

**Access to Microfinance & Improved Implementation of Policy Reform
(AMIR Program)**

Funded By U.S. Agency for International Development

IPC Teambuilding - Needs Assessment

Final Report

**Deliverable for POL Component
Contract No. 278-C-00-98-00029-00**

April 1999

This report was prepared by Cathryn Goddard, Coverdale Organization, for Chemonics International Inc., prime contractor to the U.S. Agency for International Development for the AMIR Program in Jordan.

Summary

The purpose of this memo is to document the initial visit to Jordan (April 6 -10, 1999) of Cathryn Goddard, from the Coverdale Organization, to meet with the AMIR team, and specifically the IPC team. Dr. Goddard had facilitated the workshop to launch the AMIR project initially. She has extensive experience in organizational development for USAID as well as commercial clients. In addition, she speaks Arabic and lives in Cairo.

The purpose of the assignment was to clarify the nature and extent of support needed by the IPC in areas critical to their development. The consultant met with IPC management and determined their general interest in achieving their objectives using modern management techniques for:

- Effective communications
- Team building.

More specifically, IPC management seeks to have AMIR support to:

- Strengthen presentation skills for two international business development missions
- Create a sense of team, both internally within the IPC, and among its various external stakeholders and partners, with initial emphasis on the internal team itself.

At the same time, the consultant met with AMIR staff to

- Ensure that these efforts fit within AMIR's objectives, consistent with USAID's interests
- Identify the equipment, resources, logistical and technical support (staff or consultants) needed to carry out projected workshops successfully.

A list of contacts and schedule of meetings during the trip follow as an attachment, as well as informal written comments on the IPC presentation provided by email.

In discussions with IPC and AMIR, all parties emphasized the desire to strengthen local capability in facilitation and presentation skills. The consultant examined the steps Coverdale considers necessary for conducting the participatory workshops that build commitment to shared purposes.

Steps	Purposes
Pre-workshop input (interviews, briefings and/or facilitated meetings)	Provide and gather information, as well as establish common expectations on the part of participants
Design and preparation	Prepare tasks for participants to carry out, handouts and charted material Prepare local staff or consultants as part of the facilitation team
Delivery	Strengthen teamwork within the organization and build commitment to future cooperation
Report	Share these commitments with members of the team, as well as other concerned parties.

Effective communications

This year the IPC plans two international business development missions, one in June and one in October. The consultant would deliver the first session in May and the second in September, sufficiently in advance of the travel to allow for full use of the lessons learned.

Effective presentations are a team effort, involving the on stage people who make the trip, as well as the off stage people who do the research, prepare the written materials for hand outs or on-screen use. While some team members have a more active role in the actual presentation, each one contributes directly to the image of Jordan that is projected abroad.

To accommodate the busy schedules of Jordanian leaders who will be making the trip, Coverdale would recommend three to four hour sessions (9:30 – 12:30 or 9:30 –1:30). The afternoon time would then be used to work with the staff on written materials and prepare for the next day. Should a high level official traveling with the team desire individual coaching, they could also be accommodated during this afternoon time.

Based on previous experience, Coverdale recommends training 6-8 people, eight being an upper limit (ultimately participants sit through tapings of all other participants).

Regarding support required from the AMIR project, two areas are involved, human resources and equipment. For the human resources, a skilled facilitator is needed to work with high level clients, hopefully Ms. Sameera Qadoura. In addition, logistical support will be needed, although part of this may come from the IPC staff.

If both Ms. Sameera and Ms. Rawan were available, the objective of developing local capability would be achieved. The half day schedule would not require both of them in the afternoon, so they could deal with other parts of the AMIR project during part that time, although Sameera should participate in design decisions.

A person is also needed to operate the camera and the video equipment, but a skill level to produce movies is not required, merely capturing the action is sufficient. Familiarity with the equipment to be used is certainly preferable, however.

Equipment required includes:

- Video camera
- Large screen television with VCR to project the tapes onto
- Overhead projector
- Screen
- Datashow projector
- Flip charts.

Supplies would include:

- Name tags
- Name tents/stands
- Markers
- Half sheets of paper for brainstorming
- Flip chart paper
- Hand outs (including Coverdale's proprietary materials).

For the first training session, the consultant would spend 10 days in country between May 5 and May 22, with the final schedule to be agreed upon. These dates need to be finalized quickly, taking into consideration Jordanian holidays and other scheduled events.

Team building

The purpose of a team building workshop is to strengthen the internal team by working with them to:

- Develop a common systematic approach for getting things done
- Exchange information effectively
- Establish a process of methodical review and feedback
- Clarify shared vision, along with roles and responsibilities within the team
- Produce an action plan to deal with a meaningful, work requirement.

Several target groups could be involved in team building that would occur in July.

- The management team

- The investment promotion team
- The facilitation and services team.

One way of handling the workshop would be to hold some initial meetings with the half-day format in the IPC facilities. Then the two division teams could go off site for a three day workshop and be joined by top management on the last day to hear the results of the action planning.

Details of the team building training process would be worked out during the May trip for presentation skills training, but would include the following phases:

Phases	Purposes
Team Building	Look at how you work together, develop a common language and a systematic approach for getting things done
Information Sharing	Pool your information with respect to a specific challenge your team is facing and review <ul style="list-style-type: none"> • team members' resources, experience, interests and skills • contractual or legal requirements • where you want to be • work plan or benchmarks within a work plan
Direction Setting	Establish a common vision, refine it and choose focus areas for action plans, as well as clarifying roles and responsibilities
Action Planning	Produce plans that allow you to share commitment and follow through after the workshop is over.

Regarding external team building, two forms are important to the IPC team:

- Facilitated meetings
- External stakeholders workshops.

During the four proposed trips (May, July, September and November), subject to time availability, the consultant could work with the IPC to hold facilitated meetings to pursue, for example, work in the area of the actions plans coming out of the roadmap work led by TSG. While TSG focuses on the content, a Coverdale session would emphasize the process of building an effective team for implementation.

The two organizations' complementary skills enabled them to cooperate fully during this brief assignment. One option for dealing with an external stakeholders workshop would be to have Coverdale support a TSG workshop as part of the roadmap analysis. For planning purposes, this trip is scheduled for November.

Contacts during trip

IPC Staff

Dr. Montaser Oklah, Director General, IPC
Mr. Muwaffak (Director of Business Development)
Ms. Dina Daadaa
Ms. Sahar Hijazi
Ms. Sarah (intern)
AV person (too brief to count, just intro)
Mr. Mer'ih Ibdah, Director of Planning, Development and Information Services research)
Mr. Mahmoud (Director of finance and administration)
Mr. Kamel (Director of audit)

AMIR Staff

Mr. Steve Wade, Chief of Party, AMIR
Mr. Sam Morris, Investment Advisor to IPC
Mr. Peter Bittner, Chemonics International
Mr. Ferhat Ferhat
Ms. Sameera Qaddoura, Director of Training.

Short term consultants

Sutherland Miller, TSG, consultant on roadmap
Greg Price, TSG, consultant on roadmap
Vincent Ruddy, TSG, consultant on customer service
John Hagestadt, TSG, consultant on customer service

In addition, the Dr. Goddard had brief contact with each of the AMIR team present at the time as well as the other consultants in the office

Schedule (**Results in bold**)

Tuesday, April 6, 1998

- 16:00 Departure from home at
- 23:59 Arrival in hotel in Amman

Wednesday, April 7, 1999

- 7:30 Breakfast meeting at hotel with Steve Wade, Peter Bittner joined
- 8:30 Sam Morris joins. CG and SM proceed to IPC
- 9:00 SM introduces CG to Dr. Oklah. Private meeting ensues
Agreement on need and for presentation skills and team building training
- 10:15 Review with SM
- 10:30 Meeting with Mr. Muwaffaq
Review of purposes of upcoming mission, coaching on presentation tools
- 11:30 Review with SM
- 12:00 Lunch
- 12:30 Meetings with Mss. Sahar and Dina to review presentations in power point
Review of presentation materials, coaching on clarifying purposes, standards and techniques
- 13:45 Brief meeting with TSG consultants (John and Vince)
- 14:00 Pause
- 14:30 Review presentation material
- 15:30 Session with IPC, TSG
Review of presentation itself and purposes of outward mission. Coaching on clarifying purposes, standards and techniques
- 17:30 Depart for hotel

Thursday, April 8, 1999

- 7:45 Breakfast meeting at hotel with SW, PB joined
- 8:30 Introductions to staff at AMIR
- 9:00 Meeting with Samira and Rawan
Review of requirements of presentation skills training (equipment, personnel, and schedule)

- 10:00 Logistics: airline ticket, transportation, modem, and doctor's appointment
11:00 Meeting with Dr. Oklah
Review of purposes, desired training, tentative schedule, standards, and priorities as well as identification of materials to read and review
Agreement to meet Saturday morning before CG's departure to airport
12:00 Update with SM, agreement to meet with TSG in afternoon (customer service team), obtain materials from Sahar
- 12:30 Appointment with doctor.
13:00 Return to hotel
14:00 Return to AMIR offices
Logistics and communications.
15:00 Discussions with SM, SW
15:30 Meeting with TSG consultants, F, SW, SM and PB on roadmap
17:30 Meeting with TSG consultants on customer service
Recommendations for scheduled April 25 workshop
19:30 Return to hotel

Friday, April 10, 1999

- 10:30 Meeting with Ferhat Ferhat, AMIR offices
Review of implications of roadmap on team process
12:30 Return to hotel
Preparation of brief report

Saturday, April 11, 1999

- 8:30 Obtain copies of texts to read
9:15 Depart for airport
10:45 Flight to Cairo
14:30 Return to Cairo
Report preparation

Written comments provided informally for IPC Presentation (in draft form in an email)

In our session with the managers, we agreed starting with an IPC logo is not a good idea because the team is representing Jordan, as a whole. Actually, as lovely as our own logo is, we've realized it's better to put the client's logo on our proposal covers. They like it more. For that reason, I'd recommend using a separate presentation for each country, starting with both countries' flags in the first slide.

Your title page never made it to my copy, but let me know what the first slide says. It is very important and needs to grab their attention positively.

As I mentioned, any time you're writing is smaller than 25-30-point text, you're not readable. If you increase the font size throughout, you will soon see how much you have too many words on the page. So look at any smaller font and that tells you to do an introductory slide and then a follow on. Dr. Oklah can speak to the introductory slide alone, but with a less experienced speaker, the follow up slides help to jog their memory.

This standard (25 to 30 point minimum font size) alone will eliminate a lot of the slides that are too filled up. For example the Jordan facts and figures, move part of the information to the next page, say the major imports and exports. Be careful about that slide, however. As we discussed in our session with the managers, Jordan is selling both Jordan and its role as Gateway to the Arab World. You must be careful about then having too many slides that refer to the Jordanian economy alone.

You will need to develop an Arab World or Arab Common Market slide because that's what makes you attractive to investors. Four and a half million people aren't worth leaving home for. (Wonderful as you are!)

On the map, please eliminate the names of your neighboring countries. Many of them are frightening to some degree. If you could get a map that goes to Morocco, I would label Jordan, Europe, the Mediterranean and maybe they Arab World. That's it. I don't really care if you include Somalia or

Mauritania as the Arab League would. It's not important. Probably Arab League States is the best criterion.

On the why invest in Jordan slide, you need a question mark at the end. Question marks are arresting, provocative and make people think, so do use them, especially in titles.

On the same slide, you need to tab the wording following in all of your bullets. That irregular line looks quite sloppy to an audience.

Be careful of capital letters. I would use initial caps only on that page.

Please eliminate all abbreviations and the & sign. It's more elegant to spell things out. You may have to use abbreviations occasionally, so define them the first time you use them, Qualified Industrial Zones (QIZ), and then use the abbreviation.

There are too many bullets on why invest? Use two pages with the same title if they're all great or talk around them without having it written. The font size would have corrected this because it would have run to two pages.

In our session with managers, we said it was important not to organize things around laws and regulations. Makes you look like a bunch of bureaucrats. Dr. Oklah referred to the privileges, benefits and advantages. Those words need to be the titles. So a slide could say,

What are the advantages to investing in Jordan?

Then your bullets are the content of the investment law or the labor law, not labeled by laws (like a bureaucrat), but grouped in logical areas of advantages.

Why do we use slides? To make the presentation more memorable.

So the print should be clear, the language should be vivid, the appearance of order and harmony is very important, and the images should be positive. Actually a strong negative image of what you don't want is also good. Always remember, the purpose is for them to remember.

What are the incentives and exemptions of the Investment Promotion Law (IPL)? See how questions get your attention?

Don't make abbreviations, however, if you don't then use them again.

A list of bullets all indented to the same is less memorable than a list that has some bullets and then

some second level indents. Look for the memory.

What are the guarantees to international investors?

Got it? The list however is far too long. People can't absorb more information anyway, so always remember to distinguish between what goes in the presentation which is designed to evoke interest from what is in the handouts that provide detailed information.

A wonderful American book is called, "Don't Sell the Steak, Sell the Sizzle!" People who remember the sizzle will come back for the steak.

What are the opportunities for joint ventures?

Policies sounds like I have to deal with the government.... and then your text tells me its confined! Limited! So what are the opportunities?

The partners themselves determine their relationship in the joint venture agreement.

Slides should not sound like they're written by a lawyer, no sizzle. No steak either.

Learn how to make a hard copy of a slide without the dark background. Don't hand out these dark copies.

Be careful about the Arabic numbers printing out in an English text. It frightens investors that they'll be lost in Jordan.

Use constant forms for bullets and second or third layer indents. * is something left over from typewriters and is not a real bullet. - these short dashes are not real dashes either, you need to use the longer one.

We never number bullets or use a,b,c, because it implies some are more important. We always use neutral symbols.

Colons don't belong in slides usually, but only in sentences. A change in fonts is more attractive than a colon, which blocks the flow. You are right not to put punctuation and the end of items in a list, but only a period at the end. Very good! Now go back and make the presentation consistent on this point.