LeaderFactor
Facilitator Expectations

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LeaderFactor

LeaderFactor Facilitator Expectations: Reference Guide

Thank you for partnering with LeaderFactor! We are excited to partner with you to deliver a premium learning experience for client organizations. This guide addresses specific details related to delivering our solutions while ensuring LeaderFactor's brand promise of world-class content, technology, delivery, and service is maintained. Please review and adhere to the following guidelines as a LeaderFactor partner.

Please be aware of LeaderFactor's mission, vision, and values:
Mission: To influence the world for good at scale
Vision: To enable cultural transformation through psychological safety
Values: Integrity, Competence, Mutual Respect, Communication, Initiative

Engagement Onboarding:

- A member of LeaderFactor's Onboarding team will schedule a virtual 30-minute meeting with the partner to overview the scope of the engagement and provide relevant information about the client organization.

Partner Introduction:

- When communicating with the client, please introduce yourself as a LeaderFactor Partner, and avoid mentioning other organizations to prevent any confusion for the client.
- Focus on sharing only relevant experience that supports your facilitation role.

Punctuality:

- For pre-event calls, please arrive 10 minutes early to connect and align with your CSM.
- For the event date, please join the meeting link at least 15 minutes before the workshop to ensure you are prepared when participants join.
- For in-person events, coordinate with your Client Success Manager (CSM) to ensure you have the correct location, timing, attire, and security details.

Workshop Agenda Adherence:

- Create a timestamped agenda to guide you through the workshop and ensure proper timing. Often, the most important discussions occur toward the end of the session, especially during action planning. Make sure these modules receive adequate time.

Virtual Background:

- Use a LeaderFactor virtual background for consistency with branding.

Break Timer:

- Please use our workshop countdown video to communicate the amount of time during breaks.
- If the break is less than 10 minutes, please fast forward until your desired time is on the screen.

Facilitation Confidence:

- Even if it's your first time facilitating, approach the session with confidence and competence. Your preparation and experience will guide you. If you're unsure about context or content, reach out to your LeaderFactor CSM for support.

PSindex™ Database:

- When asked about the size of our global database, please reference our approved statement, "Our database includes insights from over 800,000 data points collected from surveys worldwide. This extensive and continually growing dataset allows us to provide comprehensive benchmarks and actionable insights across a diverse range of organizations."

Slide Presenter:

- Please use the slide presenter located in your facilitator training. This will ensure that you are using the most updated design and content. Be sure to share the full-screen slides instead of the presenter view with facilitator notes.

LeaderFactor Observation:

- The CSM will join the session briefly to ensure a seamless experience for both you and the client. Expect to see your CSM either at the beginning or the end of the session.

Technical Issues:

- In case of technical difficulties, if your producer is unable to resolve the issue, ask them to immediately contact your CSM. Clarify with the CSM the best method of communication for real-time support.

Success Metrics:

- **Participant Feedback:** Each digital workbook contains a brief feedback survey to be completed at the end of the session. We expect all participants to submit feedback, which informs solution improvements and facilitation quality.
- **Agenda Adherence:** We evaluate timeliness to ensure client expectations are met.
- **Action Plan Submission:** The most important outcome of the workshop is what happens afterward. Each participant should submit their action plan by the end of the session, with a goal of 100% submission.

Post-Session Summary:

To help us understand how the session went, please provide a summary to your CSM via email (or through a meeting, if necessary). Please address the following items:

- Were the client's objectives met?
- How engaged were participants? Any notable group dynamics?
- What challenges did you face, if any?
- Any participant feedback?
- Were there unanswered questions that need follow-up?
- What action items should we be aware of for follow-up?

Thank you for helping us deliver our brand promise!

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