Managing Performance and Outcomes: Speak So People Listen…Listen So People Speak

Thursday, June 27, 2019
8:30–11:30 a.m.

Ms. Nancy Baird
President
Training Strategies, Inc.

Most managers were promoted because they have done their jobs well. But many are thrown into management without the key skills need to manage effectively. They are expected to suddenly develop management skills without any formal training. Outstanding managers are strategic decision-makers, have self-discipline to manage themselves and the staff they supervise, and the self-confidence to inspire teams. To hold staff accountable, managers have to speak with one voice to set organizational goals and standards. Once these are established, staff must be held responsible for the results.

This 3-hour management-training will provide techniques and skill practice exercises to help managers communicate organizational goals and expectations, and provide the skills needed to hold staff accountable—focusing on results. The workshop includes lecture, guided group discussion, worksheets, individual and group activities, and action plans.

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Ms. Nancy Baird, President, Training Strategies Inc.

Nancy H. Baird, M.Ed., is president of Training Strategies Inc., a human resources consulting company specializing in management and organizational development. During 25-plus years of consulting, Baird has provided extensive expertise in human resources, including setting up the HR department for an oil and gas company in Houston. She began her career with Harris County as a juvenile probation officer and training specialist. She attended the University of New Mexico and received her undergraduate degree in cultural anthropology, then earned a Master of Education in educational psychology from the University of Houston.
County and District Clerks’ Association of Texas

124th Annual Conference

Managing Performance and Outcomes: Speak So People Listen…Listen So People Speak

“The difference between mere management and leadership is communication.”

~Winston Churchill~

June 27, 2019

Presented by
Nancy H. Baird, M.Ed.
**NANCY H. BAIRD, M.ED.**

Nancy H. Baird, M.Ed., is the president of Training Strategies, Inc., a Human Resources consulting company specializing in management and organizational development. During her 25+ years of consulting, Nancy has provided extensive expertise in Human Resources including setting up the Human Resources Department for an oil and gas company in Houston for two years. Nancy began her career with Harris County where she worked as a Juvenile Probation Officer and Training Specialist.

Nancy, a native Houstonian, attended the University of New Mexico and received her undergraduate degree in Cultural Anthropology and a Master of Education Degree in Educational Psychology from the University of Houston.

Nancy has provided Human Resources consulting, executive coaching, and training to more than 300 companies, associations and agencies including: Hilcorp Energy Company; Brunel Energy, St. Mary Land and Exploration Company; Mariner Energy; Vinson & Elkins, LLP; Friedkin Companies; Scientific Drilling International; P2 Energy Solutions; American Red Cross; United Way; The Methodist Hospital; MD Anderson Cancer Center; El Paso Housing Authority; Rice University; University of Texas; Sam Houston State University; Dallas County Sheriff's Department; and National Association of Lease & Title Analysts (NALTA).

Nancy specializes in training, keynote speeches, technical writing, team building, management coaching, and strategic planning. She is an expert in designing creative training programs that change the way people think. Her humor and energy invite participants to learn and work in a relaxed, positive atmosphere.

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Website: http://www.nancybairdtraining.com/

2-Day Management Training

*“Performance Management: Building Leaders from Within”*

October 3 & 4, 2019 – Houston, Texas

For additional information: http://www.nancybairdtraining.com/
Respecting the Organizational Mission: 
Communicating Your Role as a Leader

Outstanding leaders go out of their way to boost the self-esteem of their people. If people believe in themselves it’s amazing what they can accomplish.

~ Sam Walton~

An army of sheep led by a lion would defeat an army of lions led by a sheep.

~ Arab Proverb~

“My experience with people is that they generally do what you expect them to do.”

~ Mary Kay Ash~
Instructions: Working with your group, complete the following.

The 21st Century Successful MANAGER is:

1. **Consistent**
   
   Your employees must be able to rely on you to behave in similar ways when similar situations occur. Your employees should not have to adjust their behavior according to your “mood.” Create an environment of success every day!

   What actions can you take, or behaviors can you exhibit, to create a consistent environment of success every day?

   ________________________________________________________________

2. **Honest**

   Your employees need to be able to rely on you. Your word is your bond! Guard your integrity with your life.

   Should you ever lie to your staff? _____ Yes _____ No

   If yes, under what work circumstances is it okay to lie to your staff? ____________________________

   ________________________________________________________________

3. **Passionate**

   Your enthusiasm must be visible to everyone who comes in contact with you. You must be totally committed to making your organization and your employees the best. Your passion and commitment should shine through each and everything you do every day.

   In your duties as a manager, what specific tasks require *passionate leadership*? (Be specific)

   ________________________________________________________________

4. **Flexible**

   Recognize the strategies you have created may need to be modified at a moment’s notice. Do not be rigid in the way you deliver your teaching, coaching, and counseling. Build your team with clear goals and objectives, but with flexible activities.

   Why is flexibility a critical component of your organization and its leadership?

   ________________________________________________________________

*Leaders become great, not because of their power, but because of their ability to empower others.*
Instructions: Circle all of the words you feel describe your behavior when you are at WORK.

<table>
<thead>
<tr>
<th>Critical</th>
<th>Diplomatic</th>
<th>Pushy</th>
<th>Strong-Willed</th>
</tr>
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<tbody>
<tr>
<td>Indecisive</td>
<td>Conscientious</td>
<td>Impatient</td>
<td>Independent</td>
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<td>Systematic</td>
<td>Serious</td>
<td>Tough</td>
<td>Practical</td>
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<td>Picky</td>
<td>Logical</td>
<td>Dominating</td>
<td>Decisive</td>
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<td>Cautious</td>
<td>Orderly</td>
<td>Competitive</td>
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<td>Precise</td>
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<td>Careful</td>
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<td>Conforming</td>
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<td>Unsure</td>
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<td>Helpful</td>
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<td>Talkative</td>
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<td>Satisfied</td>
<td>Dependable</td>
<td>Reacting</td>
<td>Sociable</td>
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<td>Cooperative</td>
<td>Agreeable</td>
<td>Egotistical</td>
<td>Friendly</td>
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<td>Easy-going</td>
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<td>Patient</td>
<td>Loyal</td>
<td>Convincing</td>
<td>Charming</td>
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### Handout – "My Communication Style"²

#### 1. ANALYTICAL
- **Key Value:** Work with existing circumstances to promote quality in products and services.
- **Orientation:** Thinking-oriented
- **Time:** Past-oriented
- **Description:**
  - Tendency toward perfection
  - Deals with facts, data, logic, details
  - Sometimes slow to make decisions
  - Can appear overly cautious
  - Not usually risk-takers
  - Decisions and information accurate
  - Feelings and emotions kept inside

#### 2. DRIVER
- **Key Value:** Shape the environment by overcoming opposition to get immediate results.
- **Orientation:** Action-oriented
- **Time:** Present-oriented
- **Description:**
  - Strong, decisive, results-oriented
  - Provides strong guidance
  - Can appear overly pushy
  - Demanding of themselves and others
  - Keeps emotions to themselves
  - Very self-critical
  - Does not like idle chit-chat
  - Resents those who waste time

#### 3. AMIABLE
- **Key Value:** Cooperate with others, make sure people are included and feel good about the process.
- **Orientation:** Relationship-oriented
- **Time:** Depends on who they are with at the time
- **Description:**
  - People and friendships most important
  - Goal is to get everyone involved
  - Good at recruiting others
  - Good at juggling multiple tasks
  - Concerned with feelings of others
  - Considerate of others
  - Offended when others are not as considerate

#### 4. EXPRESSIVE
- **Key Value:** Shape the environment by bringing others into an alliance to generate enthusiasm for results.
- **Orientation:** Intuition-oriented
- **Time:** Future-oriented
- **Description:**
  - Party people
  - Loves to have good time
  - Very enthusiastic and creative
  - Operates primarily on intuition
  - Does not understand those not like them
  - Easily bored, go off-task easily
  - Goes off on "tangents"
  - Brings great energy to team

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² Adapted from Inscape Publishing.
Handout – “Tips for Communicating with Different Styles”

With ANALYTICALS (1) – **DO:**
- Prepare your case in advance. Be as accurate as you can.
- Be direct, stick to business.
- Support their principles and thoughtful approach. List pros and cons to any suggestion you make.
- Present specifics and do what you say you can do.
- Take your time, but be persistent.
- Draw up a scheduled approach (with timetable) to any action steps.
- Follow through if you agree.
- Make an organized presentation of your position if you disagree.
- Be accurate, realistic. Give them time to verify that you are reliable.
- Provide tangible practical evidence.

With ANALYTICALS (1) – **DON’T:**
- Be disorganized or messy.
- Be casual, informal, or loud.
- Rush the decision-making process.
- Fail to follow through.
- Waste time.
- Leave things to chance.
- Talk on a personal note, using personal incentives.
- Threaten, cajole, wheedle, coax, or whine.
- Use testimonials from others or unreliable sources.
- Use someone’s opinion as evidence.
- Be manipulative.

With DRIVERS (2) – **DO:**
- Be brief, specific, and to the point. Use time efficiently.
- Stick to business. Do not chit-chat.
- Come prepared with all necessary requirements, objectives, and support materials in a well-organized “package.”
- Present the facts cleanly and logically.
- Ask specific questions.
- Provide alternative solutions and let them make the decision.
- If you disagree, take issue with the facts, not the person.
- If you agree, support the results, and the person.
- Persuade by referring to the objectives and results—the outcomes.
- After talking business, leave quickly—do not linger.
With DRIVERS (2) – **DON’T:**

- Ramble on or waste their time.
- Build up a personal relationship unless they initiate it.
- Be disorganized or messy.
- Leave loopholes or cloudy issues.
- Ask rhetorical or unanswerable questions.
- Come with predetermined decisions.
- Speculate wildly or offer unproven guarantees.
- Let your disagreement reflect on them personally.
- Reinforce your agreement with "I'm with you." They usually do not care.
- Direct them or order them around. They will rebel.

With AMIABLES (3) – **DO:**

- Start with some personal comment to break the ice.
- Show sincere interest in them as people, find areas of common involvement, and be candid and open.
- Listen and be responsive.
- Be non-threatening, casual, and informal.
- Ask “how” questions to draw out their opinions.
- Watch out for hurt feelings and personal reasons if you disagree.
- Define individual contributions.
- Provide assurances and guarantees that their decisions will minimize risk and harm to others.
- Provide back-up support.

With AMIABLES (3) – **DON’T:**

- Rush headlong into business or the agenda.
- Stick to business constantly.
- Force them to respond quickly to your objectives.
- Be domineering, demanding, or manipulating. Don't threaten.
- Debate about facts and figures.
- Be patronizing.
- Be abrupt and rapid.
- Offer options and probabilities. Don't be vague.
- Offer assurances you can't live up to.
- Decide for them or they will lose the initiative.
With EXPRESSIVES (4) – **DO**:  
- Plan the interaction to support their hopes, dreams, and intentions.  
- Use the time to be entertaining, stimulating, fun and fast moving.  
- Leave time for socializing.  
- Talk about their goals and what they find interesting.  
- Deal with the "big picture." not petty details.  
- Ask for their opinions and ideas.  
- Provide ideas and concepts for implementing any necessary actions.  
- Provide supporting examples from people they see as important.  
- Offer special deals, extras, and incentive.

With EXPRESSIVES (4) – **DON'T**:  
- Legislate.  
- Be cold, aloof or tight-lipped.  
- Drive on to the facts and press for solutions.  
- Deal with details, or put them in writing, or pin them down to actions.  
- Talk to them about generalities.  
- Leave things hanging in the air--or they will be left there.  
- Dream with them if time is of the essence-or else you will lose time.  
- Talk down to them.  
- Be dogmatic.
### ANALYTICAL
Remember, a **High “Analytical”** may want:

- Personal autonomy, opportunity for careful planning, exact job descriptions, precise expectations.
  - **Take** time to prepare your case in advance.
  - **Provide** straight pros and cons of ideas.
  - Support ideas with accurate data.
  - **Provide** reassurance that no surprises will occur.
  - **Provide** exact job descriptions with precise explanation of how it fits the big picture.
  - **Review** recommendations to them in a systematic and comprehensive manner.
  - **If agreeing**, be specific.
  - **If disagreeing**, disagree with the facts rather than the person.
  - **Be** prepared to provide explanations in a patient, persistent, diplomatic manner.

### DRIVER
Remember, a **High “Driver”** may want:

- Authority, challenges, prestige, freedom, varied activities, growth assignments, "bottom line" approach, opportunity for advancement
  - **Provide** direct answers, be brief and to the point.
  - **Ask** "what" questions, not how.
  - **Outline** possibilities for person to get results, solve problems, and be in charge.
  - **Stress** logical benefits of featured ideas rather than the person.
  - **When** in agreement, agree with facts and ideas rather than the person.
  - **If** timeliness or sanctions exist, get these into the open as related to end results or objectives.

### AMIABLE
Remember, a **High “Amiable”** May Want:

- Security of situation, time to adjust to change, appreciation, identification with group, limited territory, areas of specialization.
  - **Provide** a sincere, personal and agreeable environment.
  - **Provide** a sincere interest in them as a person.
  - **Focus** on answers to "how" questions to provide them with clarification.
  - **Be** patient in drawing out their goals.
  - **Present** ideas or departures from current practices in a non-threatening manner; give them a chance to adjust.
  - **Clearly** define goals, roles or procedures and their place in the overall plan.
  - **Emphasize** how their actions will minimize risks involved and enhance current practices.

### EXPRESSIVE
Remember, a **High “Expressive”** may want:

- Social recognition, popularity, people to talk to, freedom from control and detail, favorable working conditions, recognition of abilities, chance to motivate people, inclusion by others.
  - **Provide** favorable, friendly environment
  - **Provide** chance for them to verbalize about ideas, people and their intuition.
  - **Offer** them ideas for transferring talk into action
  - **Provide** testimonials.
  - **Provide** time for stimulating, sociable activities.
  - **Provide** details in writing, but don't dwell on these.
  - **Provide** a participative relationship.
  - **Provide** incentives for taking on tasks.
As a high “ANALYTICAL” manager, you are:

- Fair to everyone
- Certain to follow standards
- Conscientious
- Willing to pitch in and do the same work as your staff
- Accurate
- Able to keep confidences

As a high “ANALYTICAL” manager, your staff may see you as:

- Overly perfectionistic
- Aloof
- Hampering creativity in others with your desire to stick to the rules

As a high “ANALYTICAL” manager, you can be more effective by:

- More readily accepting differences
- Talking more with your staff
- Encouraging creativity in others

As a high “DRIVER” manager, you are:

- Comfortable in a leadership role
- Quick at making decisions
- Direct, so people always know where they stand with you
- Willing to accept challenges

As a high “DRIVER” manager, your staff may see you as:

- Intimidating
- Insensitive
- Impatient

As a high “DRIVER” manager, you can be more effective by:

- Developing more patience
- Toning down your directness – asking more questions
- Spending more time listening to your staff
As a high “AMIABLE” manager, you are:

- A good listener
- Empathic and sensitive to the needs of others
- Good with self-directed work teams
- Appreciative of your staff and regularly praise them
- Consistent in your leadership style

As a high “AMIABLE” manager, your staff may see you as:

- Indecisive
- Indirect in your directions to them
- Hesitant to implement needed change

As a high “AMIABLE” manager, you can be more effective by:

- Becoming more assertive and direct
- Coping better with change
- Not carrying the burden of everyone’s problems

As a high “EXPRESSIVE” manager, you:

- Have an open door policy
- Give your time easily to your staff
- Are Good at inspiring others
- Are Enthusiastic, giving a lot of positive feedback and delivering negative feedback in a positive manner

As a high “EXPRESSIVE” manager, your staff may see you as:

- Not detailed enough in your instructions
- Superficial in your approach
- Having a lack of follow through

As a high “EXPRESSIVE” manager, you can be more effective by:

- Being more specific in praise and work instructions
- Listening more carefully to what your staff really wants
- Becoming more organized

I can explain it to you, but I can’t understand it for you.

Speak so people will listen...

Listen so people will speak.
Instructions: The key to achieving success with others is to understand their communication style and adjust your approach so you can communicate more effectively.

Working with your group, describe how the different communication styles would respond to the statement or situation presented.

1. On a work team a:
   - High "Analytical" will most likely: ________________________________
   - High “Driver” will most likely: ________________________________
   - High “Amiable” will most likely: ________________________________
   - High “Expressive” will most likely: ________________________________

2. When your staff, customer, or constituent is a:
   - High "Analytical" you need to: ________________________________
   - High “Driver” you need to: ________________________________
   - High “Amiable” you need to: ________________________________
   - High “Expressive” you need to: ________________________________

3. The biggest problem a Supervisor is going to have with a:
   - High "Analytical" employee: ________________________________
   - High “Driver” employee: ________________________________
   - High “Amiable” employee: ________________________________
   - High “Expressive” employee: ________________________________

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Adapted from Managing for Dummies by Bob Nelson and Peter Economy. IDG Books Worldwide, Inc.: 1996.
Policies and procedures are guidelines that regulate organizational action. They control or direct the conduct of people and the activities of systems. A policy explains the organization’s stand on a subject and why there is a rule about it. A procedure explains how a policy is to be implemented, or how the organization intends to operate. Policies deal with the “what” and “why.” Procedures deal with the “how.”

As a manager you are responsible for not only understanding your organization's policies and procedures, but also enforcing their compliance. Whether you agree or disagree with specific policies and procedures you are held accountable for their implementation.

Instructions: Working with your group, read the scenario and answer the questions.

Scenario: Your organization has implemented a new dress code policy. You were not involved in developing the policy and you do not personally agree with the new policy. 100% of your staff is affected by this new policy. It is your job to inform staff and ensure staff compliance with this policy.

1. How can you effectively demonstrate your disagreement with the policy?

2. How will you inform your staff of the new policy? What will you say? What format will you use to inform staff?
Reasons to Delegate:

1. **Your Success Depends on It:**
   Supervisors who successfully manage a team prove they are able to accept greater challenges.

2. **You Cannot Do It All:**
   No matter how great a supervisor you are, doing all of the work of your team or your organization does not guarantee overall success. Being overworked, overburdened, under-appreciated leads to burnout, and ultimately diminishes your skills as a supervisor.

3. **Focus on Your Job:**
   Do your job and let your staff do theirs. You are not being paid to be a receptionist, secretary, copy machine repair person, programmer, accounting clerk, and/or a probation officer. You are being paid to manage. Focus on the “big picture” and your job of working toward the achievement of organizational goals.

4. **Delegation Increases Staff Morale and Success:**
   Remember, the number one quality people look for in a job is “the ability to be a valued, involved employee.” If you make all the decisions and come up with all the ideas, your employees never learn how to take initiative and successfully take tasks from inception to completion. Exceptional supervisors mentor and groom staff so they can meet their full potential. You are providing staff with the opportunity to be involved and get a view of the “big picture” when you delegate.

**Six Steps of Delegating:**

1. **Communicate the Task**
   Describe exactly what you want done, when you want it done, and what end results you expect.

2. **Provide Overview of the Task**
   Explain an overview of the task—why the task needs to be done, its importance in the overall plan, and possible complications that may arise.

3. **Identify the Standards**
   Discuss and agree on the standards that will be used to measure the success of the completion of the task. Make sure the standards are specific, measurable, controllable, and attainable.

4. **Grant the Authority**
   Grant the employee with authority necessary to complete the task without continual roadblocks or conflicts from other staff.

5. **Provide Resources and Support**
   Discuss and identify the resources needed for your employee to complete the task. Provide these resources and make sure your employee has easy access to these resources.

6. **Get a Commitment**
   Make sure your employee has accepted the assignment of the delegated task. Discuss and confirm your and your employee’s understanding of and commitment to completing the task.

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Adapted from Managing for Dummies by Bob Nelson and Peter Economy. IDG Books Worldwide, Inc.: 1996.
Meetings are the primary forums in which supervisors and team members conduct business and communicate with one another. Meetings that produce results do not happen by accident. In fact, most meetings are run poorly, waste time, and make employees less efficient and less effective. Superior managers conduct meetings that are useful, efficient and productive. Use these steps to conduct more effective meetings.

1. **Be Prepared**
The payoff for preparing for a meeting is tremendous. Spending a little time planning will save a lot of time during the meeting. Your goal is to get results from your meeting quickly and efficiently.

2. **Have an Agenda**
An agenda is your road map, your meeting plan. Distribute the agenda to participants prior to the meeting to help them prepare for the meeting.

3. **Start and End on Time**
Respect your team by starting and ending your meeting on time. Do not repeat information as late members join the meeting. Team members who are chronically late will learn if they are late they missed vital information.

4. **Have Fewer but Better Meetings**
Call a meeting only when it is absolutely necessary. When you call a meeting, make sure there is a clear purpose for the meeting. Today, you can use e-mail to discuss or disseminate many of the things that used to be discussed in meetings.

5. **Determine Who Should Attend**
Be selective with whom you invite to your meetings. Invite only as many participants as needed to get the job done. But, be careful not to exclude people who may have the best insight into your issues simply because of their position in the organization or their beliefs, communication style, or lifestyle.

6. **Maintain the Focus**
Be ruthless about keeping your meetings on topic at all times. Stick to your agenda. Do not let meetings become places for “committee work.” Assign detailed discussions on an issue to a committee and let them report back to the meeting with their findings.

7. **Capture Action Items**
Make sure you have a system for capturing, summarizing, and assigning action items to individual team members. Use flip charts or a white board.

8. **Conclude the Meeting**
Make sure to announce the meeting’s conclusion. All too often, participants linger on and discuss other areas that are not on the agenda. At the end of the agenda tell participants the meeting is over.

9. **Get Feedback**
Ask for feedback to measure the effectiveness of your meetings. You can find out what you did right, what you did wrong, and get ideas on how to make future meetings more effective. Ask participants to give you their honest and open feedback, either verbally or in writing. Use this information to improve your meetings.

Adapted from Managing for Dummies by Bob Nelson and Peter Economy. IDG Books Worldwide, Inc.: 1996.
Behavior—Based Interviewing:

1. Focuses on what candidate has done in the past, as opposed to, whether the candidate is able to do something in the future.

2. The more recent the performance/behavior, the more likely it is to be repeated.

3. Also known as “Competency-Based Interviewing.”

4. Asks candidate to demonstrate their knowledge, skills, and abilities (collectively known as competencies) by giving specific examples from past experience.

5. Interview questions are based on real situations that relate to the competencies for the position.

6. Information gathered from the candidate is significantly more predictive of what their behavior/performance is likely to be in the position.

7. Questions are open-ended by nature.

8. Questions are based on job description.

9. Same questions should be asked of each candidate applying for the position.

10. Usually prefaced with:
    - “Tell me about a time when…”
    - “Share with me an experience where you had to…”
    - “Give me an example of a situation that…”

11. Used at the beginning of the interview so the candidate realizes early on that he or she is expected to give detailed examples about past performance/behavior.

Best predictor of future performance/behavior is past performance/behavior.

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Adapted from High-Impact Interview Questions, by Victoria A. Hoevemeyer. AMACON a division on American Management Association: 2006
<table>
<thead>
<tr>
<th>Traditional Interview Questions</th>
<th>Behavior-Based Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>What would you do if someone asked you to do something unethical</td>
<td>Tell me about a time you were asked to do something you felt was unethical.</td>
</tr>
<tr>
<td>If you could change one work-related decision you made during the</td>
<td>Tell me about a work-related decision that, if you could, you would like to redo. Why</td>
</tr>
<tr>
<td>past year, what would that be?</td>
<td>would you want to redo it? What did you learn from the experience that you would apply</td>
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<td>to the redo?</td>
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<tr>
<td>How do you work under pressure?</td>
<td>Tell me about a time you were faced with stressors at work that tested your coping</td>
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<tr>
<td>Do you handle pressure well?</td>
<td>skills.</td>
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<td>Tell me about a time you did not handle a stressful situation well.</td>
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<tr>
<td>How would you rate your communication skills and what have you</td>
<td>Give me an example of a time when you were not as successful in your oral communication</td>
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<td>done to improve them?</td>
<td>as you would have like to have been. What did you learn from this situation that you</td>
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<td>have used to improve your communication skills?</td>
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<tr>
<td>How do you go about determining your priorities?</td>
<td>Tell me about a time when you had too many things to do and you were required to</td>
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<td>prioritize your tasks.</td>
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<td>What process do you use to solve problems?</td>
<td>Give me an example of a difficult problem you faced at work and what you did to solve</td>
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<td>the problem?</td>
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<tr>
<td>What are your strengths?</td>
<td>Describe a time when one of your strengths enabled you to be successful.</td>
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**Worksheet – “Behavior-Based Interviewing”**

**Instructions:** Working with your group, select two (2) areas and write sample behavior-based interview questions.

<table>
<thead>
<tr>
<th>Job Description Area</th>
<th>Behavior-Based Question</th>
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<tbody>
<tr>
<td>1. Ability to establish and maintain effective working relationships with employees, supervisors, other departments, officials, and the public.</td>
<td></td>
</tr>
<tr>
<td>2. Position requires working in difficult, time-restrained environment with deadlines.</td>
<td></td>
</tr>
<tr>
<td>3. Contributes to team effort by accomplishing related results as needed.</td>
<td></td>
</tr>
<tr>
<td>4. Ability to effectively report to more than one manager and accept responsibility for required results.</td>
<td></td>
</tr>
<tr>
<td>5. Position requires accuracy and diligent recording of all information.</td>
<td></td>
</tr>
<tr>
<td>6. Maintains confidentiality by keeping all proprietary information confidential.</td>
<td></td>
</tr>
<tr>
<td>7. Ability to anticipate approaching problems and establish strategic plans for future success.</td>
<td></td>
</tr>
</tbody>
</table>
Strategic Action Teams: Holding Staff Accountable for Results

ACCOUNTABILITY BREEDS RESPONSE-ABILITY.
~STEVEN COVEY
PART 1 - PROBLEM EMPLOYEE

1. **IDENTIFY A PROBLEM EMPLOYEE:**

   Think of a problem employee -- someone who has caused you trouble, gives you management headaches, or, in general, does not perform well on the job.

2. **NAME OF PROBLEM EMPLOYEE:**

3. **WHAT MAKES THIS PERSON A PROBLEM EMPLOYEE?**

   How does he or she create problems for you? What do they fail to do in their job that creates problems for you? What negative consequences do they have on co-workers, clients, the Company, team, and/or on you as a manager/supervisor?

   ---
   
   1. 
   
   ---
   
   2. 
   
   ---
   
   3. 
   
   ---
   
   4. 
   
   ---

PART 2 - PROCESS VERSUS OUTCOME

**PROCESS** The way in which employees get their work done

**OUTCOME** The results, the actual work they produce

In the blank next to each statement:

Write a **P** if you think it is a process concern.

Write an **O** if you think it is an outcome concern.

---

1. **Documentation of performance problems help establish that future, progressive discipline is not retaliatory.**
   - If an employee is not disciplined for inappropriate conduct, and then starts being disciplined after engaging in any kind of protected activity (such as harassment or discrimination claim, being on jury duty, taking medical leave, etc.), then the discipline may appear to be retaliatory.

2. **Documentation makes it easier for multiple supervisors or successive supervisors to track behavior and performance.**
   - Many employees are supervised by more than one person or change supervisors during the course of their employment.
   - Accurate documentation of performance and conduct make it easier for multiple supervisors to correct performance deficiencies, to discipline consistently, and to apply progressive discipline where appropriate.

3. **Consistent documentation can be used to counter a discrimination charge.**
   - If an employee claims that he or she has been disciplined in a discriminatory manner, consistent documentation of discipline can help establish that the employee was treated no different than other employees who were similarly situated.

4. **Disciplinary records can help the employer prove its position in arbitration or in court, if necessary.**
   - Supervisor’s leave, memories fade.
   - Arbitrators, judges, and juries expect an employer to document its activities.
   - The lack of documentation may cause the finder of fact to doubt the employer’s version of the facts or make it look like the employer is hiding something.

5. **Documentation of discipline helps employees know where they stand and may improve their performance.**
   - People have a tendency to hear only what they want to hear, especially when receiving bad news.
   - Written documentation of discipline can increase the likelihood that an employee will understand and remember the supervisor’s expectations and change his or her performance accordingly.

6. **In most instances, there must be documentation before termination for unsatisfactory work performance.**
   - An employee generally cannot be discharged for unsatisfactory work performance unless the employee has received written notice setting forth the deficiencies in his or her performance.
   - For severe charges, the employer may discharge an employee immediately for just cause.

7. **Progressive discipline is very difficult to impose without written documentation of past disciplinary actions.**
   - An employee should not be terminated for just cause without some form of progressive discipline unless the charge is very severe.
   - Generally, disciplinary action is more likely to be upheld if it matches the severity of the incident and reflects a progressive approach.
   - If past conduct and disciplinary actions have not been recorded, it is very difficult to establish the severity of repeated conduct or that a higher level of discipline is appropriate.
ABC's of Documentation

ACCURATE:

- Factual and Specific: Write descriptive examples; describe behaviors, dates, times, numbers or other information that clearly support your evaluation.
- Job related: Comments should directly apply to the employee's job responsibilities. Personal opinions may be viewed as unfair and may lead to legal problems.
- Directly Observed: Hearsay is rarely appropriate in an evaluation. An exception might occur if enough evidence from key people is collected. For example, "eight of nine participants reported that the trainer would not take their questions."

BEHAVIORAL:

- Describe behaviors, not conclusions.
- Don't write: "John seemed hostile to the customer" (a conclusion).
- Instead, write: "John raised his voice and refused to listen to the customer's objections" (a series of behaviors).

CONSISTENT:

- Cite both strengths and weaknesses for each employee, where appropriate.
- Write approximately the same amount and detail for each employee.

DOCUMENTATION GUIDELINES:

1. **Document promptly:** The rule is "if it's worth remembering, it's worth writing down. Handwritten memos and notes that have been dated and signed will suffice if the facts are accurate.
2. **Ignore minor issues:** Focus on important incidents. Remember document outcomes not processes.
3. **Focus on specific job-related behaviors:** Stick with the facts. Record specific dates, times, and behaviors.

**Poor Documentation:**

- Sally is always late and argumentative.
- Sally has a negative, argumentative attitude.
- Sally's behavior is a negative influence on her peers.
- Sally does not do have follow-thru and does not appear to care about her job.

**Good Documentation:**

08/09/18  Meeting was delayed because Sally arrived at 9:15 a.m. for an 8:30 a.m. meeting. When Sally arrived at work, she engaged in a loud verbal altercation with the receptionist asking her, "Why did you tell everyone I was late?" You knew I was stuck in traffic." "Why do you have to get in my business and get me in trouble with my Supervisor?" "Mind your own damn business!"

08/20/18  Sally missed the deadline on the quarterly financial report. It was due on August 15th, and she turned it in on August 20, 2018. When she was questioned, she became angry, left meeting, and slammed my door.

09/10/18  Meeting was delayed because Sally arrived at 9:45 a.m. for an 8:30 a.m. meeting.

10/01/18  Supervisor met with Sally to conduct 7-Step Performance Improvement Process. (Notes from meeting attached.) Sally will submit, by October 7, 2018, her Plan of Action for improving her performance. (Plan will be submitted to Susan Smith, Supervisor).
**Worksheet – “Documentation”**

**Instructions:** Working with your group, select two (2) from the list below and provide examples of objective documentation using the ABC’s – Accurate, Behavioral, and Consistent – of good documentation.

<table>
<thead>
<tr>
<th>Subjective</th>
<th>Objective Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>John is not a team player and has a bad attitude.</td>
<td></td>
</tr>
<tr>
<td>Susan does not follow instructions and/or proper procedures.</td>
<td></td>
</tr>
<tr>
<td>Leo is unreliable – Tardy, Absenteeism, &amp; Dependability.</td>
<td></td>
</tr>
<tr>
<td>Admin. Asst. Salas always blames others for her problems and doesn’t carry her weight with team.</td>
<td></td>
</tr>
<tr>
<td>Blair is unethical and rude to co-workers and the public.</td>
<td></td>
</tr>
<tr>
<td>Sandra has a problem with meeting deadlines.</td>
<td></td>
</tr>
</tbody>
</table>
PERFORMANCE IMPROVEMENT PROCESS

Step 1: Analyze employee's performance
Step 2: Ask employee to meet with you
Step 3: Find out how things are going
Step 4: Ask employee to do self-analysis
Step 5: Present your analysis of employee's performance
Step 6: Negotiate Performance Agreement
Step 7: Close Interview and Schedule Follow-up

Leadership is the art of getting someone else to do something you want done because he or she wants to do it.

~ Dwight Eisenhower~
Performance Goals:
Performance goals are specific statements that describe results to be achieved, when, and by whom, in order for a goal to be accomplished. They are quantifiable and/or observable achievements that can be measured. Performance goals should be clearly differentiated from activities or strategies employed to attain them. Each performance goal must relate to the overall mission of the organization.

Performance Goals should include:
1. **Who**: The performer(s)
2. **What**: The action or performance (use action verbs)
3. **When**: A time element
4. **How**: An evaluation method
5. **Where**: The place

Performance Goals should be **SMART**:
- **Specific**: Performance Goals must be clear, concise, and simple to understand. Someone not familiar with your work should be able to read and understand the goal quickly and easily.
- **Measurable**: Performance Goals must be measurable and quantifiable wherever possible. Examination of completed work should lead to a determination of whether goals were accomplished. The manager and the employee need to agree on a method to measure the performance goal.
- **Attainable**: Although performance goals should stretch and challenge an employee’s capabilities, they must be within reach, attainable, and *controllable*.
- **Results-Oriented**: Performance Goals should focus on results to be achieved, as opposed to the activities to be completed in the achievement of the goal.
- **Time-Bound**: Performance Goals should be time-bound and trackable. Manager and employee should be able to monitor progress toward the goal in order to allow mid-course corrections.

**Performance Goal Examples**:

**Example 1: Time Management**

<table>
<thead>
<tr>
<th>Performance Goal:</th>
<th>Martha will increase her ability to complete multiple, diverse tasks of differing priorities.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Step 1:</td>
<td>Martha will develop an action plan for increasing her ability to complete multiple, diverse, tasks of differing priorities</td>
</tr>
<tr>
<td>Action Step 2:</td>
<td>Martha’s Plan of Action will be approved by her Supervisor and be implemented.</td>
</tr>
</tbody>
</table>

**Example 2: Process Management**

<table>
<thead>
<tr>
<th>Performance Goal:</th>
<th>John will identify methods to streamline the intake process to make it more efficient.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Step 1:</td>
<td>John will review the current intake process to identify areas needing improvement.</td>
</tr>
<tr>
<td>Action Step 2:</td>
<td>John will submit, to his supervisor, a step-by-step process to improve the efficiency and shorten the time frame for the intake process.</td>
</tr>
<tr>
<td>Action Step 3:</td>
<td>Upon supervisor’s approval, John will present the new intake process to other team members during a staff meeting.</td>
</tr>
</tbody>
</table>
**Employee’s Name:** 

**Manager’s Name:** 

<table>
<thead>
<tr>
<th>What ______________________________ (Employee’s Name) will Work on: (List Performance Goals)</th>
<th>What ______________________________ (Manager’s Name) will Work on: (How will Manager help?)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>1.</td>
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<td>2.</td>
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<td>4.</td>
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<td>5.</td>
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</tr>
<tr>
<td>6.</td>
<td>6.</td>
</tr>
</tbody>
</table>

**Employee’s Signature:** _________________________________  **Date:** ____________

**Manager’s Signature:** _________________________________  **Date:** ____________
<table>
<thead>
<tr>
<th>What __________________________ (Employee’s Name) will Work on: (List Performance Goals)</th>
<th>What __________________________ (Manager’s Name) will Work on: (How will Manager help?)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Develop a plan of action to increase ability to accurately complete multiple, diverse tasks of differing priorities.</td>
<td>1. Schedule employee for company’s “Time Management” training.</td>
</tr>
<tr>
<td>2. Develop a plan for improving accuracy on reports with a goal of 100% accuracy.</td>
<td>2. Provide employee with “Tips for Accuracy” handout.</td>
</tr>
<tr>
<td>3. Identify the level of Excel training needed to improve proficiency in developing highly technical charts in Excel format.</td>
<td>3. Provide list of available Excel training.</td>
</tr>
<tr>
<td>4.</td>
<td>4.</td>
</tr>
<tr>
<td>5.</td>
<td>5.</td>
</tr>
<tr>
<td>6.</td>
<td>6.</td>
</tr>
</tbody>
</table>

Employee’s Signature: __________________________ Date: __________
Manager’s Signature: __________________________ Date: __________
1. **Provide Employee with Sample Performance Improvement Plan (PIP) – Employee Writes PIP.**
   - Instruct employee to complete a Performance Improvement Plan (PIP) for each of the agreed-upon goals for improvement.
   - Review sample with employee to ensure employee's understanding of expectations.
   - Discuss requirements and answer employee's questions about PIP.

2. **Set a Deadline for Employee to Return PIP to Supervisor.**
   - Provide employee with date PIP is to be completed and turned in to supervisor. Timeframe should be no longer than 5 days.
   - Mark the due date and time on your calendar.
   - Clarify employee's understanding of what is expected of him or her.

3. **Schedule Follow-Up Meeting to Review Employee's PIP.**
   - Schedule several days after you have reviewed the employee's PIP. Make sure you have time to review employee's PIP.
   - If PIP is not complete or too vague, return the PIP to the employee and request additional information. (This should be done by email, so you have a record.)
   - Re-clarify employee’s understanding of what is expected of him or her.
     
     **Example:** “As we discussed, and per our agreement, you are responsible for providing me with a detailed plan of action for improving your performance (PIP). Review the sample provided, if you need additional information.”

   - Send a reminder to employee 2-days in advance of follow-up meeting.

4. **Conduct Follow-Up Meeting.**
   - Review, with employee, their Performance Improvement Plan (PIP).
   - Reach an agreement on PIP.
   - Thank the employee for their input and end on a positive note – “I know you can improve.”

5. **Schedule 2nd Follow-Up Meeting to Review Employee's Progress.**
   - Immediate reinforcement of new behavior is important.
   - Change is difficult and periodic encouragement is needed.
   - Ensures employee of your commitment to agreement and provides opportunity for clarification.
   - Find out how things are going – what has worked…not worked.
   - Review your employee's progress.
   - Decide "Where to go from here."

6. **Conclude Performance Improvement Process**
   - Only if employee’s performance has improved and there are no longer performance problems.
   - Point out specifics of how you have noticed the employee’s performance has improved and compliment employee for a job well done.
   - Inform the employee this **concludes the Performance Improvement Process** regarding the identified performance problems and congratulate employee.
Sample Performance Improvement Plan (PIP) Sample

<table>
<thead>
<tr>
<th>PERFORMANCE GOAL</th>
<th>ACTION STEPS</th>
<th>RESOURCES</th>
<th>TARGET DATE</th>
<th>EVIDENCE OF ACCOMPLISHMENT</th>
</tr>
</thead>
</table>
| Increase ability to accurately complete multiple, diverse tasks of differing priorities. | 1. Create a Master List of ongoing projects with deadlines. | • Time Management Training  
• Master List instructions | 08/01/18 | Completed “Time Management” Training Preliminary Master List Completed |
| | 2. Review Master List with supervisor and make necessary changes/edits. | • Supervisor  
• Preliminary Master List  
• Weekly Calendar  
• Master List | 08/10/18 | Final Master List Completed |
| | 3. Maintain a weekly calendar that corresponds to master list. | • Weekly Calendar  
• Master List | 08/15/18 & ongoing | Weekly Calendar and Master List completed |
| | 4. Begin and end each day with a review of Master List and Calendar. | | & ongoing | Accurately completing multiple, diverse tasks of differing priorities. |
| | 5. Consult with supervisor when priorities change to make adjustments as needed. | • Supervisor  
• Weekly Calendar  
• Master List | 08/15/18 & ongoing | Accurately incorporating changing priorities into workday. |

Employee Name: ____________________________ Date of Plan: ____________________________

Supervisor Approval: ____________________________ Date: ____________________________

Instructions: Working with your group, select the two (2) best practices needing improvement at your organization and provide your recommendations for improvement.

1. **Get to Know Employees**
   - Capitalize on informal “getting to know you,” opportunities.
   - Look for opportunities to listen and learn about your younger employee’s plans and goals for the future.

   *We need to improve our skills in managing Generation X and Y employees in this area by:*

2. **Have a Sense of Humor About Work**
   - Be serious about the work without taking yourself too seriously.
   - Lighten up and monitor your own stress level. Remember, for younger employees, the best description for a boss is “laid back.”

   *We need to improve our skills in managing Generation X and Y employees in this area by:*

3. **Provide Ongoing Training and Learning Opportunities**
   - Clearly define the skills and knowledge employees must learn in order to advance to the next project or level.
   - Create, with the employee’s input, a road map of ongoing learning opportunities to keep employee engaged.

   *We need to improve our skills in managing Generation X and Y employees in this area by:*

4. **Establish Mentoring Relationships**
   - Create a network of mentors – people within your company who have expertise in a variety of areas and who are willing to mentor younger employees.
   - Expose younger employees to your company’s successful employees, by including them in meetings, projects, and/or other activities.

   *We need to improve our skills in managing Generation X and Y employees in this area by:*

---

5. **Allow Some Flexibility in Scheduling**
   - Position flexibility as a reward for accomplishing tasks.
   - Give younger employees, wherever possible, ownership of the process for accomplishing goals and tasks.

   *We need to improve our skills in managing Generation X and Y employees in this area by:*

6. **Balance the Role of “Boss” and “Team Player”**
   - Roll up your sleeves and work side-by-side with your younger employees.
   - Be a role-model by providing opportunities for your younger employees to share leadership roles with you.
   - Get out of their way and let them work.

   *We need to improve our skills in managing Generation X and Y employees in this area by:*

7. **Provide Consistent and Constructive Feedback**
   - Focus on employee’s strengths, not their weaknesses. “I know you are really good at asking for help, next time ask me before you make a change in the schedule.”
   - Focus on one issue at a time. Do not overwhelm employees with a list of mistakes.
   - Control your anger. Do not lose your cool. Employees cannot hear you when you are angry. Intimidation does not work with younger employees.

   *We need to improve our skills in managing Generation X and Y employees in this area by:*

8. **Recognize and Reward Generation Xers and Yers**
   - Base your incentives and rewards on one factor – PERFORMANCE – RESULTS.
   - Ask each employee how he or she wants to be recognized and rewarded for a job well done.

   *We need to improve our skills in managing Generation X and Y employees in this area by:*

---

Dream Job
Next Exit
1. **60-Day Rule**
   - The time period for the progressive discipline – from verbal warning to disciplinary action – should never last more than 60 days.
   - Clearly record the date and time for beginning and end of progressive discipline process.

2. **Maintain Focus**
   - The progressive discipline must be related to the original problem or problems addressed in the verbal warning.
   - An employee cannot have an ongoing progressive discipline with added performance problems.
   - If additional problems appear, address them separately.

3. **Close Out**
   - If the employee’s performance improves, congratulate the employee and close out the process.
   - Clearly inform the employee that this progressive discipline process is closed successfully.
   - Do not drag it out and bring it back up at a later time.
   - There should always be a clear time frame for each progressive discipline process.

4. **Control Your Temper**
   - Do not start or continue the process when you are angry.
   - Stay calm.
   - Develop a plan before you begin the process.

5. **Avoid Entrapment**
   - Do not set out to “get” someone.
   - Make sure you have the correct facts.
   - Do not get involved unless there is sufficient and accurate evidence of a performance problem.

6. **Keep Accurate Records**
   - Complete a “Progressive Discipline Form” each time you meet with the employee.
   - Records will be used to demonstrate fair and equitable treatment.
   - Set a time frame to destroy records. (i.e. if employee’s performance remains improved for 2 years, destroy progressive discipline records.)

7. **Know Your Authority**
   - Know what disciplinary steps you are allowed to make without approval from your supervisor and/or human resources.
   - Identify your role in the implementation of progressive discipline.

8. **Keep Others Advised**
   - Advise others (supervisor and human resources/personnel) and maintain communication of your actions when working with a problem employee.
   - Inform others (supervisor and human resources/personnel) when progressive discipline is complete.
# Progressive Discipline Form

<table>
<thead>
<tr>
<th>Employee Name:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Job Title:</td>
<td></td>
</tr>
<tr>
<td>Supervisor’s Name:</td>
<td></td>
</tr>
<tr>
<td>Date of Meeting:</td>
<td></td>
</tr>
<tr>
<td>Employee Job Description Reviewed:</td>
<td>Date Job Description Reviewed by Supervisor</td>
</tr>
</tbody>
</table>

**Nature of Performance Problem(s):** (Attach additional pages if necessary)

<table>
<thead>
<tr>
<th>Corrective Action(s):</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Verbal Warning:</td>
<td>Date of Verbal Warning</td>
</tr>
<tr>
<td>Employee’s Plan of Action to Improve Performance Received:</td>
<td>Date Rec’d</td>
</tr>
<tr>
<td>Written Warning:</td>
<td>Date of Written Warning</td>
</tr>
<tr>
<td>Employee’s Plan of Action to Improve Performance Received:</td>
<td>Date Rec’d</td>
</tr>
<tr>
<td>Disciplinary Action:</td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td>Disciplinary action taken</td>
</tr>
<tr>
<td>Date</td>
<td>Disciplinary action taken</td>
</tr>
</tbody>
</table>

**Employee Comments:**

<table>
<thead>
<tr>
<th>Employee’s Signature:</th>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor’s Signature:</td>
<td>Date:</td>
</tr>
</tbody>
</table>
1. **Keep a “Good Stuff” Folder on Each Team Member**
   - Give “good stuff” folder to each of your staff. Instruct staff to keep all their “good stuff” in their folder.
   - Keep a “good stuff” folder on each team member.
   - Keep record of all accomplishments, complementary emails, positive activities, special projects, committee assignments, etc. staff has been involved in during the year.

2. **Regular, Ongoing, and Informal Feedback from Supervisors**
   - Once-a-year evaluations are not enough.
   - Employees should receive regular input from their supervisors.

3. **Mutually Established Performance Goals**
   - Performance goals and objectives should be set by employees and supervisors.
   - Goals may be short-term and long-term and can cover a wide variety of objectives, depending on employee’s current job responsibilities and future aspirations.
   - Identify core competencies to determine future performance goals. (Use Employee Power Profile)
   - Goals should be specific and quantifiable where possible.
   - Supervisors should provide additional training or other support to help employees reach goals.
   - New performance goals should be recorded, reviewed regularly, and modified as needed.

4. **Action Plans**
   - Action plan should specifically detail employee’s plan for improvement.
   - Allow employee to design the plan for improvement. Supervisor may help with suggestions.
   - Once plan of action is agreed upon, it should be reviewed regularly to make sure it is being implemented successfully.

5. **Performance Review Should Accurately Document “Big Picture”**
   - Do not use annual review to discuss ongoing performance problems.
   - Annual review should focus on the employee’s overall performance and whether goals have been met.
   - Supervisors should identify and discuss the problems with employee as they occur.

6. **Ask Employees to Do a Self-Evaluation**
   - Use the same performance evaluation form used by your company/agency.
   - Require staff to turn in their self-evaluation at least two weeks prior to manager’s due date.
   - Allows staff to be involved in process and provides you with valuable information.
Recognizing and Rewarding Employees

There are two things people want more than sex and money – praise and recognition.

~Mary Kay Ash~
Instructions: Complete the following.

1. Think about the last time you received negative feedback.
   When? ____________________________
   Who gave you negative feedback? ____________________________
   How did he/she give you the negative feedback? ____________________________
   How did it make you feel? ____________________________

2. Think about the last time you were positively recognized for work you did well or progress you made on a project.
   When were you recognized? ____________________________
   Who recognized you? ____________________________
   How did he/she recognize you? ____________________________
   How did it make you feel? ____________________________

3. What is the best way to positively recognize/reward you?
   ____________________________________________________________

‘Recognition is a short-term need that has to be satisfied on an ongoing basis -- weekly, maybe daily.’
Team Member: ___________________________________________________________

Date: __________________________________________________________________

1. What is the best way to recognize and reward your success and achievements?
________________________________________________________________________

2. What unique perspective do you bring to our team?
________________________________________________________________________

3. What specific strengths and skills do you have to help increase our team's success?
________________________________________________________________________

4. What kind of training and/or personal development will help you become a stronger team member?
________________________________________________________________________

5. What opportunities can I provide for you to assume a greater responsibility or to achieve greater visibility?
________________________________________________________________________

6. What one (1) thing would you change about me as a manager to increase productivity?
________________________________________________________________________

7. What one (1) thing would you change to make this team more productive?
________________________________________________________________________

8. Additional comments: _________________________________________________
________________________________________________________________________

Manager’s Signature: ____________________________________________________
Dynamic Leadership

Leadership is the art of getting someone else to do something you want done because he or she wants to do it.

~Dwight Eisenhower~

Leaders become great, not because of their power, but because of their ability to empower others.

~John Maxwell~
TO MANAGE: To bring about, to accomplish, to have charge of or responsibility for, to conduct

TO LEAD: Influencing, guiding in direction, course, action, and/or opinion.

- The manager administers—the leader innovates.
- The manager is a copy—the leader is an original.
- The manager maintains—the leader develops.
- The manager accepts reality—the leader investigates it.
- The manager focuses on systems and structure—the leader focuses on people.
- The manager relies on control—the leader inspires trust.
- The manager has a short-range view—the leader has a long-range perspective.
- The manager asks how and when—the leader asks what and why.
- The manager has his/her eye always on the bottom line—the leader has his/her eye on the horizon.
- The manager imitates—the leader originates.
- The manager accepts the status quo—the leader challenges it.
- The manager is the classic good soldier—the leader is his or her own person.
- The manager does things right—the leader does the right thing.

**Outstanding leaders go out of their way to boost the self-esteem of their people. If people believe in themselves it’s amazing what they can accomplish.** ~ Sam Walton

**An army of sheep led by a lion would defeat an army of lions led by a sheep.** ~ Arab Proverb

---

Instructions: Circle the two (2) areas you need to improve.

1. Give frequent and meaningful recognition for a job well done.
2. Interact with employees on an informal basis. Go to team member’s work area. Meet them on their own turf. Actively make a point of speaking to all team members each day.
3. Ask for team member’s opinions and listen with an open mind. Try to understand their point of view.
4. Share information with team members, and ask for their input and response on issues.
5. Offset demoralizing actions and events by emphasizing what went well, and use the experience as a learning opportunity.
6. Listen 80% of the time and talk 20%.
7. Lead the way in stopping the gossip—stop listening, stop rewarding gossippers.
8. Get into the "trenches" with staff. Look for opportunities to understand team members' jobs better.
9. After management meetings, share information, updates, and issues with staff.
10. Ask direct reports: "What two (2) things do you want me to stop doing?" "What two (2) things do you want me to start doing?" "What two (2) things do you want me to keep doing?"
11. Praise in public and give feedback (correct and criticize) in private.
12. Focus on 80% of your employees, not the 20% with problems.
13. Focus on the positive things you like about each team member. Focus on what you LOVE — Not on what you Hate!
14. Create team-building activities to strengthen the team and to have FUN at work!

To improve in the areas I have identified, I will:

Area 1: ________________________________________________________________
____________________________________________________________________

Area 2: ________________________________________________________________
____________________________________________________________________
2 Things…Questionnaire

Name of Your Supervisor/Manager: ________________________________

1. What two (2) things do you want me (your manager) to STOP doing?
   1.) __________________________________________________________
   2.) __________________________________________________________

2. What two (2) things do you want me (your manager) to START doing?
   1.) __________________________________________________________
   2.) __________________________________________________________

3. What two (2) things do you want me (your manager) to CONTINUE doing?
   1.) __________________________________________________________
   2.) __________________________________________________________

Your Name: ________________________________________________
Date: ______________________________________________________

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Worksheet – “My Plan of Action”

“People Don’t Grow Automatically. To Grow, You Have to Be Intentional.”

Instructions: Complete the following.

1. One (1) thing I learned during this workshop is:

________________________________________________________________________

________________________________________________________________________

2. I will use this to become a better and more productive leader by:

   Action Steps Needed:

   1.) ______________________________________________________________
   2.) ______________________________________________________________
   3.) ______________________________________________________________
   4.) ______________________________________________________________

3. The person I will check-in with to make sure I am sticking to my plan of action is:

   Name: ______________________________________________________________

   Date: ______________________________________________________________
Date of Training:  June 9, 2019

Instructions:  Please rate the following questions about the training.

1. Prerequisites were necessary or desirable:
   Strongly Agree      Strongly Disagree
   5  4  3  2  1

2. The ideas and activities presented achieved the objectives of the workshop:
   Objectives Met      Objectives Not Met
   5  4  3  2  1

3. The program content was timely and effective:
   Strongly Agree      Strongly Disagree
   5  4  3  2  1

4. Training facilities were satisfactory:
   Strongly Agree      Strongly Disagree
   5  4  3  2  1

5. The speaker(s) had adequate mastery of the subject presented:
   Excellent         Poor
   5  4  3  2  1

6. The presentation/training skills of the speaker(s) were:
   Excellent         Poor
   5  4  3  2  1

7. The training provided me with information I can use:
   Very Useful        Not Useful
   5  4  3  2  1

8. Overall, I consider this training to be:
   Excellent         Poor
   5  4  3  2  1

9. The stronger features of the training were:

10. The weaker features of the training were: