

1. DECISION MAKING – EQUIPMENT DELAYS

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is intended for leaders and professionals who need to make decisions that affect business results. It may also be useful for other employees or in preparation for a leadership or project manager role. In this simulation, the leader has to analyze a situation affecting a major project, make a decision about what to do, and then communicate with others who will have to implement the decision.

This simulation may be done individually. Partners may be used, if desired and realistic for the real-life decision making environment. (If leaders make decisions by consulting with peers in your organization, then partners may be appropriate. If decisions get made alone, then partners are not recommended.)

Skills/Competencies Applied: Decision making, analyze information, problem solving, leadership, leading teams.

Time: 45-60 minutes

Facilitator Notes:

- This simulation requires a time limit in order to put learners under realistic pressure. We recommend 30 minutes from the time learners receive their initial information in Step 1 until the time when they must report on their decision at the beginning of Step 5. Leave enough time for debrief and discussion afterward.
- This simulation forces learners to make a choice about whether to: (a) make the decision with the information initially available, (b) ask stakeholders for input, or (c) ask stakeholders to be involved in the decision. You will provide more information to those who ask for input or involve others, if you receive the request within 5 minutes of the start. (Pay attention to when the additional handouts can be delivered!)
- The scoring criteria for this simulation are based on two main factors: decision quality and decision acceptance. A third factor, decision timeliness, is forced into the simulation by the time limit. Modify the scoring criteria, task standards, and details to match the content and decision model you are teaching, if appropriate.

STEP 1. SET THE STAGE

You are in charge of a project team that is working on a major equipment order for a customer. This customer provides a variety of business support, printing, and shipping services to other firms. Your customer is installing the new piece of equipment to improve the efficiency of the way it processes transactions for the businesses it serves. The project team you lead includes employees from several different departments within your company—sales, purchasing, production, design, distribution, installation, and customer training. Your customer has requested several unique components for this equipment package. You produce some internally and get others from suppliers. The customer set a specific target date—the week of the 14th—for installation, and your team will need to provide the equipment and the training to start on the delivery date.

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2. DECISION MAKING – BREAKFAST INNOVATION

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is intended for leaders and professionals who need to make decisions that affect business results. It may also be useful for other employees or in preparation for a leadership or project manager role. In this simulation, the leader has to analyze a situation affecting a product line, make a decision about what to do, and then communicate with others who will have to implement the decision.

This simulation may be done individually. Partners may be used, if desired and realistic for the real-life decision making environment. (If leaders make decisions by consulting with peers in your organization, then partners may be appropriate. If decisions get made alone, then partners are not recommended.)

Skills/Competencies Applied: Decision making, analyze information, problem solving, leadership, leading teams, innovation.

Time: 45-60 minutes

Facilitator Notes:

- This simulation requires a time limit in order to put learners under realistic pressure. We recommend 30 minutes from the time learners receive their initial information in Step 1 until the time when they must report on their decision at the beginning of Step 5. Leave enough time for debrief and discussion afterward.
- This simulation forces learners to make a choice about whether to: (a) make the decision with the information initially available, (b) ask stakeholders for input, or (c) ask stakeholders to be involved in the decision. You will provide more information to those who ask for input or involve others, if you receive the request within 5 minutes of the start. (Pay attention to when the additional handouts can be delivered!)
- The scoring criteria for this simulation are based on two main factors: decision quality and decision acceptance. A third factor, decision timeliness, is forced into the simulation by the time limit. Modify the scoring criteria, task standards, and details to match the content and decision model you are teaching, if appropriate.

HANDOUT A – ADDITIONAL INPUT FOR BREAKFAST INNOVATION

This handout is only available 15 minutes before the end of the simulation!

You met with Sandy at the R&D facility and looked over the things the team was working on. Everyone on the R&D team you spoke with was very enthusiastic about getting the chance to try something new. One of the biggest developments was the work on converting the product from freezer-only to shelf-stable forms—making breakfast food that did not have to be frozen, just microwaved from room temperature. One example was a tray of eggs, bacon, and pancakes that could go from shelf to microwave without needing to visit the freezer. This has definite possibilities, and may offer some different packaging and marketing opportunities. This kind of product was about twelve to fifteen months out from being commercially viable, and it would require a shift in consumer behavior to make it a profitable product offering.

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3. ETHICS – HIRING WITH A CONFLICT OF INTEREST

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is for people in professional or managerial roles, and it may be useful for people in other situations. In this simulation, the learner has to recognize whether a conflict of interest exists, handle pressure from his or her boss to cross ethical boundaries, and take action to resolve an ethical dilemma.

This simulation requires a partner. The partner has information that the learner does not have.

Skills/Competencies Applied: Ethical decision making, responding to pressure, compliance with ethics guidelines, hiring and selection.

Time: 30-45 min

STEP 1. SET THE STAGE

You are a department manager in a large company that produces consumer goods. Your department is part of the Purchasing group for your company. The group is responsible for negotiating and purchasing goods and services from many different suppliers—raw materials for your products, packaging material, printing services, trucking and distribution services, and more. You are in the process of hiring a new employee to fill an open position in your department. The “Buyer” position you are trying to fill will be responsible for negotiations and contracts with a dozen current suppliers, and will also handle agreements with new suppliers, as needed. You have already established the qualifications you need in the next person to fill this position and the job description has been approved by Human Resources.

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4. ETHICS – HANDLING THE PRESSURE FOR RESULTS

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is for people in professional or managerial roles, and it may be useful for people in other situations. In this simulation, the learners have to recognize ethical implications of decisions, handle pressure for results, and balance results and ethics.

Group Simulation: This simulation is designed for a group of three learners. There are three player strategies, and each of these strategies has information that learners with other strategies do not have. This simulation can be done with up to six learners in a group—just distribute the strategies as evenly as possible among the learners in a group.

Timed Simulation: This simulation has a time limit to keep the pressure on the learners. Studies have shown that time and results pressures are the two most important factors leading to ethics violations. There is a 10 minute reading and prep period. For groups of three, give a 20 minute simulation time limit. Increase this time limit to 25 minutes for four team members and 30 minutes for groups of six.

Skills/Competencies Applied: Ethical decision making, responding to pressure, compliance with ethics guidelines, getting results.

Time: 45-60 minutes

STEP 1. SET THE STAGE

The end of the fiscal year is drawing near, and your group is not meeting its goals. There are many reasons for this, but none of them will matter to the senior management of the company. All that matters is that results are not meeting goals. Everyone is concerned that if the firm does not meet its goals, then there will have to be layoffs and other cost cutting, and no one wants that to happen.

Your team is gathered to find ways to boost productivity and meet the goals. You and each of your team members have different ideas and information about how that might be possible. Time is short and you need to come up with a plan to get results.

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5. PRESENTATION SKILLS SIMULATION

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is for people learning or practicing giving presentations. This is a generic simulation—feel free to change the specific topic, goals, presentation audience, or conditions and requirements to make this fit your training audience. In this simulation, the learner has to prepare, build, and deliver a presentation to a group of other people.

This simulation requires access to the information and tools required to perform the task. This may include presentation software, such as Microsoft PowerPoint®, and an appropriate presentation setting. Also, a partner or group may be required, depending on the nature of the presentation and the kind of environment you want to create.

Trainer Preparation: Assign a topic and a purpose (or let the learners choose their own) and appropriate information and resources to the learners.

Skills/Competencies Applied: Presentation skills, job skills, public speaking.

Time: 60 minutes + 15 minutes for each learner presentation

STEP 1. SET THE STAGE

Think about a situation in which you need to make a presentation. Consider the audience and determine the purpose of the presentation—is this to inform, persuade, or both?

Consult with your trainer to find out if there are any special requirements, constraints, resources, templates, or methods that apply to your presentation.

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6. CUSTOMER SERVICE – FIXING A CO-WORKER’S PROBLEM

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is for people who provide customer service on the phone or face to face. In this simulation, the learner has to work with an angry customer to fix a problem that a co-worker created for the customer. This simulation uses an internal IT help desk scenario, and can be modified to work for many different kinds of customer service situations.

This simulation requires a partner. The partner has information that the learner does not have.

Skills/Competencies Applied: Customer service, problem solving, service recovery.

Time: 30-45 minutes

STEP 1. SET THE STAGE

You work at the computer help desk for your company. Over the course of a typical day, you help many different employees with their computer hardware and software problems. You have several co-workers at the help desk. Usually, you are able to finish a job on your own, but sometimes meetings or emergency jobs come up and you have to help finish a “help ticket” that another team member started. You have notes on each help request that comes in so that you can all track progress and see what other team members have done.

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7. CONFLICT MANAGEMENT – DEALING WITH DISRESPECT

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is intended for anyone who may be exposed to disrespectful behavior on the job—whether that behavior comes from customers, co-workers, or managers. This simulation may also be of special value for supervisors and managers as they try to respond to issues of disrespect brought to them by upset employees. In this simulation, the learner faces the challenge of what to do when someone else is the target of the disrespectful behavior, what to do when it is directed at oneself, and how to escalate the issue appropriately and effectively.

This simulation requires a partner. The partner has information that the learner does not have.

Skills/Competencies Applied: Conflict management, dealing with difficult behavior, giving feedback, personal assertiveness.

Time: 30-45 min

STEP 1. SET THE STAGE

You work on a team that gets a lot of things done at work. You were hired into this position a little less than a year ago and you have learned a lot since then. Most of the people on your team are good people and pleasant to work with. There is just one person, Frank, who is hard to deal with.

Frank is a senior person on the team, but he has the same job you do. He seems to do okay at the work, but he can't seem to go for a day without making a rude joke or teasing someone until they get irritated or uncomfortable. His comments tend to be sarcastic, rather than helpful, and it can be hard to tell when he is trying to be funny and when he is just being difficult. He tends to put off helping anyone other than his friends unless the team leader, Sandy, specifically tells him to help out. One of his favorite phrases is, "Hey, I'm just kidding! Get more thick-skinned!"

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8. GIVING FEEDBACK – DEALING WITH DISTRACTING BEHAVIOR

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is for managers and individual contributors. A team leader has to confront an employee about her habit of stopping by and chatting with others, distracting them from work they need to get done.

This simulation requires a partner. The partner has information that the learner does not have.

Skills/Competencies Applied: Giving feedback, managing performance, gaining agreement, leading teams.

Time: 30-45 minutes

STEP 1. SET THE STAGE

You are a supervisor, responsible for a work team of twelve people. Your team is has a lot of work to get done each day, and everyone does pretty good job. You have been proud of their efforts and the results they have achieved over the past year. Recently, some of your employees have complained to you in private about Jessica, another team member. Jessica does good work, but seems to have time to stop and chat with other people often enough to distract them from their work. Two of the team members who have complained to you said that they tried to drop polite hints, but that Jessica just didn't get it, and kept talking. This is making it more difficult for the team members Jessica chats with to meet their goals. So far, everyone is still producing results, but it sounds like frustration with the distracting conversations is growing. One person asked, "Doesn't she have enough to do? I don't mind chatting for a bit, but she kept talking for twenty minutes, even after I tried to get back to work again! I don't know how she gets her own work done!"

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9. GIVING FEEDBACK – MOSTLY POSITIVE, WITH ONE CORRECTION

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is for managers and individual contributors. A team leader recognizes an opportunity to give one of his or his team members some feedback. The feedback is mostly positive, but there is one thing that the employee should do differently. Handling the mix of feedback is the challenge of this simulation.

This simulation requires a partner. The partner has information that the learner does not have.

Skills/Competencies Applied: Giving feedback, managing performance, gaining agreement, recognizing employees, leading teams.

Time: 30-45 minutes

STEP 1. SET THE STAGE

You are a supervisor, responsible for a work team of twelve people. Your team has a lot of work to get done each day, and everyone does a pretty good job. You have been proud of their efforts and the results they have achieved over the past year. Darren, one your team members who started out in an entry-level position, was promoted last month to another job in your team with broader responsibilities. You have been watching Darren and coaching him on some of the new tasks and responsibilities.

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10. GIVING FEEDBACK – THE RELUCTANT TEAM MEMBER

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is for managers and individual contributors. A project leader has to confront a reluctant team member about poor results and expectations that the team member has missed.

This simulation requires a partner. The partner has information that the learner does not have.

Skills/Competencies Applied: Giving feedback, managing performance, gaining agreement, leading teams.

Time: 30-45 minutes

STEP 1. SET THE STAGE

You are in charge of a project at work. There are several other people working on it, and you are responsible for coordinating their efforts. One of your team members, John, has not been turning in his fair share of the work. He is responsible for three parts of the project—one was to do some research and provide information to the other team members so that they could do their own work. John completed this a week late and without enough detail. Two other team members had to go do their own research to get their questions answered. The other two parts of the project involve creating sections of a report to senior management about the cost implications of the different project options. So far, he has sent an outline for these sections, but provided no details. It is now two weeks after those sections should have been done.

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11. INFLUENCE – WINNING A SEAT AT THE TABLE

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is for people who need to use influence, rather than the power of their role or position, to get the needs of their constituents met inside an organization. In this simulation, the learner represents a group of people who create custom products for customers, but do not have input into the sales process. The challenge is to win “a seat at the table” so that the people who do the work are included in the initial sales conversations. The learner has to bring up the issue in conversation, influence stakeholders, and gain agreement. With modification or skillful facilitation, this simulation can be used for any situation in which an individual needs to use influence to gain a bigger role in organizational decision making.

This simulation requires a partner. Partners play different roles, depending on the learners’ choices, and have information that the learners do not have.

Skills/Competencies Applied: Influencing others, gaining agreement, making proposals, collaboration, teamwork.

Time: 45-60 minutes

Preparing and Running the Simulation: This simulation has three major challenges that the learners must handle and three types of stakeholders that the learners can interact with to exert influence. This can be complex for the partners, who may have to switch between the three different roles and respond accordingly. There are several different strategies that learners might use to win a place at the table. Some are straightforward, with emphasis on influencing just one of the stakeholders. Others are more complex, spreading influence across people in all three stakeholder roles.

STEP 1. SET THE STAGE

You are a project manager and lead software developer at an innovative and successful software firm, Venn Software. Many companies use comprehensive enterprise resource planning (ERP) computer systems to help run their businesses. Venn Software specializes in making these ERP systems easy to use by creating custom screens and more natural ways for employees to enter and extract information. Your company helps its clients save money by letting their employees spend more time serving their customers, and less on managing their information.

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12. NEGOTIATION – WORKING OUT A MAJOR SERVICE CONTRACT

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is for people who need to negotiate important agreements. This may be useful for professionals and managers. In this simulation, the learners approach negotiation from one of two perspectives—buyer or vendor. They each need to prepare a negotiating strategy, present their proposals and react to others' offers, and negotiate to agreement.

Partner or Group Simulation: This simulation is designed for two learners. Depending on the circumstances, you may assign negotiating teams of two or even three people per team, but this will reduce the practice opportunity available to each learner.

Skills/Competencies Applied: Influencing others, negotiation skills, sales skills, buyer skills, getting results.

Time: 45-75 minutes

Setup: Each learner has a different role—seller or buyer. Each has different objectives, priorities, stakeholders, and information. Both parties want to reach an agreement, but the urgency and situations of the buyer and seller are different. Consider using this simulation early in a workshop or negotiating skills course after a brief introduction to some of the principles you have selected. Then, this simulation can be a good opportunity for learners to explore how those principles work in practice.

STEP 1. SET THE STAGE

AJS Fleet Services is a mid-sized trucking service company. Your firm provides truck maintenance and repair services for businesses of all sizes across the country. Companies that have trucking fleets depend on their trucks to remain profitable. AJS maintains customers' trucks in good working order, fixes them when they break or are involved in accidents, enters them into the record-keeping system, and provides reports to ensure compliance with federal, state, and local regulations. AJS can also provide data and analysis services to help their customers analyze driver behavior, manage risk and fuel use, and reach optimum utilization and profitability of the trucking components of the customers' businesses. AJS offers high reliability, high quality of service, and low overall cost. The company operates fifteen large service centers near major urban areas. It also subcontracts with dozens of highly reputable and skilled mechanics to provide local service to its customers.

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13. SALES – B2B SERVICES

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is for people in or moving into a business-to-business (B2B) sales role. With modification or skillful facilitation, this can be used for any big-ticket commercial sales situation. In this simulation, the salesperson has to understand the customer's needs, write a proposal, and make a presentation to win over a group of decision makers. This simulation may be done individually, if there are sufficient role-players, or in groups of two to four learners.

This simulation requires several role-players. It is best if there is at least one role-player for each sales team, and four for the ending presentation. Role-players have information that the learners do not have.

Skills/Competencies Applied: Qualifying a customer, consultative selling skills, writing proposals, making business-to-business (B2B) sales, making presentations, overcoming objections, closing the sale.

Time: 3 hours

STEP 1. SET THE STAGE

You are one of the lead sales representatives at an innovative and successful software firm, Venn Software. Many companies use comprehensive enterprise resource planning (ERP) computer systems to help run their businesses. Venn Software specializes in making these ERP systems easy to use by creating custom screens and more natural ways for employees to enter and extract information. Your company helps its clients save money by letting their employees spend more time serving their customers, and less on managing their information.

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14. SALES – VACATION TRAVEL

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is for people in or moving into a sales role. With modification or skillful facilitation, this can be used for any big-ticket consumer sales situation. In this simulation, the salesperson has to qualify the customer, help the customer select an appropriate vacation package, and overcome objections.

This simulation requires a partner. The partner has information that the learner does not have.

Skills/Competencies Applied: Qualifying a customer, consultative selling skills, showing empathy, overcoming objections, closing the sale.

Time: 30-45 minutes

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You have three meaningful decisions to make about how to handle this situation. Use the information provided here to handle this challenge as you would if this were a real situation. This is for practice! Take this opportunity to try new techniques and approaches to this challenge.

STEP 1. SET THE STAGE

You are one of the lead sales consultants at a very reputable family travel agency. Your agency is an independent chain, and not directly affiliated with any major travel, cruise, or resort company. Your specialty is in cruise ship vacations. Your agency also offers resort, safari, and group vacations, but 80% of your firm's business comes from families that book cruises.

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15. DELEGATION – CHOOSING TASKS, CHOOSING DELEGATES

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is intended for managers and team leaders who frequently need to delegate work. It may also be useful for other employees. In this simulation, the leader has to decide which tasks to delegate and which of the eligible employees to delegate them to.

This simulation requires a partner. The learners will take turns with the delegation practice in the fourth step of the simulation.

Skills/Competencies Applied: Delegation, getting results, time management, providing direction, leading teams.

Time: 45-60 minutes

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You have three meaningful decisions to make about how to handle this situation. Use the information provided here to handle this challenge as you would if this were a real situation. This is for practice! Take this opportunity to try new techniques and approaches to this challenge.

There are nine standards that you should try to meet over the course of this simulation. Your partner will rate you on whether or not you met each of these standards after the simulation is done.

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STEP 1. SET THE STAGE

You are in charge of a work team that has eight employees. You will depart for a week-long business trip tomorrow morning. This gives you only one day left in the office, and there is a lot that you have to get done before you leave. Some of the work will have to be delegated so that it can be done while you are gone. Fortunately, you have two experienced employees who can help you get most of this work done.

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16. DELEGATION – FOLLOWING UP ON A DELEGATED TASK

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is intended for managers and team leaders who frequently need to delegate work. It may also be useful for other employees or in preparation for a leadership role. In this simulation, the leader has a task to delegate, and then must follow up to make sure that the employee working on the delegated task gets the needed results.

This simulation requires a partner. The partner has information that the learner does not have.

Skills/Competencies Applied: Delegation, getting results, accountability, providing direction, leading teams.

Time: 30-45 minutes

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You have three meaningful decisions to make about how to handle this situation. Use the information provided here to handle this challenge as you would if this were a real situation. This is for practice! Take this opportunity to try new techniques and approaches to this challenge.

There are thirteen standards that you should try to meet over the course of this simulation. Your partner will rate you on whether or not you met each of these standards after the simulation is done.

STEP 1. SET THE STAGE

You are in charge of a work team that has eight employees. You will depart for a week-long business trip tomorrow morning. During the time that you are away, there is an important project that needs to get started. Because you will be out of the office, you need one of your experienced employees to get the project organized and moving forward. You have decided to delegate this task to Alonzo (or Alicia), one of your more senior team members.

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17. LEADERSHIP – INSPIRING ACTION IN TOUGH TIMES

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is intended for leaders who need to help people take action when the right course of action is unclear. It may also be useful for other employees or in preparation for a leadership role. In this simulation, the leader has to make a difficult choice about what action he or she wants people to take, communicate the decision to inspire action, and walk the talk personally.

This simulation requires a partner. The partner will act as a discussion partner, coach, and limited evaluator.

Skills/Competencies Applied: Leadership, influence, inspiration, providing direction, leading change, leading teams, leading across generations.

Time: 45-60 minutes

.. You have three meaningful decisions to make about how to handle this situation. Use the information provided here to handle this challenge as you would if this were a real situation. This is for practice! Take this opportunity to try new techniques and approaches to this challenge.

There are ten standards that you should try to meet over the course of this simulation. Your partner will rate you on whether or not you met each of these standards after the simulation is done.

STEP 1. SET THE STAGE

You are in charge of a team of twenty employees. You have some great people on your team, but business conditions have been difficult. Sales across most parts of the company have been down from projections for a year and business is flat. Your company's strategy is to produce and sell the best product in its market. The problem is that there are many more competitors in your market over the last three years with products that are simpler to use. Your main product line no longer has the brand recognition it once did; it's just not as widely recognized by new customers as in years past. Many of your customers have been pressed financially, too. They have put off making purchases or switched to cheaper products that are "almost-as-good-as" yours.

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18. LEADERSHIP – KEEPING YOUR BEST EMPLOYEES

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is intended for anyone who leads or manages people. Creating a motivating work environment that keeps people engaged and productive is a management responsibility and a long-term challenge. In this simulation, the leader has to establish and explain a retention plan, recognize and respond to employee statements that may indicate retention risks, and address some examples of employee dissatisfaction in detail.

This is a simulation written for table groups of 4-6 learners. The activities in this simulation could also be used by individual learners or pairs. They could also be adapted or expanded to be larger parts of a workshop on employee retention.

Skills/Competencies Applied: Leadership, influence, inspiration, providing direction, retaining employees, motivation, leading teams, leading across generations.

Time: 75-90 minutes

Facilitator Notes:

- This simulation intentionally leaves the specific industry, type of company, and product or service vague in Step 1. This makes it possible to use with different types of learners because it presents only the details relevant to the leadership challenge. If you wish to add more detail to the simulation to give the learners a more concrete picture and feel for the situation, feel free to do so.
- Consider customizing the retention plan worksheet for learners. Your organization may already have a form, or you may simply want to elaborate on or create an example for learners using the worksheet presented with Step 2. Decide whether you want the learners to complete any of the optional elements of the retention plan.
- Reproduce, cut out, and prepare the employee statement cards for Step 3. Make sure that you understand and can explain the rules and scoring method. The most points that a learner can score each turn is 4 (one for each criterion), regardless of the number of people in a group. Encourage role-play, if appropriate.
- The retention challenge task in Step 4 is more of a group problem solving and discussion activity than a true simulation task. Feel free to add detail to increase the degree of realistic context for this step or just leave it as is to promote a good discussion.

- Review the twelve standards in Step 5 of the learner’s material to make sure that you are familiar with the general standards and how they apply to the topic of employee retention. This will allow you to facilitate and coach this simulation effectively.
- This simulation is written for a first-level team leader; a person who manages employees directly. It is also appropriate for mid-level and senior leaders with some extra facilitation. Feel free to alter the description of the learner’s responsibilities to change the target level of the simulation.

19. PERFORMANCE MANAGEMENT – CORRECTIVE ACTION

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is intended for managers who supervise and manage the performance of other employees. In this simulation, the leader has to take corrective action with a difficult employee who is not meeting performance expectations.

This simulation requires a partner. The partner has information that the learner does not have.

Skills/Competencies Applied: Managing performance, giving feedback, delivering bad news, gaining agreement, leading teams.

Time: 30-45 minutes

STEP 1. SET THE STAGE

You are in charge of a team of twenty employees. You have some great people on your team, but business conditions have been difficult. Sales across most parts of the company have been down from projections for a year and business is flat. Your company's strategy is to produce and sell the best product in its market. The problem is that there are many more competitors in your market over the last three years with products that are simpler to use. Your main product line no longer has the brand recognition it once did; it's just not as widely recognized by new customers as in years past. Many of your customers have been pressed financially, too. They have put off making purchases or switched to cheaper products that are "almost-as-good-as" yours.

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20. PERFORMANCE MANAGEMENT – GIVING A “MEETS” RATING

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is intended for managers who supervise and rate the performance of other employees. In this simulation, the leader has to give a strong performer a “meets expectation” performance rating, and knows he will not be happy with the news.

This simulation requires a partner. The partner has information that the learner does not have.

Skills/Competencies Applied: Managing performance, giving feedback, delivering bad news, gaining agreement, leading teams.

Time: 30-45 minutes

STEP 1. SET THE STAGE

You are in charge of a work team that has fifteen employees. There is a fairly typical spread of ability and results among your team members—some are outstanding producers, a few need a lot of help and guidance to get results, and most do a great job most of the time. It is time to give annual performance ratings to your employees. Your organization uses a simple three-point scale: “Needs Development,” “Meets Expectations,” and “Exceeds Expectations.” According to this system, almost everyone should be in the “Meets Expectations” category. The “Needs Development” rating should only be given to employees who are not able to meet all of the performance expectations of their jobs; usually this is because they are new, but this rating also applies to employees who are unwilling or unable to perform up to expectations. On the high end, only the top 20% in any department can receive an “Exceeds Expectations” rating, and their results and potential for advancement must be clearly and consistently above those of their peers. Basically, as long as an employee has no problems meeting the basic work expectations of the job, he or she should receive a “Meets Expectations” rating.

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21. SETTING EXPECTATIONS – WHEN RESTRUCTURING CHANGES THE JOB

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is for intended for managers. As a result of restructuring, the department is losing an employee and project managers will need to take on most of the work that employee did. The leader needs to convey these new performance expectations to a project manager.

This simulation requires a partner. The partner has information that the learner does not have.

Skills/Competencies Applied: Giving feedback, managing performance, delivering bad news, gaining agreement, managing restructuring and layoffs, leading teams.

Time: 30-45 minutes

STEP 1. SET THE STAGE

You are the leader of a work group within a department that does a lot of projects for external and internal customers. Times have been difficult and sales are down. As a result of restructuring, Tom, the Business Analyst that supported your department, has been laid off and his position eliminated. Your boss has made it clear that you need to set new performance expectations with your project managers (PMs), because they will now have to pick up most of Tom's former responsibilities.

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22. RETAIL SALES SKILLS – SIMULATION MODEL

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is for people learning or practicing the skill of selling to retail customers. This is a generic simulation model that can serve as an outline for training on many different kinds of retail sales situations. You can use this simulation outline for structured on-the-job training or for classroom training with groups. In this simulation, the learner has to make the customer feel at ease, help the customer make a buying decision, and follow up to add value to the sale.

Skills/Competencies Applied: Sales skills, retail service skills, job skills, customer service skills.

Time: 5-30 min

STEP 1. SET THE STAGE

Here are instructions for setting up and running this simulation with different types of retail sales situations.

- (Prepare) Identify the sales approach the learner will have to perform on the job. (Your company's branded sales process, for example.) Write down the correct procedure for performing this task, including any standards that the learner will have to meet. (For many tasks, the procedure and standards may already be documented by your organization.) Make sure that you understand how to do the task well enough to train it.
- (Prepare) Make a list of 5-10 of the most common situations the learner will have to face when performing this task. For example,
 - Customers who aren't sure just what it is that they need and are looking for advice.

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23. SERVICE SKILLS SIMULATION MODEL

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is for people learning or practicing the skill of serving customers. This is a generic simulation that can serve as an outline for training on many different kinds of customer service situations. You can use this simulation outline for structured on-the-job training or for classroom training with groups. In this simulation, the learner has to make the customer feel at ease, understand and fill the request, and follow up to ensure proper service delivery.

Skills/Competencies Applied: Service skills, job skills, customer service skills.

Time: 5-30 minutes

Facilitator Notes

Important: The trainer needs to clearly define the skill or task that the learners will perform—including any steps and quality or time standards—before setting up this simulation. This simulation requires more trainer preparation than other pre-defined task simulations, and is more flexible in practice.

This simulation requires access to the information and tools required to perform the task. Depending on the nature of the task, the facilitator may need to supply practice or simulated material for learners to use. Also, a partner or group may be required, depending on the nature of the task.

STEP 1. SET THE STAGE

Here are instructions for setting up and running this simulation with different kinds of customer service skills. For illustration purposes, only, an example is shown for the server at a restaurant. Use the same model to fit the service skills to the ones most important to your own training audience.

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24. TECHNICAL/JOB SKILLS SIMULATION MODEL

FACILITATOR INSTRUCTIONS

SETUP

This 5-Step Simulation™ is for people learning or practicing a specific job skill. This is a generic simulation that can serve as an outline for many different kinds of technical and job skills. You can use this simulation outline for structured on-the-job training or for classroom training with groups. In this simulation, the learner has to understand the task, perform the task, and finish the task and/or pass the results on properly to others.

Skills/Competencies Applied: Technical skills, job skills.

Time: 5-30 minutes

STEP 1. SET THE STAGE

Here are instructions for setting up and running this simulation with different kinds of technical or job tasks.

- (Prepare) Select one task the learner will have to perform on the job. Write down the correct procedure for performing this task, including any standards that the learner will have to meet. (For many tasks, the procedure and standards may already be documented by your organization.) Make sure that you understand how to do the task well enough to train it.

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