

# TRAINING

FALL 2005

T O D A Y

Chicagoland Chapter



## CC-ASTD Makes a Difference in Africa

by Donna Steffey..... 3

## Achieving the Gain Without the Pain

by Craig Perrin..... 7

## Trader Joe's Adventure

by Len Lewis ..... 10

## Insights in Corporate Training

Interview with Stella Kopelman..... 11

## New Learning for a New Culture: St. James Hospital and Health Center

by Marianne Araujo  
Marcia Cooke  
Therese Yaeger..... 12

## How to Avoid Meeting Muck

by Cyndi Maxey..... 14



## Letter from the Editor

# Spirit of Adventure

If you're in the mood to take a break from your daily routine, this issue of *Training Today* may be just the thing to re-energize your spirits.

As many of you know, a number of CC-ASTD members recently developed a world-class training project to help AIDS/HIV widows and orphans in Kenya and Tanzania. Those on the team who traveled to Africa to provide training—Donna Steffey, Ed Bancroft, Janet Harding, Loukia Verhage, Alice Obermiller, and Jennie Montgomery—have collaborated for this issue, telling their stories of this amazing adventure and sharing their impressions and hopes.

Next, Achieve Global's Craig Perrin

offers a solid case for anyone who's ever had to convince management (always an adventure!) of the need for fun in training programs. We hear from Dearborn Press author Len Lewis on the adventures of Trader Joe's in developing their own unique, fun corporate culture. Then new CC-ASTD member Stella Kopelman speaks to the ways her organization, Discover Network in Riverwoods, has tamed the tiger by engaging department managers in corporate training programs by way of a seamless, finely tuned process. From Benedictine University, Therese Yaeger has teamed up with Marianne Araujo and Marcia Cooke of St. James Hospital and Health Center to tell us of their progress

in exploring ways to blend Appreciative Inquiry (AI) with training. And finally, you won't want to miss Cyndi Maxey's take on adventures—or how to avoid them—in meetings. With her years of experience serving on Boards, Cyndi will have us all sitting up a little straighter in our chairs as she contributes her light-hearted but relevant insights.

It has been my pleasure to serve as *Training Today* editor during 2004–05. It's been an adventure for me and I've learned a lot. I take pride in working with many excellent authors over the past two years, and appreciate meeting so many good people from CC-ASTD along the way. What a great group we are!

—Karen Bolek

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# CC-ASTD Makes a Difference in Africa

by DONNA STEFFEY

**V**oices of the orphans sang out in unison as six CC-ASTD members entered the simple dirt-floor classroom. CC-ASTD ambassadors Jennie Montgomery, Janet Harding, Alice Obermiller, Loukia Verhage, Ed Bancroft, and Donna Steffey traveled halfway around the world to hear these children sing. We also came to help by sharing our business knowledge with the people dedicated to working with orphans and HIV/AIDS widows in Tanzania and Kenya. Fifteen CC-ASTD members back in Chicago donated over 300 hours of community service time to design and plan our training, because they too wanted to help program directors learn more about operating and developing sustaining enterprises.

It started in January, 2005. I had finished reading *The Power of Intention* by Dr. Wayne Dyer. Having just completed my CC-ASTD presidency, I had our 2004 board message, “partnering to make a difference in business and education,” fresh in my mind. My intention was to try and continue to make a difference in business and education. But how?

In e-mail that day was a message from ASTD National. Global Alliance for Africa, a Chicago-based non-profit organization, had posted a volunteer request on the job bank in DC by mistake. National, located in the DC area, remembered the volunteer China HRD project our chapter accomplished in 2003, so they forwarded the request to me.

I immediately called Global Alliance for Africa. Volunteers Debra Pickett and Victor Villanueva described the training project help they wanted, which was based on needs assessments done in Africa.

CC-ASTD then sent out a request for designers/trainers who had international training experience along with a history of volunteerism. Fifty CC-ASTD members responded. From that group, fifteen were selected for Phase One.

Global Alliance for Africa collaborates with African organizations taking innovative approaches to the care and education of HIV/AIDS widows and orphans in Africa. Their goals are to strengthen the organizational structure of the programs, help them develop long-term, self-sustaining auxiliary businesses to support the programs, and improve their ability to teach and coach teen orphans and widows on how to start and run small businesses.

CC-ASTD’s volunteer project was treated like any other performance improvement initiative. A number of needs analysis conversations took place between GAA and our CC-ASTD consultants. These conversations involved the expertise of our own Andi Dunn, PhD, who completed her doctoral research in Tanzania, Nancy Kramer, African Peace Corps volunteer, and Glenda Van Jaarsveld of AVSC, who was born in South Africa. Following this needs analysis, we took the steps of:

- defining our deliverables;
- deciding on courses: two Business, one Train-the-Trainer, and one Coaching course;
- setting up project activity plans and time lines for a June delivery in Tanzania at the GAA African Partner’s meeting; and
- scheduling pilot programs for May with a group of recent African immigrants to the US to test our training materials.

Our business design team included: Letitia Robinson, Kacie Walters, Don Beman, Janet Harding, Judith Filek, Loukia Verhage, and Ed Bancroft. Our Train-

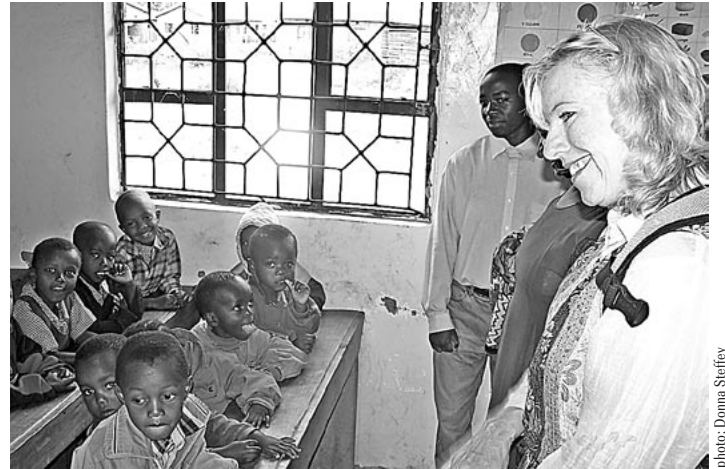


photo: Donna Steffey

Orphaned children greet Donna Steffey and CC-ASTD Team

ing and Coaching team included: Robert Israelite—who had traveled to Uganda in April and who, along with Bridget Purdone, became an invaluable consultant to us on drawing up the final design—as well as Lisa Bly, Megan Morse, Alice Obermiller, and Jennie Montgomery.

GAA decided that our CC-ASTD team should deliver the training we had designed. Any volunteer willing to go to Africa had to get a series of shots and pills, pay their own expenses, and endure 22 hours of air travel.

More importantly, we had to be ready to immerse ourselves in the poverty and grief of a nation that has endured slavery, civil wars, and now HIV/AIDS. We had to be ready to meet orphans whose eyes smiled and melted our hearts. We had to be ready to visit widows who were operating small businesses. These are women whose husbands may have given them HIV before they died, and whose husbands’ families may have taken their homes and left them homeless because that is what the law allows. We had to be ready to meet remarkable community leaders, many of them widows themselves, running these programs. We needed to teach and not feel guilty for having the fate of being born in the US, nor feel completely inept in the presence of such heroes.

Six CC-ASTD members answered the call.

We worked together, side by side with our GAA partners. We laughed and cried together, we visited an AIDS hospital, we pulled bodies from an overturned vehicle on the road and administered first aid, we counted in Swahili with a group of children in a “school” under a tree, and we did our chapter and our profession proud.

What follows here is an offering of team members’ perspectives on what we taught, the challenges we faced, and the training principles we practiced.



photo: Donna Steffey

Neighborhood kids bring their brand of soccer to Ed Bancroft

## Identifying Desired Performance or Boiling It Down

by Ed Bancroft

*When we are done, what do we want people to know how to do?*

This question drove all of our drafting and redrafting. It pushed us to be better.

Being a performance management consultant made me the likely candidate in this group for the role of “boiler.” It wasn’t always easy to identify which one or two core skills should be taught per topic so that participants would be more likely to apply the new learnings. Sometimes this meant going back and refining models for how to market a business or teach others. At one Chicago meeting, several of us jumped up to the board and started brainstorming madly until we emerged with the five key steps to starting a business. That became one of our frameworks for the many meetings that followed.

We worked tirelessly within the team to “get it right.” I think we were a little fearful of creating an “international incident” with a content or training faux pas. Group members opened themselves to direct and sometimes bristling feedback. Everybody wanted to *respectfully* bring value to a place very different from our own.

In Africa we started by visiting GAA partners and their client businesses. These

visits gave us a real sense of the challenges of starting and running a business. They also built trust and optimism in the trainer group. The visits inspired several new tools developed on the ground to help participants learn from each other. During the training, I conducted a lively, multi-language summary session on what they had learned about business. *Why Are Some Businesses Successful?* was a tool with specific African examples that summarized what we saw and heard during our visits, and what they discussed in class.

We created other tools to be used during our follow-up coaching, including:

- *Advising for Business Success*—a sequence of steps to guide a new business;
- *Roles and Responsibilities*—a worksheet delineating the key roles and assignments as a business is planned; and
- *Learning Plan*—a plan for on-the-job learning.

*Advising for Business Success* was a paraphrase of comments made by one of the participants. Two of the tools were a variation of succession planning work that I have been doing in the US. All tools grew organically from our intense involvement and desire to respect our clients, blend our two worlds, and partner with GAA.

What is the feedback since our departure? People are working hard to incorporate the skills into their critical daily work. They’d like to see ASTD trainers back once or twice a year.

Currently, ASTD/GAA’s Phase Two plan is to design another program to be delivered February, 2006.

*Ed Bancroft is President of Bancroft Consulting Inc., an organization dedicated to creating unique and practical performance management strategies that make a measurable difference. Ed has authored many articles. His most recent is CEO Measurement and Evaluation: The Three P’s, in the June 2005 issue of Trustee Magazine. Contact Ed at ed.bancroft@sbcglobal.net or 847-446-6491.*

## Teaching Money Management

by Janet Harding

*“Never doubt that a small group of thoughtful, committed people can change the world. Indeed, it’s the only thing that ever has.”*

– Margaret Mead

The plight of Africa had been bothering me for some time. I recently saw the

movie *Hotel Rwanda* and recalled that after WWII, the world promised to never let another Holocaust happen. *Didn’t that include Africa?* But what could one person, hundreds of miles away and with limited funds, do for a continent with such mind-boggling issues? Being part of this project was my opportunity to make a difference.

The GAA partner I worked with was WIA, Women in Action. WIA operates a day care program for orphans, provides home-based AIDS care, and awards small business grants to widows. Our visits were enlightening and prepared us well for our training.

I was the first presenter. Talk about butterflies. My unit on Money Management had two goals:

1. Help the GAA partners coach their clients—widows who were recipients of small grants—set up and manage a small business.
2. Help the partners better manage the income from the business activities of their own organizations.

The day started with an example using local produce and modes of transportation. We were told that participants might interact only when prompted, and with responses that would “please” Westerners—NOT! Two minutes into my presentation, a hand shot up and I was informed of the “preferred” mode of transportation in Africa and the “correct” name of the produce.

You can imagine how I was feeling at that moment. I smiled and explained that we would spend the day “learning from each other” and that my only reason for being there was to help ensure the long-term survival of their organizations so they can continue helping widows and vulnerable children in Africa. That was the moment they accepted me and, indeed, our entire group. Yes, we were there to share our expertise, but I also accepted and embraced the fact that we would learn a great deal from each other.

Life in this part of the world is difficult, but the African people we met were incredibly resilient and committed to their own development. This journey was life-changing, and I was honored to have been part of this project.

*Janet Harding is Senior Trainer at Washington Mutual Bank, which has a strong commitment to community development. Washington Mutual donated funds and notepads for the children. Janet’s*

colleagues sold popcorn during local training classes. The money raised went to school supplies and grant money for WIA. Janet can be contacted at: [jhardin14@hotmail.com](mailto:jhardin14@hotmail.com).

## Promoting Business Marketing by Loukia Verhage

As Americans, we are so accustomed to sophisticated marketing that we don't realize the simplest marketing plan can have a great impact on those outside our culture. The materials developed for delivery at Tumaini (HOPE) Community Center were simple. Imagine, though, trying to explain the concept of an "elevator speech" to people who may eat only one meal a day, let alone ride on an elevator! The problem—what is an elevator speech? OK, how about a "poster phrase," as they call those 2' x 4' ads that plaster buildings? Once I introduced the concept of the poster phrase, we went to work on one. All parties answered three questions:

1. What does your business do?
2. How are you different?
3. Why are you helping customers?

Once answers were established, participants crafted a single sentence to explain their businesses. Having the participants work with each other interactively was the key to success. The noise level in the room was deafening and glorious. This allowed the participants to practice business discussions in a safe environment. In addition, we discussed how to have others refer customers or "spread the word."

All of the exercises were successful due to a few guidelines that I have learned in my own consulting practice.

- Have instructors visit each participant's table to assist with materials, further translate, or explain points.
- Demonstrate what the participants need to do by explaining the objective of each exercise, elaborating each step, and providing examples.
- Create a safe environment for practice by reminding them that it is OK to err here in the classroom so they get it right before stepping into the outside world.
- Pay attention to the face and body language. By enunciating words clearly and slowly and by making use of the interpreters present for every three sentences,

we guaranteed understanding.

The result? An incredible desire among the attendees to participate, learn, and create. They left with a marketing phrase that they could use to grow their business and develop more self-sufficient organizations. As they go forward, they will also be able to coach the widows and orphans running small businesses to do the same. In other words, they left the community center with HOPE.

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## Coaching the Coaches By Alice Obermiller

As a career and professional development coach at the University of Chicago GSB, my role in Africa was to share the basic principles of coaching. The training began and I reviewed the foundations for building trust, giving advice, checking for understanding, and establishing follow-up procedures. Everything was going well, and then... a trainer's nightmare! Between a late team start and translation into Swahili, time was running out. The exercise planned for that point in training was to practice the advising techniques to foster mentoring relationships between partners—but if I continued as planned, my training would significantly cut into the next presentation. If I just delivered content, they would miss out on a great exercise.

What was I to do?

It was then that I thought of Margaret, whom I met the evening before as we gathered with the GAA partners for networking and barbecued goat at a local restaurant. Margaret, an AIDS caseworker, is a young mother of two. She shared her story of living in a 6' x 6' room with her children and two brothers whom she supports. She talked about the sister who, out of shame, was unable to acknowledge her disease and died of AIDS. She also spoke of the constant choices she personally must make between buying food for her family or giving money to someone who needs it to buy a wooden box so a loved



Alice Obermiller shares tips on advising clients

one can be buried with dignity. This is Margaret's life, and my time with her shed light on a profound truth about coaching: those who coach and advise others for a living frequently need that same deep support themselves.

The group was attentive, so I erred on the side of finishing the content. With every content point, I referred to how they could help one another as well as their clients through the use of these techniques. From the nods in the audience, I could see the added emphasis resonate. I proceeded to complete the explanation of the remaining steps, opened the floor for questions, and then encouraged the partners to complete the exercise during their remaining time together.

I agonized over the choice to forge ahead. The in-class exercise could have been a fabulous experience and an excellent learning tool. Did I make the right choice? It's hard to say. In the end, I do think the training conveyed its intended meaning based on one simple comment from a partner: "Sister, I like what you have to say." For a girl from a small town in Indiana, being called "sister" in Africa was glowing praise. I think I did all right.

*Alice Obermiller works for the University of Chicago Graduate School of Business, providing leadership development coaching and programming to MBA students. Readers may contact Alice at [aobermil@ChicagoGSB.edu](mailto:aobermil@ChicagoGSB.edu).*

## Delivery Training Techniques by Jennie Montgomery

*From one root grew a variety of fruits.*

Traditional thinking and some media communication would have us believe that Africa is a country of one race and one ethnic group. In reality, the continent of Africa is rich in every dimension of human diversity, including financial status (not everyone is poor) and educational



background (there are hundreds of universities). This spectrum of diversification creates a beautiful, exciting atmosphere for continuous learning.

Our CC-ASTD trip offered many opportunities for the team of professionals to teach—but also to learn. One such learning opportunity took place in the Olduvai Gorge museum where we marveled at the plaster cast molding of footprints of early man. According to archeologists, the human race began on this continent. At one time in history we were all the same, but evolved into the different races and ethnic groups we see today; from one root grew a variety of fruits.

The project and our diverse team of trainers also emerged from one root. The root was an idea developed by GAA, who wanted to make a difference in the lives of others by creating economic development through education.

The Training Techniques unit I facilitated included five diverse methods of training, using techniques that engage and motivate participants. The techniques will help the participants be more effective when training the widows and orphans who are their clients. In an activity designed to check understanding, the participants drew a picture representing



The CCASTD Team sees Africa on Safari  
left to right: (front) Jennie, Loukia, and Janet  
(back) Donna, and Alice

what they learned during the training. It was amazing to see how each drawing was representative of the diversity of thought in the group. We often overlook the fact that a person's field of work and background greatly influences his or her methodology for working on problems.

The activity energized the participants. When asked whether they preferred to stop for lunch or continue, they voted to continue. Participants beamed with pride and excitement as they explained their drawings, the fruits that emerged from the conference.

From the one root (an idea for change), our diverse team was able to create a variety of fruits that will nourish the people of Tan-

zania by helping them to be self-sustaining. Jennie Montgomery is Principal, trainer, and diversity consultant with Professional Success, Inc., an organization that combines real-world corporate experiences, training expertise, and years in the trenches to guide learners through diversity awareness and strategic planning. Jennie is at [jmont@profsuccess.com](mailto:jmont@profsuccess.com) or 773-685-7469.

### Post Script by Donna Steffey

One more remarkable part of this story was meeting in Tanzania with Dr. Ray Masha, an extraordinary GAA director who is now running for parliament. He told us that he read *The Power of Intention* by Dr. Wayne Dyer. When he assured us that it was his "intentions" that brought us to Africa, I knew that our CC-ASTD ambassadors were, in fact, "partnering to make a difference in business, education... and now Africa."

For information on the GAA, visit [www.globalallianceafrica.org](http://www.globalallianceafrica.org).

Donna Steffey is President of Vital Signs Training, specializing in design and delivery of award-winning performance improvement programs. She is also a past president of CC-ASTD (2004) and a contributing author to *Real World Communication Strategies that Work* (2003) and *Real World HR Strategies* (2004), both published by Insight Publishing. Donna can be reached at [Itrainum@aol.com](mailto:Itrainum@aol.com) or 815-248-3104.

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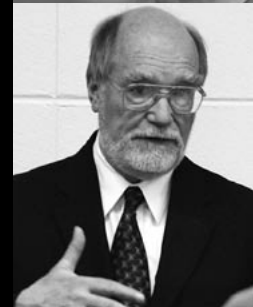
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# Achieving the Gain Without the Pain

by CRAIG PERRIN

As specialists in learning and development, we strive to achieve lasting behavioral change—and therefore performance improvement—in the workplace. One ongoing challenge is how to engage participants in training. More and more, we find that making training fun is one of the most successful methods.

In an article for *Enterprise Reengineering*, Nancy Lee Hutchin describes the positive effects fun can have on employees, including:

- Reducing stress by increasing respiration and circulation, and suppressing stress-related hormones
- Increasing creativity
- Increasing the trust levels among the individuals who share the fun

As obvious as this appears to be, corporate management does not always agree about the value and place of fun in training—an attitude many of us may have encountered. Their reasoning is often, “School (training, education) should not be fun. If I, as an executive, invest in training, I want people to gain skills that produce measurable bottom line results. They can’t be doing that if they’re having fun!”

The Catch-22 for the training professional is that you will be held accountable for results from training, but may not be allowed to develop and conduct training that achieves the best results.

How can you deal with this conundrum? The best approach is to appeal to the executive’s practical focus. First, discuss the goals of your training in terms of behavioral and performance change. Then introduce the importance of learning by doing in simulations that closely parallel actual job tasks, but in a non-threatening and supportive setting. Help your managers understand two key outcomes: that participants become comfortable applying new skills and gain confidence in their new abilities. Explain to executives how occasional games and other activities are not frivolous but, in fact, have this very serious purpose.

## Defining “fun”

When you consider it, there are many definitions of “fun,” and it behooves us as training professionals to be acutely aware of the nuances. “Fun” may be defined as both enjoyment and amusement. This is a critical issue because, as Marc Prensky notes in *Digital Game-Based Learning*, “...while amusement may, in fact, be frivolous, enjoyment and pleasure are certainly not. We enjoy and take pleasure from many of the most serious things in life... The enjoyment, pleasure or ‘fun’ we derive from these activities is the principle source of what makes us return to do them again and again—and there is increased ‘fun’ from the fact that the more we do them the better we get, the easier they become, and the more goals we achieve.”

And that is the essence of the argument for making training

fun. It gets participants engaged, it encourages them to try new behaviors, and it provides a non-threatening setting to practice the behaviors—thereby helping them gain the confidence to apply new skills and concepts in the workplace. As the media philosopher Marshall McLuhan once observed, “Anyone who tries to make a distinction between education and entertainment doesn’t know the first thing about either.”

## Building fun into the training design

A number of practical steps in learning design and classroom facilitation can help you make training both fun and functional.

- Create “fun with a purpose.” Integrate fun with your objectives and training content by building engaging and enjoyable activities directly related to the learning process. These activities should connect people with the content and motivate them to apply content to their jobs. As training professionals, we do not merely stack fun activities on top of content to vary the tempo—they should be integral to the content. For example, including trivia questions in a module may be fun for participants, but unless the questions relate to the content, they do nothing to further the learning process.
- Make the fun activities relevant to the professional lives of your participants. If participants see no practical value, fun is meaningless to them. However, if you’ve researched and distilled relevant content, you can integrate enjoyable activities. Fun also helps vary the pace and tone: relaxed participants, who don’t always feel challenged in a pass/fail situation, are more receptive and responsive.
- Realizing that people learn differently, engage them in different types of activities—visual/aural, team/individual—as well as with different types of technology. As every trainer knows, extended reading is no longer a primary activity for individuals of any age. People now have shorter attention spans and are accustomed to diversion and entertainment. This is not necessarily a generational issue; every age group is now more comfortable with a mix of media.
- Move smoothly through your training structure from the value of new skills to a demonstration of the skills, to an analysis of the demonstration, to practicing the skills, to feedback on the practice, to planning application of the skills in the workplace. This fundamental structure is the core of training; integrated fun helps participants to engage that structure.

## Determining the appropriate times for “fun”

Serious topics require serious treatment. Since work life includes elements of both comedy and drama, training should include them as well.

Consider a supervisory training module on correcting perfor-

mance problems or terminating an employee. While these are serious issues, training need not be boring. Elements of drama—in a story, a video, or a role play—are not precisely “fun,” but they engage learners with the content in appropriate ways. A related matter is varying the level of seriousness from module to module. In leadership training, we recommend following a session on correcting performance, for example, with a more upbeat topic such as recognizing good performance.

Another issue relates to individual sensitivities and differences. We scrupulously avoid humor that may offend even one participant—not just because of the individual harm that causes, but also because one person’s alienation makes others in the group uncomfortable, which is the very opposite of “fun.” So we take care to structure fun activities that ensure that everyone can continue to learn.

Closely related is the issue of cultural diversity. We recently developed a module on serving diverse customers—a challenging topic because we needed to make people aware of cultural stereotypes without saying bluntly that they may be prejudiced, consciously or unconsciously. To get the program right, opening eyes without opening unproductive confrontations, we involved a diverse group of developers—some of whom were living the issues we covered, such as physical limitations, language barriers and cultural differences. The result was an engaging module on highly sensitive topics, with both dramatic and comic elements used to powerful effect.

### Technology can be fun, but is it always effective?

We’ve all seen cycles in which a particular technology appears and is hailed as the next great thing in training. Then, after we’ve attempted to integrate it into training, we realize our expectations for cost or effectiveness weren’t reasonable, even though the experience may have been fun for the trainer or participants.

One recent example is e-learning. As powerful and enjoyable as it can be, we’ve found that, in its present form, e-learning rarely stands on its own for the delivery of soft skills training. The reason is that the learning process consists of multiple phases:

- 1) Commit to learn
- 2) Assess current performance
- 3) Acquire knowledge
- 4) Develop competence through practice
- 5) Apply new learning

This sequence of learner-centric activities supports new behaviors, improves job performance, and ensures the success of soft skills training. However, the timing, emphasis and media associated with each phase will vary based on content, audience and logistics. The selection of the appropriate medium for each phase must reflect its desired outcome, not the cost or convenience of a given technology.

Here are some examples of how this mix of methods can be applied:

- In phase 3, knowledge acquisition, classroom participants learn by interacting with each other and the facilitator. That powerful benefit is lost in the solitary experience of an asynchronous e-learning “equivalent,” whether the learning methodology is fun or not.

- Direct, real-time interaction is even more important in phase 4, developing competence through practice. Real-time practice with another human being is essential to soft-skill mastery. In a safe, comfortable and enjoyable setting, learners can rehearse skills, receive constructive feedback, observe others using the skills, and offer constructive feedback. The goal of this phase is to develop baseline competence and build confidence that motivates application in the workplace.

For those phases of learning that lend themselves most successfully to e-learning, injecting fun into training delivery may be even more important than in a classroom setting because of the lack of direct human interaction. You can build fun into e-learning through media and learning activity structure: engaging interactive vignettes and skill demonstrations employing live action video or audio and dynamic still images, game-based activities and realistic simulations.

### Adding fun to the bottom line of training

The ultimate measure of training—and of our success as training professionals—is its impact on behavior change and improved performance in the workplace. Presentation serves these key outcomes. In each new program we are challenged to develop relevant activities that engage training participants to help them acquire and apply new knowledge and skills. Making training fun can be a highly successful way to drive that process.

*Craig Perrin is Director of Product Design for AchieveGlobal (www.achieveglobe.com). Craig can be reached at craig.perrin@achieveglobe.com.*



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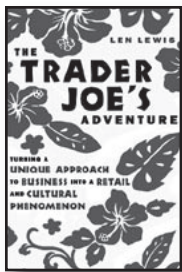


## Best Practices in OD

# Trader Joe's Adventure

by LEN LEWIS

There's a saying in retail circles that the last 100 feet are the hardest. Every effort can be made to heighten the efficiency of the supply chain and get products from the manufacturer to the retailer's back door in the most cost-effective way possible. Yet, if in-store execution is shoddy, retailers simply end up shooting themselves in the foot.



A big part of this execution—the last 100 feet—at the hugely successful grocery chain Trader Joe's is its employees: people who like what they do, go out of their way to help customers, and even engage in some suggestive selling. Why has Trader Joe's been able to master the last 100 feet? Here are a few reasons why:

- **Compensate workers well.**

Wages may attract high-quality employees, but are not necessarily the reason they remain loyal, as any human resources expert can attest. Employees stay because Trader Joe's offers compensation on the human level as well as the wage level. Intangibles such as respect for employees' opinions and regular opportunities for them to develop their talents are part of their compensation.

- **Encourage multitasking.**

At Trader Joe's, it's not unusual for store managers to sweep the floors, stock shelves, and work the registers when the need arises. Multi-tasking is part of a collaborative work environment that allows each employee to feel important rather than relegated to the bottom of the heap.

- **Make it fun.**

Everyone at Trader Joe's, from the captain on down, truly appears to enjoy what they do. "They don't seem to feel bad about being there," notes one retail consultant, adding that he's observed the same attitude at Trader Joe's stores across the country.

By taking an adventurous approach to developing their own unique business model with these and other best practices, Trader Joe's has achieved a level of success with its employees—and customers—virtually unsurpassed in the supermarket industry.

*Len Lewis is the author of The Trader Joe's Adventure: Turning a Unique Approach to Business into a Retail and Cultural Phenomenon (Dearborn Trade Publishing). Len can be reached through his publicist, Courtney Goethals, at 312-894-0322. Readers may also contact Len directly at lenlewis@optonline.net, or through his Web site at lenlewiscommunications.com.*



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## Insights in Corporate Training

# Interview with Stella Kopelman

*In this issue, Training & Development Manager Stella Kopelman of Discover Network in Riverwoods talks about the critical process of engaging managers in the training programs of employees.*

**Training Today:** *Stella, what kinds of training are offered at your organization?*

**Stella:** Discover has several training departments that support various areas. My team is called Discover Network Training & Development. We provide programs for all Discover Network employees on core industry and business knowledge. We also produce custom programs for various functional areas.

**Training Today:** *How do you communicate with managers to win their support for your training initiatives?*

**Stella:** Manager buy-in, support and involvement are not optional for us to take on a training project. Without manager involvement, 87% of learning is lost after 30 days. Our team, and ultimately our company, cannot afford to engage in activities that will not be retained long-term. We have made a business decision that the

only way for our department to be considered a valuable resource rather than a cost to the organization is to show measurable improvements; we cannot do that without manager support and involvement. Therefore, we involve managers every step of the way through a process we've developed called Manager Leveraged Learning (MLL).

The three phases of this process are:

1. Manager Alignment – Prior to training, we provide managers with job aides to help them have a dialog with employees regarding their expectations for the learning that's about to take place.
2. Learning Event – During training, we involve managers in the course to show a partnership between training and the manager. It is very important for managers to show employees that they are interested and that they support the program.

3. Skill/Knowledge Application – After the training, we provide managers with coaching and job aides regarding how to work with their employees to turn concept into reality. This is critical for retention of knowledge/skills.

**Training Today:** *What are benefits of training to the managers of those you train?*

**Stella:** Managers are benefited because we engage in training activities that support their goals. By focusing on training needs that directly support our strategic initiatives, we are able to measure and report on improvements in business results. The managers of those we train are very interested in seeing changes that help them reach their goals.

*Stella Kopelman can be reached via e-mail at [stellakopelman@discoverfinancial.com](mailto:stellakopelman@discoverfinancial.com), or by phone at 224-405-3868.*



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# New Learning for a New Culture: St. James Hospital and Health Center

by MARIANNE ARAUJO, MARCIA COOKE, THERESE YAEGER

**W**ith the rising costs of health care, it is more important than ever to address staffing and training costs in hospitals. An ongoing concern for hospitals is training and maintaining an exceptional nursing staff. But how does a healthcare center with multiple sites create effective training sessions that create a “generative learning process”? Chicago’s south suburban St. James Hospital provides one such successful scenario.

## St. James Hospital and Health Centers

Since 1911, St. James Hospital and Health Centers has provided the most advanced, yet compassionate care for its patients. It has evolved from a 50-bed acute care hospital to a two-campus healthcare delivery system that today serves more than 550,000 patients. With campuses in Chicago Heights and Olympia Fields, St. James offers a wide range of services and a unique blend of both allopathic (M.D.) and osteopathic (D.O.) philosophies of medicine. Through the ministry of the Sisters of St. Francis of Perpetual Adoration, St. James is the only healthcare facility in Illinois recognized by the Center for Innovation in Healthcare Facilities as one of the *top ten most innovative facilities in health care*.

## New Culture, New Learning!

St. James has recently completed a \$90 million expansion. However, with the purchase of the new hospital, a culture shift to the mission, vision, and values of the Sisters began to evolve. To surface possible fears and instill new hopes in the new staff members, the Sisters sought an element of deeper engagement in learning. This called for a shift in approach from videotapes and PowerPoint lectures providing “information required” to an inquiry-based learning model that parallels an Appreciative Inquiry process.

## Appreciative Inquiry and Positive Questions

Appreciative Inquiry (AI) architects David Cooperrider and Diana Whitney (2005) describe AI as “the co-evolutionary search for the best in people, their organizations, and the relevant world around them. In its broadest focus, it involves systematic discovery of what gives life to a living system when it is most alive, most effective, and most constructively capable in economic, ecological, and human terms. AI involves, in a central way, the art and practice of asking questions that strengthen a system’s capacity to apprehend, anticipate, and heighten positive potential.”

AI postulates building on organizational strength as a key factor in the speed of change and learning. Ludema’s work on the unconditional positive question is then furthered by Araujo’s work for health care that defines generative learning as learning in which the participant plays an active role, involving an exchange of information building on the knowledge present in the room, and reaches a “crescendo” of high-energy learning. The ultimate goal is to take the knowledge of the individual through inquiry and convert it to information shared, bringing each individual to the highest level of knowledge in the room. Learning generates new and additional learning, becoming even more generative (Araujo, 2003).

At St. James, all new training classes have begun using the “Unconditional Positive Question” as described by Ludema, et al. (2003). Questioning complements the AI process to further generate knowledge and create high-energy learning. Learners are each given benchmark data and publications regarding specific topics that meet their individual interests. Each individual reads, reviews, and prepares to teach the subject matter to fellow orientees. An expert clinician is in the room, ready to add new knowledge if a question surfaces that no one else can answer.

For St. James’ newly hired nurses, higher order thinking is being fostered by exposing the orientees to the larger healthcare issues and addressing how patient problems can impact not only on the patient, but the community and the healthcare industry. For example, the topic of safety is introduced using the Patient Safety Goals as defined by the Joint Commission for the Accreditation of Healthcare Organizations. It is brought back to the institution level by discussing hospital-specific initiatives. Finally, the impact on the individual patient and community is addressed.

## A Generative Learning Process

This process has already been measurably successful, possibly because a nurse, by nature of his/her job, is both learner and teacher. In this process, learning moves from a competition to an exchange; away from power by withholding to power by sharing (teaching); from a passive to an active exercise; and from individual knowledge to group knowledge.

This new application of the principles of AI as a model for change creates an environment of energy, self-confidence, and positive business outcomes. Marcia Cooke, Clinical Nurse Specialist in Nursing Education and Research at St. James Hospital and Health Centers sums it up stating, “Knowledge sharing is different than teaching. When I knowledge-share, I voluntarily give you my knowledge. You give me yours if you choose to share, we ask some more questions, and we create possible new knowledge. Knowledge sharing is active, requires energy, and then takes new energy transitioning from storage to action.”

Continuing with this model’s success, future orientations will be guided by the following principles:

1. An appreciation for the patient experience

2. Care coordination
3. Building on what is known
4. Developing critical and creative thinking
5. Creating a learning experience
6. Building loyalty
7. Developing a culture of one hospital with two campuses

Considerations have been given to learning beyond the classroom setting as well. Nurse managers, charge nurses, and preceptors are integral to the success of this new model. The nurse educators are teaching new nurses to teach by designing information sessions to explain the process, outlining the unit-based orientation program, and addressing questions that will encourage knowledge sharing and generate learning.

**People will support what they help create.**

Evaluations by the new practitioners have been overwhelmingly positive. While the skills taught are procedural, they involve learning to seek evidence for practice through the study of current research,

allowing learners to apply that research in work settings, and promoting generative learning as part of a high level of nursing practice.

**St. James' Future**

The new workshops offer a fresh approach—ultimately one that must demonstrate fiduciary and business accountability. Therefore, the program will be measured by retention and new staff turnover. Soon this generative learning process will be introduced for full house orientation and will be used to train specific skill sets required in multiple units and multiple job levels.

\* \* \* \* \*

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*Therese F. Yaeger is Associate Director of the Organizational Development Doctoral program at Benedictine University, where she also teaches OD and OB courses. Her recent publications include Global and International Organization Development with Sorensen, Head, and Cooperrider, and Appreciative Inquiry: An Emerging Direction for OD with Cooperrider, Sorensen, and Whitney. She can be reached at tyaege@ben.edu.*

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by CYNDI MAXEY

**W**hy is it that the most pleasant person in everyday life turns into the most difficult at the monthly meeting? What is it about the Board table that converts team players into silent observers or arrogant warmongers? How do you accurately describe the negative effects of the two-hour conference call – pandemonium? – boredom? These scenarios typify a common, pervasive problem in business and professional life today—meeting muck. Meeting muck is the oozy, slimy, muddy, cloudy, insidious gook that invades even the best-intended meetings and conference calls. It dirties the cleanest of agendas; it drains the most energetic of work relationships—and sadly, slows potential productivity. Meeting muck is exasperating because, like mud after a heavy rain, it seems to return and return no matter how hard you try to eliminate it.

We trainers and developers like to talk about meetings as team efforts, but in the final analysis, a really great meeting is the product of really great individual efforts—mixed with a strong dose of will power and discipline. The late Chicago Bears running back Walter Payton said, “You can’t change the team until you change yourself.” He spoke of football, but it works for meetings, too.

To change yourself, first be aware of the most common behaviors that slow down productive communication. Second, recognize when **you** are the one demonstrating those behaviors. Third, change your style and practice positive, helpful behaviors even in the face of others’ inability to do so. This is often difficult. Others on the conference call or around the board table can unknowingly lead you to immature and ineffective comments. Be careful. Take deep breaths. Keep your contributions healthy. When you sense muck, carry your own mop. Don’t wait for someone else.

## Ten Common Causes of Meeting Muck and What to Do About Them

1. *Agreeing with everything.* This sounds like a misnomer but it gets in the way of progress. You’re probably trying to save face or politick in some way if you’re doing this. *Mop-up tip:* Play devil’s advocate. Say you’d like to stir up more discussion by presenting the opposite point of view. Example: “We have good reason to be happy with recent conference attendance; just for fun, though, let’s consider what we’d do if next year’s economy goes flat and discretionary income changes. I think we should be prepared.”
2. *Dominating discussion.* If you’re doing this, you’re trying too hard. Listen to yourself; if you hear your own voice longer than a few minutes at a time, you’re not practicing conversation—you’re practicing lecture. *Mop-up tip:* Look at the faces around you and watch for signs of unrest—fidgeting, eye rolling, side glances, etc. When you see these, people are antsy and ready for their turn. Over-use of handouts is another red flag. If you’re on a conference call, make a concerted effort to time yourself for three-minute contributions only. Watch your watch. Example: “Here are my three main points about selecting a new vendor for the upgrade. I’m sure many of you have others, and I’d appreciate your consideration of these.”
3. *Side chatting.* This is just poor manners. Sadly, it is observed more and more. As technology influences our listening ability, we become easily distracted. Too many younger workers, especially, think it’s OK to sidetrack during business. It just looks and sounds bad, and it’s annoying to all. *Mop-up tip:* When you have an urge to chat, jot a note in the margin of your handout to remind yourself to do so later. When others try to start side conversations with you, gesture for them to write something down or mouth the word, “Later.” Example: Write a note to yourself, such as “Ask Jolene why George isn’t here today and why she has a new laptop.”
4. *Complaining.* A meeting is not a venting session unless it is specifically designated as one. The tendency to complain without suggesting or proposing a solution that can be discussed openly is frustrating for all. *Mop-up tip:* Don’t complain without contributing a solution idea. Example: “My department really got confused during that last IT training session; could we possibly allow more time for the next one?”
5. *Digging up dirty laundry.* All solutions lie in the present and the future. Dwelling on old mistakes will only muck up the clarity of new ideas. *Mop-up tip:* Resist any urge to relive the past. If you must, mention it briefly with an extremely relevant correlation to the present or future—tied directly to problem solving. Example: “Three years ago we made that mistake; we focused on our brochure rather than our member needs. What we can learn from that today is to design a brochure that’s crisp but very clear about the benefits. We want to make money, not lose it.”
6. *Allowing too many chiefs.* This happens especially to the kindest facilitators and meeting leaders. In the spirit of participation, too many people talk too often with too much power. *Mop-up tip:* You don’t have to be the leader to help clean up this one. You can actually say, “Joe is in charge today. I feel we should let him decide the next step.” And if you are the leader you can make a mental note when discussion is getting out of hand. You then need to make a clear statement of control. Example: “It’s clear there are many strong opinions here. In the interest of time, I’d like to suggest we go with the original plan and fine-tune the plan at a later date.”



7. *Displaying anger.* The best teams have conflict. The best meetings negotiate through it all the time. However, expressive, hurtful anger clogs up progress. *Mop-up tip:* When you feel angry or frustrated, take a deep breath and make an I-Statement as calmly as possible. Example: "When I hear this Board talk about the budget at every decision point, I get frustrated because I feel we should balance other things with it—like employee satisfaction and lessons learned when we take shortcuts. Is it possible that we can put budget aside for a few minutes to get at other issues?"
8. *Making assumptions.* This happens at meetings when nobody paraphrases or checks in. Especially on conference calls, this problem pervades. *Mop-up tip:* Use paraphrasing and questioning frequently. Example, "What I hear you saying is you're bored with this approach. Am I correct?"
9. *Interrupting.* This is one of the simplest muck-ups, yet it's one of the hardest to cure. It's just a bad habit. *Mop-up tip:* Ask a colleague to say your name out loud each time you interrupt someone at the next meeting. (Make sure others at the meeting know that you're working on this.) Have patience and remember that your speed of thinking and listening may be different from others' and that you'll never get the main point if you interrupt. You'll only be seen as rude.
10. *Prejudging.* This will be evident at a meeting where an idea is brought forward and members pounce on it. Every idea deserves to be aired; often the best plans result from what appear at first to be misdirected ideas. Leaders especially need to be aware of pre-judging and allowing all opinions to be heard—realistically, of course, within the time frame. *Mop-up tip:* When you catch yourself jumping too quickly down the throat of an idea, stop and ask an open question instead. Example, "That's interesting, Sally. How do you figure that baby ducks will be a trendy theme for the 2006 sales effort?"
11. *Bonus tip: Living in the past.* This tendency creeps into a meeting that is overrun with old timers—old timers

of any age who have been around too long to accept new ideas and new approaches. You can detect this muck up easily when you hear these phrases: "We tried that before and it didn't work," or "We lost money on that before," or "That idea comes up every year." *Mop-up tip:* When you hear nay-saying from yourself or others, acknowledge the thought and ask to hear or be heard anyway. Example: "I appreciate your perspective, Joe. But let's hear the rest of the plan. It might work this time in this economy."

Meeting muck—don't let your meetings get bogged down in it! If you're the leader or facilitator, discuss ground rules like this. Don't let people downplay ground rules. They're important—and to be productive, we need them. Stress the importance of each individual playing along; rules don't work if one or two think they can get by without following them. Soon, the whole group catches on and the muck gets worse. If you use your mop-up techniques consistently, your agenda and your climate will stay clean and healthy.

Cyndi Maxey, communication consultant, speaker, author, and owner of Maxey Creative Inc., has been a member of CC-ASTD since 1982. Over the years, she has served CCASTD in many ways including four years on the Board as VP Membership and Secretary; a volunteer for membership program and nominating committees; Professionally Speaking PDN leader for three years; designer/developer/presenter of HRD Institute, and speaker for many monthly meetings. She has also served on the Boards of Chicago Chapter NAWBO (National Association of Women Business Owners), and for eight years, the National Speaker's Association—Illinois (a CC-ASTD Alliance Organization). She was NSA—Illinois President from 2003–2004. Her latest book, *How to Present Like a Pro: A Field Guide to Mastering the Art of Business, Professional, and Public Speaking*, with coauthor Kevin E. O'Connor, will be released by St. Martin's Press, NYC, in June 2006. Contact Cyndi at [cmaxe@cymaxey.com](mailto:cmaxe@cymaxey.com) or 773/561-6252, or visit her Web site at [www.cyndimaxey.com](http://www.cyndimaxey.com) for more articles and information.



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