Trust Edge Simplified: Leader Notes

Use these notes as a starting point as you prepare for the course. As you lead the modules, feel free to insert your own style, experience, and examples throughout the course. If you are new to group facilitation or the course material, follow the step-by-step instructions and scripted language in the notes section on each slide to help you stay focused on the key points and facilitate the course most effectively.

The course is built for approximately 15-30 people but can be adjusted to fit your group size. If your session will have fewer or more participants, it is important to review each step of your agenda and decide how to best modify the discussions and activities to accommodate your group size.

There is always more than one way to approach setting up and positioning activities. Should you have any questions about how to best conduct a particular activity for your group's unique needs, please contact Trust Edge Leadership Institute (TELI) at **651-340-6555** or e-mail Info@TrustEdge.com.

About the PowerPoint

- **Slide-by-Slide Instructions**: Clear instructions and scripted language can be found in the notes section on each slide. You can also print these ahead of time—see section on page 2 "Materials and Equipment".
- **Quotes/Data:** The course includes quotes from various authors, data from The Trust Outlook® research, and information from the American Management Association.
- **Video:** Each module include video-based teachings from TELI CEO David Horsager. These clips are used to introduce the module and teach the primary course material.
    - Most videos play automatically in full screen when you click to that slide with exception of some module header slides which require an extra click.
    - Slides with a video have a play symbol and/or text over them which automatically disappears once the video starts playing.
- **Action Slide:** Slides with teal arrow icons indicate it's an action or activity slide:
    - » **Connect:** Gives participants an opportunity to get to know one another.
    - » **Discuss:** Allows participants to process out loud and hear each other's insights.
    - » **Reflect:** Allocates time for individual, internal processing and contemplation.
    - » **Apply It:** Provides practical practice and application of the course material.

Group Engagement

People learn and process differently from one another so throughout the course there is a mix of learning styles: small and large group discussions, individual reflection, videos, activities and worksheets.

The most successful trainings have highly engaged participants where the leader facilitates a safe environment for contributing insights. Allow participants time to quickly think before directing them into any type of out loud discussion. Repeating a question or prompt in a couple of different ways can help give participants time to think of their response. Avoid singling out participants to answer a question too early on in a session; people usually warm up to contributing part way into a training. Participants who are caught off guard can feel pressured or spotlighted which creates an environment of fear rather than safety; this is especially true if participants do not know each other.

To create an environment where participants more readily share in discussions, we recommend gradually expanding the discussion method from personal reflection and sharing with the person next to them to small group discussion and then large group shout-outs.

Discussion Methods

- **Reflection:** This is time for participants to think and take notes on their own ideas. Reflection can help participants consider how the course material applies to their individual situation.
- **Pair-and-share:** This discussion method is where participants turn to a person next to them and share thoughts based on a conversation prompt.
- **Table Group/Small Group:** For the most effective table/small group discussion, give a direction for who in the group should share first (e.g., the person with the shortest last name or the person with the closest birthday to today).
- **Shout-outs:** This method should move very quickly. Ask the stated question in a way that elicits responses from the audience (e.g., "Let's hear a response from the back of the room. Go ahead and shout it out!"). Hear the response and quickly affirm it! For a large group, repeat what was said so that everyone hears it. Consider giving a 5-second example to expand on some of the shout-outs. Move quickly and resist the urge to drag this out. Gather just a handful of responses before moving forward in the course.

In-Person Groups

Preparation

- ☐ Send an agenda 24 hours prior to the meeting.
- ☐ Choose a quiet meeting room or other relatively secure environment.
- ☐ Make sure all seats have a clear view of all visuals and you, while still being able to see/talk easily to other participants. (Tables or pods of 4-6 work best.)
- ☐ ***Important:*** Test to verify that the video clips play with audio, and that the color and volume are set correctly.
- ☐ Make sure the location is equipped for participants with disabilities or special needs.
- ☐ Remove distractions: Turn off all notifications systems, silence phones, and close documents. Eliminate multi-tasking during a meeting
- ☐ Practice names of participants and be prepared to begin the session with a short introduction of attendees to help the relationship connection process.

Materials and Equipment Needed

- ☐ PowerPoint Slides
  - Allow time to download the full deck (approx. 2.5 GB). The high quality videos require a longer download time.
  - Print Slides with Notes for each module as you need them (Full deck is 178 slides).
    - To print the Slides with Notes, open the PowerPoint, click "File", then click "Print",
    - Under "Settings", click on "Full Pages Slides", then select "Notes Pages" and print.
- ☐ Projector or screen to play slide deck with embedded videos
- ☐ A slide clicker to advance slides
- ☐ Worksheets (for each participant)
- ☐ Timer
- ☐ A bell/sound effect to get participants' attention after group activities

Optional (but recommended equipment for longer trainings)

- ☐ A stand for leader notes
- ☐ A stool
- ☐ Name tags for each participant
- ☐ Sticky notes on each table/seat

Virtual Groups

Preparation

- ☐ Send an agenda 24 hours prior to the meeting.
- ☐ Send digital worksheets ahead of time to participants.
- ☐ Plan for backup assistance: consider assigning a scribe, timekeeper, note taker or group guides for virtual chatrooms.
- ☐ Plan when to kindly acknowledge late arrivals; right before or after breaks works well.
- ☐ Remove distractions: turn off all notifications systems, silence phones, and close documents. Eliminate multi-tasking during a meeting.
- ☐ Practice names of participants and be prepared to begin the session with a short introduction of attendees to help the relationship connection process.
- ☐ Maximize lighting and sound quality:
    - Mute the microphone when not talking to reduce audio feedback.
    - Place camera at eye-level. Look in the direction of the camera for eye contact.
    - Having good lighting and sitting farther from a wall provides better clarity of video when using a virtual background.
    - Use a noise-canceling microphone, headsets, or earbuds.
    - Wear solid color clothes with brighter colors.
- ☐ ***Important:*** Test to verify that the video clips play with audio, and that the color and volume are set correctly.
- ☐ Open the meeting at least 30 minutes beforehand for troubleshooting any technical difficulties.

Materials and Equipment

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- ☐ Digital worksheets (sent ahead of item)
- ☐ Timer

Virtual Event Time Management

- Expect a slower pace for a virtual event than a traditional meeting.
- Be prepared to pivot, add, or cut part of the agenda, if needed.
- Plan specific times for any breakout groups
- Be respectful and adhere to the designated meeting end time.

During the Meeting

- Be energetic! Use positive reinforcement, smiling, and acknowledgment. Enthusiastically cheer on small wins (silent clapping or thumbs up is effective).
- Model virtual etiquette: encourage everyone to participate, create a safe environment, and establish clear protocol for asking questions.
- Address participants by name when talking directly to them.
- Plan ahead for participation: choose from hand-raising tool, physically raise hands, or ask for questions in advance.

Module Lengths

Each module is approximately 45-60 minutes; Time estimates will differ based on the size of the group and the pace of the group leader. You can modify the length of modules by sharing personal examples, asking additional group questions or adding/subtracting time to the activities and discussions.

Practice!

Before scheduling your Trust Edge Simplified Modules, practice the material. Time yourself and go through each module out loud, then add your estimated time for the reflections, discussions, and application. Finally, note the length of each module based specifically on your style of facilitation.

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