talk.

25 minutes (2:35)

Objective: participants will know their four basic safety responsibilities and understand that safe jobsites are created and maintained thru systematic, pro-active safety programs. They will outline a 5 minute Tool Box Talk.

You may want to create a flipchart — in advance — that lists these topics. This visual reference will help keep groups on track as they prep their Tool Box Talk.

Topic 2.18: A Safe Jobsite for Your Crew and Others (p 51) Tell everyone: *Look over pages 51 and 52 — and look up at me when you've finished.* Allow 5+ minutes for reading this topic since it's a 2-page text. The "look up at me" instruction will signal when to proceed.

- Review a supervisor's four basic safety responsibilities, listing them on a flipchart*. Then ask:
 - > **Who sees that this range of safety responsibilities is much broader than you thought it would be?** (This show of hands will indicate how much the class needs to learn about their safety responsibilities — which may affect the time you allocate to topic 2.18.)
 - > **Point out** and make notes on a flipchart*:
 - » *Safe jobsites are created and maintained thru systematic, pro-active safety programs.*
 - » *A comprehensive safety plan will focus on three different approaches to jobsite safety hazards: eliminate them; reduce them; avoid them.*
 - » *Proper safety gear and pro-active safety training are essential if you and your crew are to avoid accident and injury.*
 - » *Your Safety Director is a resource, but you and the one who is responsible for Job 1, Job 2, Job 3 and Job 4.*
 - » *Make sure every crew member knows where you stand on safety — that's it's part of every plan, every decision, and every day.*
 - » *Communicate about safety to your crew repeatedly and be consistent in what you say.*
- **Split up into small groups** and tell the groups: *Your task now is to outline a 5 minute Tool Box Talk by creating a flipchart that list the key points you'll cover. Pass out blank flip charts and assign each group a topic from this list:*
 - > *get 5 topics from a Safety Director*
 - > *get 5 topics from a Safety Director*
 - > *get 5 topics from a Safety Director*
 - > *get 5 topics from a Safety Director*
 - > *get 5 topics from a Safety Director*

Allow 10 minutes for groups to prep a presentation and create a flip chart, then have each group post their flipchart and give a one-minute summary of their key points.

- To wrap up this topic, **point out** this sidebar on page 52:
 - > *Never forget that your attitude “speaks” so loudly that it overpowers anything you say — and this applies to safety more than anything else. Your attitude will be unmistakable if you:*
 - » *talk about hazards;*
 - » *show concern for the safety of your crew;*
 - » *act decisively whenever you discover unsafe practices;*
 - » *encourage crew members to report any potential hazards to you ASAP;*
 - » *never back down by cutting corners on safety to make the budget or beat the schedule.*
 - > *The bottom-line responsibility for safety is yours — the safety of your crew and the safety of others who pass thru your work area.*

Topic 3.11: Staying Positive and Overcoming the Blahs (p 62). Tell everyone to turn to page 62 and allow them a minute to look it over.

Point out: *Staying positive isn’t always easy — but you have to do it. Here are some ideas that may help.*

- Ask: *Who has used one of these techniques? How did it work out?*
- After several people have shared their experiences, ask: *Does anyone have a new technique to add to this list?*

Topic 3.22: Action Plan (p 107). **Point out:** *The time you’ve spent in this workshop will only have practical value if it affects your daily work at your jobsite. Your Action Plan is the best way to accomplish this.*

- Ask: *Has anyone ever tried to implement some Action Plan ideas?*
- Ask: *How did it go and what did you learn from the experience?*
- Ask: *How can you keep a steady flow of action ideas coming?*

10 minutes (2:45)

Objective: *participants will understand how to keep a positive mental attitude.*

5 minutes (2:50)

Objective: *encourage everyone to make using an Action Plan a daily practice.*

A TWO-SESSION WORKSHOP • SESSION 2

5 minutes (2:55)

Objective: *find out if people want any follow-up meetings; recognize participants and send everyone away with a word of encouragement.*

Closing. Point out the **Review** on pages 100-106. *If you work thru all the topics in the book, these questions are an excellent review of its ideas and skills. Each question is cross-referenced to the page that contains the answer.*

Then ask if people in the group want to continue to get together every now and then. If there's interest, set up a meeting within 30 days — no later or people will “break contact” with the workshop and each other. Facilitate and encourage this follow-up meeting, but don't force it. Just follow the group's lead, and they'll find a level that works for them.

Copy or circulate the filled-out **Class Registration List** so participants can pick up each others' phone and e-mail contact information. Encourage them to talk with each other about what they've learned in the workshop. Put your name, phone and/or e-mail on the list, and tell the class when it's OK to contact you.

Pass out the **Workshop Feedback Form**. Ask everyone to fill it out and either give to you or leave it on the table at the front of the room.

Thank everybody for coming to the workshop. Pass out workshop certificates and recognize participants — **and do this personally** — one by one, with eye contact, a smile, a handshake, and a word of encouragement.

This concludes the two-session workshop.

Workshop Agenda

Session 1

- Opening Remarks and Introductions
- Overview of *Stepping Up To Supervisor*
- Topic 1.01: The Challenge Ahead (p 8*)
- Topic 1.03: Copy a Successful Supervisor (p 10)
- Topic 1.04: What Kind of Supervisor Do You Choose to Become? (p 11)
- Topics 1.07-1.09: Your Attitude About Safety...Quality...Productivity (p 14)
- Topic 1.20: Six Day Look Ahead Schedule - detailed presentation (p 24/25)
- Topic 1.21: Six Day Look Ahead Schedule - personal plan (p 24/25)
- Topic 3.22: Action Plan (p 107)
- Preview Part 2 (p 29)

Session 2

- Topic 1.21: Six Day Look Ahead Schedule – Review personal plan (p 24/25)
- Topic 2.01/2.02: The Four Fundamentals (p 30/31)
- Topic 2.03: Fundamental #1, Demonstrate Your Authority By Setting Reasonable Standards and Limits (p 32)
- Topic 2.04: Making the Transition and Establishing Your Style (p 33)
- Topic 2.09: Fundamental #2, Get Results Through Your Crew (p 38)
- Topic 2.16: Fundamental #3: Make Quality, Safety, and Productivity Part of Every Plan, Every Decision, and Every Day (p 50)
- Topics 2.22 & 2.23: Safety/Quality/Productivity Exercises (p 60/61)
- Topic 2.24: Which Is First: Safety, Quality, or Productivity? (p 62)
- Topic 2.25: Fundamental #4: Become a Confident and Respected Leader (p 64)
- Topic 3.22: Action Plan (p 107)
- Preview Part 3 (p 73)

* = page numbers in *Stepping Up To Supervisor*

Session 3

- Topic 3.02: “Killer” Mistakes (p 75)
- Topic 3.11: Staying Positive and Overcoming the Blahs (p 88)
- **Special Situations** – Selected Topics
 - » Topic 3.04: A Touchy Transition; Dealing With Resentment (p 78/79)
 - » Topic 3.10: Solving Problems (85)
 - » Topics 3.05 & 3.06: The Problem Crew Member (p 80/81)
 - » Topic 3.07: Handling Conflict Among Crew Members (p 82)
 - » Topic 3.08: Working With Other Crafts and Crews (p 83)
 - » Topic 3.19: Keeping Your Supervisor Happy (p 98)
 - » Topic 3.09: Case #4: Between a Rock and a Hard Place (p 84)
 - » Topic 3.03: Handling Mistakes (p 76)
 - » Topic 3.17: Getting a First-Rate Crew and Keeping It (p 95)
 - » Topic 3.13: When Sending a Message, Always Confirm That the Receiver Actually Understands the Details of What You Just Said (p 91)
 - » Topic 3.14: Reports and Emails: Don’t Let the Words You Write Undercut Your Effectiveness as a Supervisor (p 92)
- Topic 3.21: Workshop Review (p 100)
- Topic 3.22: Action Plan (p 107)
- Closing

Workshop Objectives, Schedule & Details

Basic Plan for Session 1: Introduce the topics covered in *Stepping Up To Supervisor*; get people “into” the book and “into” the class discussion by working through a few exercises and discussing them; introduce the **Six Day Look Ahead Schedule** and make sure that everybody understands how to use it; highlight and review selected topics from Part 1 (pages 7-26*); get people started on compiling an **Action Plan**; preview Part 2.

Opening Remarks & Introductions. Welcome everyone to the workshop; introduce yourself and tell your company name or construction industry affiliation.

- Tell people to pair up and do a 60 second interview with each other: name, company, current job title, current project, number of years in construction, a couple of items of personal interest. If there’s an odd number, form one group of three.
- Appoint somebody to keep track of the # of years in construction as **each person takes 30 seconds** to introduce the person they interviewed. Keep it moving — this activity is only 15 minutes!
- At the end, ask the tally keeper how many total years of construction experience is in the room. **Point out:** *We have X years of construction experience in this room. None of us has all the answers, but here in this group we have a lot to draw on — so, for the next two hours we need everybody to pitch in and contribute and make this workshop really worthwhile.*
- Distribute copies of the workshop **Agenda**; pass out copies of workshop **Housekeeping Rules** or guidelines and **point out** any that you feel need special attention.

Book Overview (p 3/4, etc*) Tell everyone to turn to page 3.

- Summarize the key points from the Introduction; review the Table of Contents. **Point out:** the **Action Plan** sidebar (page 13) and the **Action Ideas** form (page 84); the **Checklists** (pages 93-101); the **photocopy masters** in Part 4 (pages 86-89); the **Index** (pages 105-108); and the **Pocket Checklist**.
- **Point out:** *We’ll use this book today for information and you’ll fill out some of the worksheets in it. You can also use it as a self-study book to cover additional topics, now and later. It’s yours — highlight key ideas; make notes. Make it your book.*

This three-session workshop is ten hours total. You can extend it by covering additional topics from Part 3, Special Situations and/or Alternate Topics. Guidelines for these topics are on pages 61-67 & 69-72.

15 minutes (0:15)

Objective: *break the ice; get people to talk; encourage participation; pass out the workshop agenda and review workshop housekeeping rules.*

30 seconds max! The pace of this activity sets the pace for the workshop. If you have more than two hours for this session, you’ll probably use some of the extra time here — but don’t let it run on & on.

5 minutes (0:20)

Objective: *point out and preview what’s in the book; participants will understand how to use the book — during the workshop and after it’s over.*

* = page numbers in *Stepping Up To Supervisor*

A THREE-SESSION WORKSHOP • SESSION 1

10 minutes (0:30)

Objective: *get everyone thinking about what's ahead as a supervisor; identify common challenges.*

10 minutes (0:40)

Objective: *participants will identify traits of successful supervisors.*

10 minutes (0:50)

Objective: *participants will identify common mistakes new foremen make & how to avoid them.*

10 minutes (1:00)

Objective: *participants will focus on attitude and its effect on the three key elements: safety, quality, and productivity.*

Don't let the group break up and leave the room or you won't get them back for 10-15 minutes, your schedule will be shot, and the workshop will lose momentum.

Topic 1.01: The Challenge Ahead (p 8) .Tell everyone to read page 8. Allow 3-5 minutes for them to Read it and fill out the list at the bottom of the page.

- Ask: *What challenges do you expect to deal with when you become a supervisor?* List their responses on a flipchart. Try to get something from every person on this; see what the common responses are.

Topic 1.03: Copy A Successful Supervisor (p 10). Tell everyone to look over page 10 and make notes about successful supervisors they've known. Allow 5 minutes to do this.

- Ask various people to tell the traits they identified, and list them on a flipchart.
- **Point out:** *This group was able to come up with a more extensive list than any one person did, and this shows how you can learn from each other — even if many of you are not experienced supervisors. I really encourage you to discuss the topics in the book with each other between sessions and after the workshop is over.*

Topic 1.04: What Kind of Supervisor Do You Choose To Become?

(p 11). Tell everyone to look over the two lists in the box on page 11, add a couple of items to each list, then identify three mistakes to avoid. Allow 5 minutes for this, then ask:

- *What did you add to the list of traits for a successful supervisor? What did you add to the failure list?* List responses on a flipchart.
- Ask: *What are the most important mistakes that you plan to avoid?* List the ideas people offer, and follow up by asking: *How will you do this?* List responses on a flipchart.

Topics 1.07 - 1.09: Your Attitude About Safety...Quality...Productivity (p 14). Tell everyone to read pages 14 and 15. Allow 5 minutes for this. Some people might not be able to read it all in 5 minutes — but you have to keep things moving. But notice who they are. You may need to give them some extra attention during or after the workshop.

- Ask: *What effect can your attitude as a supervisor have on the safety of your crew? On the quality of the work your crew puts in place? On your crew's productivity?* Then ask: *What's your priority? Safety...Quality...Productivity — what can you do?*
- At the end of this topic, tell everyone to stand up and take a **One-Minute Stretch Break.**
- End the stretch break by saying: *You'll notice we've skipped over some pages in the book, but remember that this is a self-study book, and I encourage you to work through the rest of the pages in Part 1 on your own sometime during the next couple of days. I promise you, it'll be worth your time.*

Topic 1.14: Taking Charge (p 20) Tell everyone to look over page 20.

Allow about 5 minutes for this, then begin a discussion **Point out:** *The fill-in blanks at the bottom of page 20 are for your notes on how these sources of power might play out in your personal situation.*

- Ask: *What sources of knowledge power can help you “take charge” in your start-up as a supervisor?*
- Ask: *What sources of position power can help you “take charge” in your start-up as a supervisor?*
- Ask: *What sources of personality power can help you “take charge” in your start-up as a supervisor?*
- Ask: *What’s often the cause when a supervisor goes off on a “power trip” during the start-up of a new supervisory role?*

The answer you’re fishing for: *probably a feeling of vulnerability — about a personal shortage of knowledge power, position power, or personality power. Remedy: a realistic self-assessment, followed by action to eliminate or minimize that vulnerability. This is not easy to do.*

Topic 1.15: Presenting a Strong, Effective Image (p 21) Tell everyone: *Look over page 21 and check the boxes that apply to your personal situation.* Allow a minute or two for this, then start a discussion.

- **Point out:** *Your image is a combination of your WORDS and your ACTIONS — as viewed by your crew and others.*
- Ask: *How do your words affect the image you project?*
- Then ask: *How do your actions affect the image you project?*
- **Point out:** *The greatest risk to the strong, “take charge” image you want to project — is any situation where your words and your actions don’t match up.*
- Ask: *What are some situations you must watch out for to avoid a mismatch between your words and your actions?*
- Ask: *What can you do to avoid or minimize this potential problem?* Listen for and reinforce **systematic approaches** (regular tool box talks; Monday morning meetings; Friday afternoon meetings). **Point out:** *You’ll get better long-term results from systematic approaches than from one-shot actions.*

10 minutes (1:10)

Objective: *participants will understand that it’s necessary to “take charge” and they’ll know three sources of power that can enable that transition.*

15 minutes (1:25)

Objective: *participants will learn about factors that can affect their “take charge” image and will understand and analyze how their words and actions may affect the image they project. They’ll identify areas where their words and actions may not match up.*

A THREE-SESSION WORKSHOP • SESSION 1

20 minutes (1:45)

Objective: participants will review standards and limits re discipline used by supervisors they've worked for and their effect on the results achieved. They'll identify the top most important standards and limits they will put in place and the mistakes they'll try to avoid.

Topic 2.07: Establishing Discipline (p 36) Tell everyone: *Look over page 36. Make notes under each of the four paragraphs.* Allow about 5 minutes for this, then split up into small groups.

- Tell the groups: *Review and discuss your notes, then compile two profiles: standards and limits re discipline. Be specific, with examples — but cite only your first-hand experience, not jobsite chatter.*
 - » *the best supervisors you've worked for — their limits and the results they achieved;*
 - » *the worst supervisors you've worked for — their limits and the results they achieved.*
- Allow about 5 minutes to do this, then open a discussion:
 - » *Considering all these positive and negative examples. What are the top 3 standards and limits you'll put in place as a supervisor?*
 - » *What are the top 3 mistakes you'll try to avoid as you put your standards and limits in place.* List the replies on a flipchart.
- To wind up the discussion, **point out:** *As a supervisor, you'll have specific goals for the work your crew is to put in place — safety quality, budget, and schedule. They will be challenging, measurable targets — and you can expect that they will be tracked, probably daily or weekly. You'll have resources to achieve these goals, and your most important resource is your crew.*

The purpose of your standards and limits is not to enforce some sort of parental role on your crew — it's to keep each one of them focused on actions that will achieve these goals. That's what it means to establish discipline.

*When you get home tonight, take a look ahead to **Fundamental #2: you must get results thru your crew.** It's on page 38.*

15 minutes (2:00)

Objective: participants will understand "killer" mistakes and how to prevent them.

Topic 3.02: "Killer" Mistakes (p 65). Tell everyone to turn to page 65 and allow them a minute to look it over. Then ask:

- *Can anyone tell us about a project that "went sour" because of one of these "killer" mistakes? How could it have been prevented?*
- *After some discussion, ask: Does anyone have some other "killer" mistake that's important enough to add to this list? How can you prevent this mistake?*

Topic 1.20: Six Day Look Ahead Schedule - detailed presentation

(p 24/25). The Six Day Look Ahead Schedule is probably the most difficult topic in this book. In this topic, you'll introduce the Look Ahead Schedule and work through an example. Then, working in small groups, each participant will fill out a personal Six Day Look Ahead Schedule for the upcoming week.

- **Point out:** *Many supervisors use this kind of tool to plan the activities of their crew and keep the work under control.* Tell everyone to refer to the completed example on page 25 as you show **Visual #1** (LG page 61) and walk them through steps ① through ④.

Topic 1.21: Six Day Look Ahead Schedule - personal plan (p 24/25).

Ask: **Who is already familiar with a Six Day Look Ahead Schedule?** (Remember who these "Look Ahead experts" are.) If you hear a few moans, assure everyone that once they work through this tool in small groups, they'll get the hang of it.

- Split up everyone into small groups of 4 or 5, and make sure the "Look Ahead experts" are spread out among the groups. Pass out copies of the blank Look Ahead Schedule form on LG page 63, one for each person. Tell the groups: *Each of you is to create a personal Six Day Look Ahead Schedule for the upcoming week, using this blank form — which is also in your book on page 27 and pages 115/116/117.*

Note: moving around to form into groups works as sort of a stretch break, so you don't need to announce one.

- Allow at least 20 minutes, but no more than 25 minutes for this group work, then pull everyone back together and ask: *By working through this form, what did you learn about what's coming up next week on your project? Are you more ready now than before you completed the Six Day Look Ahead Schedule? How so?*
- You may want to use **Visual #2** (the blank form on *Stepping Up* page 27) to create an example that specifically fits the group or to enable one of the participants to show his Six Day Look Ahead Schedule to everyone else. The Visual #2 form master is on page 77 of this *Leader's Guide*.

20 minutes (2:20)

Objective: *introduce the Six Day Look Ahead Schedule; make sure everyone understands it clearly enough to do an SDLAS on their own.*

30 minutes (2:50)

Objective: *participants will understand the Six Day Look Ahead Schedule tool and apply it to their current project.*

Note: If you have more than 3:25 available for Session 1, you may want to allow more time for Topics 1.20 & 1.21 on the Six Day Look Ahead Schedule.

Or you can add one or two topics from the ten **Special Situations** or **Alternate** topics outlined on pages 61-72 of this *Leader's Guide*. Insert these topics just before Topic 3.22, *Action Plan*. Allow time as suggested in each topic's outline (10-30 minutes).

25 minutes (3:15)

Objective: participants will learn about Jerry Seinfeld's Productivity Secret. They'll apply this approach by choosing a change or improvement they want to make, defining how they'll measure their progress, and identifying what small, achievable things they're going to focus on doing. They'll arrange to report their results to each other during the next 30 days.

You may have to follow up to get people to be specific — about the changes & improvements they're going to make and also on exactly how they're going to measure their progress. Once someone pins down answers to the first 2 questions, a list of "small, achievable things" is easier to come up with.

New Topic 3.15: Jerry Seinfeld's Productivity Secret (p 93). Tell everyone to look over page 93 and make notes about a possible change or improvement they'd like to make — on the jobsite or in their personal life. Allow 5 minutes for this, then start a discussion.

- Ask various people: *Describe the change or improvement you'd like to make. Focus on specific, incremental improvements — not sweeping game changers.*
- Then ask: *How will you measure your progress?*
- And: *Name one or two small achievable things you can do that will move that measurement in a positive direction.*
- Keep this discussion fairly short — just long enough to get some ideas flowing, then split up into small groups of 4 or 5. Tell the groups: *Each of you is to come up with a change or improvement you want to make. Follow Steps 1, 2 & 3 on page 93 to figure out how you'll measure your progress, and identify the small, achievable things you can do to move your measurement in a positive direction.* Allow 10-15 minutes for groups to tackle this assignment, then bring the class back together.
- Ask various people these 3 questions:
 - > *What is the change or improvement you've decided to make?*
 - > *How are you going to measure your progress?*
 - > *And what are the "small, achievable" things are that you're going to focus on doing?*
- **Point out:** *Note that you DID NOT set a goal. Instead, you're going to focus on doing a few small, achievable things that will move you in the direction you want to go.*
- To wind up this topic, tell everyone to swap phone numbers with others in their group, then — starting Sunday night — take a pic of your Seinfeld Calendar and text it to the others along with any comments on how it's going. Do this for the next 30 days, then take stock of how it's worked out for you.
- **And remember . . .**

don't break the chain!

Topic 3.22: Action Plan. Ask: *Has anyone tried out any action ideas they've listed so far on their Action Plan (page 107)?* Pause for replies, then follow up: *I encourage you to write down ideas, skills or techniques you think you can use on your current project or in your daily work.*

- **Point out:** *This workshop will only have an impact on your success as a supervisor if & when you apply what you've learned to your day-to-day work on your jobsite!*

Preview Part 2 (p 29) Tell everyone to turn to page 29, and allow a minute for people to look over the list of topics covered in Part 2.

- Then move ahead by making a few remarks about Fundamental ① (page 32), but don't prompt a discussion. Repeat this preview for Fundamentals ② (page 38), ③ (page 50), and ④ (page 64).
- Tell everyone to work through Part 2, pages 29-72, as self-study, before the next session.
- **Point out:** *As you can see, this workshop moves fast and we cover a lot of topics. You'll get a lot more out of it if you read through the book as self-study between sessions. Highlight key ideas and make notes. Then you'll really be ready to pitch in on the discussions and activities — and we can spend more workshop time on discussions and activities and less time on reading. Bring along any questions that you come up with as you work through Part 2.*
- Copy or circulate the filled-out **Class Registration List** so participants can pick up each others' phone and e-mail contact information. Encourage them to talk with each other about what they're learning in the workshop. Put your name, phone and/or e-mail on the list, and tell the class when it's OK to contact you.

5 minutes (3:20)

Objective: *prompt everyone to start compiling ideas for an Action Plan.*

5 minutes (3:25)

Objective: *preview Part 2; exchange phone and e-mail contact info.*

This is the end of Session 1. Whew!

In Session 3 you'll cover several Special Situations and/or Alternate Topics. The best time to choose among these topics is now — just after you complete Session 1. By now, you have an idea of the interests, strengths, and concerns of your workshop group. You can review your choices after you finish Session 2.

Review *Leader's Guide* pages 61-67 and the related pages in *Stepping Up To Supervisor* now — and then choose which topics you want to cover.

See the sidebar note re the Solving Problems topic on *LG* page 61.

USE THIS BLANK PAGE FOR NOTES

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Basic Plan for Session 2: Make sure everyone understands each of the **Four Fundamentals**; continue to encourage everybody to develop an **Action Plan**; preview Part 3.

Topic 1.21, Six Day Look Ahead Schedule - Review personal plan (p 24/25). As people are arriving for class, encourage a discussion of the Six Day Look Ahead Schedule. To start Session 2, review and reinforce the Six Day Look Ahead Schedule by asking:

- *Who used the Six Day Look Ahead Schedule since we last met?*
- *How did it help you supervise the work? the people? tools and equipment? important safety and quality issues?*
- *What changes or adjustments did you make as the days went by?*
- *Did you feel that you had the work under control? How so?*
- Before starting Topic 2.02, ask: *Who had a chance to work through most or all of Part 2 in the book? Who had a chance to work through some of the pages in Part 2?* This will give you some insight into how much self-study is going on and how prepared people are for today's session. If few people have worked through Part 2 on their own, you'll need to allow time today for people to read and you'll probably have to skip one or two activities. If you must skip something, decide in advance what it will be.

Topic 2.01/2.02: The Four Fundamentals (p 30/31). Tell everyone to turn to page 30 and show **Visual #3**. Ask: *What are the four fundamentals that every successful construction supervisor must master?* Get responses from four different people and write them on a flipchart. Once the flipchart is complete, tape it to the wall where everyone can see it.

10 minutes (0:10)

Objective: review Six Day Look Ahead Schedule; reinforce jobsite application of workshop ideas and skills.

5 minutes (0:15)

Objective: present the four fundamentals.

A THREE-SESSION WORKSHOP • SESSION 2

15 minutes (0:30)

Objective: participants will understand *Fundamental #1* and how to apply it; they will anticipate and learn how to deal with possible difficulties or resistance.

15 minutes (0:45)

Objective: participants will understand that a supervisor's personal style is a key choice; help people anticipate and deal with possible difficulties or resistance.

15 minutes (1:00)

Objective: participants will understand *Fundamental #2* and how to apply it; they will understand how they must think and act differently.

Topic 2.03: Fundamental #1: Demonstrate Your Authority By Setting Reasonable Standards and Limits (p 32). Tell everyone to turn to page 32 and allow 2-3 minutes to skim the page.

While they're reading, wander around and note whether people have filled in the "Standard and Limits" blanks at the bottom of the page. Show **Visual #3** and ask:

- **What are the most important standards and limits you'll have to establish?** Make three lists on a flipchart:
 - » Standards (for work performance)
 - » Standards (for behavior)
 - » Limits (on behavior)
- Choose 1 or 2 items from each list and ask: **How will you do it? What difficulties or resistance might you encounter? How will you deal with them? What do you have going for you that will help?** Encourage everyone to contribute ideas and observations from their own personal experiences and current jobsite situations.

Topic 2.04: Making the Transition and Establishing Your Style (p 33).

Tell everyone to turn to page 33 and allow them 2-3 minutes to skim the page. **Point out:** **Your style is something you can choose and develop over time. Don't let it just "happen"** Go over each of the four guidelines and ask:

- **How important is this guideline?**
- **How can you go about putting it in place?**
- **What problems or resistance might you encounter and how would you deal with them?**

Topic 2.09: Fundamental #2: Get Results Through Your Crew (p 38).

Tell everyone to turn to page 38 and allow 2-3 minutes for them to skim pages 38 and 39. Show **Visual #3** and **point out:** **You don't use a tool belt or need a tool box to do these tasks.** Then ask:

- **As a supervisor, how do you have to think differently?**
- **How do you have to act differently?**
- **If you can't do it all yourself, how do you get results through your crew?** When you review the four ▼ points on page 38, be sure **communication** is mentioned. **Point out** the bold-faced sentence on dealing with productivity gaps on page 15.

- At the end of this topic, tell everyone to stand up and take a **One-Minute Stretch Break** — but **don't let the group break up and leave the room** or you won't get them all back for 10-15 minutes, your schedule will be shot, and the workshop will lose momentum.

Topic 2.16: Fundamental #3: Make Safety, Quality, and Productivity Part of Every Plan, Every Decision, and Every Day (p 44). Tell everyone to turn to page 44. Allow 3-4 minutes for them to skim pages 44-47, then show **Visual #3** and ask:

- **What are the standards for safety and how do you achieve them?** (Federal & state OSHA regulations; company safety policies. Refer to page 51.)
- **What are the standards for quality and how do you achieve them?** (The contract documents & specs. Refer to page 58.)
- **What are the standards for productivity and how do you achieve them?** (The budget & the schedule. Refer to page 59.)

New Topic 2.19: Safety: Direct and Indirect Costs (p 53) Tell everyone to look over page 53. Allow a minute for this, then start a discussion.

- Ask: **Who can tell us about the direct costs from a safety incident that occurred on a jobsite you worked on?**
A jobsite security situation? Allow a couple of minutes for these two queries. Save most of your time on this topic for a discussion of indirect costs.
- Then ask: **Who can tell us about the indirect costs from a safety or security incident that occurred on a jobsite you worked on?** Invite war stories; ask about details. Most situations that come up will be about safety incidents, and you may have to probe to learn about a security situation. Some safety incidents may have had traumatic consequences.

See the **Special Note** sidebar on this point.

This discussion may run for 10+ minutes. Let the details sink in.

Then **point out**: **The indirect costs of a safety or security incident can be 3x to 20x or more than its direct costs. Many indirect costs are accompanied by various costly side effects. Some indirect costs, especially human costs, have a "ripple effect" that reaches people who weren't directly involved. Some safety incidents can result in permanent disability or can lead to PTSD symptoms.**

15 minutes (1:15)

Objective: participants will understand *Fundamental #3* and how to apply it; they will develop personal standards for safety, quality, and productivity.

20 minutes (1:20)

Objective: participants will learn that a safety or security incident can have both *Direct and Indirect costs* — and that *Indirect Costs* can be many times greater than *Direct Costs*. They'll identify a wide range of *Indirect Cost* examples.

Special Note: it's possible that the discussion of a safety incident may prompt a participant to have a troublesome flashback. If you notice this happening, make sure that person gets support from others. If they leave the room, send another participant with them to ensure that they're OK.

A THREE-SESSION WORKSHOP • SESSION 2

20 minutes (1:40)

Objective: participants will prepare and present a Safety/Security Action Plan for one of the activities on their Look Ahead Schedule.

New Topic 2.20: Safety/Security Action Plan (p 54) Tell everyone to look over pages 54-56. Allow 3-4 minutes for this, then **point out:** *You are the key factor in your crew's safe performance of their work on your project. Note paragraph 2 on page 54: the words "you" and "yours" appear 5x!*

- Take a few minutes to review **The Top 10 OSHA Violations in the Fiscal Year 2018** on page 54/55. **Point out:** *All ten of these violations were up in 2018 over 2017 — some by 1 or 2% but also some by 20%...25%...30%!*
- **TBD; get SD help w outline, details, examples**
- placeholder text
 - » example
- placeholder text
 - » example
- placeholder text
 - » example

10 minutes (1:15)

Objective: participants will understand how Fundamental #3 applies to quality and safety issues; they will see how they must think and act differently.

Topics 2.22 & 2.23: Safety/Quality/Productivity Exercises (p 60/61).

Tell everyone to turn to pages 60/61. **Note:** this discussion will lag if only a few people did the self-study exercises. If so, use the three questions under **Quality Focus** (page 60) and the two questions under **Safety-Security Activity** (page 61) to prompt the discussion. This discussion should reveal common items for quality focus and common safety-security activities.

- **Point out:** *It's essential to schedule safety-security activities and quality activities in the same way you schedule labor, equipment, and material deliveries.*
- Discuss their answers to the set of questions on Quality.
- Discuss their answers to the Safety questions.
- Highlight the effects on productivity that can result from a focus on quality and safety.

Topic 2.24: Which Is First: Safety, Quality, or Productivity? (p 62).

Split up everyone into small groups of 4 or 5. Tell each group to go over questions 1-6, exchanging ideas and answers and writing them in the book. Allow about 10 minutes for this interaction, then bring everyone back together.

- Ask each group to present its ideas and answers to the three pairs of questions (1/2, 3/4, 5/6).
- Take a vote on _____ First, then discuss the results.
- Tell everyone to take a look at the Muddy Boots remarks on page 123. **Emphasize:** Safety First! It's a given and it's not negotiable.

15 minutes (1:40)

Objective: participants will understand trade-offs among quality, safety & productivity; they will confirm that safety is the #1 priority.

Topic 2.25: Fundamental #4: Become a Confident and Respected Leader (p 52-57).

Tell everyone to turn to page 52 and look over pages 52-57. Allow 5 minutes, then show **Visual #3** and ask:

- *Everyone knows you have to become an effective leader to be an effective supervisor, but how do you do that?* This question might be met by a few moments of silence, but let it sink in. The discussion will take hold.

10 minutes (1:50)

Objective: participants will understand Fundamental #4 and how to apply it.

Topic 2.10: Earning Your Crew's Respect and Keeping It (p 39)

Tell everyone: *Look over page 39 and check the ideas that are likely to be helpful to you for earning your crew's respect. Not popularity, but respect.* Allow about 5 minutes for this, then **split up into small groups**.

- Tell the groups: *These are six really good ideas, but it's hard to keep six things in mind all the time. Discuss these ideas and choose the two ideas that your group would give top priority. Why? What key factors do you need to keep in mind to make each idea work?*
- Allow about 5 minutes to do this, then open a discussion by asking each group to report its choices, reasons, and key factors. Then talk about priorities and trade-offs and ask about special situations where one approach would likely have the most effect.
- To wind up this discussion, ask: *What are common factors in all your efforts to earn your crew's respect?* (Replies you're fishing for: they're based on **action**, not talk; they demonstrate a **positive attitude**. Allow a minute, and if you don't hear these two replies, put them out there yourself.)
- At the end of this topic, tell everyone to stand up and take a **One-Minute Stretch Break** — but **don't let the group break up and leave the room** or you won't get them all back for 10-15 minutes, your schedule will be shot, and the workshop will lose momentum.

20 minutes (2:10)

Objective: participants will review ideas for earning their crew's respect and analyze which ideas will be most effective. They'll understand that respect is earned thru action, not talk.

A THREE-SESSION WORKSHOP • SESSION 2

25 minutes (2:35)

Objective: *participants will know their four basic safety responsibilities and understand that safe jobsites are created and maintained thru systematic, pro-active safety programs. They'll outline a 5 minute Tool Box Talk.*

If you plan to extend your 3-Session workshop beyond 10 hours, you can cover “Killer” Mistakes and/or **Eliminating Your Personal Down Periods** in Session 2 instead of in Session 3. Then you can include additional **Special Situations or Alternate Topics** in Session 3. Review the Special Situations and Alternate Topics you plan to cover in Session 3. Add or delete topics if the flow of Session 2 calls for changes in the mix.

Re: Certificate forms on pages 89/91. You'll need to prepare these certificates in advance for presentation at the end of Session 3. Be sure to include people who were not on the advance registration list.

Topic 2.18: A Safe Jobsite for Your Crew and Others (p 51) Tell everyone: *Look over pages 51 and 52 — and look up at me when you've finished.* Allow 5+ minutes for reading this topic since it's a 2-page text. The “look up at me” instruction will signal when to proceed.

- Review a supervisor's four basic safety responsibilities, listing them on a flipchart*. Then ask:
 - > **Who sees that this range of safety responsibilities is much broader than you thought it would be?** (This show of hands will indicate how much the class needs to learn about their safety responsibilities — which may affect the time you allocate to topic 2.18.)
 - > **Point out** and make notes on a flipchart*:
 - » *Safe jobsites are created and maintained thru systematic, pro-active safety programs.*
 - » *A comprehensive safety plan will focus on three different approaches to jobsite safety hazards: eliminate them; reduce them; avoid them.*
 - » *Proper safety gear and pro-active safety training are essential if you and your crew are to avoid accident and injury.*
 - » *Your Safety Director is a resource, but you and the one who is responsible for Job 1, Job 2, Job 3 and Job 4.*
 - » *Make sure every crew member knows where you stand on safety — that's it's part of every plan, every decision, and every day.*
 - » *Communicate about safety to your crew repeatedly and be consistent in what you say.*
- **Split up into small groups** and tell the groups: *Your task now is to outline a 5 minute Tool Box Talk by creating a flipchart that list the key points you'll cover. Pass out blank flip charts and assign each group a topic from this list:*
 - > *get 5 topics from a Safety Director*
 - > *get 5 topics from a Safety Director*
 - > *get 5 topics from a Safety Director*
 - > *get 5 topics from a Safety Director*
 - > *get 5 topics from a Safety Director*

Allow 10 minutes for groups to prep a presentation and create a flip chart, then have each group post their flipchart and give a one-minute summary of their key points.

- To wrap up this topic, **point out** this sidebar on page 52:
 - > *Never forget that your attitude “speaks” so loudly that it overpowers anything you say — and this applies to safety more than anything else. Your attitude will be unmistakable if you:*
 - » *talk about hazards;*
 - » *show concern for the safety of your crew;*
 - » *act decisively whenever you discover unsafe practices;*
 - » *encourage crew members to report any potential hazards to you ASAP;*
 - » *never back down by cutting corners on safety to make the budget or beat the schedule.*
 - > *The bottom-line responsibility for safety is yours — the safety of your crew and the safety of others who pass thru your work area.*

Topic 3.22: Action Plan. Ask: *Has anyone tried out any action ideas they’ve listed so far on their Action Plan (page 107)?* Pause for replies, then follow up: *I encourage you to write down ideas, skills or techniques you think you can use on your current project or in your daily work.*

Point out: *This workshop will only have an impact on your success as a supervisor if & when you apply what you’ve learned to your day-to-day work on your jobsite!*

5 minutes (1:55)

Objective: *prompt everyone to continue compiling ideas for an Action Plan.*

Preview Part 3 (p 73) Allow a minute for the class to look over the list of Special Situations covered in Part 3. Then turn to page 74 and ask:

- **Who thinks this might be an important topic for you?** Get a show of hands or allow for a few “Oh, yeah” comments, but don’t launch into a group discussion. Just page quickly through Part 3, previewing each of the topics and allowing each person to “connect” with some of them. These comments from the class may suggest which topics to discuss in Session 3.
- Remind everyone to work through Part 3, pages 74-99 before the next session. **Point out** the Review on pages 79-82 and tell the class: *If you work through these questions, you’ll get an excellent review of the ideas and skills you’ve learned in this workshop.*
- **Point out:** *Session 3 will focus on the Special Situations presented in Part 3. As preparation, I encourage everyone to be sure to read and think about the 8-step problem solving process described on page 85 so you can apply it as we work thru these topics.*
And make notes, if possible, on a current jobsite problem that this 8-step approach could help you solve.

5 minutes (2:00)

Objective: *preview Part 3.*

This is the end of Session 2.

USE THIS BLANK PAGE FOR NOTES

“Final” Prototype
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Basic Plan for Session 3: emphasize the importance of “killer” mistakes; discuss how to eliminate personal down periods; review those **Special Situations** that are especially relevant to the people in this workshop; continue to encourage development of **Action Plans**; find out if people are interested in any follow-up meetings; and recognize participants for completing the workshop.

Note: Part 3 of the *Stepping Up To Supervisor* book presents 14 Special Situations. This *Leader’s Guide* provides workshop guidelines for discussing 11 of them. To start, discuss two of the most important special situations, **Killer Mistakes** and **Eliminating Your Personal Down Periods** (Topic 3.02 and Topic 3.11). There’s a 70 minute time block for discussing other Special Situations that are especially relevant to the people in this workshop.

Topic 3.11: Staying Positive and Overcoming the Blahs (p 88). Tell everyone to turn to page 88 and allow them a minute to look it over.

Point out: *Staying positive isn’t always easy — but you have to do it. Here are some ideas that may help.*

- Ask: *Who has used one of these techniques? How did it work?*
- After several people have shared their experiences, ask: *Does anyone have another technique to add to this list?*

New Topic 2.14: Developing a Self-Motivated Crew (p 45) Tell everyone to look over pages 45-47. Allow 3-4 minutes for this, then start a discussion.

- First, **point out and emphasize:** *Motivation is not something that one person does to another.*
Sustained. Motivation. Comes. From. Within. Each. Person.
- Then: *What motivators have you seen affect the performance of a crew you’ve been on? What exactly was the effect? How was it sustained and for how long?* Invite one-line examples — but keep the comments short so many people have a chance to speak up.
- Next: *What demotivators have you seen affect the performance of a crew you’ve been on? What exactly was the effect? How did supervisors deal with it? And for how long did it affect the crew?* Invite one-line examples — but again, keep the comments short.
- **Split up into breakout groups** of 4 or 5. Tell each group: *Do a mental walk-thru on the path your crew members take from the gate to the parking area to today’s work location. Note any detail or factor that might be problematic, annoying, or undercut the likelihood they’ll deliver excellent performance. Then, as a group, come up with a list of the strongest three demotivators — and what actions you’d take to eliminate or minimize each one.*

As people are arriving for class, encourage a discussion of Action Plans: What ideas have they tried? What happened? How did it go?

10 minutes (0:10)

Objective: *participants will understand how to keep a positive mental attitude.*

25 minutes (0:35)

Objective: *participants will understand that motivation comes from within each person; they’ll learn that motivation is affected by factors that are motivators and factors that are demotivators; they’ll analyze factors on their jobsite that may be demotivators and suggest how to eliminate or minimize them.*

This topic continues on p 60.

20 minutes (0:55)

Objective: *participants will do a self-assessment of leadership traits they already possess. They'll identify actions that could enhance selected leadership traits during the next 6 months.*

You may want to create a flipchart in advance for the long list on page 66. Then you can use it to note the tally for each trait from the show of hands.

- » After 5-10 minutes, bring everyone back together and give each group 2 minutes to report its list and remedies. Summarize their comments on a two-column flipchart: **Demotivators & Remedies**. To wind up this discussion, invite everyone to take a pic of the flipchart. (This will also accomplish the effect of a stretch break.)

Topic 2.27: Leadership Characteristics (p 66) Tell everyone: **Look over page 66 and check the boxes that indicate the traits you feel you already possess.** Allow 5 minutes for this, then ask: **What did you add to the list?** Then get a show of hands for each trait, and post the tally on a flipchart. This will indicate a class “leadership profile” based on participants’ self-assessments.

- **Split up into breakout groups** and tell the groups: **Look over the list of leadership traits — and take note of the traits people in your group feel they already possess. Then choose 2 or 3 key traits and come up with ideas and actions that could enhance these traits for people in your group. What can each of you do during the next 6 months to make this happen for you? Make a few notes you can share with the class.**
 - Allow 5-10 minutes for this small group discussion, then ask: **Now, let's hear some quick 30-second summaries — what 2 traits are you going to do something about? What are you going to do? How will you measure your results?** Allow 5-10 minutes to get as many comments as people are willing to make. (These stand-up expressions of intent will encourage buy-in for post-workshop actions.)
 - To wind up this discussion, **point out:** **Here's what you did with this topic:**
 1. **First, you did a self-assessment.**
 2. **Then, you made a short list based on your personal priorities.**
 3. **Then, you made an Action Plan to affect the leadership traits you chose — and you wrote it down.**
 4. **Finally, you figured out how you're going to measure your progress.**
 - **Point out:** **This four-step procedure applies to many issues you'll analyze and deal with as a supervisor. Each step is important. Don't cut corners.**
- Pause...someone may remark that they also “went public” with their Action Plan. If that happens, also **point out:** **“Going public” increases the probability that real action will follow — but it also raises the stakes. If you “go public” — your actions will “speak” louder than your words.** If no one mentions this, put it out there yourself.

Special Situation Topics (Pages 61-78). If you've already selected the Special Situations topics to cover, just tell everyone to turn to the appropriate page for the first topic and begin.

You have a total time block of 2:05, so the cumulative time for the topics you choose must add up to 125 minutes. Guidelines for eleven topics are presented on pages 61 - 67 of this *Leader's Guide* — plus four Alternate Topics are covered on pages 69 - 72. There's a form on page 67 you can use to keep track of the total time blocks for the topics you choose.

————— Special Situations —————

Topic 3.04: A Touchy Transition/Dealing With Resentment (p 78/79).

Est time: 10-15 minutes Tell everyone to turn to page 78, and allow about 5 minutes for them to look over pages 78 and 79. Then, to begin a discussion that gets people to talk about this transition, say:

- *Think back to the last few times you got a new supervisor. What did those new supervisors do that made the transition go easier for them? For you and other crew members?*
- *What mistakes did they make, and how did it affect you and the rest of the crew? How did it affect the work? What remedies did they try, and how did it work out?*
- *What can you do if you detect some resentment about your new role and promotion?*

Topic 3.10: Solving Problems (p 85). Est time: 10-15 minutes.

Nothing quite engages workshop participants like people-centered problems. Many say that dealing with people-centered problems is their greatest concern as a supervisor — and also their greatest source of satisfaction. Tell everyone to turn to page 76 and allow them a minute to look it over. **Point out:** *There are two kinds of jobsite problems: job-centered problems and people-centered problems.*

- Ask: *What are some examples of people-centered problems that you've seen or encountered on a jobsite?* As each is mentioned, ask: *What was the effect on safety? quality? productivity?*
- Present the eight-step problem solving procedure for major job-centered problems (4th ▲ paragraph on page 85).
- Ask: *Which step do you think is the most difficult?* **Point out:** *it's Identifying the Real Problem which is often overshadowed by symptoms — sometimes noisy symptoms that look to be the problem — until you get rid of them and discover that the problem is still there.*
- Ask: *What are some jobsite examples of noisy symptoms that can make it difficult to identify the real problem?* Invite a few war stories about these complications and their consequences.

125 minutes (3:00)

Objective: *discuss those specific Special Situations that are relevant to the people in this workshop.*

box 1 box 2

min ()

Objective: *participants will understand the dynamics of their transition to supervisor — and think about how they'd handle possible resentment.*

After you select each Special Situation topic to cover, write the # of minutes you're allowing for it in box 1, then calc & write the cumulative time in box 2. This will help you stay on schedule.

min ()

Objective: *participants will learn an 8-step problem solving process and how to isolate the Real Problem; they'll apply this process to job-centered and people-centered problems.*

Solving Problems is a good topic to cover as one of the first Special Situations topics because the 8-step procedure is applicable to many Special Situations. If participants looked over the Solving Problems topic before class, as you requested at the end of Sessions 1 & 2, they'll already be up to speed, and it should prompt a vigorous discussion.

min ()

Objective: participants will understand effective approaches to dealing with a problem crew member — and become aware of approaches that are mistakes to avoid.

min ()

Objective: participants will understand how to apply the 8-step problem solving process to conflict among crew members.

You'll need to work in 1 or 2 **One-Minute Stretch Breaks** somewhere in the middle of this 125 minute time block.

Special Situation Topics – Possible Topics to Cover - continued

Topics 3.05/3.06: The Problem Crew Member (p 80); Handling a Problem Crew Member (page 81). Est time: 10-15 minutes.

Experienced supervisors say this is one of their toughest challenges. This topic gets people to talk about what works and what doesn't. The class likely includes some people who've had experience dealing with a problem crew member — with some successes and some mistakes.

- Tell everyone to turn to page 80, and allow about 5 minutes for them to look over pages 80 and 81.
- Using the ▼ list on page 81, go over each of the ten possible ways a supervisor could react to a problem crew member. Read each statement. Ask: *What's been your experience?* Invite war stories.

Topic 3.07: Handling Conflict Among Crew Members (p 82). Conflict happens. To start, **point out:** *Since it's your job to get results thru your crew, when conflict arises among your crew members, it's part of your job to step in, handle it, and get your crew back on track. Here's how.*

- Review the eight ▲ steps on page 82. As you list each one on a flipchart, invite comments about it. Ask: *What works? What doesn't?*
- Tell everyone to look over the systematic 8-step problem solving procedure for major job-centered problems on page 85-87. **Point out:** *The 8-step approach we just went thru works for all kinds of jobsite problems — technical problems and people-centered problems.*
- Invite a war story, and if you get a good one, track it thru the 8-step process as an example that shows how this approach can work out on a problem they'll likely face in their first year as a supervisor.

Topic 3.08: Working With Other Crafts and Crews (p 83). Est time:

10-15 minutes. Tell everyone to turn to page 83. Allow them a minute to look it over, then ask:

- **What are the pressure points on a typical project where working with other crafts and crews gets complicated or invites conflict?** List responses on a flipchart.
- Then choose several responses and for each one, ask: **What can you do to prevent complications and conflict? How do you go about solving this problem once it occurs?**
- **Point out:** Supervisors of other crafts and crews are dealing with many challenges that are similar to the ones you face. Take a minute — turn back to page 71 — and mentally “round the bases” from that other supervisor’s point of view.

min ()

Objective: participants will identify pressure points on a typical project where working with other crafts and crews can be complicated. They’ll learn ways to work thru these situations.

Topic 3.19: Keeping Your Supervisor Happy (p 98). Tell everyone to turn to page 98 and allow them a minute to look it over. Then **point out:** *It’s sometimes difficult to figure out exactly what it takes to keep your supervisor happy.*

- Ask: **What do you think your supervisor expects from you?** List responses on a flipchart. Make a two-column list and get people to identify both **day-to-day** expectations and **long-term** expectations.
- Then choose several responses and, for each one, ask: **What can you do to ensure that you meet this expectation? How do you go about resolving a problem here if it occurs?**
- Ask: **If it’s difficult or impossible to keep your supervisor happy, what can you focus on to make sure your job performance is satisfactory?** Make a three-column list on the flipchart to record the responses:

Safety | Quality | Budget | Schedule

- Tell everyone to turn to page 82 and **point out:** *The 8-step process for solving people-centered problems is a good place to start if you sense you’re having a problem meeting your supervisor’s expectations. Solve this “expectations problem” and you’ll keep your supervisor happy.*

min ()

Objective: participants will explore what their supervisor may expect from them — and how to focus on meeting those expectations.

min ()

Objective: participants will analyze a situation that had mistaken judgments at two levels — and how a crew leader stepped up to handle both mistakes.

Topic 3.09: Case #4: Between a Rock and a Hard Place (p 84). Split up everyone into breakout groups of 4 or 5. Tell each group to read and discuss the case on page 84 — and decide how Charlie should handle the situation.

- After 5-10 minutes, bring everyone back together and have each group report its solution. To wind up the discussion, tell everyone to turn to the Muddy Boots comments on page 123. **Point out:** *Charlie has two situations to handle, and each message has three parts.* List the three message parts for each situation on a flipchart.

min ()

Objective: participants will understand how to handle technical mistakes and mistakes involving people.

Topic 3.03: Handling Mistakes (p 76). Tell everyone to turn to pages 76/77 and allow them about two minutes to look them over. Then **point out:** *Mistakes happen. If you're not making some mistakes, your pace is probably way too slow and cautious for construction. But you can minimize the damage mistakes can cause to safety, quality, the budget, and the schedule. Let's talk about the two kinds of mistakes: technical mistakes and mistakes involving people.*

- Ask: *What technical or mechanical mistakes have you made or seen made on a jobsite?* List responses on a flipchart. Then ask: *How were these mistakes corrected?* Then **point out:** *The easiest problems to solve are those that will go away if you throw money at them. The really tough problems require changes in behavior or special effort to repair an important working relationship.*
- Ask: *What mistakes involving people have you made or seen made on a jobsite?* List responses on a flipchart. Then ask: *How were these mistakes corrected?*
- **Point out** the four ▲ suggestions on pages 76/77. **Note:** spend at least 70% of the time you allow for this topic on mistakes involving people, 30% or less on technical mistakes.

min ()

Objective: participants will understand the potential impact of a first-rate crew and how to sustain its effectiveness.

Topic 3.17: Getting a First-Rate Crew and Keeping It (p 95). Tell everyone to turn to page 95. Allow them a minute to look it over, then ask:

- *Who has worked on a crew that stuck together for a year or more? What kept you together? What was the impact on the crew performance?* Invite examples.
- Ask: *How can you go about adding a new crew member without screwing up the effectiveness and solidarity of the original crew?*
- Ask: *What's the best thing you ever heard someone say about the performance of a crew?*

New Topic 3.13: When Sending a Message, Always Confirm That the Receiver Actually Understands the Details of What You Just Said

(p 91) Tell everyone to look over page 91. Allow about 2 minutes for this, then start a discussion.

- Ask: *Who can tell us about a message that was unclear or incomplete which later caused a problem? What did it effect — Safety? Quality? Budget? Schedule? And what did it take to resolve the problems and get the project back on track? Were there “costs” that could not be recovered?*

Invite war stories — and keep probing until you get at least one incident involving safety.

- **Note:** Topic 2.19 (LG page 53, *Stepping Up* page 53) on Direct and Indirect Costs sets up this topic to emphasize the range of Direct and Indirect Cost consequences that can result from a faulty message. Refer the class back to page 53, and talk about direct and (especially) **indirect** costs. Let this discussion run for 10 minutes — or longer if someone brings up a significant safety incident.
- To wrap up this discussion, **point out:** *Everything on a jobsite moves at a rapid pace. But the saying “Haste makes waste” applies 1,000x to messages that involve action. You want someone to do, or not do, something. Focus on the details — what and when – and confirm that the Receiver understands the details and agrees to carry out the action you expect. You’re asking for trouble if you just talk... then assume...then walk away or hang up.*

min ()

Objective: *participants will understand that they must confirm every message they send — that the Receiver has understood all relevant details and agrees to carry out any expected action. They’ll relate jobsite incidents where a message was not accurately received — the consequences that followed and what was then required to get back on track. They’ll also review Indirect Costs on page 53 to emphasize the range of consequences that can result from a faulty message.*

min ()

Objective: *participants will learn their effort to make their written messages accurate, complete, clearly-written, and objective will project a strong, effective image as a supervisor. They'll learn about mistakes and shortcuts to avoid and will develop a checklist that ensures their written communications are first rate.*

Topic 3.14: Reports and Emails: Don't Let the Words You Write

Undercut Your Effectiveness as a Supervisor (p 92)

Tell everyone to look over page 92. Allow about 2 minutes for this, then **point out:** *This is not a lecture from your high school English teacher about what you should or shouldn't do. It's savvy advice — a heads up that will help you present yourself as a smart person and an effective supervisor. Your writing is serious, jobsite business, not a Tweet.*

- To drive home this topic, ask: *Why is it foolish and shortsighted to write like a texting teenager?*
 - » Answer: *You never know who will see your written message. Assume it will be posted on the Internet, in view forever, with your name on it. Choose your words wisely.*
- Then **emphasize:** *Proofread everything before you hit Send — even your text messages. Typos show a careless lack of attention to detail — which doesn't project a strong, effective image. Take another look at page 21. (Pause 60 seconds.)*
- Use correct words and punctuation. Review the 5 bullet points at the bottom of page 92. (Pause 2 minutes.) **Emphasize again:** *Your writing is serious, jobsite business — not a throw-away Tweet.*
- You can safely assume that most participants feel that the job-related writing they're required to do is a time-consuming pain. You have two tasks to accomplish with this topic: (1) persuade participants to respect writing reports and other communications as serious, jobsite business; and (2) give them at least one tool that makes writing an effective message easier.
- **Task #1.** Ask this series of questions (ask, pause, get a couple of answers, then move briskly thru this series):
 - » *What do you use text messages for? Who do you text during a typical week? Who do your texts get forwarded to?*
 - » *What do you use email messages for? Who do you email during a typical week? Who do your emails get forwarded to?*
 - » *What reports do you have to write or submit in a typical month? Who gets these reports?*
 - » *Putting all this together, how widely do you think your written words get distributed? (The accurate answers: I'm not sure. I don't really know. Probably to a lot of people, some I've never met.)*
 - » *What are some of the uses your written words might affect? Answers may include: future estimates and bids; safety actions; budgets and schedules for current projects; performance information on materials, subs, other crafts and crews.*

- » **Emphasize again:** *As a supervisor, your written communications are serious, jobsite business. It's important to your performance to do your best to make each one as accurate, complete, and clearly written as you can. And objective — with any assumptions, opinions, or speculation clearly identified.*
- **Task #2. Split up into small groups** of 4 or 5. Tell the groups: *Review the 5 bullet points on page 92 and make a checklist you can use to avoid common mistakes on your written communications. Allow about 5 minutes to do this.*
 - » Then open a discussion: *What are some of the checklist items your group came up with?* Write down the replies on a flipchart.
 - » Probe for ideas that were not among the bullet points on page 92. Add the “ambiguous pronoun” point, ie: *Sometimes writers will use personal pronouns like he/she/him/her/they/them multiple times in a sentence or an instruction — but it won't be clear who each pronoun refers to. If you write (or say): “He must take action to...” be certain it's crystal clear exactly who “he” is.*
 - » Then tell the groups to get back together and come up with their final checklist. Tell them to choose a Recorder who will put their list in “checklist form” (similar to the Pocket Checklist) and email a copy to each group member plus a copy to the other Recorders. **Point out** the Sample Checklist on page 81 in the Visual Masters section.

Use this form to plan the Special Situations you'll cover — the time you will allow for each topic, and the cumulative time vs. the total 125 minute (2:05) time block you have to work with.

Special Situations Plan

Topic	Page	Time	Total Time

Total time must not exceed 125 minutes — unless you extend Session 3 beyond 200 minutes (3:20) or add a Session 4.

A THREE-SESSION WORKSHOP • SESSION 3

5 minutes (3:05)

Objective: encourage everyone to work through the Review to reinforce what they've learned in this workshop.

5 minutes (3:10)

Objective: encourage everyone to make using an Action Plan a daily practice. Spotlight examples.

5 minutes (3:15)

Objective: find out if people want any follow-up meetings; recognize participants and send everyone away with a word of encouragement.

Topic 3.21: Review of Topics Covered in *Stepping Up To Supervisor* (p 79-82). Point out the Review but you won't have time for people to work through it during this workshop. This is just as well, because anyone who works through these questions later will get an excellent review of the ideas and skills they learned in the workshop.

- Tell everyone to turn to page 100-106, and make sure everyone understands that these questions are a **Review**, not a test.
- **Point out:** *Work through this Review sometime in the next few days. It will help you remember what you've learned. Each review question is cross-referenced to the page that contains the answer — and the answers to all the questions are on page 92.*

Topic 3.22: Action Plan. Point out and emphasize: *The time you've spent in this workshop will only have a real value if it affects your daily work at your jobsite. Your Action Plan is the best way to accomplish this.*

- Ask: *Has anyone tried to implement some Action Plan ideas?*
- Ask: *How did it go and what did you learn from the experience?*
- Ask: *How can you keep a steady flow of action ideas coming?*

Closing. Ask if people in the group want to continue to get together every now and then. If there's interest, set up a meeting within 30 days — no later or people will "break contact" with the workshop and each other. Facilitate and encourage this follow-up meeting, but don't force it. Just follow the group's lead, and they'll find a level that works for them.

Pass out the **Workshop Feedback Form** and ask everyone to fill it out and either give to you or leave it on the table at the front of the room.

Thank everybody for coming to the workshop. Pass out workshop certificates and recognize participants — **and do this personally** — one by one, with eye contact, a smile, a handshake, and a word of encouragement.

This concludes the three-session workshop.

Alternate Topics

Here are four alternative topics you can *substitute* in any session. Or you can *insert* them in a session where you think they fit the flow *to extend* that session.

As mentioned on *Leader's Guide* page 81, the **Stuff To Think About** feature that's presented with each topic provides a springboard for your focus on key points to discuss in a workshop. **Stuff To Think About** presents guidelines for workshop activities and prepares everyone for class discussions.

Topic 1.05: Your Attitude Will Show the Way (p 12) Tell everyone:
Look over pages 12 and 13 — and do the exercise on page 13.

- **Point out:** This exercise is an important personal assessment. We'll talk about "attitude" today, but we won't be asking you to reveal your answers — so be honest in what you write down. Allow about 5 minutes for reading this topic and the exercise, then begin a discussion by asking:
- Think back on your jobsite experiences. Describe a situation where a supervisor's attitude made a significant positive difference in a crew's performance — a difference that affected safety, quality, the budget, or the schedule.
- Now — think back on your jobsite experiences and describe a situation where a supervisor's attitude made a significant negative difference in a crew's performance — a difference that affected safety, quality, the budget, or the schedule.
- To wind up this discussion, **point out:** It's your actions, not your words, that show your attitude. If your actions don't match up with your words, your crew will be sharp enough to pick up on it. In fact, your attitude "speaks" so loudly that it overpowers anything you say. Tell everyone: Circle the page number 13 so you can come back to it in a few months and see if your thoughts, feelings, and attitude have changed.

Move this Alternative Topics section to start on page 69, ie immediately following Session 3 of the 3-session workshop. **Done** 7/5/2019

10 minutes

Objective: participants will self-assess their personal thoughts & feelings about factors that affect a supervisor's attitude. They'll understand the effect and importance of attitude on a crew's jobsite performance.

ALTERNATE TOPICS

10 minutes

Objective: *participants will first think about their own motivation and make notes on the motivations they observe among their crew members. Then they'll merge these observations into a view of "crew motivation" that can affect their potential to get results thru their crew (Fundamental #2).*

New Topic 2.13: What Motivates Crew Members on a Jobsite? (p 42)

Tell everyone to look over pages 42-44. After about 3-4 minutes, set the stage for this topic:

- *This topic is an exercise of introspection. We won't be discussing individual motivations in class. You'll be thinking about individual motivations, but your focus will be on a "crew motivation" that can affect Fundamental #2 — your potential to get results thru your crew.*
- *Think about your own motivation re Maslow's Hierarchy of Needs — especially Levels 3 and 4. How do these needs — and your actions to satisfy them — play out for you.*
- *Then, think about each of your crew members & make a few notes. Again, your focus is primarily on Levels 3 and 4, tho also be alert to the possibility of a Level 2 or Level 5 need.*
- *Think about how to merge these individual motivations into a "crew motivation" — and what might that motivation include re: safety, quality, budget, schedule?*
 - » *What are the strengths & weaknesses of your crew for turning this "crew motivation" into actual crew performance?*
 - » *What can you do to maximize these strengths and minimize these weaknesses?*

Note: topics 2.13 & 2.14 should be presented together and in sequence. Topic 2.13 is a quiet, introspective topic which may fit best as an interlude after a topic that prompts vigorous discussion.

Topic 2.06: Can You Run a Tight Ship? (p 35) Tell everyone: *Look over page 35. Answer the 10 questions and write down your total for each of the three columns.* Allow about 5 minutes to do this, then split up into small groups.

- Tell the groups: *Review the 10 questions on page 35 and discuss where each of you stands on each question — yes/no/unsure. Do a tally for your group:*
 - » *what are the top 2 “yes” answers?*
 - » *what are the top 2 “no” answers?*
 - » *what are the top 2 “unsure” answers?*
- Allow about 5 minutes to do this, then open a discussion:
 - » *These may be tough questions to ask yourself, but they reflect a reality about construction supervision. It’s important to have a clear self-assessment of your readiness to run a tight ship.*
 - » *What are the 2 top “yes” answers your group came up with?*
Write the replies on a flipchart.
 - » *What are the 2 top “no” answers your group came up with?*
What are the 2 top “unsure” answers your group came up with?
Write the replies on the flipchart.
 - » *What can you do to changes these “no” and “unsure” answers to “yes” answers?*
- To wind up the discussion, **point out:** *Your answer to the last question “What are you going to do...” — is not a generic answer. It’s your own personal answer. But it’s important that you ask this question now, then take action so you’re as ready as possible to run a tight ship on Day 1.*

20 minutes

Objective: *participants will develop an understanding of their readiness to run a tight ship. They’ll identify actions that can increase their readiness.*

ALTERNATE TOPICS

20 minutes

Objective: participants will analyze three possible strategies a new supervisor could follow as he takes over as foreman — then recommend one strategy with their supporting reasons; they'll note trade-offs and risks to watch out for.

Topic 2.08: Case Study #2: Which Strategy Would You Use? (p 37) Tell everyone: *Look over page 37. Choose the strategy you'd recommend to Henry and list your reasons.* Allow about 5 minutes for this, then **split up into small groups.**

- Tell the groups: *Discuss the strategy that you each came up with and the reasons supporting your recommendation. Then compile a group recommendation. Also identify any variations or additions your group would add to the 3 choices and point out any weaknesses, risks, or special circumstances Henry should watch out for.*
- Allow 5-10 minutes for this small group discussion, and pull the class back together when you observe that the groups look like they've reached a consensus. Ask someone from each group to present their recommended strategy and supporting reasons, then open the discussion to see if you get an overall consensus. Note key points on a flipchart — especially supporting reasons and risks.
- To wind up the discussion, **point out:** any differences in assumptions each group made; any differences in supporting reasons; the risks Henry must watch out for.

A Dozen Other Topics that could be added to this Alternate Topics section (get XYZ's priority list and/or add new topics that would fit the company or organization):

- 1.02 What Can Success as a Supervisor Do for You?
- 1.06 Communicating Thru Your Attitude
- 1.11 A Few Words About Self-confidence
- 1.18 Supervisors Are Always Planning
- 2.05 It's Not Business As Usual
- 2.17 Make Quality Your Way of Doing Business
- 2.26 Leading Your Crew to the Next Level
- 2.28 Leaders Build Winning Teams
- 2.30 How to Help Crew Members Become Self-motivated
- 3.01 Be Alert for Bad Habits That Might Get in Your Way
- 3.16 Developing Your People Skills
- 3.18 Getting Your Crew to Pull Together As a Team

Visuals and Visual Masters

Visuals — “masters” suitable for creating PowerPoint or Keynote slides on a computer, overhead transparencies on a copier, or oversized flipcharts — are provided on pages 75/77/79.

- **Visual #1, Topic 1.20, pages 24/25: Six Day Look Ahead Schedule (filled out example).** Use this Visual of the form on page 25 to walk participants step-by-step through the development of a Six Day Look Ahead Schedule. The Visual master is on page 75 of this *Leader's Guide*.
- **Visual #2, Topic 1.20: Six Day Look Ahead Schedule (blank).** You may want to use this Visual of the blank form on page 27 to create an example that specifically fits the group or to enable one of the participants to present his Six Day Look Ahead Schedule to the group. The Visual master is on page 77 of this *Leader's Guide*.
- **Visual #3, Topics 2.01 & 2.02 , pages 30/31: Four Fundamentals**
A new supervisor has hundreds of thoughts swirling through his head; use this Visual to **focus** participants on these four fundamentals. If you do two or three sessions, have this Visual on the screen as participants arrive for Session 2 and Session 3. Visual #3 is on page 79 of this *Leader's Guide*. Use this Visual again when you discuss each of the Four Fundamentals:
 - » **Topic 2.03, page 32: Fundamental #1**
 - » **Topic 2.09, page 38: Fundamental #2**
 - » **Topic 2.16, page 50: Fundamental #3**
 - » **Topic 2.25, page 64: Fundamental #4**

If you don't have access to the hardware necessary to project these images on a screen, you can make oversized flipcharts from pages 55/57/59, but get these flipcharts made up in advance — don't try to create them freehand and on the fly as you present each topic.

Of all the Visuals, **Visual #1: Six Day Look Ahead Schedule (filled out)** used in Topic 1.20 (pages 24/25) is the most important; it will make the most difference in your presentation. If you don't have projection hardware and a screen at your workshop location, we suggest that you go to FedEx/Office or a local graphics shop and get an enlargement made of Visual #1 and use this flipchart to present the Six Day Look Ahead Schedule.

“Final” Prototype
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These 3 visuals are old PDFs that can't be edited. Need to find an editable version or change the TR #1 etc labels with a inDesign patch. Looks like they could use some clean-up — probably created on a much smaller screen, with old Aldus Pagemaker software. Patch may be the simplest solution.

		FOR THE WEEK OF:							TR #1
		Mon 4/15	Tue 4/16	Wed 4/17	Thur 4/18	Fri 4/19	Week Recap	Mon 4/22	
SIX DAY LOOK AHEAD SCHEDULE		Project Name: Central Plaza							
		Jobsite Location: Route 6 Frontage Rd. Project #: O-7734							
Supervisor: Hendershot		Crew: Formwork							
Task: Set Forms Location: Blg #6 Start Task: 4/8 Finish Task: 4/26	Materials & Supplies	forms & braces (side 1)	wall ties wedges & walers	forms & braces (side 2)	concrete	rebars & bar supports			
	Equipment & Tools	level & rod	generator & drill	level & rod	generator & vibrators	bolt cutters			
	Crew	3 carpenters 1 apprentice	3 carpenters 1 apprentice	3 carpenters 1 apprentice	3 carpenters 1 apprentice	3 carpenters 1 apprentice	3 carpenters 1 apprentice		
	DBP	650 sf	650 sf	650 sf	0	650 sf	2,600 sf	650 sf	
	Actual Prod								
	Over								
	Under								
Key Quality Issues	Planned	check 50% skip ties	check elevation of footing	check for plumb & alignment	check for blow-outs	check 50% skip ties			
	Actual								
Safety & Security Activities	Planned	place bar end safety caps	check ladders	test ground fault interrupter	check handrails & scaffolding	check traffic flow & clearances	place bar end safety caps		
	Actual								

It's better not to use this page for notes; your writing might show through when you make a visual from the master on page 49.

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SIX DAY LOOK AHEAD SCHEDULE

FOR THE WEEK OF:

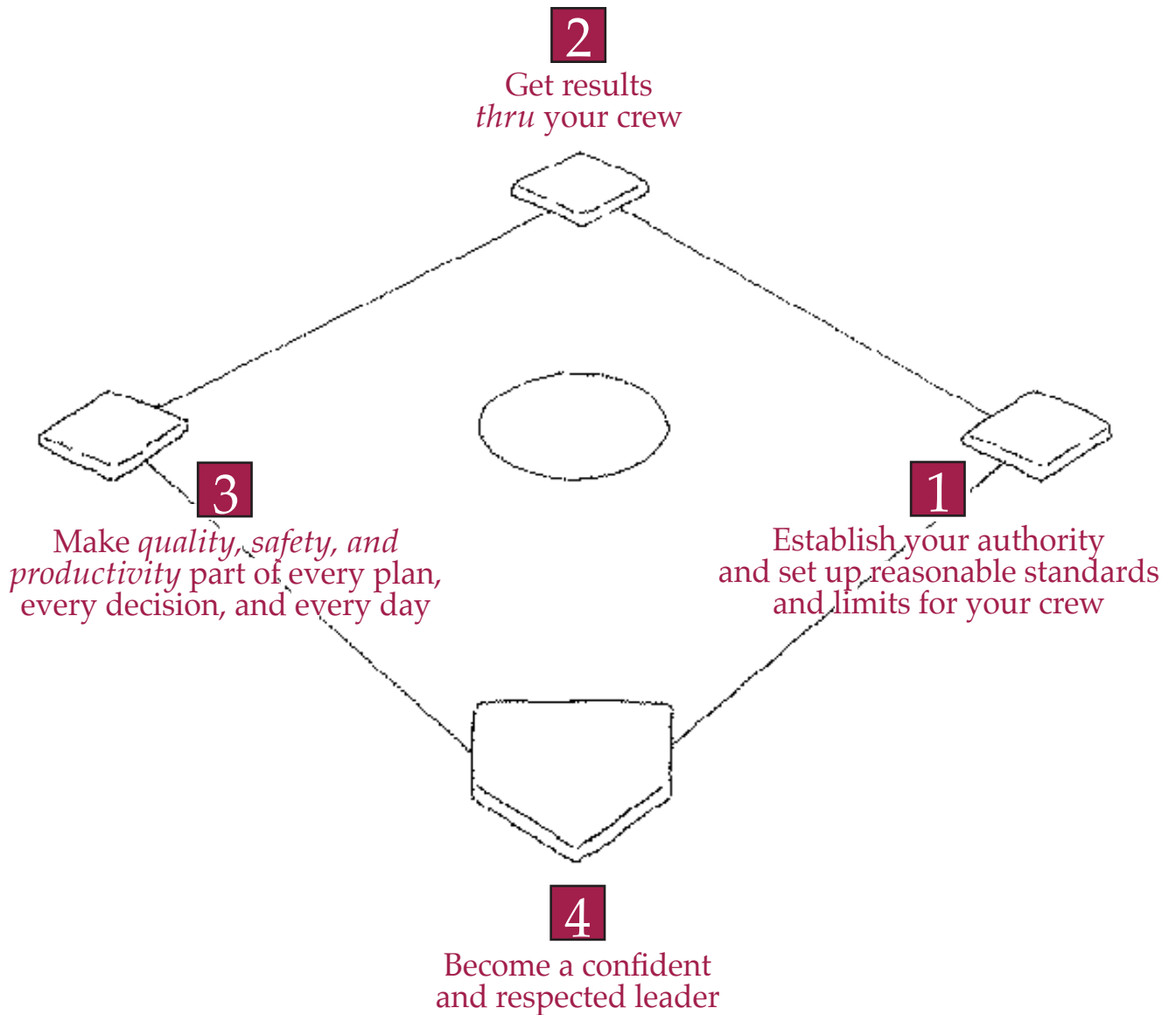
TR #2

Project Name:		Jobsite Location:							Project #:
Supervisor:		Crew:							
		Mon	Tue	Wed	Thur	Fri	Week Recap	Mon	
Task:	① Materials & Supplies								
Location:	② Equipment & Tools								
Start Task:	③ Crew								
Finish Task:	④ DBP								
	⑦ Actual Prod								
	Over / Under								
Key Quality Issues	⑤ Planned								
	Actual								
Safety & Security Activities	⑥ Planned								
	Actual								

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THE FOUR FUNDAMENTALS OF EFFECTIVE SUPERVISION



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Special Notes

Daily Journal: An Idea You Can Use in Any Two-Session or Three-Session Workshop

As you wind up Session 1, tell everyone to keep a **daily journal** of the most significant jobsite issues and events of each day concerning: (1) safety; (2) quality; (3) the budget; and (4) the schedule.

Then, as people are arriving at the next class meeting, encourage them to form into small groups and briefly discuss these notes. Tell them to look for patterns — both good and bad — and solutions. To start Session 2/3, ask one person from each group to give a one-minute summary of their discussion — then move right into **Topic 1.20/3.02**.

Create a Leader's Guide Page for Another Topic

If responses from the class single out a topic or concern that isn't among the topics outlined on **pages 15 - 52**, use these guidelines as a template to design a new topic by making up your own list of key points and discussion questions.

- Tell everyone to turn to *Stepping Up* page ___ and allow about ___ minutes for them to look over pages __ and __. Then, to begin a discussion that gets people to talk about _____ say:
_____.
- If the topic is one that's covered in *Stepping Up To Supervisor Pocket Checklist*, review its key points by referring to the checklist for that topic on pages 125-135.
- Optional: create and include an assignment for breakout groups.
- Prompt discussions with open-ended questions that begin with **what, why, and how**. See pages 12/13 for more examples.
 - » **What's been your experience?** Invite war stories.
 - » **Think back to the situation. Why did it happen that way?**
 - » **What happened, and how did it affect you and the rest of the crew? How did it affect the work?**
 - » **What could you do to improve on the situation?**
 - » **How can you apply what we've been talking about on your jobsite?**

Stuff To Think About

The Stuff To Think About feature that's presented with each topic in the *Stepping Up* book highlights aspects of that topic which can also be your focus on key points. and it provides ideas for discussion questions.

Participants who read the book between class sessions and think about these points will be primed to lead class discussions.

They'll usually step up to get a discussion started. And if you encourage early Session 2 arrivals to discuss their daily journal or the LookAhead Schedule as they arrive, you'll notice who the likely discussion leaders are.

The Role of the Instructor

A workshop is not a lecture by an “expert” to a roomful of “rookies.” True, you have more experience and knowledge about the topics you’ll cover than they do, but your role is a **facilitator or manager**: (1) to present information that sets up an topic; (2) to manage that topic so everyone participates and understands a set of key points; (3) to help each person think thru how he could *apply* what he’s learned on his jobsite and make a **Action Plan** that fits his personal situation.

Your role is to accomplish each **Objective** within the time allotted — sort of like “the budget” and “the schedule” for a task on a jobsite.

Typical Room Set-Ups

Eye contact and elbow room. During presentations and discussions, every person (including you) must have direct eye contact with every other person — without turning around. Set up the chairs so each workshop participant has at least a foot of elbow room on each side. Here’s an arrangement that works.

“Bent” U Shape. You can set up long tables in a U shape or arrange several small tables in a U. “Bend” the sides of the U so people will have better eye contact with others to their left and right. Whatever you do, seat everyone on the perimeter; don’t seat people on the inside of the U where they have to turn around to get eye contact.

Since many activities involve breakout groups of about four people, this room set-up must be quickly adjustable to give each group its own space. Sometimes you just have to pick up tables and chairs and move them around.

You



Breakout Groups

Some workshops will include several people from the same company, organization, or social group. Split them up. Try to make each of the breakout groups diverse. If possible, avoid any concentration of natural leaders, heavy talkers, high-status people, poor readers, outsiders who aren’t part of any group. For Session 2 and 3, don’t be reluctant to scramble the groups if you think it might help the discussions and interactions.

While groups are at work, wander around. You can listen in on their discussions, but don’t jump in with answers. If you think a group needs redirection or a boost, use **open-ended questions** to get them on track.

See pages 12/13 for more about open-ended questions.

A Few Dos & Don'ts

As you work thru each topic, keep your focus on the **Objective**, and keep your eye on the clock — especially the cumulative timeline.

If you see that you're behind schedule, adjust the pace, omit part of an topic, or simply run a little late — but don't announce: *We're running behind*. There's nothing to be gained by saying that, and it can become a distraction. As far as everyone in the class is concerned, you're always right on time.

Repeatedly use questions to connect the ideas, skills, and techniques you're talking about with jobsite situations. Ask: *How would you do this over at XYZ project?* **Remember:** learning is the means; *doing* is the end — to be achieved thru each person's **Action Plan**.

Use praise to recognize “right” answers and “good” solutions — and “workable” solutions that aren't perfect. And, if possible, recognize participation itself, even if the comment is off the mark.

Be sure that everyone understands that, most of the time, you're not looking for One Right Answer. You're looking for a range of workable solutions. If different people or different groups come up with different solutions — that's good! Compare. Contrast. Talk about advantages, disadvantages, and trade-offs.

If someone raises an obvious contradiction or says something that's out of line, don't swat it down — turn it back to the group: *What's your take on that, Chris?* (Chris being one of the sharper people in the class!)

Again, if you're running behind schedule, **keep it to yourself**. Such remarks inhibit discussion. As far as the class is concerned, the workshop is always right on schedule. From time to time, you may need to move it ahead: *Okay, let's summarize...* Then move on.

Homework (2-Session & 3-Session Workshops)

It's reasonable to expect people to do an hour of homework between sessions, but not a lot more. In your Session 1 closing remarks:

- Tell everyone to refer to the agenda and read the pages in *Stepping Up* that you'll cover in the next session.
- Pick out a key point in today's session and tell everyone to try out or observe that idea or technique on their jobsite.
- To start the next session, ask 2 or 3 people to report their experiences and observations. Ask for quick comments — 30 seconds each — then prompt a short discussion to bring these personal “jobsite realities” into the mix. Use your judgment on how long to let it run.

Sometimes a topic, or some aspect of a topic, just doesn't go anywhere in a large group discussion.

First, try tossing out an open-ended question that begs an response from the group.

If that doesn't work — and this is a point that you think is important — you can say: “This is a tough one. Let's go to breakout groups for a quick, 2-minute discussion, and see what we can come up with.” The movement and task assignment will usually jar loose a few ideas.

This approach works best in Sessions 2 and 3, after people have some experience with breakout groups and you know who the usual discussion leaders are. Call on them to report their group's findings.

(this sidebar continues on page 84)

(this sidebar is continued from page 83)

When this techniques works, it's an opportunity to **praise** and **point out**:

"That was excellent. This shows how sometimes you can get at a tough problem by pulling a few people together to focus on it.

"Each of you probably has one or two people like that on your jobsite. But remember...after a discussion like this, if YOU take an action, YOU OWN IT, especially if something doesn't go well. You can't shift any blame to others who helped you develop a solution. YOU'RE the one who's accountable. It's part of your role and responsibility as a leader.

"On the other hand, if the action works to solve the problem — share the credit. You'll find that will encourage crew members to be motivated to help out on future problems — which will strengthen your effectiveness as a supervisor and a leader."

That's kind of a long speech, but if the opportunity unfolds, put it out there. You might even find the group eager to bend the schedule a few minutes to have a follow-up discussion.

Nothing quite engages workshop participants like people-centered problems that are also jobsite realities.

Many have said that dealing with people-centered problems is their greatest concern as a supervisor — and also their greatest source of satisfaction.

The First 15 Minutes of Session 1

There isn't a magic formula for starting a workshop, but keep these points in mind: (1) Be organized; do your **Pre-Flight Checklist** so you don't spend class time on arrangements or set-ups you could have done ahead of time. (2) The primary purpose of self-introductions is to be an ice breaker, to make everyone feel comfortable in a way that encourages participation. But don't lose sight of your timeline. (3) The way the first 15 minutes unfolds will set the pace for the workshop that follows.

Using the 30 Minute Time Blocks Before & After a Class Session Starts

These are your office hours. You may tell the class about other times you're available to talk with them, but try to arrange your schedule so you can come early and stay late. If it's a two-session or three-session workshop, tell the class what time the doors will open and what time you'll be there.

Make necessary arrangements so the doors are open and the parking lot illuminated for the earliest expected arrival and the latest expected departure.

During these time blocks, wander around and pay attention to the discussion flow and the interaction among participants. You'll get some insight into who the discussion leaders are — who has good ideas and stays on track — and who doesn't. These observations will help you keep discussions focused when the class gets underway.

Use The Rest of This Page to Write Down Any Special Notes You Want to Remember

Topic #	Topic Titles - 3 Sessions - 10 hours	Time	Cum
	Opening Remarks and Introductions - 15 min	15	15
	Overview of Stepping Up To Supervisor	5	20
1.01	The Challenge Ahead (p 8)	10	30
1.03	Copy a Successful Supervisor (p 10)	10	40
1.04	What Kind of Supervisor Do You Choose to Become? (p 11)	10	50
1.07-1.09	Your Attitude About Safety, Quality, Productivity (p 14)	10	60
1.14	Taking Charge (p 20) - 10-15 min	10	70
1.15	Presenting a Strong, Effective Image (p 21) - 10-15 min	15	85
2.07	Establishing Discipline (p 38) - 15-20 min	20	105
3.03	Killer Mistakes (p 75)	15	120
1.20	Six Day Look-Ahead Schedule - detailed presentation (p 2425)	10	130
1.21	Six Day Look-Ahead Schedule - personal plan (p 25-30 min)	30	160
3.15	Jerry Seinfeld's Productivity Secret (p 93) - 20-25 min	25	185
3.22	Action Plan (p 107)	5	190
	Preview Part 2 (p 29)	5	200
1.21	Six Day Look-Ahead Schedule - Review personal plan (p 24/25)	10	210
2.01/2.02	The Four Fundamentals (p 30-31)	5	215
2.03	Fundamental #1 Demonstrate Your Authority by Setting Reasonable Standards and Limits (p 32)	15	230
2.04	Making the Transition and Establishing Your Style (p 33)	15	245
2.09	Fundamental #2: Get Results Through Your Crew (p 38)	15	260
2.16	Fundamental #3: Make Safety, Quality, and Productivity Part of Every Plan, Every Decision, and Every Day (p 50)	15	275
2.19	Safety: Direct and Indirect Costs (p 53) - 15-20 min	20	295
2.20	Safety/Security Action Plan (p 54) - 15-20 min	20	315
2.22/2.23	Safety/Quality/Productivity Exercises (p 60/61) - 10-15 min	10	325
2.24	Which is First: Safety, Quality, or Productivity? (p 62) - 10-15 min	10	335
2.25	Fundamental #4: Become a Confident and Respected Leader (p 64)	10	345
2.10	Earning Your Crew's Respect and Keeping It (p 39) - 15-20 min	20	365
2.18	A Safe Jobsite for Your Crew and Others (p 51) - 25-30 min	25	390
3.22	Action Plan (p 107)	5	395
	Preview Part 3 (p 73)	5	400
3.11	Staying Positive and Overcoming the Odds (p 88)	10	410
2.14	Developing a Self-Motivated Crew (p 49) - 20-25 min	25	435
2.27	Leadership Characteristics (p 66) - 15-20 min	20	455
3.04	Special Situations - Selected Topics (choose 120 min from 11 topics, which total 145-200 min)	120	575
3.10	A Tough Transition: Dealing With Resistance (p 78/79) - 10-15 min	10	585
3.10	Solving Problems (p 85) - 10-15 min	10	595
3.05/3.06	The Problem Crew Member (p 80/81) - 10-15 min	10	605
3.07	Handling Conflict Among Crew Members (p 82) - 10-15 min	10	615
3.08	Working With Other Calls and Crews (p 83) - 10-15 min	10	625
3.19	Keeping Your Supervisor Happy (p 99) - 10-15 min	10	635
3.09	Case Study #4: Between a Rock and a Hard Place (p 84) - 15-20 min	15	650
3.03	Handling Mistakes (p 76) - 15-20 min	15	665
3.17	Calling a Fresh-Crew Crew and Keeping It (p 95) - 10-15 min	10	675
3.13	When Sending a Message, Always Confirm... the Details of What You Just Said (p 91) - 20-25 min	20	695
3.14	Reports and Email: Don't Let the Words You Write Undercut Your Effectiveness... (p 92) - 15-20 min	15	710
3.21	Workshop Review (p 100-108) - 5 min	5	715
3.22	Action Plan (p 107)	5	720
	Closing	5	725
	Total minutes in a 3 Session workshop: 600		

A small group breakout session can be added to these 3 topics (p. 06, 3.07)

Topic #	Topic Titles - 2 Sessions - 6 hours	Time	Cum
	Opening Remarks and Introductions	15	15
	Overview of Stepping Up To Supervisor	5	20
1.01	The Challenge Ahead (p 8)	10	30
1.03	Copy a Successful Supervisor (p 10)	10	40
1.04	What Kind of Supervisor Do You Choose to Become? (p 11)	10	50
1.07-1.09	Your Attitude About Safety, Quality, Productivity (p 14)	10	60
1.14	Taking Charge (p 20) - 10-15 min	10	70
1.15	Presenting a Strong, Effective Image (p 21) - 10-15 min	15	85
2.07	Establishing Discipline (p 38) - 15-20 min	20	105
3.03	Killer Mistakes (p 75)	15	120
1.20	Six Day Look-Ahead Schedule - detailed presentation (p 2425)	10	130
1.21	Six Day Look-Ahead Schedule - personal plan (p 25-30 min)	30	160
3.22	Action Plan (p 107)	5	165
	Preview Part 2 (p 29)	5	170
1.21	Six Day Look-Ahead Schedule - Review personal plan (p 24/25)	10	180
2.01/2.02	The Four Fundamentals (p 30-31)	5	185
2.03	Fundamental #1 Demonstrate Your Authority by Setting Reasonable Standards and Limits (p 32)	15	200
2.09	Fundamental #2: Get Results Through Your Crew (p 38)	15	215
2.16	Fundamental #3: Make Safety, Quality, and Productivity Part of Every Plan, Every Decision, and Every Day (p 50)	15	230
2.19	Safety: Direct and Indirect Costs (p 53) - 15-20 min	20	250
2.20	Safety/Security Action Plan (p 54) - 15-20 min	20	270
		100	370
2.25	Fundamental #4: Become a Confident and Respected Leader (p 64)	10	380
2.10	Earning Your Crew's Respect and Keeping It (p 39) - 15-20 min	20	400
2.18	A Safe Jobsite for Your Crew and Others (p 51) - 25-30 min	25	425
		155	580
3.11	Staying Positive and Overcoming the Odds (p 88)	10	590
		165	755
3.22	Action Plan (p 107)	5	760
	Closing	5	765
	Total minutes in a 2 Session workshop: 360		

< Topics with times in red include a small group breakout session >
 Times shown for each topic in these Session Plans are suggested allocations.
 You extend most of these time allocations, but you probably can't shorten them.
 < Topics in bold black can have a time range. Decide what you'll allocate to each one. >

Topics with times in red include a small group breakout session

Topic #	Topic Titles - 1 Session - 3+ hours	Time	Cum
	Opening Remarks and Introductions	15	15
	Overview of Stepping Up To Supervisor	5	20
1.01	The Challenge Ahead (p 8)	10	30
1.03	Copy a Successful Supervisor (p 10)	10	40
1.04	What Kind of Supervisor Do You Choose to Become? (p 11)	10	50
1.07-1.09	Your Attitude About Safety, Quality, Productivity (p 14)	10	60
1.14	Taking Charge (p 20) - 10-15 min	10	70
1.15	Presenting a Strong, Effective Image (p 21) - 10-15 min	15	85
3.03	Killer Mistakes (p 75)	15	100
1.20	Six Day Look-Ahead Schedule - detailed presentation (p 2425)	10	110
1.21	Six Day Look-Ahead Schedule - personal plan (p 25-30 min)	30	140
3.22	Action Plan (p 107)	5	145
	Preview Part 2 (p 29)	5	150
2.01/2.02	The Four Fundamentals (p 30-31)	5	155
2.03	Fundamental #1 Demonstrate Your Authority by Setting Reasonable Standards and Limits (p 32)	10	165
2.09	Fundamental #2: Get Results Through Your Crew (p 38)	10	175
2.16	Fundamental #3: Make Safety, Quality, and Productivity Part of Every Plan, Every Decision, and Every Day (p 50)	10	185
2.19	Safety: Direct and Indirect Costs (p 53) - 15-20 min	20	205
2.20	Safety/Security Action Plan (p 54) - 15-20 min	20	225
		95	320
2.25	Fundamental #4: Become a Confident and Respected Leader (p 64)	10	330
2.10	Earning Your Crew's Respect and Keeping It (p 39) - 15-20 min	20	350
2.18	A Safe Jobsite for Your Crew and Others (p 51) - 25-30 min	25	375
		150	525
3.11	Staying Positive and Overcoming the Odds (p 88)	10	535
1.20	Six Day Look-Ahead Schedule - detailed presentation (p 2425)	10	545
3.22	Action Plan (p 107)	5	550
	Closing	5	555
	Total minutes in a 1 Session workshop: 190		

Topic #	Topic Titles - 1 Session - 3 hours	Time
1.05	Your Attitude Will Show the Way (p 12) - 10-15 min	10
1.07-1.09	Your Attitude About Safety, Quality, Productivity (p 14) - 10 min	10
1.14	Taking Charge (p 20) - 10-15 min	15
1.15	Presenting a Strong, Effective Image (p 21) - 10-15 min	15
2.06	Can You Run a Tight Ship? (p 35) - 15-20 min	20
2.07	Establishing Discipline (p 38) - 15-20 min	20
2.09	Case Study #2: Which Strategy Would You Choose? (p 37) - 15-20 min	15
2.10	Earning Your Crew's Respect and Keeping It (p 39) - 15-20 min	20
2.13	When Mistakes Happen: Members on a Jobsite (p 49) - 10-15 min	10
2.14	Developing a Self-Motivated Crew (p 49) - 20-25 min	25
2.19	Safety/Security Action Plan (p 54) - 15-20 min	20
2.20	A Safe Jobsite for Your Crew and Others (p 51) - 25-30 min	25
2.23	Safety/Quality/Productivity Exercises (p 61) - 100 min in total, 20-25 min	20
2.27	Leadership Characteristics (p 66) - 15-20 min	20
3.13	When Sending a Message, Always Confirm... the Details of What You Just Said (p 91) - 20-25 min	20
3.14	Reports and Email: Don't Let the Words You Write Undercut Your Effectiveness as a Supervisor (p 92) - 15-20 min	20
3.15	Jerry Seinfeld's Productivity Secret (p 93) - 20-25 min	25
	Total time for these 13 topics can range from 285-350 minutes, depending on individual topic time allocations.	320

Note: this chart can be expanded to 11 x 17 & accordion-folded like the fold-out Six Day Look-Ahead Schedule on Stepping Up page 117. It will be approx. 50% larger.

USE THIS BLANK PAGE FOR NOTES

“Final” Prototype
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Sample Forms

Here are five sample forms which you can copy or adapt to use in managing your workshop. You can print out these certificates and forms directly from this PDF file.

- **Recognition Certificate.** Here are two versions of a recognition certificate: (1) a certificate that needs only a name, a date, and a signature; (2) certificate with artwork only,
- **Class Registration List.** Pass this form around during Session 1. If possible, make copies during Session 1 so each person can leave with this contact information.
- **Participant Information Form.** If possible, send out this form to people when they register for your workshop, and get it back in advance. Review the forms as you make your workshop plan, and make any adjustments that are suggested by the class profile.

If you're presenting a two-session or three-session workshop, try to pass it out during Session 1 and get it back before people leave.

If you're presenting a one-session workshop, forget about this form. You'll get much of the information from the Feedback forms.

- **Workshop Feedback Form.** Pass out the Workshop Feedback Form at the end of the **Closing**. Ask people to fill it out and either give to you — or leave it on the table at the front of the room (this will give them the option to provide feedback anonymously).

USE THIS BLANK PAGE FOR NOTES

Revise the certificate to switch Safety & Quality to fit the order in which these terms are now presented in the 5th edition.

OTOH, the elevated placement of "Safety" fits with topic 2.24, *Which is First...?* **done 8/1.20/19**.

BTW...An XYZ Edition will likely have its own certificate, designed by XYZ.

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Quality Safety Productivity

This is to certify that

has advanced professionally by successfully
completing a training program entitled

Stepping Up To Supervisor

and has been awarded this certificate in recognition of this achievement.

Awarded this date:



It's better not to use this page for notes; your writing might show through when you print a certificate from the master on page 73.

Quality Safety Productivity



It's better not to use this page for notes; your writing might show through when you print a certificate from the master on page 75.

TBD: add Class Registration List Form (also add to Intro activity).

The form will cover:

- first name
- nickname or first name used on the jobsite
- last name
- company or organization
- project name & location
- job title/jobsite role
- # years in construction
- cell phone #
- email address

done 8/19/19

CLASS REGISTRATION LIST

	First Name	Last Name	Company or Organization	Job Title	City, ST	Project Name	Email	Cell Phone	# Years in Construction
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
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20									
21									
22									
23									
24									
25									
26									
27									
28									
29									
30									
	< Workshop Leader >								

It's better not to use this page for notes; your writing might show through when you print a form from the master on page 77.

Tell us a few things about yourself. This will help your instructor understand the range of experiences and job situations in the class — and the goals and expectations people have for the workshop. Your comments are confidential; they'll only be used to help your instructor compile a class profile.

What first name do you use at work? _____ Your last name _____

How long have you worked in the construction industry? _____ years _____ months

Your company's name _____

What kind of work does your company do? Check any that apply.

building heavy highway M/U industrial _____

How long have you been with this company? _____ years

What's your job title or function? _____

How many people do you directly supervise? _____ people

Where do you work? jobsite home office other _____

Describe your current project (project name, location, type, size, duration, special factors)

Check any supervisory training classes or workshops you've previously taken:

- | | |
|--|--|
| <input type="checkbox"/> This is my first supervisory training class | <input type="checkbox"/> Planning/Scheduling |
| <input type="checkbox"/> Leadership and Motivation | <input type="checkbox"/> Construction Law |
| <input type="checkbox"/> Safety/OSHA | <input type="checkbox"/> Estimating |
| <input type="checkbox"/> Communication | <input type="checkbox"/> An Overview course |
| <input type="checkbox"/> Problem Solving/Decision Making | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Contract Documents | <input type="checkbox"/> _____ |

Altogether, about how many hours of supervisory training classes or workshops have you had in the past five years? _____

Who pays your course fee? my company I do other _____

Did you get any reimbursement for your time to attend this workshop?

yes, describe it _____ or it's on company time no

Why did you enroll in this workshop? Check any that apply.

- I've taken other supervisory training classes and I wanted to take this one also
- I was asked or told to attend this workshop by _____
- Stepping Up To Supervisor* was recommended by _____
- I read about or heard about *Stepping Up To Supervisor* and it seemed worthwhile
- Other _____

What are your main personal activities, hobbies, interests?

Turn the page over — there are a few more questions on the back

CLASS PARTICIPANT'S PROFILE - CONTINUED

Over the last few months, what's been the thing you like best about your job? And what do you hope to learn in this workshop that might affect this?

Over the last few months, what's been the most difficult part of your job? And what do you hope to learn in this workshop that might affect this?

What are your expectations or goals for the time you spend in this workshop?

If there's a specific question, topic, situation or problem you want to be sure we talk about sometime during this workshop, briefly describe it below:

If there is any other information that has a bearing on your participation in this course, please describe it below — your career goals; other construction training courses you've taken; special assignments you've had or might have in the future; something else you have on your mind.

It's OK for your instructor to forward this profile to Wil McKnight — where it will remain confidential & be used for the sole purpose of compiling an overall profile of workshop participants. Please initial your OK below.

To the instructor: Review, then send the initialed forms to Wil McKnight at the address on the Copyright Page. _____

HELP TO IMPROVE THIS WORKSHOP

Your feedback helps us improve the *Stepping Up* book and this workshop, and it helps your instructor improve the way he or she presents information and conducts the class. Please give us your comments by filling out this survey. It's anonymous & confidential — you can say anything — just be honest, direct, and constructive. Thank you.


Wil McKnight

Workshop name: _____

Location: _____

Today's date: _____

First, tell us a little about yourself . . .

How long have you worked in construction? _____ years _____ months

- Choose one: I've been a supervisor for _____ years _____ months
and I now supervise _____ people
- I will become a supervisor within _____ months
- I hope to become a supervisor in the future

What's your current position or job title? _____

For how long? _____ years _____ months

Describe your current project (project name, location, type, size, duration, special factors)

Over the last year or so, what's been the thing you like *best* about your job? And what did you learn in this workshop that will affect this?

Over the last year or so, what's been the *most difficult* part of your job? And what did you learn in this workshop that will affect this?

Turn the page over — there are a few more questions on the back

COMMENTS ABOUT THE WORKSHOP, BOOK & POCKET CHECKLIST

Now, tell us what you think . . .

How useful will the ideas, skills, and techniques you've learned in this workshop be **for you on your jobsite or in your day-to-day work?**

1 2 3 4 5 6 7 8 9 10 (1 = lowest rating; 10 = highest rating)

Among the **topics** we covered in this workshop, which ones were **especially helpful?**

Book page # _____ Topic name: _____

Book page # _____ Topic name: _____

Book page # _____ Topic name: _____

Book page # _____ Topic name: _____

Which **topics** were **not really worth the time we gave to them?**

Book page # _____ Topic name: _____

Book page # _____ Topic name: _____

Book page # _____ Topic name: _____

Book page # _____ Topic name: _____

What **topics or special situations** should be **expanded or added** to this workshop?

This workshop ran a total of _____ hours and was attended by _____ participants.

This workshop should be (check one): shorter longer about _____ hours total

What did you think of the book, *Stepping Up To Supervisor*? (check all that apply)

excellent good fair poor "rang true" confusing easy to read

difficult to read interesting boring _____ {_____}

Comments about the Pocket Checklist:

What did you think of the breakout groups? excellent good fair poor

need more need fewer Comments:

What other improvements could we make? Any other comments?

Optional question: What did you think of your workshop instructor? (check all that apply)

excellent good fair poor clear explanations confusing

Specific comments:

Note: all comments & opinions expressed on this form are anonymous & confidential — ie they'll only be used to improve this workshop.
To the instructor: Review the feedback. Make notes or pull copies. Send the originals to Wil McKnight at the address on the Copyright Page. Thanks.

Useful References

From Wil McKnight Associates

In addition to *Stepping Up To Supervisor*, Wil McKnight Associates also publishes *A Positive Attitude: Your #1 Asset*. Like *Stepping Up*, *A Positive Attitude* is a 100-page, self-study paperback and includes a *Pocket Checklist*.

You can see a detailed Table of Contents, order a copy, and download a copy of the *Attitude Leader's Guide* at:

www.HardHatOnline.com.

From Others (TBD)

- classic books & articles*
- Amazon keywords
- search keywords & phrases
- You/Tube keywords
- LinkedIn group names

The *Attitude* book (or selections from it) may also be available as a free download @ HHO. Confirm that decision & add a link.

Replace the previous **Crisp list** w a list of "classic" books & articles, YouTube keywords, LinkedIn group names, and search keywords & phrases. When the revised HHO blog is up, that becomes the lead item on this page — ahead of the *Attitude* reference. Each item's paragraph will explain how to go about reaching its links.

The revised HardHatOnline website will determine how all book sales will be handled. However that turns out, the intro paragraph on this page should explain how to go about ordering WMA titles & books published by others. The HHO website revision is underway now. **Do placeholder now. Update when HHO website revision is done.**

* Include the Haynes book on *Effective Meetings* cited on page 12 w its ISBN. Confirm its availability on Amazon.

USEFUL REFERENCES

This page may be blank if the list of references doesn't extend to 2 pages. The running header will then be **USE THIS BLANK PAGE FOR NOTES.**

The final *Leader's Guide* will net out @ 100 pages + front & back covers, ie a 104 page PDF.

“Final” Prototype
© 2019 by Wil McKnight Associates • August 6, 2019

EDIT NOTES RE: LEADER'S GUIDE FOR CUSTOM EDITIONS (THIS PAGE WILL NOT PRINT IN THE PUBLISHED LG)

Note: this prototype file is presented as a multi-color PDF version— which is the only version I'll publish for the generic 5th Edition of the *Stepping Up* book & its earlier 2002 Spanish version, *Ascienda a supervisor*. If any customer wants a Print version of its customized LG, I'll first edit this file to create their custom LG — then further modify it to create a 1-color Print version. That's the best sequence to follow.

However, most customers won't want a Print edition. They can use the color PDF file to print out the few copies they need & punch them for a 3-ring binder.

Two basic questions re *Stepping Up Leader's Guide*:

1. Does XYZ Construction Company want me to create both a Print version & a PDF version — or a PDF version only?
2. Are XYZ's training locations generally set up with whiteboards and computer hardware/software to support PowerPoint presentations? If so, do we switch from a flipchart/transparency approach to a PowerPoint approach? Or maybe XYZ wants to support both? Actually, a flipchart format is inexpensive & useful — tho it can be a minor TSA hassle if instructor air travel is required.

Specific editorial queries re a Leader's Guide to support a customized book/checklist:

1. re XYZ's nomenclature prefs: Call the training activity a *workshop* or a *class*? What word should we use to refer to people in the *workshop/class*? eg Is it OK to call them *participants*?
2. Get XYZ's input re: selected points to cross-reference from *A Positive Attitude: Your #1 Asset*. See *Attitude* checklists on pages 137 - 143.
3. How do we handle *Ascienda* (the © 2002 SP version of *Stepping Up* 1st Edition)? (ie recognize that, at present, there is a generic SP version, © 2002, of only the original 1st Edition *Stepping Up* — but there is no 5th edition or XYZ version). Is this even an issue, given that supervisors typically must speak & write English adequately to communicate — up & sideways, internal & external?

4. For a PDF version:

- I'll need an XYZ download address.
 - Does XYZ want separate item #s for Print & PDF versions?
 - re Links: show all links as **black underlined text** in the Print version — with a sidebar where we explain the use of links in the PDF version. **If there is no PDF version, all link styling will be edited out of the Print version.**
5. What action verbs to bold? eg emphasis verbs only (**point out, emphasize, encourage**)...or all action verbs (eg **ask, tell, remember, allow**) — which might look cluttered with too much bold text. **My pref:** emphasis words only — with a few possible exceptions for safety-related action words..
 6. Are the Visuals in the Print version to be 1-color or 2-color? (Visuals in a PDF version can be either 1-color or 2-color). This is no big deal; there are only 3.
 7. Even tho this is really the 2nd Edition of the LG, I'm calling it the 5th Edition to match up w the 5th Edition designation on the related *Stepping Up* book. Item #s will be in the 500 series: 500 & 501.

To Do — @ 8/4/2019 (to create a generic copy from the earlier 2/7/2019 LG draft)

1. Review & confirm all page #s.
2. Review/confirm substitution of "topic" for "activity" thruout the LG — which will match the book's universal use of the word "topic".
3. Review all text & sidebars for subtle edits related to 5th Edition changes in the book or LG —both narrative & format.
4. Review & resolve all TBD Edit Notes. Leave most Edit Notes in this Review Prototype, but delete all of them from the FINAL PDF file.
5. Review all LG text for additional sidebar opportunities to highlight & reinforce related safety issues,

STEPPING UP TO SUPERVISOR

On the weekend before Day 1, the reality of “Stepping Up” sinks in!

On Friday, you were a craftsman. There were five in your crew and it was a good one. But on Monday, you’ll become a supervisor, and many things will change — your job title, the kind of work you’re expected to do, and even your status on and off the jobsite. Exhilarating, but a real challenge!

To be a successful construction supervisor, you must “step up” in many ways. In your attitude. In the skills you develop to carry out your basic day-to-day responsibilities. In the way you handle problems and special situations. And — you can’t do it by yourself.

You must get results through other people.



Stepping Up to Supervisor explains the basic ideas, skills, and techniques every supervisor needs to be effective. It shows what lies ahead and presents strategies and checklists to help anticipate each new challenge and deal with it — by delivering work that’s first-rate quality, by working safely, and by keeping his crew on schedule and under budget.

This ***Leader’s Guide*** presents outlines for three workshops:

- **1 Session** @ 180 minutes = ~3 hours total;
- **2 Sessions** @ 180 minutes each = 6 hours total;
- **3 Sessions** @ 200 minutes each = 10 hours total;

plus guidelines and ideas that enable you to create a customized workshop as long as 12+ hours — whatever fits the training situation and the needs of the people in the group.

Since ***Stepping Up To Supervisor*** is written in a self-study format, each participant can also learn about any topics not covered in the workshop by working through those pages of the book on his own.

To follow up a workshop, you can encourage participants to get together for informal discussions on the ideas, skills, and techniques they’ve learned about. This approach has two important long-term benefits.

- They’ll continue to learn: by helping each other anticipate and solve problems; by passing on ideas that worked; and by talking about their experiences with things that didn’t work out as planned and the adjustments they had to make.
- People who get together for discussions will likely spend more time studying, thinking about, and applying the ideas, skills, and techniques covered in the book. They’re more likely to buy in.

Leader’s Guide for Stepping Up To Supervisor © 2019 & Ascenda a supervisor © 2002

Wil McKnight Associates • www.HardHatOnline.com

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