

# Everything DiSC<sup>®</sup> on Catalyst<sup>™</sup>

## Program Guide

### PROGRAM CONTENT

Fourteen customizable training modules including facilitation guides, PowerPoint<sup>®</sup>, participant handouts, and videos that support the *Everything DiSC<sup>®</sup> on Catalyst<sup>™</sup> Profile* and the Catalyst<sup>™</sup> platform, delivered through in-person or virtual training

### PROGRAM DESCRIPTION

*Everything DiSC on Catalyst* helps people

- Discover their DiSC<sup>®</sup> styles
- Understand and improve their relationships
- Become more effective managers
- Develop their emotional intelligence

Updated November 2021

**Catalyst.**<sup>™</sup>





## PROGRAM GUIDE

In order to make your Everything DiSC® facilitation as successful as possible, this document includes information and suggestions to help frame the sessions, prepare to conduct the training, and plan your session timing. It also outlines all facilitation modules in both their classroom and virtual formats. Please thoroughly review this guide as you plan your session.

## PURPOSE

Everything DiSC® provides participants with techniques to improve self-awareness and awareness of others, in order to be more effective in the workplace and contribute to a positive workplace culture. By delivering personalized insights built around an easy-to-understand model, Everything DiSC helps participants at all levels of an organization build key social and emotional skills, improving workplace satisfaction, results, and relationships.

## YOUR KIT

Your Facilitation Kit includes scripts, PowerPoint® slide decks, videos, and handouts needed to facilitate each module. Review these materials carefully as you plan your session, in addition to the information in this guide.

For more resources, including optional posters, customizable templates, demo resources, and a detailed video guide, please follow the *Everything DiSC® on Catalyst™* Resources link inside your kit.

## THE CATALYST™ PLATFORM

The Catalyst™ platform is participants' home base for all things DiSC®. Participants use the platform to take the Everything DiSC assessment, to explore personalized DiSC content, and to learn more about the people they work with. The platform is also used during many facilitated sessions, including all virtual facilitation modules. Take time to explore the Catalyst platform so that you can be a resource for participants throughout their DiSC journey. Also keep in mind that the Catalyst platform will change and evolve as time goes on, so check back frequently for updates.

During the facilitation, you can guide participants by sharing your screen and showing them how to navigate the Catalyst platform. One way to do this is by using the Catalyst demo, which features a fictional organization you can use to show different platform pages and functionalities. To access the Catalyst demo, follow the *Everything DiSC on Catalyst* Resources link in your kit and view the Catalyst Platform Demo instructions. There you will find login instructions for the demo experience.

## CLASSROOM VS VIRTUAL FACILITATION

All training modules included in *Everything DiSC on Catalyst* can be facilitated either in a classroom setting or virtually, and come with separate facilitation materials for each of these modalities. Use the Classroom Facilitation Guides if your training will occur in person, with all participants gathered in the same location. Use the Virtual Facilitation Guides if participants will be connecting via a webinar or videoconferencing tool.

Note that every Classroom Facilitation module has an equivalent Virtual Facilitation module and vice versa. The two versions deliver the same core principles and insights, but activities, materials, and instructions may vary between the two versions, in order to accommodate the inherent differences between in-person and virtual training. In addition, participants explore their personalized results in different ways in the two versions: In virtual facilitation, participants read their personalized content directly on the Catalyst platform during the session. In the classroom facilitation, participants mostly use the *Your DiSC Profile* pdf, which contains much of the same content found on the platform. (This pdf is available from both the Catalyst platform and EPIC.)



## MODULE FLEXIBILITY

It is recommended that all participants who are new to DiSC® begin with Fundamentals Module 1: Your DiSC Style. Beyond that, participants may go through the modules in order, or facilitators may choose to customize the order and/or omit some modules, depending on what is most relevant to participants and their organizations.

Fundamentals Module 2, Workplace Modules 1–3, Management Modules 1–6, and Agile EQ™ Modules 1–3 each begin with an optional recap of essential information covered in preceding modules. These can be used to bring participants up to speed if modules are completed out of order, or as a review if significant time has elapsed between sessions. In addition, the overview at the start of each module references pages on the Catalyst™ platform that you can instruct participants to review before the session to supplement this catch-up process.

## DiSC® STYLES AT WORK VS AT HOME

Everything DiSC® is designed to be a tool to improve interpersonal workplace relationships and effectiveness by helping individuals develop self-awareness and learn to adapt their behaviors and responses when needed. As such, the program is intended to be used in a work setting. With that said, the techniques and strategies provided can be transferred to other settings as long as the participant keeps in mind that some of the principles may not align with non-work settings.

Of note, some participants may indicate that their attitudes and tendencies at work are different than their attitudes and tendencies at home. This is not the result of a participant having a different DiSC style at work than at home. Rather, these differences likely result from behaviors that participants have learned to use in particular settings or with particular individuals, or that may not be fully expressed in different settings.



# Classroom Facilitation

## MATERIALS

Review the module overviews below or in each Facilitation Guide for a summary of materials needed for each module. Overall, you will need the following materials:

- Flip charts
- Markers
- Nametags
- Green and yellow stickers (Workplace Module 2 only) and colored sticker dots (Management Module 4 only)
- Post-it® notes (Management Module 3 only)
- Personalized *Your DiSC® Profile* for each participant
- Handouts for various modules
- Smartphone, laptop, or other internet connected device for each participant (Fundamentals Module 2 only)
- Noisemakers and prizes (optional for Management Module 2 only)

## PARTICIPANT PREWORK

All participants should complete their Everything DiSC® assessment prior to their session. Once they do, they will have access to the Catalyst™ platform, which they can explore on their own. They will also use the Catalyst platform during their session for Fundamentals Module 2.

If Fundamentals Module 1: Your DiSC Style is skipped or if certain modules are completed out of order, you can instruct participants to review particular pages on the Catalyst platform prior to the session to learn essential concepts ahead of time. See “Module Flexibility” in the first section of this guide and the Activity Prep section at the start of each module for more details.

## BEST PRACTICES FOR CONDUCTING YOUR SESSION

- Carefully review the facilitation materials, including the information provided in this section. The more familiar you are with the product, the better prepared you'll be to respond to questions.
- Be ready to show the platform. You should be prepared to log in to the Catalyst platform during your session as needed to demonstrate accessing particular pages of the platform. Particularly, in Fundamentals Module 2: Your Colleagues, you will select the page of someone else in your organization and show the content to participants. Make sure you are ready to complete this demonstration. If you don't feel comfortable sharing your screen and navigating the Catalyst platform during the session, you can consider adding platform screenshots to the PowerPoint® instead. But be aware that the platform design may change periodically, and these screenshots may become out of date.
- When printing participants' profiles in advance of a classroom session, you may choose to print only those topics being covered, in order to save paper and keep the focus on the content that is relevant to the training session.
- Participants will likely be more engaged and enthusiastic about the training if they understand in advance the purpose of the training and what they're going to get out of it. You could send out an email to communicate the following, for example:
  - The purpose of the workshop is to help participants improve self-awareness around their tendencies and interpersonal behaviors and to put them in a position to be more effective and satisfied at work, improve relationships, and contribute to a positive workplace culture.



## EVERYTHING DiSC® ON CATALYST™ CLASSROOM FACILITATION OUTLINE

The *Everything DiSC® on Catalyst™* Classroom Facilitation includes approximately 13½ hours of content, as shown below. Time estimates do not include optional recaps, which, if used, add 3–12 minutes to the start of the module.

Module	Contents	Est. Time
<b>Fundamentals Module 1: Your DiSC® Style</b>	Welcome and Introduction to DiSC (30 mins) Explore Your Profile (20 mins) Tips for Working with Me (10 mins)	60 mins
<b>Fundamentals Module 2: Your Colleagues</b>	Finding Common Ground (30 mins)	30 mins
<b>Workplace Module 1: What Drives You</b>	Introduction to Your Workplace Priorities, Motivators, and Stressors (20 mins) A Day in the Life (35 mins) Choosing Key Strategies (20 mins)	75 mins
<b>Workplace Module 2: You and Other Styles</b>	Introduction and Galaxy Videos (20 mins) Working with the DiSC Styles (30 mins) Style Benefits and Challenges (25 mins)	75 mins
<b>Workplace Module 3: Build Better Relationships</b>	Introduction and Strategies for Working Effectively Videos (30 mins) Using DiSC to Improve Relationships (30 mins)	60 mins
<b>Management Module 1: Your Management Style</b>	Management Icebreaker (7 mins) Introduction to DiSC and Management (8 mins) Management Priorities and Preferences (20 mins) A Day in the Life of a Manager (25 mins)	60 mins
<b>Management Module 2: People Reading</b>	Introduction to People Reading (5 mins) People Reading Game (23 mins) People Reading Practice (2 mins)	30 mins
<b>Management Module 3: Direct &amp; Delegate</b>	Introduction to Directing and Delegating (5 mins) Your Directing and Delegating Style (10 mins) Directing and Delegating to the DiSC Styles (25 mins) Direct & Delegate Action Plan (20 mins)	60 mins
<b>Management Module 4: Motivation</b>	What Motivates You? (5 mins) The Environment You Create (10 mins) Motivation and the DiSC Styles (25 mins) Motivation Action Plan (20 mins)	60 mins
<b>Management Module 5: Develop Talent</b>	Introduction to Developing Talent (5 mins) Your Approach to Developing Others (10 mins) DiSC Development Styles (25 mins) Action Plan for Developing Talent (20 mins)	60 mins



<b>Management Module 6: Manage Up</b>	Introduction to Managing Up (3 mins) How Your Manager Sees You (5 mins) Getting Buy-in (15 mins) Working with DiSC® Managers (25 mins) Action Plan for Managing Up (12 mins)	60 mins
<b>Agile EQ™ Module 1: Your EQ Strengths</b>	Introduction to EQ (10 mins) DiSC and EQ Mindsets (5 mins) Your EQ Mindsets (30 mins)	45 mins
<b>Agile EQ Module 2: Beyond Your Comfort Zone</b>	Introduction to Stretch (5 mins) Ask the Expert (40 mins) Stretch Opportunities (10 mins) Mindsets in Action (40 mins)	95 mins
<b>Agile EQ Module 3: Develop Your EQ</b>	Why Change Is Hard (25 mins) Mindset Practice (20 mins) Action Planning (15 mins)	60 mins



# Module Overviews



## Fundamentals Modules

### FUNDAMENTALS MODULE 1: Your DiSC® Style

**Length:** 60 minutes

**Materials**

- Fundamentals Module 1: Your DiSC® Style PowerPoint® deck
- A copy of Fundamentals Module 1 handout, My Style Guide, for each participant
- Flip charts and markers
- *Your DiSC Profile*: pp. FN-1 through FN-4 for each participant

**Goals**

- Learn about the DiSC model and the Everything DiSC® Map
- Identify your style and discover the insights it reveals
- Decide which tips and insights you want to share with others to help bring DiSC into your workplace culture

**Overview**

Participants walk through the framework of the DiSC model and watch a video that introduces the model. They learn about their DiSC styles, and discover and reflect on personalized insights. At the end of the module, they fill out a card with tips for working with them that they can post at their workstation to start the work of bringing DiSC into their organization.

### FUNDAMENTALS MODULE 2: Your Colleagues

**Length:** 30 minutes plus 5-minute optional recap

**Materials**

- Fundamentals Module 2: Your Colleagues PowerPoint deck
- Each participant should bring a laptop, tablet, or smartphone to access the Catalyst™ platform during the session

**Special Note:** This module requires participants to access the Catalyst platform during the classroom session. Each participant therefore needs a personal device and access to the internet. Also note that if any participants have disabled sharing with colleagues in their Catalyst privacy settings, they will need to turn it back on for the session (as explained in the Facilitation Guide).

**Goals**

- Use the Catalyst platform to learn about your colleagues and teammates
- Find new ways to work together

**Overview**

In this module, participants learn about each other through the Catalyst platform during the classroom experience. First, participants log into the platform and access the “Your colleagues” page. Then they partner with someone sitting next to them and look each other up on the platform. (Partners should be part of the same organization to ensure they can view each other’s information.) They take a minute to view the page and then have a discussion about their similarities and differences. Then participants switch partners, ideally pairing with someone they work with regularly. They look up their partner and view and discuss their various continua results. Finally, the facilitator points out the tips available on these pages and encourages participants to use them going forward.



## Workplace Modules

### WORKPLACE MODULE 1: What Drives You

**Length:** 75 minutes plus  
10-minute optional recap

**Materials**

- Workplace Module 1: What Drives You PowerPoint® deck
- A copy of Workplace Module 1 handouts (A Day in the Life; Action Plan for Key Strategies) for each participant
- Flip charts and markers
- *Your DiSC® Profile*: pp. WP-1 through WP-4 for each participant

**Goals**

- Discover what you prioritize in the workplace and how this affects your tendencies and preferences
- Understand yourself in the context of other DiSC styles
- Consider how to improve your workplace effectiveness

**Overview**

After an optional recap about DiSC, participants learn how their priorities affect their tendencies in the workplace and discover what motivates and stresses them. They then create flip-chart descriptions of a day in the life of their styles and share them with the large group. Finally, they review key strategies to improve their effectiveness and choose one to work on.

### WORKPLACE MODULE 2: You and Other Styles

**Length:** 75 minutes plus  
10-minute optional recap

**Materials**

- Workplace Module 2: You and Other Styles PowerPoint deck
- A copy of Workplace Module 2 handouts (Understanding the DiSC Styles; Working with the DiSC Styles) for each participant
- Green and yellow stickers
- Flip charts and markers
- *Your DiSC Profile*: pp. WP-5 through WP-9 for each participant

**Goals**

- Discover your reactions to different DiSC styles
- Identify what works for you and what challenges you when working with each style
- Use the DiSC model to understand the people you work with

**Overview**

After an optional recap about DiSC, participants watch video segments featuring a team of four coworkers to learn about each DiSC style. Afterward, participants identify a person they want to understand better so that they can work more effectively with that person. They break into groups based on the DiSC style of that person and identify what is difficult and what is easy about working with that person. Participants conclude by identifying one characteristic they find most difficult and one that works most for them for each DiSC style and discuss with the large group.





## WORKPLACE MODULE 3: Build Better Relationships

**Length:** 60 minutes plus  
10-minute optional recap

### Materials

- Workplace Module 3: Build Better Relationships PowerPoint® deck
- A copy of Workplace Module 3 handout, DiSC® Workplace Interactions, for each participant
- Flip charts and markers
- *Your DiSC Profile:* pp. WP-10 through WP-14 for each participant

### Goals

- Learn how others have bridged their differences using DiSC
- Practice using DiSC to build more effective relationships at work

### Overview

After an optional recap about DiSC, participants watch video segments of coworkers describing their challenges working with each other and the strategies they use to overcome these obstacles. They then learn personalized strategies for building a more effective relationship with someone they want to work better with and how these ideas can be applied to all their workplace relationships.



## Management Modules

## MANAGEMENT MODULE 1: Your Management Style

**Length:** 60 minutes plus 3-  
minute optional recap

### Materials

- Management Module 1: Your Management Style PowerPoint® deck
- A copy of the DiSC Management Styles and A Day in the Life handouts for each participant
- Nametags, two for each participant
- Flip charts and markers
- *Your DiSC Profile:* pp. MG-1 through MG-3 for each participant

### Goals

- Explore the priorities that drive your management style
- Consider what you enjoy about managing and what drains you
- Consider how your style helps shape your day as a manager

### Overview

After an optional recap of DiSC principles, participants share characteristics of their favorite manager in an ice-breaker activity. They read about their management priorities and discuss the aspects of managing that they enjoy or find draining. Participants then get into DiSC style groups and create posters describing a day in the life of their styles. After they present their posters to the larger group, they discuss what they learned about different styles.



## MANAGEMENT MODULE 2: People Reading

**Length:** 30 minutes plus 8-minute optional recap

### Materials

- Management Module 2: People Reading PowerPoint® deck
- A copy of the People Reading handout for each participant
- Flip chart
- Optional: Consider purchasing noisemakers for teams to indicate when they know the answer during the People Reading Game. You may also want small prizes for the members of the winning team.

### Goals

- Learn a method for recognizing other people's DiSC® styles
- Practice people reading someone you manage

### Overview

After an optional recap of DiSC management principles, participants learn how to recognize others' DiSC styles using people reading. They practice people reading using video segments in a competitive team activity. Finally, they people read someone they manage.

## MANAGEMENT MODULE 3: Direct & Delegate

**Length:** 60 minutes, plus 12-minute optional recap

### Materials

- Management Module 3: Direct & Delegate PowerPoint® deck
- Copies of the Direct & Delegate, and Direct & Delegate Action Plan handouts for each participant
- Optional: a copy of People Reading handout from Management Module 2 for each participant
- Flip chart
- Post-it® notes
- *Your DiSC Profile*: pp. MG-4 through MG-9 for each participant

### Goals

- Learn about your natural directing and delegating style
- Identify the directing and delegating needs of different people
- Write an action plan for improving how you direct and delegate to a person you manage

### Overview

After an optional recap of DiSC management principles, participants explore their perspectives on directing and delegating. They read about their directing and delegating styles and discuss their strengths and challenges. For each of the four main employee styles, participants watch a video segment showing an ineffective directing and delegating approach. After each video they discuss what was ineffective and then watch a follow-up segment that demonstrates a better approach. Finally, participants use people reading to figure out the DiSC style of someone they manage. They read about directing and delegating to that style, and they write action plans for improving their approaches.



## MANAGEMENT MODULE 4: Motivation

**Length:** 60 minutes, plus 12 minute optional recap

### Materials

- Management Module 4: Motivation PowerPoint® deck
- Copies of the What Motivates You, Motivation, and Action Plan for Creating a Motivating Environment handouts for each participant
- Optional: a copy of the People Reading handout from Management Module 2 for each participant
- Flip chart
- Colored sticker dots, two for each participant
- *Your DiSC® Profile*: pp. MG-10 through MG-15 for each participant

### Goals

- Learn how you affect the motivation of others
- Recognize what different people find motivating and demotivating
- Write an action plan for creating a more motivating environment for someone you manage

### Overview

After an optional recap of DiSC management principles, participants choose two things that motivate them and record their choices on a flip chart. They discuss similarities and differences within the group. They read about motivation and the environment they create and discuss this with a partner. For each of the four main employee styles, participants watch a video segment showing a demotivating approach, discuss what was ineffective, and then watch a follow-up segment that demonstrates a better approach. Finally, participants use people reading to figure out the DiSC style of someone they manage. They read about what motivates that style, then they write an action plan for creating a more motivating environment.

## MANAGEMENT MODULE 5: Develop Talent

**Length:** 60 minutes, plus 12-minute optional recap

### Materials

- Management Module 5: Develop Talent PowerPoint deck
- Copies of The Importance of Development, DiSC Development Preferences, and Action Plan for Developing Talent handouts for each participant
- Optional: a copy of People Reading handout from Management Module 2 for each participant
- Four Flip chart pages
- *Your DiSC Profile*: pp. MG-16 through MG-21 for each participant

### Goals

- Learn about your natural style of developing others
- Identify the development preferences of different people
- Write an action plan for developing a specific employee

### Overview

After an optional recap of DiSC management principles, participants reflect on how a manager or mentor helped them grow. They read about the advantages and disadvantages of their styles when developing people. Then, in groups, they discuss how to develop people with one particular style, and they create a poster to inform the large group. Finally, participants use people reading to figure out the DiSC style of someone they manage. They read about the development preferences of that style, and they write an action plan for developing that person.



## MANAGEMENT MODULE 6: Manage Up

**Length:** 60 minutes, plus 12 minute optional recap

### Materials

- Management Module 6: Manage Up PowerPoint® deck
- A copy of Different Approaches to Getting Buy-in handout and Action Plan for Managing Up handout for each participant
- Optional: a copy of People Reading handout from Management Module 2 for each participant
- *Your DiSC® Profile*: pp. MG-22 through MG-27 for each participant

### Goals

- Consider how your manager might see you
- Discover different approaches for getting buy-in from your manager
- Write an action plan for improving how you work with your manager

### Overview

After an optional recap of DiSC management principles, participants consider how well their managers understand them and how well they understand their managers. They read about how their managers might see them and discuss this in table groups. They watch video segments demonstrating four successful approaches for getting buy-in, each with a different style of manager. Participants use people reading to figure out their manager's DiSC style, after which they read about working with their managers. They discuss what they're doing successfully with their managers and areas where they could improve. Finally, they write action plans for working more effectively with their managers.



## Agile EQ™ Modules

### AGILE EQ™ MODULE 1: Your EQ Strengths

**Length:** 45 minutes plus 10-minute optional recap

### Materials

- Agile EQ Module 1: Your EQ Strengths PowerPoint deck
- Prepared flip charts
- *Your DiSC Profile*: pp. EQ-1 through EQ-5 for each participant

### Goals

- Develop an understanding of your EQ strengths and mindsets based on DiSC style
- Consider the benefits of those mindsets
- Think about how to better use your strengths going forward

### Overview

After an optional recap about DiSC, participants discuss the concept of emotional intelligence (EQ). Individually, they read about their own DiSC style and EQ mindsets. In DiSC style groups, they discuss past choices and behaviors related to their EQ mindsets and consider how these have benefitted them. Participants then reflect on how they can use their strengths going forward.



## AGILE EQ™ MODULE 2: Beyond Your Comfort Zone

**Length:** 95 minutes plus  
15-minute optional recap

### Materials

- Agile EQ Module 2: Beyond Your Comfort Zone PowerPoint® deck
- Flip charts and markers
- Prepared flip charts
- *Your DiSC® Profile*: pp. EQ-6 through EQ-13 for each participant

### Goals

- Gain a greater understanding of the EQ mindsets outside your comfort zone
- Understand the benefits of stretching to those mindsets
- Understand the effort involved in stretching to those mindsets

### Overview

After an optional recap of DiSC and EQ principles, participants watch a video that introduces the value of considering other mindsets. In groups, participants prepare to discuss their most comfortable mindset and teach others about its benefits. Individually, participants review one mindset outside their comfort zone and discuss with a partner how they might be more interpersonally effective if they were more comfortable using that mindset. Lastly, participants watch scenario videos where they get to choose a character, watch that character fall back on a mindset in their comfort zone, then choose an alternative mindset for the character to use instead.

## AGILE EQ MODULE 3: Develop Your EQ

**Length:** 60 minutes plus  
15-minute optional recap

### Materials

- Agile EQ Module 3: Develop Your EQ PowerPoint deck
- A copy of Agile EQ Module 3 handout, Mindset Practice, for each participant
- *Your DiSC Profile*: pp. EQ-14 through EQ-26 for each participant

### Goals

- Learn how to stretch to EQ mindsets outside your comfort zone
- Explore anticipated difficulties in stretching to new mindsets

### Overview

After an optional recap of DiSC and EQ principles, participants watch a video that explains what it takes to expand their comfort zones and why it isn't easy. They briefly discuss past experiences with adopting new habits. Individually, participants select a mindset to work on and think about why it might be difficult for them. Then, working in trios, they discuss the difficulties they'll individually need to overcome. In the same trios, participants take turns practicing a scenario for their chosen mindset while the others provide feedback. Finally, participants wrap up by creating an action plan to help them stretch toward their chosen mindset moving forward.



# Virtual Facilitation

## FACILITATOR TOOLS

Review the module overviews for a summary of the tools needed for each module. Overall, you will need the following:

- *Everything DiSC® on Catalyst™* virtual facilitation PowerPoint® decks
- Access to the Catalyst™ platform
- Webinar or videoconferencing tool that includes the following features:
  - Basic features: video/audio, chat, screensharing
  - Advanced features: polling, whiteboarding, and breakout rooms
  - If your chosen tool does not have the advanced features, alternate, simplified instructions are included throughout the Virtual Facilitation Guides

## PARTICIPANT TOOLS

Review the module overviews for a summary of the tools needed for each module. Overall, participants will need the following:

- Access to the Catalyst platform
- Access to the facilitator's chosen webinar or videoconferencing tool
- Pen and paper or electronic option for light note-taking
- Handouts for various modules

## PARTICIPANT PREWORK

All participants should complete their Everything DiSC® assessment prior to their session. Once they do, they will have access to the Catalyst platform, which they can explore on their own. They will also use the Catalyst platform throughout the virtual session to access their personalized content.

If Fundamentals Module 1: Your DiSC® Style is skipped or if certain modules are completed out of order, you can instruct participants to review particular pages on the Catalyst platform prior to the session to learn essential concepts ahead of time. See “Module Flexibility” in the first section of this guide and the Activity Prep section at the start of each module for more details.

## PREPPING FOR YOUR VIRTUAL SESSION

- **Carefully review the facilitation materials**, including the information provided in this section. The more familiar you are with the product, the better prepared you'll be to respond to questions.
- **Conduct one or more practice sessions** to ensure that you are comfortable using all necessary technology.
- **Spend time exploring the Catalyst platform**, so you can answer questions and instruct participants as needed.
- **Consider session size.** We recommend limiting the number of participants in your virtual session to ensure that everyone is engaged and participating. Many modules include activities in which you divide participants into breakout rooms for small-group or partner discussion; if you are using a tool that does not include breakout rooms, you will need to conduct these conversations with the large group. Particularly in this case, you should consider limiting sessions to 10–12 or fewer participants, breaking larger groups into multiple sessions if needed.
- **Be ready to show the platform.** You should be prepared to demonstrate navigating the Catalyst platform during your session, sharing your screen in the event that participants need this as a reference. Make sure you are ready to complete this demonstration, using the Catalyst demo described earlier in this document if needed. If you don't feel comfortable sharing your screen and navigating the Catalyst platform during the session, you can consider adding platform screenshots to the PowerPoint® instead. But be aware that the platform design may change periodically, and these screenshots may become out of date.



- **Enlist a colleague or assistant** who can help with technological problems, monitor engagement, and communicate with participants during the session so you can concentrate on conveying the content. The assistant's main job is to respond to chats related to technical issues and to help you with polls, breakout rooms, and timers. If you don't have an assistant to partner with and aren't completely confident with the platform you're using, consider (1) conducting smaller sessions, (2) conducting shorter sessions, or (3) having a low-tech backup plan if advanced features are not working. Also, consider advising participants at the beginning that if they drop off and are unable to reconnect, you will follow up with highlights of the session. You can also plan periodic breaks, which will allow you to connect with participants who are having difficulties.
- **Build polls in advance.** If possible within your chosen platform, build virtual polls before your session and save them as templates. The Activity Prep section at the start of each module lists any polls that will be used.
- **Be prepared to assign participants into breakout rooms.** At various points in the facilitation, participants should be assigned to breakout rooms for smaller discussions. Technology permitting, participants should use video/audio, not chat, for these discussions. The Activity Prep section at the start of each module lists the composition of all breakout rooms needed. When possible, prepare lists in advance so you can quickly assign people to breakout rooms. When assigning participants by style, you can use the *Team View* report to identify participants' DiSC® styles, which may help with this process.
- **Communicate with participants.** Share information on the following topics with participants prior to the session:
  - Participants will likely be more engaged and enthusiastic about the training if they understand in advance the purpose of the training and what they're going to get out of it. You could communicate the following, for example:
    - The purpose of this workshop is to help you improve self-awareness around your tendencies and interpersonal behaviors and to put you in a position to be more effective and satisfied at work, improve relationships, and contribute to a positive workplace culture.
  - Provide participants with instructions on how to log in to the videoconferencing tool and/or test their system connection, as applicable.
  - Announce that you'll open the session 15 minutes early so people can come in and get comfortable with the technology. Be there when it opens with casual icebreakers. Come up with your own topic or use one of these suggestions:
    - If you could have any superpower, what would you pick and how would you use it?
    - If you could transform into any animal, what would it be?
    - Imagine you've been chosen to join a human settlement on the moon. What skills would you bring to the community, and what would your role be?
  - Let participants know they will need to access the Catalyst™ platform (the same one they used to take the assessment) during the session and provide them with the URL: [catalyst.everythingdisc.com](https://catalyst.everythingdisc.com).
  - Because participants will need to access the Catalyst platform while simultaneously participating in the live session, you may want to recommend that participants join using a desktop or tablet rather than a phone for ease of navigation.
  - Instruct participants to complete any required prework. (See Participant Prework earlier in this section.)

## OTHER BEST PRACTICES

Here are some additional tips for making the most of your virtual session:

- As a general rule, virtual trainings should not last more than 90–120 minutes, so if you want to complete a longer program containing multiple modules, considering breaking it up over multiple sessions.
- Keep the learning personal by using participants' names. Acknowledge each participant by name when you respond to each of their questions and comments. Make their participation count.
- Let participants see you. Appear on the camera when you give your introductory remarks (which you may want to script for maximum impact). Appear on camera before any breaks and at the end, to provide a personal wrap-up. Dress up and keep smiling as you would in a live training even when the camera is not on you. Your expertise and professionalism will come across, even virtually.
- Similarly, encourage participants to turn on their videos where possible to increase engagement and encourage more robust conversations.
- Organize your materials carefully so you can find them immediately during the session.
- Decide in advance how and when to handle questions and comments from participants during the session.



## EVERYTHING DiSC® ON CATALYST™ VIRTUAL FACILITATION OUTLINE

The facilitation includes approximately 13½ hours of content, as shown below. Time estimates do not include optional recaps, which, if used, add 3–15 minutes to the start of the module.

Module	Contents	Est. Time
<b>Fundamentals Module 1: Your DiSC® Style</b>	Welcome and Virtual Team Poll (10 mins) Build the Room (10 mins) Introduction to DiSC (10 mins) Explore Your Style Story (25 mins) Tips for Working with Me (10 mins)	65 mins
<b>Fundamentals Module 2: Your Colleagues</b>	Finding Common Ground (20 mins)	20 mins
<b>Workplace Module 1: What Drives You</b>	Introduction to Your Workplace Priorities, Motivators, and Stressors (20 mins) Best and Worst Days (35 mins) Choosing Key Strategies (20 mins)	75 mins
<b>Workplace Module 2: You and Other Styles</b>	Introduction and Galaxy Videos (20 mins) Understand the DiSC Styles (10 mins) Discuss the DiSC Styles (30 mins)	60 mins
<b>Workplace Module 3: Build Better Relationships</b>	Introduction and Using DiSC to Improve Relationships (55 mins)	55 mins
<b>Management Module 1: Your Management Style</b>	Management Icebreaker (5 mins) Introduction to DiSC and Management (8 mins) Management Priorities and Preferences (20 mins) Best and Worst Days for a Manager (27 mins)	60 mins
<b>Management Module 2: People Reading</b>	Introduction to People Reading (5 mins) People Reading Game (23 mins) People Reading Practice (2 mins)	30 mins
<b>Management Module 3: Direct &amp; Delegate</b>	Introduction to Directing and Delegating (4 mins) Your Directing and Delegating Style (11 mins) Directing and Delegating to the DiSC Styles (24 mins) Direct & Delegate Action Plan (21 mins)	60 mins
<b>Module 4: Motivation</b>	What Motivates You? (5 mins) The Environment You Create (10 mins) Motivation and the DiSC Styles (25 mins) Motivation Action Plan (20 mins)	60 mins
<b>Module 5: Develop Talent</b>	Introduction to Developing Talent (5 mins) How You Develop Talent (10 mins) DiSC Development Styles (27 mins) Action Plan for Developing Talent (18 mins)	60 mins





<b>Module 6: Manage Up</b>	Introduction to Managing Up (3 mins) How Your Manager Sees You (7 mins) Getting Buy-in (15 mins) Working with DiSC® Managers (23 mins) Action Plan for Managing Up (12 mins)	60 mins
<b>Agile EQ™ Module 1: Your EQ Strengths</b>	Introduction to EQ (10 mins) Your EQ Mindsets (30 mins)	40 mins
<b>Agile EQ Module 2: Beyond Your Comfort Zone</b>	Introduction to Stretch (5 mins) Mindsets in Action (40 mins) Recognizing Opportunities (5 mins) Mindset Sharing (40 mins) Focusing Your Efforts (10 mins)	100 mins
<b>Agile EQ Module 3: Develop Your EQ</b>	Why Change Is Hard (25 mins) Mindset Practice (20 mins) Action Planning (15 mins)	60 mins



# Module Overviews



## Fundamentals Modules

### FUNDAMENTALS MODULE 1: Your DiSC® Style

**Length:** 65 minutes

**Facilitator Materials**

- Fundamentals Module 1: Your DiSC® Style PowerPoint® deck
- Access to the Catalyst™ platform
- Webinar or videoconferencing tool that includes polling, whiteboarding, and breakout room capabilities; if any of these advanced tools are not available, facilitators should be prepared to follow included instructions for modifying the session

**Participant Materials**

- Access to the Catalyst platform
- Access to facilitator’s chosen videoconferencing tool
- Pen and paper or electronic option for light note-taking

**Goals**

- Learn about the DiSC model and the Everything DiSC® Map
- Identify your style and discover the insights it reveals

**Overview**

Participants walk through the framework of the DiSC model and watch a video that introduces the model. They learn about their DiSC styles and discover and discuss personalized insights.

### FUNDAMENTALS MODULE 2: Your Colleagues

**Length:** 20 minutes plus 5-minute optional recap

**Facilitator Materials**

- Fundamentals Module 2: Your Colleagues PowerPoint deck
- Access to the Catalyst platform
- Webinar or videoconferencing tool that includes polling and breakout room capabilities; if any of these advanced tools are not available, facilitators should be prepared to follow included instructions for modifying the session

**Participant Materials**

- Access to the Catalyst platform
- Access to facilitator’s chosen webinar or videoconferencing tool
- Pen and paper or electronic option for light note-taking

**Goals**

- Use the Catalyst platform to learn about your colleagues and teammates
- Find new ways to work together

**Overview**

Participants learn about one another on the Catalyst platform. Working in pairs, participants look each other up on the “Your colleagues” page. They take a few minutes to view the pages and then chat one-on-one about their continua and the impact these might have on their working relationship before optionally sharing out with the class. Finally, participants are directed to the tips available on the Colleague pages and encouraged to use them going forward.

**Special Note**

If any participants have disabled sharing in their Catalyst privacy settings, they will need to turn it back on for the session (as explained in the Facilitation Guide).



## Workplace Modules

### WORKPLACE MODULE 1: What Drives You

**Length:** 75 minutes plus 10-minute optional recap

**Facilitator Materials**

- Workplace Module 1: What Drives You PowerPoint® deck
- Access to the Catalyst™ platform
- Webinar or videoconferencing tool that includes polling and breakout room capabilities; if any of these advanced tools are not available, facilitators should be prepared to follow included instructions for modifying the session

**Participant Materials**

- Access to the Catalyst platform
- Access to facilitator's chosen webinar or videoconferencing tool
- Pen and paper or electronic option for light notetaking
- A copy of Workplace Module 1 handout, Action Plan for Key Strategies, for each participant

**Goals**

- Explore your workplace priorities
- See how you compare to other styles
- Consider ways to be more effective at work

**Overview**

After an optional recap about DiSC®, participants learn how their workplace priorities affect their tendencies in the workplace and about what motivates and stresses them. They then brainstorm about the best and worst possible days in the life of their styles and share out with the large group. Finally they review key strategies to improve their effectiveness and choose one to work on.

### WORKPLACE MODULE 2: You and Other Styles

**Length:** 60 minutes plus 10-minute optional recap

**Facilitator Materials**

- Workplace Module 2: You and Other Styles PowerPoint deck
- Access to the Catalyst platform
- Webinar or videoconferencing tool that includes polling and breakout room capabilities; if any of these advanced tools are not available, facilitators should be prepared to follow included instructions for modifying the session

**Participant Materials**

- Access to the Catalyst platform
- Access to facilitator's chosen webinar or videoconferencing tool
- Pen and paper or electronic option for light note-taking

**Goals**

- Use the DiSC model to understand the people you work with
- Understand your reaction to the different DiSC styles
- Gain insight into your relationship with a colleague based on their DiSC style

**Overview**

After an optional recap about DiSC, participants watch video segments featuring a team of four coworkers to learn about each DiSC style. Participants then identify a person they want to understand better so that they can work more effectively with them. They first read about that person's style on the Catalyst platform and take notes on things they appreciate about the style and have realized about the style or person. They discuss their observations in small groups and then share out with the larger group.



## WORKPLACE MODULE 3: Build Better Relationships

**Length:** 55 minutes plus 10-minute optional recap

### Facilitator Materials

- Workplace Module 3: Build Better Relationships PowerPoint® deck
- Access to the Catalyst™ platform
- Webinar or videoconferencing tool that includes polling and breakout room capabilities; if any of these advanced tools are not available, facilitators should be prepared to follow included instructions for modifying the session

### Participant Materials

- Access to the Catalyst platform
- Access to facilitator's chosen videoconferencing tool
- Pen and paper or electronic option for light note-taking

### Goals

- Learn how others have bridged their differences using DiSC®
- Practice using DiSC to build more effective relationships at work

### Overview

After an optional recap about DiSC, participants learn personalized strategies for building a more effective relationship with one style of their choosing by reading their personalized tips, watching a video example, and having a small-group discussion. Then as a large group, participants discuss all four styles and consider how to use DiSC insights going forward.



## Management Modules

### MANAGEMENT MODULE 1: Your Management Style

**Length:** 60 minutes, plus 3-minute optional recap

### Facilitator Materials

- Management Module 1: Your Management Style PowerPoint® deck
- Access to Catalyst platform
- Webinar or videoconferencing tool that includes polling, whiteboarding/annotating, and breakout room capabilities; if any of these advanced tools are not available, facilitators should be prepared to follow included instructions for modifying the session.

### Participant Materials

- Access to Catalyst platform
- Access to facilitator's chosen webinar or videoconferencing tool
- Pen and paper or electronic option for light notetaking

### Goals

- Explore the priorities that drive your management style
- Consider what you enjoy about managing and what drains you
- Consider how your style helps to shape your day as a manager

### Overview

After an optional recap of DiSC principles, participants share characteristics of their favorite manager in an icebreaker activity. They read about their management priorities and discuss the aspects of managing that they enjoy or find draining. Participants then get into DiSC style groups to discuss how they'd describe a fulfilling day and a draining day for a manager with their style. After they share out to the larger group, they discuss what they learned about different styles.



## MANAGEMENT MODULE 2: People Reading

**Length:** 30 minutes, plus 4-minute optional recap

### Facilitator Materials

- Management Module 2: People Reading PowerPoint® deck
- Access to Catalyst™ platform
- Webinar or videoconferencing tool that includes polling, whiteboarding/annotating, and breakout room capabilities; if any of these tools are not available, facilitators should be prepared to follow included instructions for modifying the session

### Participant Materials

- Access to Catalyst platform
- Access to facilitator's chosen webinar or videoconferencing tool
- Pen and paper or electronic option for notetaking
- A copy of the People Reading handout

### Goals

- Learn a method for recognizing other people's DiSC® styles
- Practice people reading someone you manage

### Overview

After an optional recap of DiSC management principles, participants learn how to recognize others' DiSC styles using people reading. They practice people reading using video segments in a competitive activity. Finally, they people read someone they manage.

## MANAGEMENT MODULE 3: Direct & Delegate

**Length:** 60 minutes, plus 10-minute optional recap

### Facilitator Materials

- Management Module 3: Direct & Delegate PowerPoint® deck
- Access to Catalyst platform
- Webinar or videoconferencing tool that includes polling and breakout room capabilities; if any of these advanced tools are not available, facilitators should be prepared to follow included instructions for modifying the session

### Participant Materials

- Access to Catalyst platform
- Access to facilitator's chosen webinar or videoconferencing tool
- Pen and paper or electronic option for light notetaking
- A copy of the Direct & Delegate Action Plan handout

### Goals

- Learn about your natural directing and delegating style
- Identify the directing and delegating needs of different people
- Adapt your approach to improve the way you direct and delegate to a person you manage

### Overview

After an optional recap of DiSC management principles, participants explore their perspectives on directing and delegating. They read about their directing and delegating styles and discuss their strengths and challenges. Participants choose two of the four main employee styles; for each of these two styles, they watch a video segment showing an ineffective directing and delegating approach. After each video they discuss what was ineffective and then watch a follow-up segment that demonstrates a better approach. Finally, participants determine the DiSC style of someone they manage, read about directing and delegating to that style, and write action plans for improving their approaches.



## MANAGEMENT MODULE 4: Motivation

**Length:** 60 minutes, plus 10-minute optional recap

### Facilitator Materials

- Management Module 4: Motivation PowerPoint® deck
- Access to Catalyst™ platform
- Webinar or videoconferencing tool that includes polling, whiteboarding/annotating, and breakout room capabilities; if any of these advanced tools are not available, facilitators should be prepared to follow included instructions for modifying the session

### Participant Materials

- Access to Catalyst platform
- Access to facilitator's chosen webinar or videoconferencing tool
- Pen and paper or electronic option for light notetaking
- A copy of the Action Plan for Creating a Motivating Environment handout

### Goals

- Learn how you affect the motivation of others
- Recognize what different people find motivating and demotivating
- Adapt your approach to create a more motivating environment for someone you manage

### Overview

After an optional recap of DiSC® management principles, participants choose two things that motivate them. They discuss similarities and differences in the group. They read about motivation and the environment they create and discuss this in a small group. Participants choose two of the four main employee styles; for each of these two styles, they watch a video segment showing a demotivating approach, discuss what was ineffective, and then watch a follow-up segment that demonstrates a better approach. Finally, participants determine the DiSC style of someone they manage. They read about what motivates that style, and then they write an action plan for creating a more motivating environment.

## MANAGEMENT MODULE 5: Develop Talent

**Length:** 60 minutes, plus 10-minute optional recap

### Facilitator Materials

- Management Module 5: Develop Talent PowerPoint® deck
- Access to Catalyst platform
- Webinar or videoconferencing tool that includes polling, whiteboarding/annotating, and breakout room capabilities; if any of these tools are not available, facilitators should be prepared to follow included instructions for modifying the session

### Participant Materials

- Access to Catalyst platform
- Access to facilitator's chosen webinar or videoconferencing tool
- Pen and paper or electronic option for light notetaking
- A copy of the Action Plan for Developing Talent handout

### Goals

- Learn about your natural style of developing others
- Identify the development preferences of different people
- Write an action plan for developing a specific employee

### Overview

After an optional recap of DiSC management principles, participants reflect on how a manager or mentor helped them grow. They read about the advantages and disadvantages of their styles when developing people. Then, in groups, they discuss how to develop people with one specific style and come up with a "How to" guide to present to the group. Finally, participants determine the DiSC style of someone they manage. They read about the development preferences of that style, and they write an action plan for developing that person.



## MANAGEMENT MODULE 6: Manage Up

**Length:** 60 minutes, plus 10-minute optional recap

### Facilitator Materials

- Management Module 6: Manage Up PowerPoint deck
- Access to Catalyst™ platform
- Webinar or videoconferencing tool that includes polling, whiteboarding, and breakout room capabilities; if any of these advanced tools are not available, facilitators should be prepared to follow included instructions for modifying the session

### Participant Materials

- Access to Catalyst platform
- Access to facilitator's chosen webinar or videoconferencing tool
- Pen and paper or electronic option for light notetaking
- A copy of the Action Plan for Managing Up handout

### Goals

- Consider how your manager might see you
- Discover different approaches for getting buy-in from your manager
- Write an action plan for improving how you work with your manager

### Overview

After an optional recap of DiSC® management principles, participants consider how well their managers understand them and vice versa. They read about how their managers might see them and discuss this in small groups. They watch video segments demonstrating four successful approaches for getting buy-in, each with a different style of manager. Participants figure out their manager's DiSC style, after which they read about working with their managers. They discuss what they're doing successfully with their managers and where they could improve. Finally, they write action plans for working more effectively with their managers.



## Agile EQ™ Modules

### AGILE EQ™ MODULE 1: Your EQ Strengths

**Length:** 40 minutes plus 10-minute optional recap

### Facilitator Materials

- Agile EQ™ Module 1: Your EQ Strengths PowerPoint deck
- Access to the Catalyst platform
- Webinar or videoconferencing tool that includes polling and breakout room capabilities; if any of these advanced tools are not available, facilitators should be prepared to follow included instructions for modifying the session

### Participant Materials

- Access to the Catalyst platform
- Access to facilitator's chosen webinar or videoconferencing tool
- Pen and paper or electronic option for light notetaking

### Goals

- Develop an understanding of your EQ strengths and mindsets based on DiSC style
- Consider the benefits of those mindsets
- Think about how to better use your strengths going forward

### Overview

After an optional recap about DiSC, participants discuss the concept of emotional intelligence (EQ). Individually, they read about their own DiSC style and EQ mindsets. In DiSC style groups, they discuss past choices and behaviors related to their EQ mindsets and consider how this has benefitted them. Participants then reflect on how they can use their strengths going forward.



## AGILE EQ™ MODULE 2: Beyond Your Comfort Zone

**Length:** 100 minutes plus 15-minute optional recap

### Facilitator Materials

- Agile EQ™ Module 2: Beyond Your Comfort Zone PowerPoint® deck
- Access to the Catalyst™ platform
- Webinar or videoconferencing tool that includes polling, whiteboarding, and breakout room capabilities; if any of these advanced tools are not available, facilitators should be prepared to follow included instructions for modifying the session

### Participant Materials

- Access to the Catalyst platform
- Access to facilitator's chosen webinar or videoconferencing tool
- Pen and paper or electronic option for light notetaking

### Goals

- Gain a greater understanding of the EQ mindsets outside your comfort zone
- Understand the benefits of stretching to those mindsets
- Understand the effort involved in stretching to those mindsets

### Overview

After an optional recap of DiSC® and EQ principles and the eight mindsets, participants watch a video that introduces the value of considering other mindsets. They then view a series of scenario videos featuring characters falling back on a comfortable mindset and then experimenting with alternative mindsets instead. Participants use the Catalyst platform to choose two mindsets that they're interested in learning to stretch to. Then, in a large group, they have the opportunity to ask questions about mindsets they're interested in learning more about and share out about their own natural strengths. Finally, participants review one mindset outside their comfort zone and discuss with a partner how they might be more interpersonally effective if they were more comfortable using that mindset.

## AGILE EQ MODULE 3: Develop Your EQ

**Length:** 60 minutes plus 10-minute optional recap

### Facilitator Materials

- Agile EQ Module 3: Develop Your EQ PowerPoint deck
- Access to the Catalyst platform
- Webinar or videoconferencing tool that includes polling, whiteboarding, and breakout room capabilities; if any of these advanced tools are not available, facilitators should be prepared to follow included instructions for modifying the session

### Participant Materials

- Access to the Catalyst platform
- Access to facilitator's chosen webinar or videoconferencing tool
- Pen and paper or electronic option for light notetaking
- A copy of the Agile EQ Module 3 handouts (Mindset Practice Handout; Action Plan for Adopting a New Mindset) for each participant

### Goals

- Learn how to stretch to EQ mindsets outside your comfort zone
- Explore anticipated difficulties in stretching to new mindsets

### Overview

After an optional recap of DiSC and EQ principles, participants watch a video that explains what it takes to expand their comfort zones why it isn't easy. They briefly discuss past experiences with adopting new habits. Individually, participants select a mindset to work on and think about why it might be difficult for them. Then, working in trios, they discuss the difficulties they'll individually need to overcome. In the same trios, participants take turns practicing a scenario for their chosen mindset while the others provide feedback. Finally, participants wrap up by creating an action plan to help them stretch toward their chosen mindset moving forward.