

## **T3 User Meeting Notes**

**4/17/26**

### **Attendees:**

Tammie Kremenzki, Kari Gauthier, Cindy Jansen, Eric Gustavus, Keri McConnell, Danny D'Angelo, Rick Piraino, Sara Skarda, Patrice McGuire, Lauren Pagenkopf, Leslie Delman, Susan Hoffman, Priscilla El-Amin, Glenn Marczewski,

### **Quick recap**

The T3 User Group meeting focused on best facilitation practices and an update on LeaderTrak Lens video learning courses. Participants shared effective techniques including opening with interactive questions, using music to set mood, implementing table leaders, and creating psychological safety through confidentiality agreements and personal sharing. The group discussed strategies for re-energizing flat discussions and encouraging quieter participants to contribute, with several facilitators sharing specific approaches like "new voices, please" and pre-activity assignments. The team also reviewed LeaderTrak Lens progress, with four workshops now converted into video courses and more in development, though some participants raised concerns about the lack of visual elements and interactive components compared to traditional e-learning platforms. The discussion included feedback about incorporating more engaging learning modalities and the future upgrades to the platform.

### **Next steps**

- [Theresa: In the next 2 weeks, create and post a T3 resource page with Leader Track Lens information, including integration session scripts, activities, and agendas.](#)

### **Summary**

#### **User Group Meeting Introductions**

The meeting began with introductions, where new participant Lauren Pagenkopf was welcomed to the user group meeting. Participants shared their names and roles, including representatives from various companies. The meeting then transitioned to introductions of the Living As A Leader team, including facilitators and coaches. The group agreed to discuss best practice questions.

#### **Session Engagement Strategies Discussion**

The group discussed strategies for engaging participants at the start of sessions. Lauren suggested opening with interactive questions, while Tammie emphasized the importance

of mingling with participants before formal sessions begin. Eric shared their approach of having participants share fun stories from previous meetings to build engagement. Keri mentioned playing music when participants arrive to set the mood, and Sara highlighted the effectiveness of incorporating workplace stories with real-life examples. Patrice described a technique of assigning table leaders through a fun finger-pointing exercise, which helps facilitate discussions and manage time. John echoed similar practices of using facilitators during breakouts. Theresa concluded by sharing her use of fun questions on handouts to boost energy and engagement when needed.

### **Leadership Training Engagement Strategies**

The group discussed strategies for creating safe spaces and engaging participants in leadership training workshops. Key approaches included using icebreakers like "who would you haunt as a ghost," establishing ground rules for confidentiality and electronics use, and providing fidget toys or meaningful objects for participants to relate to. When discussions faltered, participants shared techniques such as having people stand up or move around, using pair-sharing activities, and adjusting room temperature to re-energize the group. The discussion also touched on balancing content delivery with allowing participants to explore real situations.

### **Workshop Content Balance Strategies**

The team discussed strategies for balancing real-time situation exploration with planned workshop content. Rick shared his approach of assessing time spent on real-time situations against workshop components, prioritizing higher-value activities, while Keri described her method of reserving 25-40% of time for spontaneous conversation around key learning objectives. John emphasized the importance of maintaining balance to avoid situations becoming too specialized or personal, suggesting redirection to coaching when appropriate. The discussion concluded with Rick sharing his technique for encouraging participation from quieter participants using goal-setting rather than direct calling on individuals.

### **Training Participation Strategies Discussion**

The group discussed strategies for encouraging participation in training sessions. Eric sets clear expectations for full participation at the beginning of each session. Priscilla shared her approach of allowing participants to talk privately before sharing out loud and providing writing options. Lauren described monitoring participation patterns and strategically encouraging quieter participants to contribute. The discussion included techniques like using humor (shared by Keri and Theresa), inviting new voices during group reports

(suggested by John), and emphasizing the importance of being learners rather than observers (noted by Theresa).

### **Creating Psychological Safety Strategies**

The group discussed strategies for creating psychological safety in early sessions. Leslie shared that personal stories and emphasizing confidentiality help build trust, while Cindy emphasized that confidentiality creates safety for growth. Lauren suggested using pre-work assignments to encourage participants to reflect on relevant personal experiences before the session. Priscilla highlighted the importance of creating an environment where participants feel comfortable challenging ideas, even those presented by the facilitator. Eric shared how removing management observers from the back of the room helped establish a more open environment.

### **Professional Language and Training Updates**

The group discussed challenges with using common language in professional settings, with Patrice sharing feedback about using "RBF" terminology that was deemed inappropriate by some participants. Glenn highlighted the importance of creating safe spaces for different perspectives, while Theresa raised concerns about outdated language in training materials, including references to "gold watches" and "silver bullets." The team reviewed facilitation practices shared by Kim Engabous, including using real-life company situations and specific questioning techniques to engage participants. Glenn provided an update on the LeaderTrak Lens video learning courses, reporting that four workshops have been converted into courses and launched on the Kajabi platform, with additional content including "Create a Culture of Employee Engagement" and "Support Yourself and Others Through Change" in progress.

### **Leader Track Lens Platform Development**

The team discussed the development and feedback on the LeaderTrak Lens video platform. Theresa presented a new resource page for clients and demonstrated the platform's features, including micro-learning video courses and workbook downloads. Kim Engibous raised concerns about the platform's lack of visual engagement compared to the previous e-learning format, which led to a discussion about alternative learning modalities. The team explored using Articulate 360 and AI tools to create more interactive content, with Keri sharing positive experiences using these tools for internal training. Theresa announced plans to upgrade the platform in the fall, incorporating feedback about SCORM files and additional learning modalities. The team agreed to roll out courses incrementally rather than waiting for a complete series, with the goal of finishing current videos by the end of June.

## Topics to be Discussed at User Group Meeting on June 18, 2026

### Strategies to Engage Participants

#### Questions

1. “What is the biggest engagement challenge you see with leaders today?”
  - Support and accountability from their leader. Their leaders say the right things but don’t demonstrate it through their actions. For example, the participants’ leader may tell them their development is important and then expect them to attend meetings that are scheduled during the training.
  - It’s also frustrating when the participant’s leaders don’t ask them about what they learned or talk about it during 1:1’s, or when they see them.
  - I always invite the participant’s leaders to the final 30 minutes of the last class to recognize and celebrate their employee’s achievement. It’s disappointing when the CEO, CPO, and CFO come to the celebration but the participant’s leader doesn’t try to come.
2. “What do you do when participants show up but are mentally somewhere else?”
  - If onsite, I try to walk around and talk to specific tables. When I’m standing in front of them, they tend to focus on what I’m doing.
  - I have them help me take notes on the flipchart
  - Have them move around the room and work with different people
  - Virtually – ask them all for their input (round robin)
  - Sometimes share family stories to make them laugh or connect better to the topic
3. “What activities or exercises tend to create the most meaningful dialogue?”
  - I think the most meaningful dialogue comes from sharing our experiences – especially the ones where we could “do it over”.
4. “How do you bring the conversation back to real work situations rather than theory?”
  - Share a real situation and ask how we could apply what we learned to this.

5. “What has worked well for re engaging leaders who completed the program previously?”
  - One of our groups, had leaders from the previous year meet with the leaders currently going through the program once a month to talk about what they learned and how they are applying it. It was awesome to see previous leaders investing their time to help the leaders who were just starting the program and showing support.

## **New Tools and Ideas**

### **Questions**

1. “Is there a tool, activity, or exercise you have used recently that worked really well?”
  - I’ve seen a lot of participation in topics after I share a difficult one that I’ve experienced. It tends to create more openness with the group.
2. “Has anyone experimented with something new in their workshops that others might try?”
  - I haven’t tried anything new but would love to hear what others have tried.
3. “What tools would make facilitation easier or more impactful for you?”
  - I like the idea of offering the training in a video format that can be added to the LMS. This allows for flexibility. I still find value in getting people together to talk about what they learned and how they applied it. eLearning is great, but there needs to be structured reinforcement of how the learning is applied.
  - I also appreciate the ability to have content translated to other languages. This is invaluable to our global organization. Training is difficult with the language barrier but so sought after. This provides a solution that fits everyone.