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LEADERSHIP & ORGANIZATIONAL DEVELOPMENT

Performance Based Coaching and Leadership

For years, managers believed that creating high morale resulted in high performance. We now know this is a myth. Research now confirms that if you create a high performance environment—one where expectations are clearly communicated, performance metrics are applied and frequent feedback is the norm—you will increase not only morale but also bottom line results. This workshop will give you the proficiency to do that.

The complete workshop is delivered in 3½ to 4 days of 7-8 hours of class time each day.

Syllabus

Session 1: Leadership and Performance Management

RESULTS YOU CAN EXPECT FROM THIS SESSION

You will be able to differentiate the essential components of 'leadership' as opposed to management and supervision.

You will understand the importance of 'workplace values,' be able to articulate your own workplace values and appreciate how to use them.

You will learn what really 'motivates' high performers and why this is important to you.

OVERVIEW

This 'foundation' session will provide you with essential leadership skills and considerations that are critical to effective performance management.

Session 2: Expectations, Measurement & Accountability

RESULTS YOU CAN EXPECT FROM THIS SESSION

- You will be able to establish job requirements and expectations that are clear and that will keep your direct reports focused on what's really important.
- You will be able to develop more effective performance standards and measurements.
- You will be able to implement an effective and fair performance accountability process.

OVERVIEW

According to the recent research regarding high performance, 'knowledge of what is expected of me at work' is a critical indicator of employee productivity and employee retention. To find out that what you have been working hard at isn't what you should have been focusing on is demoralizing and negatively impacts the human spirit. As a leader, your first responsibility in performance management is to provide clear performance expectations. If you struggle with how to develop and communicate clear performance expectations and priorities, this workshop will provide the framework and skills to help you ensure that performance expectations are clear, understood, and verifiable.

Effective performance measurement depends on three critical variables: clarity on what is expected; clarity on acceptable standards of performance; and a method of validation that clearly communicates the level of performance against the acceptable standard. Consistent accountability requires this. Unreliable performance measures hinder the performance management process. This workshop will help you put in place a performance validation process that eliminates the unintended consequences of a poor measurement process—which include conflict between employees and bosses and employees and other employees, less than desirable employee motivation at work, a performance management process that is not respected and valued by employees, and performance levels that are below optimum and allow poor performers to 'get by.'

Session 3: Coaching for Performance™***RESULTS YOU CAN EXPECT FROM THIS SESSION***

- You will improve your performance diagnostic skills regarding results and motivation.
- You will be able to adapt your coaching behavior to demonstrated employee performance.
- You will be able to deal with performance problems quickly and effectively.
- You will improve individual and work group performance.
- You will positively impact employee motivation and retention.
- You will improve relationships with your direct reports.

OVERVIEW

'One Size Fits All' fits no one well and everyone poorly! And "one size fits all" performance coaching fits employees the worst. Every individual does not relate well to the same style of coaching and performance feedback. Research confirms that performance coaching must vary with the individual and the situation in order to maximize performance levels and maintain strong manager/employee relationships.

Coaching is the most critical activity for you to get a return on your investment of time and influence—the two resources you have for managing the performance of others. The quality of your influence is dependent on your flexibility in coaching performance.

Your flexibility is determined by how well you use behavior patterns that consist of specific behavioral paradoxes (behavior traits that on the surface seem contradictory) that must be understood and mastered in order to improve your coaching style range and accurate performance assessment. Behavioral paradoxes that impact your influence ability include:

Authoritative behaviors and Collaborative behaviors - balancing individual decision making with shared decision making.

Enforcing behaviors and Warmth/Empathy behaviors - willingness to hold people accountable, yet expressing positive feelings and affinity towards others.

Analytical behaviors and Intuitive behaviors - using facts and evidence to assess performance, while

simultaneously using personal 'hunches' and gut instincts.

PROCESS

This challenging and highly engaging session includes personal assessments, case studies, coaching simulations, and performance diagnostic activities. This session is powerful and pragmatic and based on a simple model of how to adapt coaching behavior—why and when!

Performance-Based Coaching™ is a process that organizes behavioral choices into a tactical model for effective performance coaching—and provides you a framework that recognizes employee performance differences, and guides you on how best to adapt your behavior accordingly. Without mastery of the influencing behavioral paradoxes you are left with 'reactive' approaches to performance management.

Session 4: Coaching Communications Skills

RESULTS YOU CAN EXPECT FROM THIS SESSION

- You will be able to discuss performance in a more positive and timely manner.
- You will be able to maintain positive relationships with direct reports—even in difficult situations.
- You will be able to more effectively develop 'good performers' into 'exceptional performers.'
- You will improve your ability to more effectively deal with 'performance problems' even if severe punitive measures must be taken.
- You will improve the consistency of your accountability process.
- You will improve overall employee satisfaction and tenure.

OVERVIEW

Like many leaders, you may find that having face-to-face communications with direct reports about performance is one of the most difficult, yet important issues facing you, particularly when there are performance problems. Leaders consistently report that problem performers: (1) take up too much of their time and (2) are the most difficult situations they have to deal with. To be effective in these situations and have a chance of turning problem performance around, you must feel confident and comfortable dealing with conflict, using confrontation skills, keeping control of performance discussions, and making timely interventions. The worst course of action you can take is to let problem performance continue, since the only result is unacceptable levels of tolerance for poor performance while the results and efforts of high performers are dishonored.

Description: Do you sometimes dodge performance discussions because they can get emotional and difficult for everyone involved? This session will provide you with the skills to intervene in a timely fashion and have a greater chance of turning performance around while simultaneously keeping the relationship with the employee positive; or to support and reinforce good performance and move it to excellent performance.

You'll be more effective in keeping performance discussions focused on the performance, keeping control of the discussions, and requiring future-focused performance commitments from the employee. You will learn a framework for handling problem performance interventions that will be reliable and replicable. Performance-Based Coaching is the 'strategy' for managing performance; Coaching Communications Skills are needed to implement the strategy effectively.

Session 5: Applied Performance Management

RESULTS YOU CAN EXPECT FROM THIS SESSION

- You'll be able to reinforce the content of the previous sessions using a different media.

OVERVIEW

This session uses a video that portrays a variety of leadership interactions. The video is interrupted at key points during the showing to allow you to analyze what you have seen and to critique the effectiveness of the interactions. It provides you with the opportunity to 'see' leadership interactions and to observe their effectiveness in terms of whether the desired performance was achieved or not, and why.

PRESENTATION

These sessions are presented using a variety of methods (PowerPoint programs, handouts, videos, assessment instruments, case studies and role-playing). They are intended to be learner-driven and highly interactive; and as a result are delivered in a flexible time frame. Therefore, no specific hour-by-hour agenda is provided. The workshops are 'tailored' to the specific audience using information obtained from a brief 'pre-work' assignment.

Class Testimonials:

"This is the best training that I have ever participated in. Thank you for the knowledge; I hope to make an impact with the coaching techniques to create great workplace teams."

- *Chief of Maintenance*

"I appreciated the articulation of the difference in coaching developing versus regressing direct reports. Made good sense and is something I am watching for as I have a currently very highly functioning team, but who knows?"

"The overall benefit of this course for me was that of refreshing my "will" to find new ways to work with my highly functioning team. I look forward to the challenge of helping my group reach into that "little bit more" that they have.

"This truly was the best supervision/leadership course I have taken in my 29 years in the NPS. I wish I had been exposed to these ideas when I was early in my career. Ah well, better late than never!"

- *Chief of Interpretation*

"My executive summary on the class: I loved it! It was finally a different way to tackle some ticklish issues every supervisor in the NPS has faced and will face and we seem to never get make any progress with. I believe the current mind set on supervision causes many supervisors to just ignore both conduct and performance issues because they really don't have the tools to deal with whatever issue is on the table. I have watched 'ignoring it' turn into nightmares, costing countless dollars and supervisory time, with no real beneficial outcome to either the employee or the work unit. The TRACC tool is amazing! It takes the emotion out of performance (and even conduct) situations, and focuses on the behavior and the task. It is clean. Its success can be measured by everyone involved, and it provides a great foundation for the employee to improve, should the attitude be in the right place."

- *Park Superintendent*

Team Effectiveness

NOTE: As with all our training, we can customize and tailor this session to meet the specific needs of the organization and participants.

Our central focus for the workshop would be to present and discuss (using pre-work data) the elements of a 'Traits of Effective Teams' model. A primary source of information will come from Overcoming the Five Dysfunctions of a Team; (Patrick Lencioni; Jossey-Bass; 2005):

Trust > Managing Conflict > Building Commitment > Building Accountability > Results. Each of these elements builds on the previous one. Time will be spent describing the specific behaviors required by team members to achieve success for each of the levels in the model.

Among the most important behaviors at each level is effective communication. Effective communication is a function of the extent to which there are effective relationships. The model described above focuses on behaviors that will lead to effective relationships in the team and among individual team members—and, consequently, effective communication. Additional discussion on specific techniques for improving the mechanisms of communication (adult conversations) is included.

Strategic Planning

Strategic planning is the process of determining where an organization is going and how it is going to get there. Strategic planning is not a one-time event, but a cycle that regularly repeats itself to provide continued direction to the organization. The focus of a strategic plan is usually on the entire organization and its mission, rather than a particular product, service or program.

OQA can assist an organization with any of the aspects of strategic planning that follow:

Strategic planning serves a variety of purposes in an organization, including to:

- Clearly define the purpose of the organization and to establish realistic goals and objectives consistent with its mission.
- Communicate those goals and objectives to the organization's constituents.
- Develop a sense of ownership within the organization for the actions outlined in the plan.
- Ensure the most effective use is made of the organization's resources by focusing those resources on the actions that will provide the greatest benefit, within the organization's capacity for implementation.
- Provide a base from which progress can be measured and establish a mechanism for informed change, when needed.
- Build a consensus about where the organization is going.

A successful strategic plan will:

- Provide clearer focus for the organization, producing more efficiency work and more effective projects.
- Build strong teams among the organization's board, staff, and volunteers.
- Provide the glue that keeps the board together and focused on organizational priorities.
- Provide a mechanism to help solve major problems

The strategic planning process

The strategic plan is not a document that is created and put on a shelf. In fact, the process is probably more important than the document that is created by it. The strategic planning process is a cycle of actions that guide the organization. As such, it is a leadership responsibility.

The following steps outline the sequence of events in strategic planning. There is no fixed amount of time or detail prescribed for each event. In fact, some may well be done concurrently.

1. Validate the organization's vision, mission and values. Update, as needed.
2. Perform a scan of the organization's internal and external environment, documenting the organization's operating environment and identifying strengths, weaknesses, trends and conditions.
3. Identify and prioritize major issues/goals facing the organization over the planning period (generally the next 3-5 years).
4. Design major strategies or programs to address each of these issues/goals.
5. Establish action plans that include tasks, resource needs, roles and responsibilities for implementation.
6. Develop performance measures for each discrete action that will enable the organization to measure progress toward achieving its goals.
7. Produce a Strategic Plan document that records the organization's goals, objectives, action plans, and performance measures.
8. Develop an annual Operating Plan documenting what specific actions are going to be undertaken in the first year of the strategic plan period.
9. Develop and authorize a budget to allocate funds and other resources to the specific actions in the operating plan.
10. Conduct the organization's operations.
11. Measure performance against the plan and manage (make adjustments) according to the results.
12. Monitor, review, evaluate, and update the Strategic Plan document, as needed.

When should strategic planning be done?

The scheduling for the strategic planning process depends on the nature and needs of the organization and the its immediate external environment. The overall plan will generally cover a 3-5 year period with annual updates. Planning might be carried out once a year and only certain parts of the planning process, for example, action planning (objectives, responsibilities, time lines, budgets, etc) are updated each year.

Consider the following guidelines:

- Strategic planning should be done when an organization is just getting started in order to provide initial direction.
- Strategic planning should also be done in preparation for a major new venture, for example, developing a new service.
- Strategic planning should also be conducted at least once a year in order to be ready for the coming fiscal year (the financial management of an organization is usually based on a year-to-year, or fiscal year, basis). In this case, strategic planning should be conducted in time to identify the organizational goals to be achieved over the coming year, the resources needed to achieve those goals and actions needed to obtain those resources. However, not all phases of strategic planning need be fully completed each year. The full strategic planning process should be conducted at least once every three years.
- Each year, action plans should be updated.

Note that, during implementation of the plan, the progress of implementation should be reviewed periodically (e.g., on a quarterly basis). Again, the frequency of review depends on the rate of change in and around the organization.

Thoughts about 'strategic' planning:

- Planning is guessing, but guessing as accurately as possible is critical to an organization.
- A plan is only as good as the attention paid to it.
- A plan is volatile—at best probably for a relatively short time because of inability (unwillingness?) to predict very far into the future.
- A plan should lead to priorities for action and a willingness to spend the money and time to accomplish them.

Organizational and Operational Reviews

We have been involved in comprehensive reviews of the organizational structure and functional operational effectiveness of a variety of organizations, including non-profit and government organizations. One of our Associates spent his career with the General Accounting Office (now the Government Accounting Office), during which most of his responsibilities related to these kinds of reviews. Other Associates either led review teams or participated as team members during their careers.

We can work with you to tailor a review that will provide you with alternatives for streamlining the organization or taking actions to make the operational functions more effective, efficient and economical.

Other Related Workshops

We provide additional workshops tailored to the specific needs of your organization and the participants.

Module: Define Yourself

Module Objective:

Each participant will identify their basic workplace-related values.

Key learning points:

- Identify values of effective leaders
- Communicate personal leadership values to direct reports and others

Module: Balancing the Paradoxes of Leadership

(completion of the Harrison Assessment is a pre-requisite)

Module Objective:

Use the Harrison Assessment as a personal development tool for improving leadership personal practices.

Key learning points:

- Identify 'blind spots' in behavior that cause unintended difficulties
- Resolve the paradoxical nature of behavior traits and decrease the potential for 'flips'
- Understand how direct reports or others perceive specific personal practices in the workplace
- Develop specific, focused action plans for personal development

Module: Pitfalls in Leadership

Module Objective:

Participants identify common pitfalls in leadership

Key learning points:

- Describe the 'Gallup Studies'
- Discuss 'Best Places to Work' findings
- Discuss leadership in a 'rule-centered organization'
- Describe the importance of managing priorities

Module: Norms and Culture

Module Objective:

Describe how norms and culture influence employee and leader behaviors

Key learning points:

- Define norms
- Define culture
- Discuss examples of norms and culture in existing work group(s).

Module: Problem Solving and Decision-Making

Module Objective:

Describe the problem solving/decision-making process and how to make it effective

Key learning points:

- Describe the typical steps in the problem solving/decision-making process
- Describe the role of 'situation awareness' in decision-making
- Describe 'naturalistic' decision-making vs. 'analytical' decision-making and appropriate uses of each.
- Describe the importance of 'escalation of commitment'
- Describe the importance of 'group-think'

Module: How to Effectively Resolve Workplace Disputes

Module Objective:

Each participant will describe basic methods for resolving differences of opinion (disputes) in the workplace

Key learning points:

- Describe the leader's role in resolving workplace disputes
- Describe the basics of 'dispute resolution'
- Describe alternatives for disputes that must be elevated to more proficient levels for resolution

Module: Setting and Managing Work Priorities

Module Objective:

Describe techniques for implementing organizational goals using daily and long-term action plans.

Key learning points:

- Prioritize, delegate and track work assignments
- Manage unplanned or emergency situations
- Develop a personal tracking-management system
- Define the 'walkabout'

Module: Managing your Boss

Module Objective:

Describe proven methods for achieving/maintaining effective boss-employee relationships.

Key learning points:

- Managing yourself
- Creating a climate of mutual interdependence
- Dealing with differing boss-employee styles and needs
- Analyzing your current work situation and developing a prescription for any needed changes

Module: Career Management and Personal Development

Module Objective:

Identify techniques for positive career contributions and achieving personal development goals.

Key learning points:

- Effective use of an Individual Development Plan
- Describe techniques for self-development, self-assessment and mentoring
- Define the role of attitude and a personal work ethic

Module: The Manager's Toolbox

Module Objective:

Development of a personal library of proven problem-solving techniques and essays to optimize supervisory/leadership effectiveness in the workplace.

Key learning points:

- Defining sources for continuous learning and self-development
- Identifying staff training and development sources and techniques
- Describing operational problem-solving exercises and techniques

Influence, Delegation and Initiative

Influence

Managers and supervisors must cope with competing responses from two different demands for their time—technical time and managerial time. Technical time demands require them to spend time on the technical requirements of their job. Managerial time demands require them to spend time influencing, managing, coaching, monitoring, and evaluating the performance of others. The effective balance of these two time responsibilities is not easy.

Delegation

Effective delegation is one of the most fundamental skill-sets that makes or breaks a leader—and his or her career. Creating high performing direct reports is the number one contribution of 'management time.' It requires a comfort level on the part of the leader to delegate appropriately and the possession of skills to make delegation work for the employee, the manager, and the organization.

Initiative

The extent to which a direct report exercises initiative is heavily dependent on how a leader exercises influence and delegation with that employee.

Participants completing this training will be able to:

- More effectively influence direct reports
- Increase employee initiative and loyalty
- Improve effectiveness as a delegator
- Positively influence initiative and personal responsibility of direct reports
- Avoid the common pitfalls related to delegation
- Emphasize the importance of accountability in leading direct reports