Making Sales Training Fun, Interactive, and Educational

By Renie McClay

Adapted and reprinted with permission from *Sales Training Solutions*, Kaplan.

Warning: This is larger than an article, it is most of a chapter in the book. Look before you print!

Bio:
Renie McClay is a facilitator who engages groups and teaches organizations creative methods to keep their groups engaged. Clients include Kraft, Pactiv, CDW, Sylvan Learning, Walgreens, Eli Lilly, Lake Forest Graduate School of Management, Bangalore Management Association and more. Certifications include: Accelerated Innovation, The Relationship Edge in Business, DDI, Achieve Global, Porter Henry, and more.

She was trained with Second City and uses improvisation as a tool to help companies improve creativity and develop more productive and innovative teams. Renie has facilitated training for corporate, non-profit, and university audiences in North America, Africa, Europe, and Asia. She has trained audiences virtually from Australia, Europe, China, India, Latin America, and Canada. She helps companies develop curriculum and training programs.

She is the author of *The Essential Guide to Training Global Audiences*, *Sales Training Solutions*, *10 Steps to Successful Teams*, and *Fortify Your Sales Force*.

The intention here is to focus on defining how to reach the learning objectives while limiting the amount of instructor lecture time. I will give you ideas of how to include fun and interactive ways to teach material. Let's be clear here. This is NOT for the purpose of having fun in a class (heaven forbid!), but for the purpose of keeping learners engaged and maximizing their attention and learning. I will admit I have more fun if things in a class are lively, both as an instructor and as a participant. Is it possible there could actually be a business purpose for fun and interaction? Let's stay open to that.

Think back to a class you took in high school or college, or even a professional course you have attended in the last few years. My guess is that it included a good amount of upfront lecture. What do you remember? How effective was this class at teaching you a new knowledge or skill? You may remember little from the class.

Now think about the first time you used Word or Excel, or even the last time you purchased a new car or a DVD player. How did you learn to use Word or Excel, or learn the features of your new car or DVD player? Did you attend a class? Probably not. We learn by trial and error, or by using such resources as the manuals, the Internet, relatives or friends, and help menus. We had a reason to learn and used our skills and abilities to overcome the challenges. This is how we should approach training classes and meetings. People are capable; they learn new skills and achieve their goals every day. Do not sell them short in the classroom.

The first key to making your sales training more effective is to use a variety of techniques to introduce learners to the material. And we must not forget to have them *apply* their newfound knowledge so it sticks with them. Remember, the objective of your sales training is not to teach product knowledge, but to teach *how to use product knowledge to* ***sell***. Don't just create a fun way to share the information, but ensure it will then be used back on the job. Do not forget the application of knowledge in your attempt to be creative in presenting the material.

We know people are more engaged when training is fun and interactive. Humans (and most sales people) are social beings, so the social aspect should be included in the classroom. I want to offer creative techniques to make training more interactive, social and fun while still being educational. These techniques can be used in any stage of the learning cycle. Many can be an alternative to lectures, while others are great ways to have fun when offering guided or individual practice.

The Benefits of Making Learning Fun and Interactive

Making your program fun and interactive will not just provide a more enjoyable experience for the participants, but it will lead to greater learning. The truth is that we learn best by being active. According to Adult Learning Principles, we learn by processing information, linking it to previously held knowledge and by applying the new knowledge. All of this is also more effective in a social setting; so designing your training to include fun activities and social interaction will lead to a more successful and educational program.

Some of the interactive methods for training here will be familiar to you. Hopefully some will be new ideas or a reminder of something you have heard before. I wish I could tell you I was the inventor of these awesome methods. Many of them I have seen over my last 17 years of training. I was fortunate enough to have been introduced to the SMT: Center for Sales Excellence early in my career. I have seen many training methods demonstrated at the national conferences and at Sales Trainer Trainings over the years. I give my peers much of the credit for these methods. In training, we see something, tweak it, pass it on and all of a sudden there are many variations and they are all good and work. Thanks to my peers for generously sharing their methods and successes over the years.

Considerations

Before discussing ways to make training more interactive, fun and educational, take a look at some factors to consider when designing activities: an organization's style, the audience, and the trainer. Some activities may not be appropriate in some circumstances, and could alienate participants.

Methods

Now that we have discussed why it is important to include interaction and fun in your training, as well as some of the points to consider when designing it, let's turn to specific activities you can incorporate into your program.

First, drop any preconceived ideas that a lecture is needed at some point during the program. It's true the instructor may need to provide information, but there are times you can do so without the use of any lecture. Open your mind; be creative; lecturing is not the only way.

Now let's look at some alternatives to lectures and other activities that can be used in your training program.

Lectures that don't look like lectures

Sometimes you need to present content, but it just doesn't lend itself to some fun little game. Some of the following activities are still instructor led, but they offer interaction so that participants must think instead of being passive learners. They can be used in the place of lectures, or to support a lecture.

1. Expert Panel. Have knowledgeable people come in to discuss the topic. They can answer questions and offer different viewpoints. When to use? When entering a new industry or market segment. With Execs at a national sales meeting. With product management when rolling out a new product.
2. Use the Socratic Method to draw the information out of the group. That is, question the participants and use their answers to your questions as the basis for asking another question. The idea is to lead the participants to the point you're trying to make, to make them think things through. They apply the information for themselves, linking it to previous knowledge as you lead the discussion with questions.

3. Do a "chalk talk", diagramming the process or concept in such a way that the listeners are following the evolution of the concept visually as well as by hearing. For an extra twist, you can have the participants come up and draw out the diagram as you discuss.
4. Audio or video. Use a recorded situation to present a topic or idea, stopping regularly for discussion. The audio is still lecture, but is done differently. It should not be overdone or it gets monotonous. It can be done with flair that is often difficult to do in a live training environment. It can look like a newscast or an interview. It can involve personalities from the organization (leaders, management, or team members) which helps to increase interest.
5. Provide an outline of your notes to the group. Indicate which material is prerequisite or fundamental to the understanding of the subject and which can be taken in any order. Have the group prioritize the secondary list, and convince you -- if they can -- that they don't need the prerequisites.
6. Let participants read the material and answer questions. Then go immediately into questions and exercises. Any of the exercises listed in the next sessions can be used to test understanding and then discuss to clarify material.
7. Put an idea on trial. This activity presents and explores an idea in a structured way that most people will be familiar with, through television and movies, if not by first hand experience. Using a judge, prosecutor and defense attorney, you will examine both sides of an issue.
8. Debate. Two individuals (or teams) each take on a side of an issue and present both sides to the group in the form of a formal debate.

Review games

You can start your program with a Question and Answer Game or use it as a follow-up review. This can be a great way to begin a module if you believe the participants have base knowledge of the topic. It acts like a pretest, after which you can discuss each point and offer more information to correct misperceptions or fill in information gaps. *Do not* use such activities if the participants cannot provide any answers, as it will de-motivate them. Review games at the end of a session can be an effective way to test understanding and have fun.

Any game that we have played or seen on TV can be the model for this activity: Who Wants to be a Millionaire, Jeopardy, Trivial Pursuit, Card Games, or even Candyland. It can be low tech, such as a board from an actual game with custom reading questions, or high tech with the use of PowerPoint or programs such as Gameshow Pro. Plain board games can be purchased from companies like trainerswarehouse.com. Questions can be straight product facts, key benefits, or customer problems/scenarios. Keep the information relevant to the topic. If you have the budget you can incorporate an audience response system to track how learners are doing. Review games work very well to reinforce product information.

Group teaching

Group teaching is another method that can be used in place of a lecture, or afterward to help participants apply knowledge or see its application. If used in place of a lecture, provide the needed materials to the group that will teach the lesson, including guidelines on use of flip charts or an activity to help teach. Assign teams to research topics and present them to the group, adding only critical items that were overlooked. My rule is: The whole team goes up front to present, even if they don't all have speaking parts.

This method works well when discussing competitors. Each team can research one of the organization's competition (brochures, internet, reviewing product samples). They can compare product lines, quality, and sales forces, or identify strengths and weaknesses.

One thing I love about this is the physical movement. Participants can do this anywhere, and will often end up on the floor with a lap top or a flip chart. I love activities that bring people out of their seats and into different places or rooms.

Corporate Novel

Tell a story around the subject that requires the knowledge of the listener to understand the plot (this is why fiction is often educational.). One example of how to use a corporate novel is to communicate something important to the organization (like service basics). Tell a fictional story about a couple needing to get from one location to another. Along the way, they encounter various types of service, some good and some not so good. Participants can answer questions and then participate in a discussion around the topic, relating those experiences to the work environment. When it is done in class, it can be a variation of a case study. It can also be done outside of class (as in corporate communication) with small or large audiences.

Scavenger Hunts

Ever go on a scavenger hunt as a kid? Walking through the neighborhood looking for a paper clip, a cinnamon stick, yesterday's newspaper? Looking for things is a great way for people to get to know resources. So a scavenger hunt on an intranet or in a corporate headquarters is a good way for people to start learning their way around and how to find things. You could even have people walk to town (if the facility is close) or walk around the hotel, or even complete the search as an assignment after class and come back to report. You can send the group out to evaluate sales techniques at stores, in the hotel shops, or that night at dinner. Many companies use it to locate historical company facts, product lines, competitors, or to cover facility safety information. The key is to provide a list of items to locate based on the program's learning objectives and content. It is interesting to have participants come back and present their findings to the class and include any interesting anecdotes.

Case studies

Case Studies are a widely used and effective way to teach key concepts and skills and can be used to begin or end a session. Case Studies in the beginning of a session can create interest in the topic and offer a way to judge the knowledge of participants. After presenting a case study, you can offer participants a new way to think about the situation, and then have them apply the new model or way of thinking to the case study and see the difference. This helps link a new way of thinking to an old process.

Case studies are effective because they bring a real life scenario into the training class. They also take the learning to a higher level because participants need to understand and apply the knowledge. Case studies are beneficial because they:

- Promote thinking
- Are largely participant directed training methodology
- Are generally non-threatening to participants
- Build on the experiences of the learner
- Let people see the issues
- Are cost effective, can write it once and use it over and over

- Can be customized to the organization needs; can have different versions for different divisions or job levels if needed

There are some disadvantages to Case Studies as well. While a lecture may require minimal preparation, writing Case Studies takes certain skills and time in order to be done well. They are also more time consuming to run. The learning is often greater, but sometimes time is a factor. Case Studies can also take participants off the intended learning path if they begin to argue about the details or how they interpret the case.

You can use a case study for a variety of reasons:

- Practicing a newly learned skill or putting together everything that has been learned during a workshop
- Progressively adding more complex information to a situation
- Problem solving

Role play

Role playing is a tried and true method and it is also a powerful sales training tool. It allows you to give a good demonstration and then let participants practice doing what they have just learned and seen. It is one of the only ways to simulate a live account call. It works well because people can build their learning: learn step one and practice, learn step two and practice steps one and two, learn step 3 and practice one, two and three.

Important benefits of role play include:

- Repeated practice
- Immediate feedback

- Chance to correct behavior
- Incremental learning
- Can be repeated with many different skill and knowledge objectives
- Can get learning without the stress of doing it on a live account call

Are there downsides to Role Play? I believe there are. Someone freezing in a role play or being embarrassed can have lasting effects on the individual and the class can have a long memory of it. It doesn't just affect one person. Also, it isn't necessarily a good indicator of performance in front of a customer. There are instances where someone excels in a role play with peers, but isn't listening in front of a customer. And the reverse can be true. Someone can be nervous when role playing in a classroom situation, and when they are in a familiar place with a customer they know, they can excel.

Role play remains a staple of sales training, because it has the power to simulate the buyer-seller interaction that takes place on the job. However, it is exactly because of that power that role play can be so stressful. There is a continuum of stress in the various types of role play available to the trainer, as illustrated below:

Low Stress ⟵ Moderate Stress ⟶ High Stress

The Grinder	Triads	Reverse or Group Role Play	In Front of Group	In Front with Management Observing	Recorded

Most salespeople carry more anxiety around traditional role play in classroom sessions than they do around a call on their toughest customer. Role playing in front of a class is like being under a microscope. Having management in attendance, and/or a camera, makes it worse.

Many companies are refusing to video tape anymore. No one wants an old video of a new salesperson over promising what a product can deliver, lying around in a closet somewhere. Companies don't want any possibility that such videos can end up in front of a judge – so many pharmaceutical or insurance companies have already banned recording role plays. I don't think this is a bad trend.

However, many companies still video tape and conduct grueling new hire training, because of legacy. Sales Managers went through stressful training and had to pass demanding tests, so "If I had to do it, they can do it!" It becomes more of a test of character than training.

Or perhaps you have heard, "if they can handle the stress in front of the room, negotiating with a sales manager, then I know they can handle the stress with the customer." This is hazing, not training.

The principles of adult learning state that the learning environment should be supportive, not stressful. The triad, grinder, and reverse role play techniques outlined below tend to be lower stress, particularly when they are done "bedlam style" (everyone doing it at once, generating a lot of noise or bedlam). "Players" feel hidden by the action of the whole group. It's like having a private conversation in a noisy, crowded restaurant. You are actually more alone than you are in a canoe in the middle of a lake, where sound travels well (and you never know who may be listening...). For our purposes here, I am referring to these as role plays. In a class I would never refer to the "r" word. I say we are going to practice what we have learned, or will call it skill practice. I don't say role play because a lot of people fear them.

Role Play Variation –Triads

A Triad works just the same as a large group role play but splits the participants into groups of three. One person is the participant, one plays the role, and one observes to give feedback. Limiting the group size takes some of the anxiety out of a role play. You can then have the groups switch roles so everyone has to participate. These small groups also allow for everyone to participate and observe in a shorter amount of time. Allowing for "do overs" lets people truly learn and adjust as they go, a great way for people to practice skills.

Role Play Variation – the Grinder

Despite its name, the grinder is another lower stress form of the role play. People stand in two lines facing each other. One is the buyer and the other the seller. They role play (generally for 2 minutes), buyers give 1 minute of feedback, and the sellers "grind" to the left. Now they are facing a different seller and they do it again. Feedback again. Grind again. Do it again. Feedback again. Make sure everyone has a chance to be on both sides of the line, switch the roles and repeat three (or more) times.

It is important to do a grinder three times.

1. The first time they are getting used to the process.
2. The second time they are getting real benefit from the feedback.
3. By the third time they have likely incorporated new ideas for improvement.

When to use the Grinder

- "Canned" sales presentations

- Overcoming objections
- Closing Techniques
- Benefits of a product
- Introducing themselves or the company
- Practicing questioning
- New product release

I'll give you a tip from personal experience. Make sure you have the instructions really solid. This is hard for people to visualize from verbal instructions. So let them prepare (if required), get them in lines, verbally tell them what will happen then demonstrate it. This can be done with really large groups (at a National Sales Meeting, for example). It is tricky to manage (sometimes people need to stop in the middle of a conversation and move on), it is loud, it is energizing. Try it, you'll like it!

Role Play Variation –Reverse Role Play or Group Role Play

In a Reverse or Group Role Play, participants are not in front of the room; they can participate from their seats. The Reverse Role Play has the instructor playing the part of the salesperson (better be pretty fluent with the selling or negotiating model!). The trainer needs to act on their feet and respond to what the class presents. The class can act individually or in groups. The class has the scenario and one person or group starts with the questions or "acting." The instructor responds and it moves to the next person or group to continue the scenario. Another way of doing this is to have the groups take turns coaching the instructor on what to say in response to what the customer says.

The Group Role Play follows the same logistics but the participants play the role of the salesperson. Someone acts as a customer and the individual or group must respond. A facilitator carries on the scenario to the next individual or group. You can have some great fun discussing the responses and what went well or might be improved.

Rules for successful role plays

<u>Suggestions for taking the stress out:</u>

1. Start with a series of grinder exercises, and then graduate to triads. Since the stress level is lower, the focus will be on skill building.
2. While triads are going on, notice reps who play their sales role very well. After they are done, in private, ask if they and their partner would be willing to demonstrate their sales call to the rest of the group. Chances are, they will gladly accept and will do well.
3. Ask for other volunteers to demonstrate techniques they used or particular situations they were modeling.
4. Always allow the "salesperson" to critique themselves first, followed by the buyer and then any observer. Most sales reps are their own harshest critics.

<u>Guidelines for a successful role play.</u>

To make any type of role play successful you need to have a good scenario. Make it realistic and provide enough information to begin the discussion. Do not provide too much information or it may lead to a quick ending.

When running the role play ensure all participants have a play fair mentality. Have a discussion on what is expected of the person playing the customer. The customer should not make the situation too difficult or easy. Be careful, people get carried away so the trainer must jump in when necessary.

Simulation

Generally a simulation is simply a variation of a case study or role play, but the skill can be taught or applied through the use of technology. This may be a computer system to input an order or complete research, setting up a phone call in which the salesperson works through the call on the phone, or working through an entire sales cycle to see the results of pricing decisions.

Improvisation

One example of a technique that is wonderful for practicing sales training skills, but often overlooked is the use of Improv. This is one example where the content does not even have to relate to the topic, because the skill practiced is still in line with the end objective of selling. A sales person should be able to think on his or her feet and react quickly. The use of improv can improve this skill.

Participants can learn the product knowledge, practice it in some activities, and then participate in an improv session either related or unrelated to the content. A good debrief followed by a transition on how those same reaction skills can be used in selling will lead you perfectly to a practice exercise in which they combine the product knowledge and selling skills.

I had the pleasure of studying with Second City, the world famous improvisation group. After completing their curriculum, and doing a number of shows, I saw many similarities between working in teams and improvising as an ensemble. Sales people improvise every day, on every call. Trainers improvise every day, on every presentation. There are some fundamental improv principles that can benefit people working on teams.

- *Listen* – Means active listening vs. nodding your heads and agreeing
- *Agreement* – "Yes, and" means finding something to accept in what your team member says and adding to it
- *Be in the moment* – Focus on the moment and be free of distractions
- *No judgment* – Making team members feel comfortable by not judging their contributions

Here is the caveat: Be careful about trying this at home! Ask for help from trained professionals! Improvisation is a muscle, just like presenting and facilitating. Some people aren't successful their first time facilitating a group. Many aren't stellar their first time presenting. Improv demands a safe environment with people supporting each other.

Whole group movement

As you incorporate some of the above methods, see where you can get people out of their seats. Divide into groups and have them move to different tables. Put a flip chart on the wall and have people brainstorm or do their exercise there. Encourage people to move around. Plan a reason to move to a different place in the room. The change of scenery is good, and it is energizing to get up and move.

How to determine which method to use

There is no one real answer to which method is the best to use for a given situation; it will vary based on content, participants, time and instructor ability/style. The best approach is to be creative and try different methods. If you don't have access to the audience for some practice, grab a colleague or two and do a run through. That will help ensure success when you do it the first time.

Remember the first key is to open your mind and be creative; don't ever say a lecture is the only way to teach a section. When being creative, don't forget that all activities should support the class objectives. Don't just add an activity to add an activity. Be sure that it is appropriate, tied to the objectives, and that you understand why it is being used. And if you need to do a lecture, make sure it is darned good!

The test for knowing if it is the right method is to be ready to respond to the following scenario – what if the VP of Sales or CEO came into the room. Can you explain the learning value – very concisely and convincingly? "This will add energy" is probably not enough. You should be able to articulate things like this:

1. Before this activity they did X which accomplished X objective. After this activity they will do X plus Y.
2. This activity will add to their learning by…
3. All of this will ensure that they can…

When choosing a method, the first question to answer is if you are teaching knowledge or a skill. Knowledge is easier to learn than a skill because application of a skill first requires knowledge of the subject. If you are teaching a skill, you actually need to teach or ensure knowledge first. Remember to follow the three step teaching model of 1) Introduction to Material, 2) Guided Practice, 3) Individual Practice, and use activities for all three. Therefore, you may first need a method to teach the knowledge and then continue with the application to make it a skill. One example of what appears to be knowledge but is actually a skill is the teaching of product knowledge; you are teaching knowledge, but the end objective is to have them apply the knowledge when selling (a skill).

<table>
<tr><td colspan="6">Are you in the stage of building KNOWLEDGE or SKILL?</td></tr>
<tr><td colspan="3">KNOWLEDGE

Can I evaluate their learning <u>as they learn?</u></td><td colspan="3">SKILL

Is it an interpersonal skill?</td></tr>
<tr><td>NO

Lecture
Panel
Programmed instruction
Self-study of materials</td><td colspan="2">YES

Have learners demonstrated significant experience (knowledge) of this area or item?</td><td>NO

Case Study
In-Basket
Learner-Controlled Instruction</td><td colspan="2">YES

Have learners seen a good example of this skill in use?</td></tr>
<tr><td></td><td>NO

Structured conference
Case study
In basket
games</td><td>YES

Un-structured conference</td><td></td><td>NO

Demo., live or video
Then go to Role Play</td><td>YES

Role Play</td></tr>
</table>

How do you know if it is successful?

The number one success criterion of any training is that participants have the knowledge and skills intended. Can you say that you have met all of your objectives? Did the participants model the intended skill in the class? If yes, then you have been successful in that most important aspect. However, it is also important to create a fun, interactive, social, and educational learning environment so that people want to come back. You can rate your success in this area on the reaction of the participants. The easiest way to gather success information on this aspect is to use an after class survey. To judge your success in this area ask:

1. Did you know what you were supposed to learn or be able to do in this session?
2. Did this session keep you interested or engaged, and provide the chance for you to apply the content?

3. Do you feel you have learned the knowledge and skills intended?

And to determine if your class was worthwhile and fun:

1. Would you recommend this class to others?
2. Do you look forward to coming back for the next session?

Another indication of success for me? If I had fun as a trainer, it is a good indicator that the training was engaging and fun for the participants.

Summary – what can we do

So, did we find any legitimate reasons to vary our training methodologies and perhaps even design some fun in our training? I sincerely hope so!

I have presented tools here for your use, but just because you have new tools doesn't mean they will immediately work well. Keep these tips in mind:

- The first time you use something, plan it well. Practice it. Consider in advance the participants style, obstacles or pot holes that might come along.
- Know your audience. Choose activities that are a good fit, and use variety.
- Try it once with a test group before you take it to your target audience. Try it at home with neighborhood kids. Make a run through with a couple of colleagues or people you trust. It is good to practice verbal instructions. It is good to see whether written instructions support the exercise.
- Don't do an exercise for the purpose of doing an exercise. Have a purpose; have a point. Make the connection so learners know why they are doing it. Better yet, let them explain why they just did it.

- Provide highlighters, Post Its, fiddlers (koosh or stress balls or something to handle for active bodies) in a classroom to assist participants in connecting with content.
- Leave time in class (traditional or online) for participants to list ah-ha's and link them to something they know.
- Let participants know why you are using different methodologies; remove the "curtain" so they can see that different methods help different people. People learn by seeing, hearing, and doing. We have all styles in the room, so we will teach using different methods to respect each group. You may find you don't like some of them, but it will likely be helping someone in the room.

It is my sincerest hope there are choices you see here that you can try. Remember, just because I drink Tang doesn't make me an astronaut. Many of these approaches take planning, and they need to be used in the right places at the right time for the right audiences.

Examples/Resources

Expert Panel

Give panel questions in advance. (ask audience to submit questions, if appropriate).
Have a moderator (skills are intense listening and playing the role of "host", moderator can be a lead panelist if needed). Prep the panel members as to what to expect, the agenda.
Introduce the panel members and include their bios as it relates to the topics.
Moderator asks a question, then lets panel members answer the question.
Asks the next question, panel members answer.
If there is disagreement or lively discussion, let members address concerns or ideas.
Then take questions from the group live.
The moderator repeats the question, unless a microphone is used in the audience.

Put an Idea on Trial

This can be done in person or in a synchronous online class.

<u>Preparation</u>

- Roles: judge, bailiff, defense attorney, prosecution attorneys, witness for the defense, witness for the prosecution. The rest of the audience can be the jury.
- Give time for the attorneys to talk to their witnesses.

Execution
Bailiff: All Rise. Court is now in session. Honorable Judge Fred presiding.

Judge: (The judge comes from outside the room wearing a judge's outfit, serious or comical, white wig, a robe or black tablecloth can work as a robe and a gavel)
Welcome to the Court of Sales Professionals. This is the Case of the Questionable Product.
Bailiff, has the Jury been impaneled?
Yes, your honor.
Who are they?
Bailiff points to the jury (the whole audience OR can be an identified couple of rows of people).
The Jury is going to hear statements from the defense on the advantages of The Good Guys product line, which is being challenged by the competition. Consul for the prosecution is seeking the death penalty for Product Line X. Your job is to hear the testimony and decide on the merits of Product X for yourself. If you are convinced beyond the shadow of a doubt that Product X is guilty as charged, you are to find it guilty and recommend sentence. If not convinced beyond the shadow of a doubt that Product X is a worthless product, you should enter a verdict of "not guilty."
Ladies and gentlemen of the jury: Do you understand your charge?
Prosecution Opening comments
Defense Opening comments
Prosecution, call your witness
Defense, cross examine
Defense, call your witness
Prosecution, cross examine
Prosecution closing comments
Defense closing comments

Closing: Judge's Lines
Ladies and gentlemen of the jury. The evidence has been presented on the legitimacy and value of Product X. Your job at this time is to render a verdict on the validity of this product. You are being asked to decide the guilt or innocence beyond a reasonable doubt.
I am going to poll the jury at this time as to the guilt or innocence of this product. Jury, please raise your hand at this time if you agree with the prosecution and think that Product X should be put to death.
Those who feel not guilty?
The decision of the jury is final. Pound the gavel.

Now, as we have heard before, it is all in the debrief. What salient points came out pro and con? This is a fun way to present ideas, but it can get long. You can limit cross examination to one or two questions, and consider giving a time limit to each attorney. The first time you do it, I would try and keep it to 20 or 30 minutes. If people are into the roles, and sales people often are, it can go pretty long. I love using people from the audience for roles where possible. You can also use this for techniques (putting lecture on trial, for example!).

Debate
Here is a "not ready for prime time" Debate method for training purposes.
You will need 3 people, Moderator, Proponent, and Opposition.

Moderator reads debate issue.
Opening remarks in favor
Opening remarks opposed
Opposition responds to the proponent points
Proponent responds to the opponent
Closing comments from each

You can have the audience vote on the conclusion. You can have a panel of judges decide on the outcome. You can have a scripted conclusion, reviewing the main points and reinforcing the learning.

Watch out – If there is a predetermined outcome, choose a different method. This method is to identify and bring out points for both sides. If there is a right answer, best to just present the right answer.

Improvisation
Debriefing Exercises – It is all in the debrief!
Choose activities that support your objectives for the event. The purpose for most will be to practice listening and the accepting of team members' ideas. In most brainstorming or innovation sessions, people's roles should be neutralized. Every person's ideas are valued regardless of job level. Ideas that seem impractical or out there can lead to the next big thing,so each offering needs to be accepted and not judged. Judgment and cognitive weeding out can come later! Early on, encourage ideas flowing. Participants should be asked, what the relevance of this activity was and they should be able to state it.

The facilitator should demonstrate and participate along with the group. Don't ask them to do things you are not willing to do. No one should be *forced* to do improv in front of a group. You can set up a safe environment and let people participate if they choose. If it is going on bedlam style, it is generally safe.

Mirroring
Participants face each other and mirror the actions of their partner.

- Have participants face one another. Ask partner A to begin a physical action. Partner B should try to mirror (not anticipate) what partner A is doing.
- Let the activity run for a while. Eventually, ask partner B to take the lead (without verbally discussing the handoff).
- This activity may require a demonstration from the teacher! Make sure they understand that this activity is about seeing what your partner is doing, accepting that action, and mirroring the activity.
- This activity is about giving and receiving focus – the important thing is to have a balance and be able to lead or follow depending on the needs of the situation.

What are keys to success here? Having slow movements that your partner can follow. Not trying to trick the other person or have it be hard to follow. Facilitate working as a team, so an audience can't tell who is leading and who is following.

Counting as a Team
While standing in a circle, have all participants close their eyes. While closed explain the following:

- The goal is to get to the number 18.
- You can only say one number at a time
- Anyone can speak at anytime
- Only one person can speak at a time
- If two people speak at the same time, you must stop and go back to one
- Someone starts with one.

Don't let them discuss a strategy of getting there. They should not speak other than counting. If the game takes too long, coach them about remembering the goal and what the easiest way to get there is. Facilitate for listening. What was frustrating here? What was helpful? You are trying to work as a team to get to this number.

Sell This!
Divide the group into teams of 3 or 4. Brainstorm a list (or come with a list prepared) of fictional product names and give one name to each group.

Give each group 15 minutes to come up with the following:

- What the product is/does
- A celebrity spokesperson for that product
- A jingle for their commercial

A more advanced version of this includes the team acting out a commercial.

Each team presents their "product" to the large group. For example, the group presents – our product is Can Can and it is a new motivational diet drink. Our celebrity spokesperson is Oprah Winfrey. Our jingle will be, "Maybe diets didn't work in the past, but now you Can Can."

Facilitate acceptance. This doesn't have to be funny (although it often is). The point is for groups to work together and support each other's ideas.

Examples of fictional products are Orange Blast; Bling, Bling; Hidey Ho; Cool Colors; Notables; Darl Doodles, Heat Up, Can Can, Alabaster, Lemon Zestier, Born To, Deluxe Portion, Ganglion, Blue Laze, Lucky Lew, Phony Phylum, Beach Core. Or use terms that are meaningful to your industry, but the fictional names should refer to something that doesn't exist.

Scavenger Hunt
Online Scavenger Hunt– information from the intranet site
Who is the VP Finance?
What is the current stock price?
How many SKUs are in the storage bag product line?
What product lines are for sale in Canada?
Where do you access the expense reporting?
What is the phone number for Customer Service?
How many regions does the company have?

What is the order minimum for a printed deli storage bag?
How do you order product brochures?

Corporate Headquarters Scavenger Hunt – orientation to a new building
Get a cup from the cafeteria
Get a business card from customer service
What high school did Bill Sodes graduate from?
Get a business card order form from the Copy Center
What is your Region Number for expense reporting purposes
Bring a sales brochure for the newest new product rollout
Get an autograph from someone in marketing
Get a company pen from the company store
Get a company envelop from the mail room

Case Studies
Preparing Case Studies
Consider the Purpose

- To allow participants to apply knowledge to a realistic situation
- To generate informed discussion around an issue
- Problem solving

Write your learning objective (what do you want participants to get out of this exercise).

How to Create

1. State the problem
2. Select a setting that is not an exact replica of the work environment, and characters that will not be recognized. You are trying to eliminate distractions or side tracking.
3. Give sufficient background information to make an informed judgment
4. Pose the problem as a question
5. Write directions and discussion questions
6. Write facilitator notes, what points trying to make?
7. Pilot and revise the case study (it can be just a few people who understand the audience, but don't do it the first time with the live audience)

Watch Outs

- Is it too detailed?
- Is there appropriate detail level and enough time?
- Is anything distracting (sounds like my account, too close to industry)
- Is dialogue clear?
- Are directions clear?
- Is facilitator prepared?
- Is the case too difficult? (The more complicated or more "twists" the more opportunities it will be argued or interpreted incorrectly.)

What do you need to create a case study?

- The case study formula
- The skills to be taught

- The industry/business vocabulary of the learners

Execution

1. State the purpose
2. People read (can be done as pre-work)
3. Put people in small groups
4. Give ample time to discuss
5. Let groups present their ideas or solutions
6. Have facilitator points clearly outlined, but avoid taking a stand. Let the group come up with the ah, ha's where possible. Facilitator only adds what is essential.

Card Game

How many ways can you split up a topic? How much can be learned by putting things back together again that have been split? "Shuffling a deck" of mixed items that were once together is a simple process and can reinforce lessons on processes or important combinations of elements. Here's how to do it:

1. Determine the skills or knowledge area. Examples:
   a) Selling the benefits of Product X to customers with different needs
   b) Following a prescribed call procedure in detail
   c) Matching feature, advantage, benefit

2. Divide it into its component parts. Examples:
   a) Five different customers with five different sets of needs. Ten or fifteen product benefits that could help each customer in appropriate combinations.
   b) The ten step call procedure and the many tasks that are to be accomplished in each call.

3. Write all the component parts on card-shaped sections of card stock. Print and cut.

4. Shuffle all the cards to mix them up.

5. Have participants sort them. Have a discussion about the various combinations.

Notes:

♣ The project is best done in groups of four to five, where people can all see all the cards laid out.

♦ In groups larger than five, you will need a set of cards for each small group.

♥ The main content of the lessons should be taught <u>before</u> the game. For example, in "a" above, participants should be given examples and work through benefit/customer combinations and in example "b", participants should be aware of the ten step call and its components. This is critical, because the game is just one more way to teach complex subjects and cannot be a substitute for adequate instruction. Also, if the material is not understood before the game, the game will become extremely frustrating.

♠ There should always be a follow-up discussion at the end of the game. While challenging questions are good, there should be no ambiguity about the "right" answers, once you explain them.

Card Game Examples
Fun Facts
Use facts of the city the training (or meeting) is being held in for choosing teams or as a get to know you exercise. Distribute cards to the group and the people who have the same fact need to find each other.

1 Tired of hearing Chicagoans boast of the 1893 Columbian Exposition, newspaper editor Charles Dana dubbed Chicago the "Windy City."
2 Adler Planetarium opened in 1930 and was the first planetarium in the Western Hemisphere.
3 Buckingham Fountain is the largest fountain in the world; it shoots a water jet 135 feet high.
4 Chicago has the largest public library in the world.
5 Chicago is home to the world's largest population of Poles outside of Warsaw.
6 Chicago's first elevated railway "The El," went into operation to begin the "Loop" that would circle the city's downtown area.
7 Walt Disney was born in 1901 in Chicago.
8 John Dillinger was shot by the FBI in the alley next to the Biograph Theater in 1934.
9 Northwestern University, the first university in the Chicago area, was founded in 1851.
10 On August 12, 1833 the town of Chicago was incorporated with a population of 350.

Historical Timeline Variation of a card game
Company history for new hire orientation. Give people pre-work with a summary of the company history to read before they come to class. Put posters on the wall with decades written on them (can do this on tables or online as well). Make cards of historical facts of the company, with no reference to dates.

1950s
1951 Started making spaghetti sauce and pasta in mama’s kitchen.
1959 Started selling at the corner grocery store
1960s
1962 Gained first major account and sold in supermarkets
1967 Purchased a manufacturing facility and became Mama’s Sauce and Pasta.
1969 Made variations of the basic spaghetti to include linguini.
1969 Created a marketing department; company slogan was “Just Like Mama Made”
1970s

1971 Acquired a noodle company and began manufacturing macaroni and bow tie pasta under the brand Noodles for Dinner
1973 Added flavored sauces to the line (marinara, meat sauce, pepper basil flavors)
1974 Expanded the line to include oils and seasonings
1975 Hired the first sales force and took the product lines national
1979 Had the first national sales meeting
1980s
1982 Had the first sales contest
1985 Was the number one selling pasta sauce nationally for the first time
1986 Company went public
1988 Introduced the Just Add Meat boxed dinners
1989 Company slogan was "Just Like Mama Used to Make"
1989 Downsized the sales force and went broker
1990s
1990 Expanded sales to Canada
1993 Created a website of 10 minute meals
1997 Hired back the sales force
1997 Brought the Alitalia brand from Europe to the US
1998 Sold the Just Add Meat boxed dinners
1998 Built a west coast production facility
2000s
2000 Created account teams
2001 Record breaking sales for oil division
2004 Introduced a Pasta Fast entrée line

Distribute the shuffled cards between the participants. Have each one put their card(s) on the decade poster they think it belongs in. Have the group look it over. Let them discuss and as a team get as close as they can to the correct history. Facilitator then takes down any cards that are misplaced. The group has to find the correct place for them. When appropriate, let them look at the prework or the answers and then correct the cards. When all the cards are in the right decade, have the group summarize each decade for the company. This is an alternative to a PowerPoint presentation of reviewing the historical facts.