

CONSCIOUS COLLABORATION

SKILLS TO SUSTAIN

PROFESSIONAL LEARNING COMMUNITY CONVERSATIONS

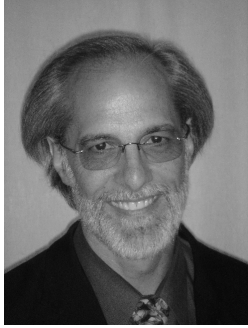


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Presented by
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Expectations and Concerns

What? An “expectations and concerns” activity helps adults learn more and faster in a workshop or course. It is especially useful when competent and confident adults are being asked to learn something new.

Why? It is normal for adults to have concerns about learning new ideas or skills in a group. An “expectations and concerns” exercise causes adults to reflect on hopes and fears they might have in learning new material. By making concerns public, adults usually discover their concerns are not unique. Finding common ground around common concerns no longer remains a potential source of resistance.

“Expectations and concerns” activities also cause adults to think about their positive expectations. This motivates learners and influences how they focus their attention and therefore, increases participant learning.

How? At a signal from the presenter, take some personal time to think and then write. In the “expectations column” list what you expect to happen and hope to learn.

In the “concerns column” list some personal concerns about this session.

Concerns

Expectations

Ways of Talking

“We make our world significant by the courage of our questions and the depth of our answers.”

---- Carl Sagan

Professional communities are born and nurtured in webs of conversation. What we talk about in our schools and how we talk about those things says much about who we are, who we think we are and who we wish to be, both in the moment and in the collective future that we are creating for ourselves as colleagues and for the students we serve.

To develop shared understanding and be ready to take collective action, working groups need knowledge and skill in two ways of talking. One way of talking, dialogue, leads to collective meaning making and the development of shared understanding. The other way of talking, discussion, leads to decisions that stay made.

Dialogue honors the social/emotional brain, building a sense of connection, belonging and safety. As a shape for conversations, it connects us to our underlying motivations and mental models. This way of talking forms a foundation for coherent sustained effort and community building. In dialogue we hear phrases like “An assumption I have is...” and, “I’d be curious to hear what about this issue.”

Discussion in its more skillful form requires conversations infused with sustained critical thinking, careful consideration of options and respect for conflicting points of view. This way of talking leads to decision making that serves the group’s and school’s vision, values and goals. In a discussion we hear phrases like “We need to define the problem we are solving before jumping to solutions.” and, “I’d like to see the data that these assumptions are base on before we go much further.”

Conversation and Deliberation

When groups come together they “converge” and “converse”. Drawing from these words’ respective Latin roots means that group members “turn together” and “associate with one another”. Conversation is informal talking in which participants share information, anecdotes and opinions to learn from one another or simply enjoy each other’s company. When the conversation takes on an organized purpose to either deepen understanding or make a decision, a group that understands that there are two ways of talking acknowledges this point of deliberation and consciously chooses to engage in either dialogue or discussion. Deliberation in its Latin root, *deliberare*, means to weigh as in evaluate, assess or ponder.

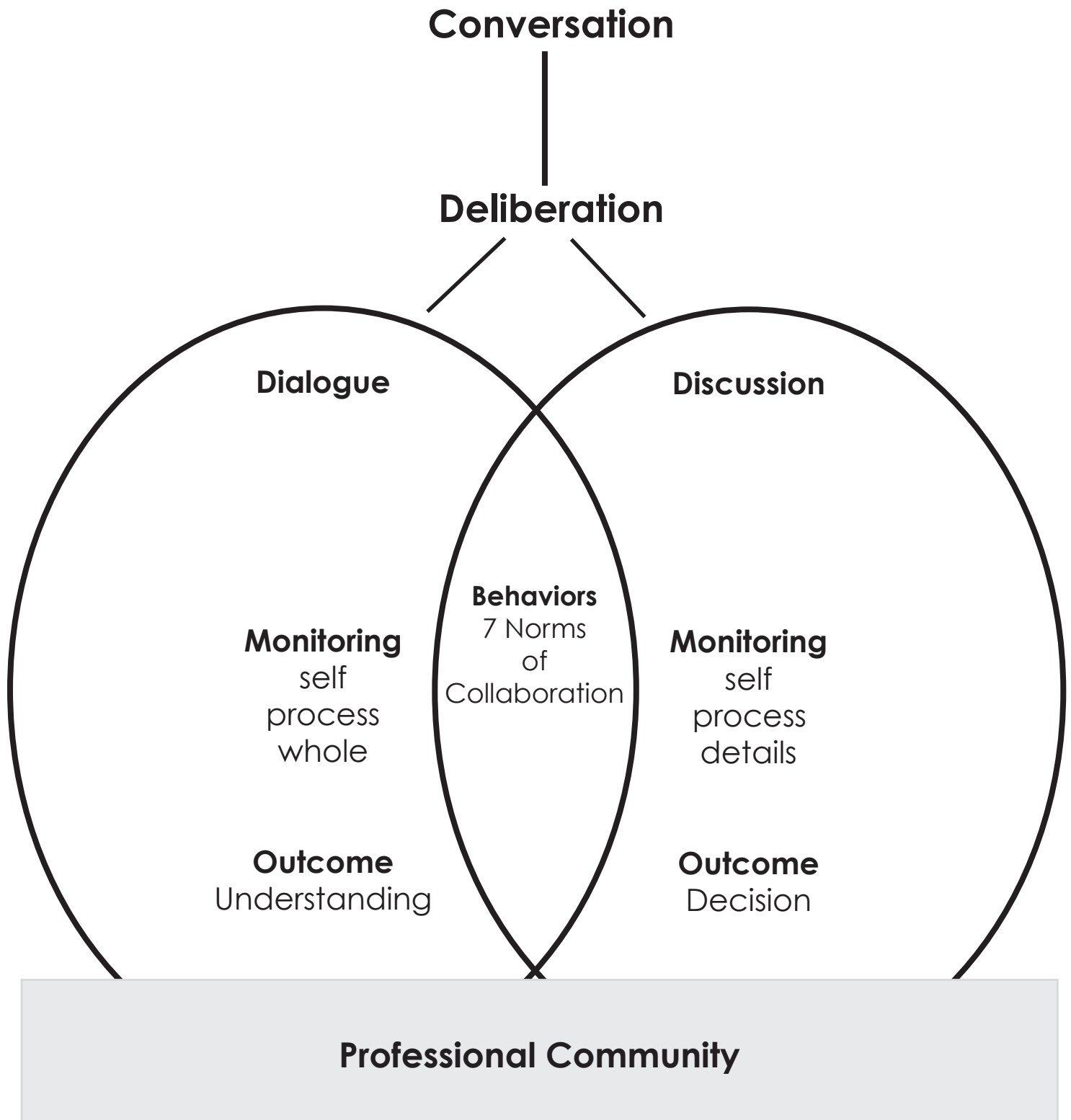
Group members only have this choice point available to them when they have roadmaps for ways of talking and consciousness about group processes and group purposes. A significant part of this awareness is recognizing that culturally embedded patterns shape behaviors – patterns from the greater surrounding culture and patterns from organizational and group culture. Many groups default into the western cultural habit of polarized discussion and debate. Our media-saturated world bombards us with arguments framed by commentators as point-counterpoint, pro and con, left versus right and other polarities. These models transfer to conversations in working groups; they then frame how participants listen to others and how and when participants speak. If group members are not careful, they listen not to understand but in order to hear gaps in the logic of other speakers or they interrupt to make a point, whether or not the current speaker is finished. Conversations then break down into verbal combat with winners and losers.

All too often, valued colleagues become conscientious objectors, choosing not to participate in the fray. The group then loses perspective and potential alternative viewpoints. The loudest and most persistent voices become the policy makers, and in the worst cases, the process sows the seeds of passive noncompliance or sabotage in those who feel excluded or devalued.

When groups understand that they have more than one way of talking available to them, they can then consciously choose whether to pursue the path of dialogue or follow the path of discussion. Most important issues require explorations along both pathways. Many sensitive issues, especially those with high stakes attached for the participants, may call for separate sessions in which the dialogue and discussion are separated in time and sometimes space. One useful facilitation technique is to explicitly mark agenda items as either dialogue or discussion and offer language models to further mark the distinctions between the two forms of discourse.

As group members become more sophisticated with the ways of talking, the pathways become more malleable. For example, during a dialogue, a group member senses an emerging consensus on an issue. He or she then inquires if this is so and frames a proposal to move the item to a decision. In another case, during a discussion, emotions rise and the details become muddled. Someone then proposes that the group switch to a dialogue format for a set period of time to explore the feelings and underlying issues that are present.

Ways of Talking



The Path of Dialogue

Dialogue is a reflective learning process in which group members seek to understand each other's viewpoints and deeply held assumptions. The work dialogue comes from the Greek dialogos. Dia means "through" and logos means "the word". In this "meaning-making through words," group members inquire into their own and others' beliefs, values, and mental models to better understand how things work in their world. In dialogue listening is as important as speaking. For skilled group members, much of the work is done internally.

Physicist and philosopher David Bohm described dialogue as process of surfacing and altering the "tacit infrastructure of thought." As a quantum physicist, Bohm draws an analogy between dialogue and superconductivity. Electrons cooled to extremely low temperatures dramatically change their behavior, operating more as a coherent whole and less as separate parts. In supercool environments, electrons flow around barriers and each other without resistance, creating very high energy. The same electrons radically change behavior in a new environment. At higher temperatures they operate as separate entities with random movement and loss of momentum.

Dialogue creates an emotional and cognitive safety zone in which ideas flow for examination without judgment. While many of the capabilities and tools of dialogue and skilled discussion are the same, their core intentions are quite different and require different personal and collective monitoring processes.

Monitoring Dialogue

Mindful group members pay attention to three essential elements during productive dialogue. They monitor themselves, fidelity to the process of dialogue and maintain awareness of the new whole that is emerging from and within the group.

Self

Dialogue is first and foremost a listening practice. When we "listen to our listening" we notice whether or not we are internally debating with the speaker, reviewing our mental catalogue of related information and personal anecdotes, or composing a response. Noticing these common internal processes allows us to switch them off so that we can hear others without judging.

Dialogue requires choice making. Typical choices include how and when to talk ---- Do we paraphrase prior comments as a check for understanding and or synthesis? Do we inquire into the ideas and assumptions of others? Or, do we put a new idea or perspective on the table to widen the frame?

Suspension is an essential internal skill in dialogue. To suspend judgment, group members set aside for a time their perceptions, feelings impulses and carefully monitor their internal experience. Points of personal conflict can easily emerge when we feel that others are not hearing us or that they are distorting our point of view. Points of conflict also surface when our own values conflict with those of a speaker. These areas of discomfort influence our listening and our responses, which in turn influence the thoughts and behaviors of other group members.

Peter Senge notes that suspension also involves developing awareness of our own assumptions and purposely hanging them from the ceiling – suspending them in front of the group so that all can examine them. These assumptions are beliefs – often unexamined—of why we think things work as they do. Our assumptions drive our perceptions, simultaneously opening and blinding us to possibilities in the world around us.

Process

Dialogue as a process requires focusing on the goal of developing shared understanding. In our action oriented work environments this is often counter cultural. Yet, in every group with which we've worked participants can all recite examples of decisions that were poorly conceived, poorly communicated, simply ignored or in the worst cases violated by many organizational members without consequence. At the root of all of these stories were group processes that were not thought out, often hurried and inappropriately facilitated. The rush to action pushed unclear decision-making processes and timelines onto the group without sufficient attention to developing shared understandings of both problems and solutions.

By going slow and honoring the flow of dialogue, groups can often go fast when they get to the choice points within decision-making. When the assumptions and the implications of those assumptions have been explored during dialogue, group members don't second-guess the motives of others during discussions.

Meetings should be safe but not necessarily comfortable. When a group confuses safety with comfort, it sacrifices productive tension for the ease of conviviality. Humor and banter can be avoidance strategies as much as they can be social lubricants. A lack of comfort with discomfort weakens dialogue and undermines the learning possibilities in that moment.

Whole

Thought is both a personal and collective process. We influence and are influenced in turn by others. During dialogue, the line between self and others blurs when we open ourselves to the possibilities within the communal thought space. This created whole is in itself a goal of dialogue. Communities move forward together. Collective understanding leads to shared goals and shared practices that tap the power of cumulative effect for student learning and for the adult learning community.

The whole is always greater than the sum of the individual parts. In many ways it is both process and product simultaneously. By learning to observe the processes, patterns and results that emerge from our dialogues we can more consciously participate and more consciously contribute to the whole of which we are a part.

Understanding as the Outcome

Well-crafted dialogue leads to understanding. This is the foundation for conflict resolution, consensus and professional community. Decisions that don't stay made are often the result of group members feeling left out and or having their ideas discounted by the group. Dialogue gives voice to all parties and all viewpoints.

Misunderstanding lies beneath most intra and intergroup conflict. Dialogue illuminates and clarifies misunderstandings when the underlying values and beliefs surface for examination. Often there is alignment at this level. It is at the solution level that opinions differ. Working from a foundation of shared understanding, group members can more easily and rationally resolve differences, generate options, and make wise choices when they move to the discussion side of the journey.

The Path of Discussion

Discussion in its Latin root *discutere* means to shake apart. It focuses on the parts and their relationships to one another – the causes, the effects and the ripple effects of proposed actions and solutions. In its most ineffective forms, discussion takes the form of serial sharing and serial advocacy without much group member inquiry into the thinking and proposals of others. Participants attempt to reach decisions through a variety of voting and consensus techniques. When discussion is unskilled and dialogue is absent, decisions are often low quality, represent the opinions of the most vocal members or leader, lack group commitment, and do not stay made.

Three elements shape skilled discussions: (a) clarity about decision-making processes and authority, (b) knowledge of the boundaries surrounding the topics open to the group's decision-making authority, and (c) standards for orderly decision-making meetings. Most meetings are, in fact, structured discussions.

Monitoring Discussion

Mindful group members pay attention to three essential elements during productive discussion. They monitor themselves, fidelity to the processes of skilled discussion and the details of the problem-solving, planning and decision-making processes with which they are engaged.

Self

Productive discussions require group members with emotional and mental flexibility. When our outcome is to influence the thinking of others and we give up models of “winning and losing”, we are more able to notice our thoughts and actions and the affects of those thoughts and actions on others.

Mentally, this requires taking a balcony view. This perceptual position is neither *egocentric* (I am intensely aware of my thoughts, feelings and intentions and know my own boundaries) nor *allocentric* (I am aware of how something looks, feels, and sounds from the point of view of another). The balcony view is a third perceptual position, a *macrocentric* perspective, in which with compassion and detachment we try to understand the nature of the situation the group is in at the moment. It is with this view, looking down upon the group, that we gain the most knowledge about our group, the group's interactions and ourselves.

From the balcony we can make the most strategic choices about how and when to participate. Should I advocate or should I inquire? At what points should I press? When should I probe for detail or let go? How might I phrase an idea for greatest influence? These are the same internal skills that teachers employ when they “monitor and adjust” in their classrooms.

Process

Skilled discussion as a process requires mindfulness about focusing on one topic and applying one process tool at a time. When topics and processes blur group members lose focus. To maintain focus requires clear structure, purposeful facilitation, impulse control on the part of individual group members and recovery strategies if the group strays off course.

Effective group members share responsibility with the facilitator for maintaining the flow of the discussion, for encouraging other group members to share knowledge and ideas, and listening for and surfacing points of confusion or murkiness.

When working groups stray from skilled discussion, they may move to an unskilled form of debate. This occurs when group members overshoot useful advocacy of ideas and proposals and start listening for and challenging the fallacies in the arguments of others. The Latin origins of the word debate, *battuere* means to fight or beat down. When meetings descend to the level of street debate, not academic debate, we focus on beating down the ideas of others. Scoring points becomes the goal and winning comes from intimidation and intonation as much or more than from logic or reason.

Details

While successful dialogue requires attention to the whole, successful discussion focuses on the details, both in isolation and in their interactions. The path of discussion is also the path of decision. As such, groups need to identify any constraints under which they might be working such as, timelines, deadlines, budgets, product standards, the negotiable items, the nonnegotiable item, task assignments and most importantly who they are in the decision-making process.

Groups skilled in discussion employ many intentional cognitive skills. There is no set sequence for these efforts. The task before the group determines the necessary intellectual toolkit.

Groups need tools for:

- Generating ideas, including a repertoire of brainstorming and creative thinking strategies and protocols.
- Organizing ideas, including both conceptual and graphic tools.
- Analyzing ideas, including a variety of tools for surfacing assumptions and clarifying particulars.
- Deciding among alternatives, including clarification of decision-making roles and processes.

Decision as the Outcome

Decision, in its Latin root *decidere* means to cut off or determine. In practice this means to cut off some choices. The purpose of discussion is to eliminate some ideas from a field of possibilities and have the stronger ideas prevail. Groups must learn to separate people from ideas in order for this to work effectively. If ideas are “owned” by individuals, then to cut the idea away is the same as cutting the person away. Ideas once stated should belong to the group, not to individuals. In this way they can be shaped, modified, and discarded to serve the group’s greater purposes.

Professional Community

Professional community is both a cause and an effect of the two ways of talking. As a cause being in community provides the motivation and vision of ways of interacting and working together. As an effect, strong professional community results from both what is talked about and how people talk. Such talk requires courage, confidence in self and others and skillfulness in applying the maps and tools for developing shared understanding and strategic decision-making practices.

The Seven Norms of Collaborative Work

Promoting a spirit of inquiry: Inquiring to explore perceptions, assumptions and interpretations and inviting others to inquire into their own thinking. Inquiring into the ideas of others before advocating for one's own ideas.

Pausing: Pausing before responding or asking a question allows time for enhances dialogue, discussion and decision-making.

Paraphrasing: Using a paraphrase starter that is comfortable for you: "So..." or "As you are..." or "You're thinking..." and following the starter with a paraphrase assists members of the group to hear and understand each other as they formulate decisions.

Probing: Using gentle open-ended probes or inquiries such as, "Please say more..." or "I'm curious about..." or "I'd like to hear more about..." or "Then, are you saying...?" increases the clarity and precision of the group's thinking.

Putting ideas on the table: Ideas are the heart of a meaningful dialogue. Label the intention of your comments. For example, you might say, "Here is one idea..." or "One thought I have is..." or "Here is a possible approach..."

Paying attention to self and others: Meaningful dialogue is facilitated when each group member is conscious of self and of others and is aware of not only what she/he is saying, but also how it is said and how others are responding. This includes paying attention to learning style when planning for, facilitating and participating in group meetings. Responding to others in their own language forms is one manifestation of this norm.

Presuming positive intentions: Assuming that others' intentions are positive promotes and facilitates meaningful dialogue and eliminates unintentional put-downs. Using positive intentions in your speech is one manifestation of this norm.

Four Group Member Capabilities¹

There is no such thing as group behavior. All “group behavior ” results from the decisions and actions of individuals. When individual choices align in productive patterns, the group produces positive results.

Group work would seem to be a natural condition of human life. Since the dawn of humanity on the plains of Africa, bands, clans, tribes, and teams have collaborated for defense, food, gathering, and ceremonial purposes. Yet work in groups is often difficult, full of conflicts and tensions, but at the same time is absolutely necessary for producing results in modern organizations.

The tensions between part and whole are not easily resolved. Each group member must balance personal goals with collective goals, acquire resources for his or her own work, and share those resources to support the work of others.

Individual group members need consciousness and lenses for shaping personal decisions and behaviors in meetings. Four capabilities shape the self-monitoring system of high-performing group members. These in turn organize and drive seven norms of collaboration.

A *capability* names what a person is able to do. It is different than *capacity*, which refers to how much one can hold. Capabilities are the metacognitive awareness with which people determine when to use, how to use or not use certain skills. Capabilities therefore organize and direct the use of skills; they influence the application and effectiveness of knowledge and skills.

The four group-member capabilities are as follows:

1. To know one's intentions and choose congruent behaviors.
2. To set aside unproductive patterns of listening, responding, and inquiring.
3. To know when to self-assert and when to integrate.
4. To know and to support the group's purposes, topics, processes, and development.

To Know One's Intention and Choose Congruent Behaviors

Clarity of intention in the moment and over time drives attention, which in turn drives the *what* and *how* of a group member's meeting participation. This clarity precedes and influences the three other capabilities. It is the source of impulse control, patience, strategic listening, and strategic speaking.

This capability is the foundation for flexible and effective behavior. If, for example, a person's intention is to positively influence the thinking of others, various behaviors can be used congruently with that intention: under some circumstances, a paraphrase will convey an attempt to understand and open the door for reciprocal understanding; in some situations, direct advocacy will be more persuasive; in other cases, an inquiry into the thinking of another speaker may be more effective.

To Set Aside Unproductive Patterns of Listening, Responding, and Inquiring

For each meeting participant, there are two audiences. One is external, made up of the other group members. The other is internal, made up of feelings, pictures, and talk going on inside each individual. Group members need to continually decide which audience to serve. Three major set-aside areas focus this choice and allow fuller and more nonjudgmental participation. They are as follows:

1. To set aside autobiographical listening, responding, and inquiring.
2. To set aside inquisitive listening, responding and inquiring.
3. To set aside solution listening, responding, and inquiring.

The autobiographical frame leads to several problems on group work. The first is the filtering process that goes on when individuals try to hear another's story through the lens of their own experiences. Although this can be a source of empathy, it can also lead to distortion and miscommunication.

This type of listening, responding, and inquiring is a major source of wasted time in meetings. It can lead to endless storytelling in which everyone around the table shares a related anecdote. This is dinner party conversation, not productive meeting talk. Each member of the eighth-grade team does not have to relate a discipline horror story. The team should explore a collective understanding of these students and their needs and develop appropriate response patterns that elicit desired behaviors.

The inquisitive frame is sometimes triggered by the autobiographical. People inquire to see how others' stories compare to their own. Pure curiosity also motivates inquisitive listening, responding, and inquiring. A critical question at this junctures "How much detail do we need to move this item?" This is an example of what we call a "naïve question." Such questions can be asked by any group member. The purpose is to focus attention on critical matters and avoid unnecessary specificity.

The solution frame is deeply embedded in the psyche of educators. Status, rewards, and identity are all tied up in being a good problem solver. The pressure of time in schools pushes people toward action and away from reflection. The down side of this pattern is that the groups and group members get trapped in situations and action plans before they have time to fully understand the perspective of others.

The solution frame also stifles the generation of new possibilities. It gets in the way of developing alternative ways of framing issues and problems, and it pushes groups toward action before creating clear outcomes.

To Know When To Self-Assert and When to Integrate

In productive groups each member must decide when to self-assert and when to integrate with the group. In one group, a member confided to us that she was concerned about the autocratic disposition of the new chairman. While she valued the directness that he brought to the group's work, she was concerned that a collective ownership would gradually be lost if he were not sometimes challenged.

Her issue, and the tension for each group member, is when to challenge and when to go with the flow. Self-assertion and integration are conscious choices only when group members have personal clarity about their own intentions and knowledge of and a willingness to support the group's outcomes and methods.

Self-assertion does not necessarily mean self-focus. It can mean asserting oneself into the flow of group interactions to refocus the group on a topic or on a process. It can mean reminding others of the purpose of the meeting when the conversation strays off course. It can also mean speaking up and advocating for topics and processes.

When individual group members integrate, they align their energy with the content and processes of the meeting. During dialogue they suspend judgments and counter arguments in an attempt to understand viewpoints different from their own. During discussions, they follow the flow of logic and reasoning as it emerges. In this way, solutions satisfying to the group as a whole are likely to emerge.

Consensus decision-making is the ultimate test of this capability. This procedure assumes that participants know when and how to self-assert and when and how to integrate, both during and after the decision-making process.

To Know and Support the Group's Purposes, Topics, Processes, and Development

All ongoing groups need to balance three simultaneous agendas. The first is *task focus* which is the ultimate expression of the group's purpose. The second agenda is *process skills development*. Without continued attention to expanded repertoire and expanded skills, the group stagnates and does not expand its capacity for handling complex work in the future. The third agenda is *group development*. All groups exist on a continuum from novice to expert performance. Experience alone is an insufficient teacher. Many longstanding groups operate at the novice levels of performance.

High-performing groups are adaptive groups. They learn from experience and improve the way they work. In supporting the group's purposes, topics, processes, and development, individual group members make a commitment to this shared learning and to personal learning.

Paraphrasing

Paraphrasing is one of the most valuable and least effectively used communication tools. Paraphrasing in the workplace is used primarily to surface another person's thinking. When speaking, our intention is to communicate clearly. Unfortunately, what is clear in our mind is not always clearly understood. The paraphrase offers a respectful and accessible entry into understanding what someone else is saying and to support his or her ideas.

The effective paraphrase is oriented to the thinking of the speaker, not to the one who is paraphrasing. When you elect to paraphrase, you are attempting to reflect the speaker's thoughts, words and emotional state. The paraphrase is not used to add your own thoughts. When using an effective paraphrase, you are a mirror to the speaker's words, not a spotlight to add your own thoughts or perspectives.

When used to help surface thinking, paraphrasing does not include the pronoun "I". Using the first-person preface, "I," indicates you are interpreting, not listening, and perhaps reframing the speaker's thoughts. When interpreting or reframing someone else's thoughts, they can perceive being challenged. This can lead to an unnecessary conflict. The recommendation is to frame the paraphrase in the speaker's words and gestures to maintain rapport. Good paraphrases are not agreements, rather they give the sense of being "listened to."

Try this experiment. Paraphrase, and then ask a question. Do this several times. Now ask questions without preceding them with paraphrases. A good paraphrase communicates, "I am trying to understand you—and therefore, I value what you have to say". Interestingly, the paraphrase implies "I" without using "I." Questions preceded by paraphrases are perceived similarly. Questions by themselves, no matter how artfully constructed, put a degree of psychological distance between the asker and the asked. Psychological distance refers to trust. The lower the trust you have in someone the greater the psychological distance. The greater the trust you have in someone, the shorter the psychological distance between the two of you. When you trust someone, you are more likely to share your thoughts honestly and openly. Paraphrasing aligns the parties and creates a safe environment for thinking.

One powerful use of a paraphrase is that the listener can never be "wrong." Speakers will always correct the listener if they feel they have been misunderstood and the correction is done without having felt attacked or intimidated.

The Structure and Flow of Effective Paraphrasing

Well-formed paraphrases reflect the speaker's content and the speaker's emotions about the content. A paraphrase also leads the conversation, in that what is paraphrased is most likely what the speaker (whose words are being paraphrased) will respond to next. Well-formed paraphrasing creates permission to probe for details and elaboration. Without the paraphrase, probing may be perceived as interrogation. The process and flow may look, feel and sound something like this:

- Before paraphrasing, listen and observe carefully to "hear" the content and "feel" the emotions of the speaker.
- Signal your intention to paraphrase. This is done by using an approachable voice and by opening with a reflective stem. Such stems put the focus and emphasis on the speaker's ideas, not on the paraphraser's interpretation of those ideas.

- If your habit is to use the first person (e.g. “What I hear you saying is...”) focus on modifying your “entry” words. To do otherwise may signal to many speakers their thoughts no longer matter, and the person paraphrasing is now going to insert his or her own ideas into the conversation.

The following paraphrase stems signal that a paraphrase is coming:

- ✓ You're suggesting...
- ✓ You're proposing...
- ✓ So, what you're wondering...
- ✓ So, you are thinking...
- ✓ Hum, you're pondering on the effects of...
- ✓ Your hunch is...

Choose a logical level with which to respond. There are three broad categories of logical levels, any one of which may be used depending on the context and intent of the conversation:

1. Acknowledge and clarify content and emotion. If the paraphrase is not completely accurate, the speaker will offer corrections: “So, the budget allocated to these 2 line items is reduced.” or “Ah, your thinking the budget report is accurate on the benefits costs.”
2. Summarize and organize by offering themes and containers to organize several statements or separate jumbled issues. This is an especially important level of paraphrase to use when multiple speakers contribute to a topic: “There are two ideas here. One is that you can request transcripts _____. Another idea is that waiting might be more beneficial.” This paraphrase is appropriate when the speaker has addressed multiple issues, is wrestling with decisions between two or more distinct futures, or has declared beliefs about a series of facts.
3. Shift focus to a higher or lower logical level. Paraphrasing within a flow of discourse often moves through a sequence of acknowledging, summarizing, and shifting focus to a higher or lower logical level. Logical level refers to levels of thinking. When concrete and fact driven, we are on a low logical level – consider it linear and predictable. When we talk about a topic and include our beliefs or values, we shift our logical level higher to more complex ideas. Paraphrases move to a higher logical level when they name concepts, goals, values, and assumptions:

If a person says, “I can't seem to get my work done on time. I keep getting more projects all the time.” A shift focus paraphrase might be, “So the issue for you is about prioritizing,” or “It is important for you to have your work done on time.”

Paraphrase to move to a lower logical level when abstraction and concepts need grounding in details: When someone says, “It is not fair for Tom to run the meeting and share only his ideas.” A paraphrase that downshifts the shift focus might sound like, “So 'fair' might mean each of you gets an opportunity share ideas with one another without interrupting.” This manner of paraphrasing is especially effective to dissipate emotional distress by reflecting the speaker's values statements or deeply held beliefs in a way that allows them to examine them from a differing perspective.

Learning Styles and Paraphrasing

Paraphrases that summarize or shift the logical level of discourse support and stretch the thinking styles of different group members. Global thinkers (those who might initially focus on large-scale issues and make conclusions about smaller, more incremental topics) appreciate paraphrases that separate and organize “thinking in progress.” At other times the shift down in logical levels grounds global thinkers in specific examples and concrete details. Concrete, high sequential thinkers (those who learn from specific instances or facts, and then apply that knowledge to a much larger framework) learn from the shift up to higher logical levels. This helps them explore a bigger picture and creates a wider context for thinking.

Listening to the speaker’s word choice might also prove a valuable manner in which to enhance rapport through the paraphrase. Using visual, auditory or kinesthetic words in a paraphrase responding to a declaration in the same learning style adds another layer of perceived “understanding” and rapport to one whose words are being paraphrased.

Adapted from *The Adaptive School: A Sourcebook for Developing Collaborative Groups*, Garmston, R. and Wellman, B. (1999), Christopher-Gordon Publishers, Inc. Norwood, MA., pages 39-41.

Norms Inventory

Rating Our Perceptions of Our Group

Promoting a spirit of inquiry

1. We inquire to explore perceptions, assumptions and interpretations.

Low 1 _____ 2 _____ 3 High

2. We invite others to inquire into our perceptions, assumptions and interpretations.

Low 1 _____ 2 _____ 3 High

3. We inquire before we advocate.

Low 1 _____ 2 _____ 3 High

Pausing to allow time for thought

1. We pause after asking questions.

Low 1 _____ 2 _____ 3 High

2. We pause after others speak to reflect before responding.

Low 1 _____ 2 _____ 3 High

3. We pause before asking questions to allow time for artful construction.

Low 1 _____ 2 _____ 3 High

Paraphrasing within a pattern of pause - paraphrase-question to ensure deep listening

1. We listen and paraphrase to acknowledge and clarify.

Low 1 _____ 2 _____ 3 High

2. We listen and paraphrase to summarize and organize.

Low 1 _____ 2 _____ 3 High

3. We listen and paraphrase to shift levels of abstraction.

Low 1 _____ 2 _____ 3 High

Probing to clarify

1. We seek understanding of the meaning of words.

Low 1 _____ 2 _____ 3 High

2. We seek understanding of data, explanations, ideas, anecdotes and generalizations.

Low 1 _____ 2 _____ 3 High

3. We explore the implications and consequences of proposals and plans.

Low 1 _____ 2 _____ 3 High

Putting ideas on the table and pulling them off / placing data and perceptions before the group

1. We state the intentions of our communications.

Low 1 _____ 2 _____ 3 High

2. We provide relevant facts, ideas, opinions and inferences.

Low 1 _____ 2 _____ 3 High

3. We remove or announce modification of ideas, opinions and points of view.

Low 1 _____ 2 _____ 3 High

Paying attention to self and others to monitor our ways of working

1. We balance participation and open opportunities for each other to contribute and respond.

Low 1 _____ 2 _____ 3 High

2. We restrain our impulses to react, respond or rebut at inappropriate times or in ineffective ways.

Low 1 _____ 2 _____ 3 High

3. We maintain awareness of the group's task, processes and development.

Low 1 _____ 2 _____ 3 High

Presuming positive intentions to support a non-judgmental atmosphere

1. We communicate respectfully whether we agree or disagree.

Low 1 _____ 2 _____ 3 High

2. We embed positive presuppositions in our paraphrases, summaries and comments.

Low 1 _____ 2 _____ 3 High

3. We embed positive presuppositions when we inquire or probe for specificity.

Low 1 _____ 2 _____ 3 High

Essential 7 Abilities of Effective Presenters

The most effective leaders, presenters, facilitators, and teachers all have something significant in common...

- **Establish credibility.** This lays the foundation for the group to attribute intelligence, competence, confidence and expertise to the presenter. Credibility is a presenter characteristic perceived and assigned by the group. A few of the specific skills associated with credibility include choosing voice tone, use of the frozen gesture, credible stance, and abdominal breathing patterns.
- **Build and sustain rapport.** This involves strategies and moves that create a short-term psychological state in which the lines of communication are wide open. When rapport is high, participants are cognitively vulnerable and therefore receptive to considering new understandings that challenge their current models of knowing. Knowing how to establish rapport, break rapport, and re-establish rapport are critical skills in the learning environment to support participant thinking and problem solving.
- **Read the group.** This entails recognizing, processing and responding to the group's nonverbal patterns. The presenter reads the group to anticipate their learning needs as well as their psychological and physiological needs. Reading the group involves the skills related to group dynamics through the observable behaviors of audience members. By reading the nonverbal behaviors of participants, an effective presenter can anticipate resistance, recognize receptivity, and choreograph facilitation moves that support positive group dynamics.
- **Balance task, process and group development.** This is an interaction between outcomes (task), protocols (process), and relationship (group development). Effectively balancing the three ensures acquiring a tangible outcome while promoting maximum learning and optimal participation in the time available.
- **Listen to and acknowledge participants.** This involves deliberate steps in a delicate dance. Adults offer several challenges in learning environments. One of these challenges is the willingness to reveal what they know and don't know as well as what they are learning. Effective listening requires Ability 2, *Rapport*, as well as specific voice, eye, gesture, and stance patterns to give the participant the sincere perception of being listened to and acknowledged. Participant engagement and learning depends on being understood and having the sense of feeling safe enough to expose their thinking to the group.
- **Respond appropriately.** This is dependent on the effective implementation of skills from Essential Ability 5, "*Listen to...*" When a person feels listened to and acknowledged, the effective presenter can then deliver an appropriate response. Responding appropriately requires evaluating, synthesizing and delivering a congruent verbal and nonverbal message. It is about making the person and the group right. By right we mean establishing a learning environment where it is safe to be wrong, to reveal learning, and to reveal what you do not know.
- **Recover with grace.** This involves the ability to recognize when the group stops thinking and you have lost group rapport or group attention, or perhaps even just lost your place. Graceful nonverbal moves ensure the group will stay present, focused, and engaged. This intriguing ability includes the nonverbal moves associated with changing location, pausing, gestures of location and stance.



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Essential Ability 1: Establish Credibility

What is Credibility?

Credibility is a presenter characteristic perceived and assigned by the group. Being perceived as credible lays the foundation for the group to attribute intelligence, competence, confidence and expertise to the presenter.

What good is Credibility?

By using the credible voice presenters can more effectively amplify important content, give directions and deliver nonnegotiable information or data. By developing conscious awareness of voice and a willingness to expand the range, presenters can be of greater influence with participants during meetings, seminars, workshops, trainings, classes, and keynotes.

How to establish and maintain Credibility

One way to establish credibility is to insert a pause or gesture. Another way is to shift from an inviting voice to a credible voice and watch to see how quickly the group gives you attention. Fast attention correlates to having high credibility from the group.

To maintain credibility, periodically use at least one pattern, or any combination of patterns systematically and then watch the group's reaction. If you perceive the group being less attentive, increase the frequency of the patterns until you achieve the attention and response you want.

1. Credible Voice



Narrow modulation, tone lowering at the end of a phrase or sentence.

2. Pause

Be silent and still when inhaling or pausing. One more thing, close your mouth when pausing!



3. A Frozen Gesture

During a pause, use a frozen and relaxed gesture.



5 Patterns to establish credibility



5. Stance

Use neutral posture, weight even on both feet, about hip distance apart. Arms at your side, shoulders and hands relaxed.

4. Low Breathing

When inhaling, allow your abdomen to expand, not your chest. Also breathe slowly and deeply through your nose.



Visual Indicators of Credibility

Credible voice	<ul style="list-style-type: none"> • Head is relatively still when speaking • Chin drops at the end of the phrase or sentence
Pause	<ul style="list-style-type: none"> • Speaker is silent during the pause • Mouth is closed while breathing and there is infrequent blinking
Frozen Gesture	<ul style="list-style-type: none"> • Lower arm is parallel to the ground • Hand is open with palm either facing down or perpendicular to the ground
Low Breathing	<ul style="list-style-type: none"> • Body is still yet relaxed, shoulders are relaxed (down)
Stance	<ul style="list-style-type: none"> • Body weight is balanced • Posture is erect, yet relaxed • Arms are at one's side • Hands are relaxed and open

Practice by following the icons while saying aloud the following:



"Welcome. Today our agenda has 3 important points;



the budget, project reports, and production."

7 Essential Abilities of Effective Presenters*

- Establish credibility
- Build and sustain rapport
- Read the group
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Essential Ability 2: Build and Sustain Rapport

What is Rapport?

Rapport is a short-term psychological state in which the lines of communication are wide open. When people are in rapport with each other communication flows more efficiently between them.

What good is Rapport?

When rapport is high participants are cognitively vulnerable and therefore receptive to considering new understandings that challenge their current models of knowing. Knowing how to establish rapport, break rapport, and re-establish rapport are critical skills in the learning environment.

How to "✓" and maintain rapport

One way to "✓" rapport is to pace with the person to whom you are talking. For instance, when pacing, mirror their nonverbal patterns and match their energy. Watch to see if they mirror your patterns. If they do, it is an indication of rapport.

To maintain rapport when listening, continue to mirror and be present in the moment. When speaking, match their language by using the same verbs and adjectives. An advanced rapport skill is called leading. When leading you are attempting to get them to mirror you.

1. Match Voice



Vary modulation, tone lifting or lowering at the end of a phrase.



2. Match gestures



Mirror when listening. Use similar gestures when speaking.

3. High Expectation



Visually listen to the other person. Initially use direct eye contact, low breathing, and head nods.



5 Patterns to build and sus- tain rapport



5. Mirroring

Match the other person's gestures, posture, breathing, energy, and words -- careful not to parrot.

4. Match breathing

When listening, match the breathing of the speaker. To shift them to lower breathing, slowly reduce your speech rate during their exhale.

Visual Indicators of Rapport

Match Voice	<ul style="list-style-type: none"> When listening first, use their voice pattern when deciding to speak. Use approachable voice; chin lifts at the end of the phrase or sentence. Voice tones match.
Match Gesture	Gestures tend to be matching in frequency, intensity, and range.
High Expectation	When listening, direct eye contact, nods, silent during the pauses.
Match Breathing	Breathing patterns are similar. May be high or low depending on situations.
Mirroring	Both parties tend to reflect each other's gestures, tone, eye contact, and energy.

Practice by following with a partner. Sit 90° from each other or across from each other.

Person A talks about a person they admire. The person can be living, a relative, or a famous person from history as long as she/he is someone they admire.



Person B gets into rapport as quickly as they can. Person B maintains rapport for about 2 minutes. Then person B breaks rapport with person A. You can break rapport by diverting your attention to something other than person A.



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Essential Ability 3: Read the Group

What is 'read the group?'

To read a group means to identify when the group is or is not:

- in rapport,
- attentive,
- thinking,
- having a positive experience, or
- in a state of psychological safety.

What good is it to 'read the group?'

When presenting, you only have one shot to make a good impression. Having an ability to accurately read a group is important so you can be both proactive and reactive to the group's needs and responses. Effectively reading and responding to the group often results in a session where participants walk away feeling they learned a lot, were respected, and valued the workshop.

What to do once you read the group

Reading the group is half the challenge. The other half of the challenge is determining the course of action needed to get the group where you want them. This takes lots of practice and it is very dynamic in real-time.

For instance, imagine having difficulty getting a group's attention in a timely manner. Insert a 'yellow light,' a pause, or "I interrupt myself. When you do get their attention using one skill, increase the range of that skill to improve your own muscle memory and perceptual acuity.

1. Echo



When the group repeats aloud something you said.

2. Synchronicity



Having the group respond to a nonverbal pattern or verbal request at the same time.



5. Rapport

When presenting or during group activities, participants demonstrate the patterns of rapport (see EA2, Rapport).

5

Patterns to read the group

3. Fluidity



Noticing the group's breathing and their fluid body movements.

4. Response time



Respectfully getting the group's attention after an activity without using direct management.

Indicators to recognize "read the group"

Echo	When you want the group to repeat what you said, they echo back in unison.
Synchronicity	When the group does the same thing at the same time, i.e., looking at a slide, laughing, going auditory, being intrigued, or beginning an activity.
Fluidity	Smoothness to their gestures and body movements. This is most easily seen when they are working in table groups.
Response time	The time spent releasing a group or bringing them back from an activity. Often brief at the beginning of a session while increasing by the end of the session.
Rapport	In group activities you notice the visual indicators of rapport. When presenting you notice the visual indicators of rapport towards you.

Essential Abilities of
Effective Presenters*

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Practice reading a group by watching for any one of the five indicators. Once you notice an indicator, stretch yourself and try to influence that indicator by expanding your range of implementation of any one or two recommended nonverbal patterns. By doing this you will increase your perceptual acuity for noticing these complex group dynamic patterns and also increase your ability to effectively respond to the group.

Essential Ability 4: Balance task, process and group development

What is balance task, process and group development?

Effective groups manage internal and external influences. Internal management includes meeting structures such as one-topic-at-a-time and one-process-at-a-time.¹ Group members know how to participate, when to self-assert and support the group processes. External management includes due dates and organizational pressures. Reflection is an essential skill to support group development.

What good is Essential Ability 4?

It has been said that a group too busy to reflect is a group too busy to improve. By using the skills from this Ability, groups increase their efficacy, flexibility, consciousness, interdependence, and craftsmanship. Time is saved as efficiency improves. Relationships are preserved.

How to “✓” for Essential Ability 4

One way to “✓” is to use the Norms Inventory¹ at the end of each meeting. The data gathered from the inventory can be used to focus a reflective conversation and identify areas of improvement.

Skill five, naive questions, is itself a way to “✓.” Any group member can ask a naive question to refocus, clarify a topic and process, probe, or surface intention.

1. Meeting Structures



Includes one process at a time and one topic at a time.

2. Group Member Capabilities¹



Congruence of intention with behavior, listening, integrating, and supporting group processes.



3. 3rd Point²

When you want to focus the group's energy on an issue or data, 'go visual' by using an easel or screen.

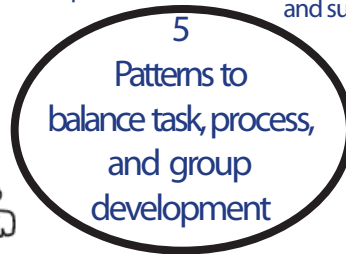


4. Norms of Collaboration¹

Promoting a spirit of inquiry, pausing, paraphrasing, putting ideas on the table, presuming positive intentions, probing, paying attention to self and others.

5. Naive Questions

Using tentative language, gestures, and voice you can refocus a group, support thinking, and introduce new ideas for consideration.



Indicators of Essential Ability 4

Meeting Structures	Explicit processes are explained and followed. Protocols are used.
Group Member Capabilities	Each member's intention and behavior are congruent. Each member listens constructively, knows when to self-assert and integrate, and supports the group process.
3 rd Point	Speaker points to and looks at information visually displayed on an easel or screen.
Norms of Collaboration	Seven norms are consistently observed in each group member.
Naive Questions	When the group goes off task, a naive question refocuses the group and the group does not downshift.

To practice 3rd point, follow the two listed scenarios as written.

Then discuss: What differences are you noticing between the two scenarios? In what ways might scenario 2 be useful to you?

Scenario 1: Least recommended

Stand facing the audience. Using a definitive voice while looking at the group and say; "The test results are in and there is a 25% decrease in productivity and a 15% decrease in end user satisfaction."

Scenario 2: Most recommended

Using a definitive voice while initially looking at the group say;

"The test results are in and there is a 25% decrease in productivity and a 15% decrease in end user satisfaction."



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¹ Garmston, B. and Wellman, B. (2009). *The Adaptive School: A Sourcebook for Developing Collaborative Groups* (2nd Ed.). Christopher-Gordon Publishers, Norwood, MA.

² Grinder, M. (2007). *Elusive Obvious, the science of nonverbal communication*. www.michaelgrinder.com, Battle Ground, WA.



Essential Ability 5: Listen to and Acknowledge participants

What is listening to and acknowledging participants?

Exhibiting and practicing high expectations, paraphrasing, and thanking are all patterns that demonstrate you are listening to and acknowledging a participant.

What good is listening to and acknowledging participants?

By using each of the six skills, participants feel listened to. As participants share their learning, group dynamics are strengthened and learning is accelerated.

How to listen to and acknowledge participants.

First, by moving to the opposite side of the stage, two outcomes emerge:

- 1 the person speaking tends to increase their volume for all to hear, and
- 2 peripheral vision benefits to see the group's reaction to the comment.

How the group responds to the comment determines how to respond. If the group is shocked or confused, you respond directly to the comment. If the group is annoyed by the comment, you delay your response by saying "Let's you and I talk during the break." By delaying your response, you preserve a positive group dynamic.



1. Stand still

When listening to what a participant is saying, stand still and use direct eye contact.



2. A frozen gesture

Place your arms at your side or extend a soft gesture (palms up) toward the speaker as they speak.



6. Paraphrase

Initially, paraphrase their comment to verify your understanding of their thinking.



5. Thank you

When they complete their comments, say "thank you" before paraphrasing or responding.



3. Pause

Be silent until they complete their thought and stop talking.



4. Low Breathing

While the participant speaks, continue to breath low and in a relaxed manner.



Indicators of Listen to and Acknowledge

Stand still	Remain still, relaxed, and look at the speaker until they complete their comment.
Frozen Gesture	Lower arm is parallel to the ground. Hand is open with palm either down facing or perpendicular to the ground.
Pause	Consider using the pause after you say "thank you." Be sure to keep your mouth closed during the pause.
Low Breathing	Body is still yet relaxed and shoulders are relaxed (down).
Thank you	Use this phrase before responding.
Paraphrase	When appropriate, clarify, summarize, or shift focus paraphrase as you respond.

Practice listening and acknowledging (in pairs):

Least Recommended:

Person A asks a question or makes a comment to person B.

- Option 1: Person B walks away as person A speaks.
- Option 2: Person B shuffles paper while person A speaks.
- Option 3: Person B interrupts and begins to respond.

Most Recommended:

Person A asks a question or makes a comment. Person B employs the six patterns.

Reflection: What are you noticing about the influence of these patterns on rapport, relationship, and thinking?



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Essential Ability 6: Respond appropriately

What is 'respond appropriately'?

It is the ability to respond to participant questions and comments in a manner that preserves rapport and group dynamics. This includes appropriately recognizing the type of question and responding congruently.

What good is 'respond appropriately'?

A presenter never knows what comments a participant will make or questions they might ask. Responding appropriately lets the group know you are listening and know your material. An appropriate response also maintains credibility and rapport, while honoring the participant's learning. By responding appropriately you save time, support participant learning, maintain rapport and group dynamics.

How to respond appropriately?

As we all know, there are many ways to verbally respond to a question. We can provide a short answer, yes or no, true or false, and even form an essay-type response. Our intention is to address the nonverbal patterns that support the verbal responses. By attending to the nonverbal patterns the presenter maintains credibility and rapport while also maintaining a positive group dynamic.



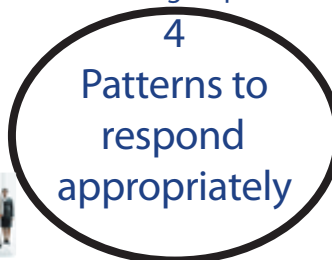
1. Location

As you see the raised hand move to a location away from the "raised hand" where you can see the whole group.



2. Stance

Approachable when listening. After the question or comment is asked, say "thank you," using an inviting voice then shift to credible to maintain credibility.



4. Watch the Group's Reaction

Using peripheral vision look for shock, confusion, and annoyance. Respond appropriately

3. Pause and Breathe



To support thinking, as you prepare to respond, pause and breathe low and relaxed.

Indicators of 'respond appropriately'

Location	As a hand is raised, presenter continues speaking, while away from the raised hand. The new location maximizes peripheral vision to see the group and allows for direct eye contact with the person speaking.
Stance	Inviting stance when listening and saying, "Thank you." Shift to credible when responding.
Pause and Breathe	Presenter pauses and continues to breath low in preparation to respond.
Read the Group	Presenter watches and waits for the group's response. The group's response determines how the presenter responds.

Practice Location: Follow the prompts to practice 'location.'

1. Presenter location:

As you see a hand rising, continue speaking and move away.



2. Responding location:

As you reach this location, pause using an inviting stance when listening.

4. Start by saying:

"Thank you," in an inviting voice. Respond, credible voice and based on the group's reaction:

A. If the group is still or beginning to turn to one another, answer the question.

B. If the group makes noise (tsk...tsk) or is eye rolling, use direct eye contact and say, "Let's you and I talk during the next break."



3. After the question is asked. While breathing low, pause 3 seconds and peripherally watch the audience.



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Essential Ability 7: Recovery with Grace



1. Change Location

Wherever you are standing, move; silently and look intelligent.



2. I Interru... myself

After saying 2 or 3 words, stop. Shift position or location and restart your sentence using a different tone or pace of speech.

What is recovery with grace?

Recovery with grace is the ability to get out of a situation while preserving credibility, relationship, and positive group dynamics.

What good is recovery with grace?

No presenter is perfect. We all make mistakes from beginning a sentence we wished we hadn't to providing a response that was not satisfactory to the person who asked or to the group. By learning the skills to recover with grace we preserve our credibility and rapport while maintaining positive group dynamics.

When to recover with grace?

A few situations are listed below. This is not an exhaustive list as there are too many situations to list. However, from our experience and the experiences of others gifted presenters the five listed here are situations we have found to be the most common and important.

1. When the speaker's response is not satisfactory to the person who asked.
2. When you started a sentence you wished you hadn't.
3. When you lose your train of thought and forgot what you were saying.
4. When the group is not receptive to what you just said.
5. When you 'get shot' by a tough question or comment from a participant.



4. Decontaminate

- Pause, exhale, drop your gestures, use indirect eye contact.
- Walk away and look intelligent.
- Restart in a new location.



3. Amnesia

After you change positions, use as many different nonverbal patterns as you can when compared to the patterns from

Indicators of recovery with grace

Change location	Speaker moves while silent and restarts.
I interrupt... myself	You hear the interruption, see the change in body position or location and hear the sentence begin again from the beginning.
Amnesia	The speaker's gestures, voice qualities, and stance are all different from the initial location.
Decontaminate	You hear a pause, see the speaker exhale while simultaneously dropping all gestures including eye contact. The speaker takes a step and snaps into the new location resuming direct eye contact and uses new gesture characteristics including range, frequency, and intensity.



Practice recovery with grace:

Change location:

1. From one location, make a statement.
2. Then pause, use indirect eye contact, and drop your gesture.
3. Take a step while remaining silent.
4. Next, look at the group and continue using different gestures and voice qualities.

I Interrupt...myself:

1. Begin a sentence.
2. Interrupt yourself after 2 or 3 words.
3. Pause, use indirect eye contact, take a step while looking intelligent.
4. Then restart the sentence using a different tone and volume while making direct eye contact.

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