



Institute for
Learning Innovation



Connection Train- the-Trainer Guide

*Teaching staff to create intentional, inclusive
moments of connection with every guest*



For museum, zoo, science center, and other informal learning organizations

1. Purpose of This Training

This guide helps trainers teach staff how to intentionally create a small moment of connection with every guest. The goal is not to create long conversations, scripted interactions, or a team of extroverts. The goal is to help every guest feel welcomed, seen, valued, and supported.



Connection is a strategic effort to create a relationship with each guest, such that the interaction is more than a transaction.

By the end of training, staff should be able to:

- Explain why connection contributes to an inclusive guest experience.
- Demonstrate the core connection behaviors during role-play.
- Use questions and listening to understand what a guest may want or need.
- Adapt the support they provide without making assumptions about a guest.
- Maintain intentional connection when time is limited or the organization is busy.
- Use the A.R.E. Method and One Question Rule when they need a simple structure.



2. What Connection Looks Like

Connection is observable. That matters because observable behaviors can be practiced, coached, and improved.

Instead of: “Be welcoming.” Coach observable actions:

Open with a warm welcome	Ask a question	Make an empathetic statement	Offer to help or engage	Give a personalized recommendation when appropriate	End positively
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The Connection Fidelity Checklist focuses on these behaviors:

- ✓ Open the interaction with a warm welcome, positive tone, and smile.
- ✓ Engage others by asking questions.
- ✓ Adapt communication based on what the guest communicates or needs.
- ✓ Make reciprocal or empathetic statements that demonstrate interest.
- ✓ Offer to show, engage, guide, or provide personalized help.
- ✓ Conclude the interaction with a positive statement.

Connection is a skill—not a personality trait.

Some excellent employees may be introverted, neurodivergent, shy, new, or simply not naturally conversational. They can still create meaningful connections in ways that feel authentic to them.

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USEFUL TRAINER LINE

*We're not asking everyone to become extroverts.
We're asking everyone to make one person feel like they belong.*



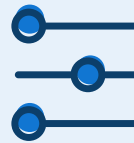
3. Connection and Inclusion

An inclusive environment requires more than offering the same information to everyone. Every guest deserves the opportunity to experience a warm, authentic connection. What may change is the support needed to make that experience meaningful.

THE KEY DISTINCTION



The opportunity to connection should be the same.



The level of support needed may change.

Do not teach staff to guess what a guest needs based on appearance, disability, age, behavior, communication style, or who they are visiting with. Teach them to ask questions that help the guest tell us what would make their visit more comfortable, engaging, or successful.

Examples:

- "What would help make your visit most comfortable today?"
- "Who are you visiting with today?"
- "Would you like me to show you some of our sensory resources?"
- "Would it be helpful if I pointed out some quieter spaces?"

COACHING TIP

Instead of: "They look like they need..."

Coach: "What question could you ask that would help you understand what they need?"

4. Coach for Mastery. Coach for Intentionality.

DURING TRAINING	DURING REAL OPERATIONS
Coach for mastery	Coach for intentionality
Can they demonstrate the connection behaviors?	Did they intentionally create connection?
Use role-play and practice	Observe real guest interactions
Practice the full toolbox	Choose the right tool for the moment
Build fluency	Use good judgment

TRAINER PRINCIPLE

"We train to mastery so staff have a full toolbox. We coach them to use good judgment about which tools fit the moment."

5. Connection Under Pressure

One of the most common barriers to connection is the belief that connection requires time. It does not. A busy day may change the length or shape of an interaction, but it does not remove the expectation that guests should feel welcomed.

Ask staff



What makes connection easiest?

What changes when there are 40 people waiting?

Do you feel rushed?

Do you skip the conversation?

Do you focus only on getting people through?

Contextual Differences



Slow Tuesday: Practice the full toolbox and stretch comfort zones.



Busy Saturday: Ask one meaningful question, offer one personalized recommendation, and end warmly.

The goal is not a longer interaction.
The goal is an **intentional interaction**.

Minimum Effective Connection

When time is limited, staff do not need to complete every behavior on the checklist. Instead, they should intentionally create one or two meaningful moments of connection.

Ask one
meaningful
question

Make an
empathetic
statement

Offer one
personalized
recommendation

Provide one
helpful next
step

End
positively

! IMPORTANT

"Minimum effective connection" is not permission to skip connection when we're busy. It is a strategy for **maintaining connection** when time is limited.

6. Provide Staff with printed copies of The A.R.E. Method, The One Question Rule and The Quick Tips for Connection Guides

Some staff will naturally know how to create connection. Others will benefit from a simple structure. The A.R.E. Method gives staff a practical tool without requiring them to memorize a script and a single question can shift an interaction from transactional to relational.

7. Practice & Role-Play

Role-play gives staff enough time and opportunity to practice the full set of connection behaviors. Have participants work in pairs or groups of three. One person is the staff member, one is the guest, and one may use the checklist as the observer.

SCENARIO 1: FIRST VISIT

Guest: "We've never been here before. What should we do first?"

Coach the staff member to:

- Greet the guest.
- Ask a question.
- Show interest in the answer.
- Offer guidance or a personalized recommendation.
- End positively.

SCENARIO 2: CONNECTION IN 30 SECONDS

Challenge: It's super busy in the facility today, make someone feel seen in 30 seconds.

Possible behaviors:

- Smile.
- Make eye contact when appropriate and comfortable.
- Use an enthusiastic greeting.
- Ask one meaningful question.
- Comment on something the guest shared.
- Offer one personalized recommendation.

8. Coaching the Skill

The checklist is a coaching tool, not a tool for catching mistakes. Trainers should focus on observable behaviors rather than personality, intent, or whether they personally liked the interaction.

When observing an interaction, ask:

- 1 Did the staff member have the opportunity to connect?
- 2 If yes, did they use the skill?
- 3 If not, what got in the way?
- 4 How could they incorporate one more or one different behavior next time?

Keep feedback supportive and specific. Coach toward one observable next step rather than telling someone they were "not friendly enough."

THIS WEEK'S TRAINER CHALLENGE

1. Print off the three guides and distribute to employees.
2. Use the Connection Fidelity Checklist below with one employee.
3. Practice one role-play scenario with that employee.
4. Try the 30-Second Connection Challenge with that employee.
5. Observe one real guest interaction employee.
6. Coach and provide feedback with that employee.

9. Connection Fidelity: Trainer Checklist

Use this section during initial training to ensure the target behavior is taught, practiced, observed, and coached.

Mark each training step as Yes (1) when completed or No (0) when not completed.

Training Step	Yes / No
1. Provide a rationale for the target skill being trained.	
2. Vocally describe the steps of the target skill.	
3. Provide the trainee with a written summary (PowerPoint slide deck or guide).	
4. Trainer demonstrates the target skill for the trainee.	
5. Trainer has the trainee practice performing the skill.	
6. Observe and record trainee correct vs. incorrect performance of the target skill.	
7. Provide supportive and corrective feedback.	
8. Repeat practice, observation, and feedback until the trainee correctly performs the skill.	

Connection Skill Area

Target Behavior	Score (+ / -)	Notes
Opens interaction with a warm welcome with positive tone and smile		
Engages others by asking questions		
Adapts communication based on what the guest communicates or needs		
Makes reciprocal/empathetic statements and demonstrates interest		
Offers to show, engage, guide, or provide personalized help		
Observe and record trainee correct vs. incorrect performance of the target skill.		
Concludes interaction with a positive statement		

Percent Independent: _____ / 6 = _____ %

Suggested training mastery criterion: 80% with three role-play scenarios and/or observed guest interactions. Once mastery is demonstrated, use the checklist as a coaching reference for intentionality during daily operations.

10. Trainer Observation & Coaching Notes

Create one copy of the template for each employee you train.

1. Copy the template below.
2. Paste it into a new Word document.
3. Save the document using the employee's name.
4. Use the document to record observations, feedback, coaching conversations, and progress throughout training.
5. Keep each employee's training document updated so you can refer back to it during future coaching.



TIP: Keep one document per employee so their feedback and progress stay organized in one place.

Trainee: _____

Trainer: _____

Date: _____

Strengths observed:

Opportunity for growth:

One behavior to practice next:

Follow-up observation/date:
