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Tools and Materials

Ver. 1.1, updated 6 October 2008

This document contains handouts for each session of the Humans At Work[SM] program. Think of it as a "starter package" of program handouts.

These handouts are basic, and do not cover every element of the entire program content. If you are delivering the program yourself, you will probably wish to supplement them with additional information. You'll also need to plan additional development time to develop scenarios for in-class exercises, which are not included here.

These handouts are not pretty. If you're delivering the program yourself, you should plan some time to format them.

Contents (bookmarked for easy reference)

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Program Books

The program books contain the bulk of the homework reading, or include key concepts that are used in the program. Don't be tacky – if you're going to use someone's ideas, buy their book.

These books also form the foundation of the manager's professional library. They are all important to reinforce program ideas and provide resources to the participants as they continue their practice after the program is finished.

- **Becoming A Manager: How New Managers Master the Challenges of Leadership (2nd Edition)** – Linda A. Hill, Harvard Business School Press, 2003

- **Difficult Conversations: How to Discuss What Matters Most** – Douglas Stone, Bruce Patton and Sheila Heen, Penguin Books, 2000

- **The Essential Drucker**, Peter F. Drucker, Collins Business/HarperCollins, 2001

- **Fierce Conversations: Achieving Success at Work & in Life, One Conversation at a Time** – Susan Scott, Berkley Books, 2004

- **The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization** – Peter M. Senge, Charlotte Roberts, Richard B. Ross, Bryan J. Smith, Art Keliner, Currency/Doubleday, 1994

- **The Gentle Art of Verbal Self-Defense at Work (Second Edition)**, Suzette Haden Elgin, Prentice Hall, 2000

- **Managing Transitions: Making the Most of Change (Second Edition)** – William Bridges, Da Capo Press, 2003

- **The New Compleat Facilitator: A Handbook for Facilitators (Second Edition)** – Drew Howick, Howick Associates, 2002

- **Oxford Guide to Plain English** (Second Edition), Martin Cutts, Oxford University Press, 2007

Program Articles

These articles are program homework reading. All articles are available for purchase from the publisher's website unless otherwise indicated. If you lose the hyperlinks in this document, visit the Tools and Materials page at the Humans At Work website for links to all articles.

- "The Human Side of Management" by Thomas Teal (*Harvard Business Review*, November-December 1996)
- "The Five Minds of a Manager" by Jonathan Gosling and Henry Mintzberg (*Harvard Business Review*, November 2003)
- "Power Is the Great Motivator" by David C. McClelland and David H. Burnham (*Harvard Business Review*, January 2003)
- "How to Build Your Network" by Brian Uzzi and Shannon Dunlap (*Harvard Business Review*, December 2005)
- "Active Listening" article from Mind Tools, no author credited (available at the Mind Tools company website)
- "Guidelines for Active Listening and Reflection" by Don Sharp of Sales Concepts (available at the Sales Concepts company website)
- "Behavioral interviewing Strategies for Job-Seekers" by Katharine Hansen of Quintessential Careers (available at the Quintessential Careers company website)
- **"**How Management Teams Can Have a Good Fight**,"** by Kathleen M. Eisenhardt, Jean L. Kahwajy and L.J. Bourgeois III (*Harvard Business Review,* July-August 1997)
- "Want Collaboration?" by Jeff Weiss and Jonathan Hughes (*Harvard Business Review*, March 2005)
- "Communities of Practice: A Brief Introduction" by Etienne Wenger (available at his website)
- "Communities of Practice: Learning as a Social System" by Etienne Wenger (available at the Community Intelligence Labs website)

Confidentiality Contract

During the Humans At Work℠ program, you will be sharing stories of your personal experiences in the workplace and expressing opinions about workplace practices. Some of these may not be flattering to the company or your co-workers. We need to agree to create a safe environment in which to share these stories.

By signing below, you agree not to repeat stories, personal information or personal opinions that you hear in these sessions, unless there is a legal reason to do so. You are free to share program ideas and information, but not discuss other participants' performance or learning experiences.

This is not a legal document, but it is a moral commitment. If you cannot make this commitment, you should not participate in this program.

* * *

I promise to preserve the confidentiality of these sessions as described above. The people who are sharing this learning experience with me can trust me to maintain a safe environment in which we can all express ourselves freely and learn from each other's experiences and ideas.

______________________________   _______________
Name   Date

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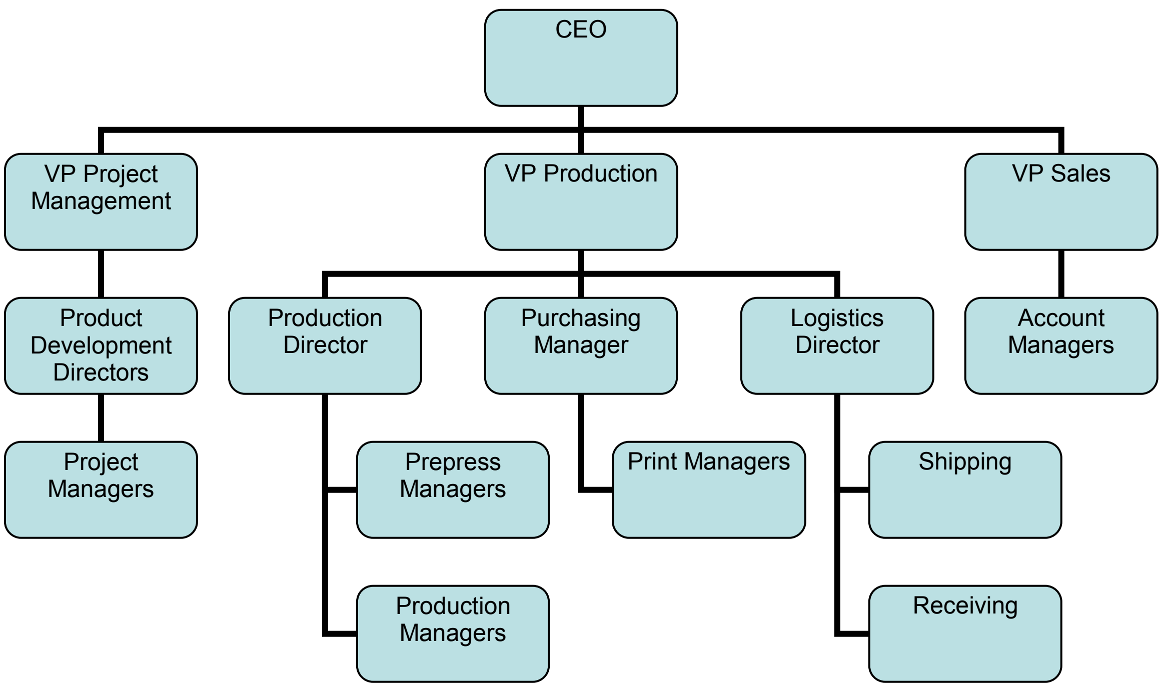
Hierarchical vs. Web Models of Organizations

Here's a typical organizational chart. This is how we traditionally think about companies – as "top down" structures, organized into functional silos. This chart makes it look like work starts with the CEO and flows in convenient clear channels throughout the organization, with people at the "same level" handling any issues involved in handoffs or crossovers.



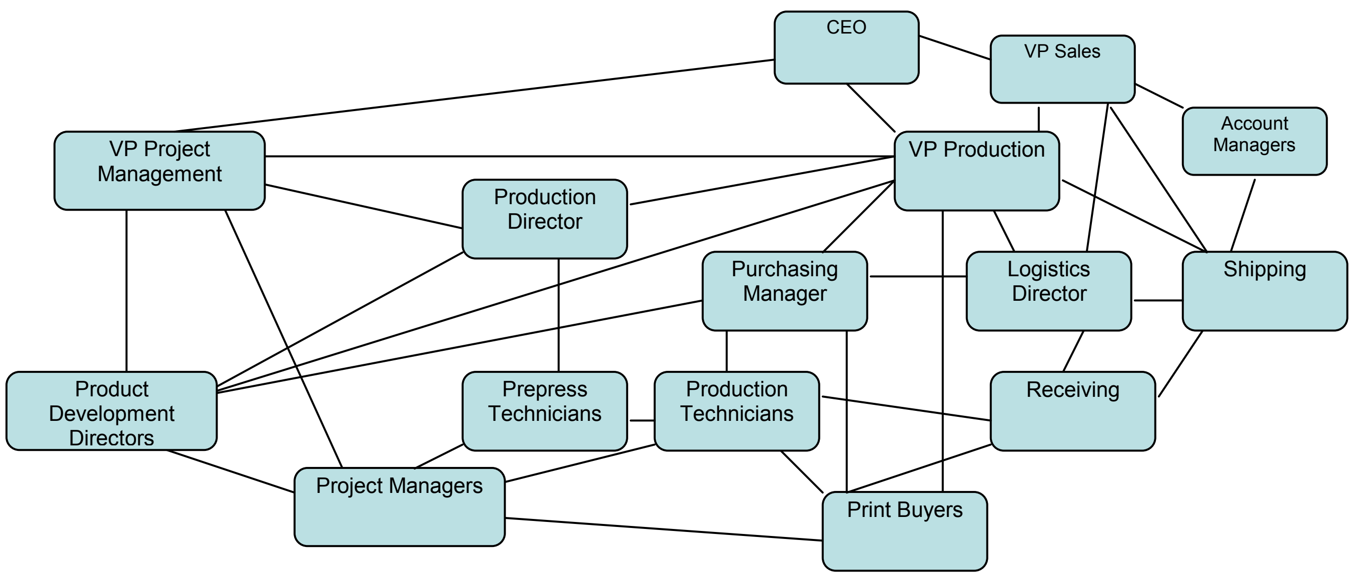
A typical hierarchical organization chart

But this isn't the way work really happens. Getting work done in companies relies on people working in relationships across department and hierarchy lines.

To get work done, we depend on multiple inputs of information, data and results from other people on different teams, at all levels. We are expected to provide the same support to them. Our companies are networks of relationships.

Managers don't just interact with their own teams. Managers don't just interact with other managers. As a manager, you have to be prepared to have the right relationships to make sure your team's work gets done.

Here's how a relationship model of the same company might really look:



There's no "right" way for a company to work, although there are ways that are more effective and productive. Good managers work toward those better ways, but they also deal squarely with the reality of how work currently happens in their company – and they build their relationships accordingly.

Prioritizing Key Business Relationships

A key business relationship is one with someone outside your own team whose work directly impacts your team's success – someone who can make it easier or harder for your team to accomplish its work.

This may be anyone in the organization: please don't shoot yourself in the foot by assuming that only other managers or executives are important to your success.

Here are the relationships you need, in order of importance:

Group 1: People who regularly interact with you or your team.
Group 2: If necessary, the managers of the people in Group 1.
Group 3: Your peers who aren't already in Group 1
Group 4: Senior managers who aren't already in Group 1 or Group 2.
Group 5: Everyone else.

Group 1: People who regularly interact with you or your team.
These may be people inside or outside your company (such as vendors, customers, industry or government bodies, or the wider community).

Here are some questions to help identify Group 1 relationships:

- Who are your biggest 'customers' inside your own company? Who do you need to get things done for?
- Who are your biggest 'suppliers' inside your own company? Who hands off critical work to your team?
- If there is a crunch or a problem, whom do you need to alert? Who will be affected, and who can help you solve the problem? (Sometimes they are not the same people).
- Who is giving you the most problems right now?
- Who makes decisions about how particular work is done between your team and theirs? (This may be the person herself, her manager, or someone else involved in the process.)
- Who supports your team in an administrative sense (people in HR, Finance, Facilities, Legal, etc.)?

- Include your assistant, your manager and your manager's assistant in Group 1.

Group 2: If necessary, the managers of the people in Group 1.
Although work doesn't necessarily flow along authority lines, you can get into trouble if you don't respect the hierarchy. You especially don't want to put one of your key contacts in the awkward position of being asked to do something for you without their manager's approval – and the best time to ask for favors is after you have an effective relationship, not before.

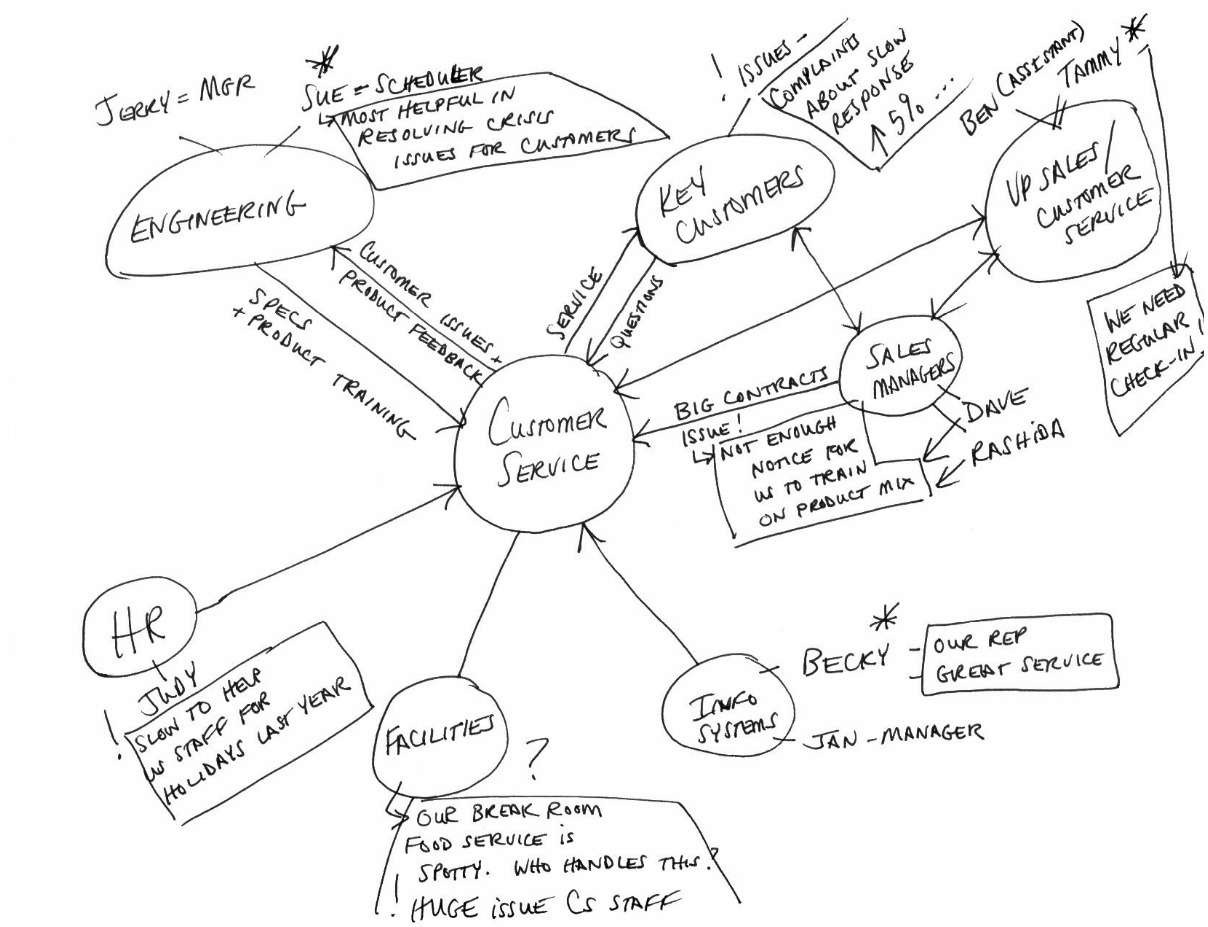
Group 3: Your peers who aren't already in Group 1
Peers are great informal sources of company information.

In choosing these relationships, focus on people who seem effective in their jobs, based on your experience of them or on feedback from people who have worked with them.

Group 4: Senior managers (who aren't already in Groups 1 or 2)
Senior managers can be role models or active mentors. They can teach you more about the company, the industry and business in general. Focus on people who seem effective in their jobs and who seem to share some of your management values.

Group 5: Everyone else.
Remember that every interaction creates relationship – especially when you are a manager, and even more so as you are promoted to positions of greater responsibility.

Example Relationship Map



How to create a Relationship Map:

1. Make a separate map for Group 1, Group 2, etc.

2. Start with your team name in a circle in the center of the map.

3. Brainstorm teams or individuals who interact with your team, based on the criteria for Group 1, Group 2, etc. Put those team or individual names in circles on the map.

4. If you use a team name in a relationship circle, then indicate the names of people you interact with for specific important reasons. If you don't know who you should be interacting with, make a note of that – that's a gap you will need to fill.

Remember, you don't have relationships with "teams" or "departments" – you have relationships with people.

5. Use symbols. The example below uses " ! " to indicate issues/problems, and " * " to indicate a relationship that is particularly strong or successful. It also uses arrows to show what important work flows between teams, and whether the relationship is primarily one-way or two-way.

   Make your own system that works best for you. You might find yourself using symbols, different colors, or keywords.

6. If you have particular issues with another team or person, try to capture the essence in brief notes.

7. Don't worry about how it looks. If it's particularly messy, you may want to write it up soon so you don't lose any of the meaning.

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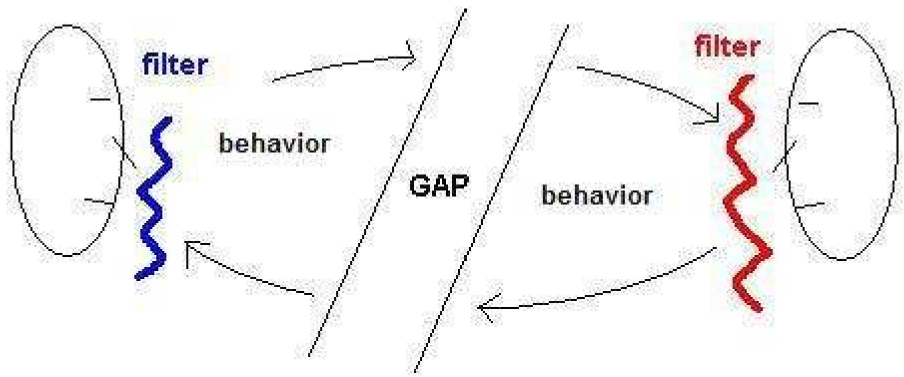
Key Relationship Worksheet

Name	Team	Why is this person a key relationship?	Status	Next steps

Status Green -- active and productive, and you are already maintaining the relationship effectively.
Yellow – the relationship isn't well-established, or you have specific concerns or issues.
Red – you have no relationship, or have a history of conflict and difficulty.

Interpersonal Gap



Interpersonal Gap

The Interpersonal Gap is a model of how communication works between people. It's based on the work of John Wallen, Ph.D., and is widely used in communication training.

The goal of this model is to help you understand that the message you believe you are sending is not necessarily what the other person receives – even when everyone has the best intentions.

Here's how it works:

1. I have something to communicate to you. I start the communication in person, by phone, through email, or some other means.

2. First, my message has to pass through my personal filters. These are things that you cannot see, and that I may not be consciously aware of – but they affect the way I send my message. Filters can include:

    1. The intention(s) behind my message
    2. My mood
    3. My physical state
    4. My opinion of you and our relationship
    5. My assumptions about you or the situation
    6. My socialization, cultural background, education and upbringing
    7. Any experience that might be affecting me – a fight with a spouse, a problem at my daughter's school, the fact that my shoes are too tight…. Anything.

My filters affect the way I communicate – the words I choose, my body language, whether I make eye contact, etc.

3. You cannot see my filters, and so you cannot be aware of how they are affecting my communication. In other words, you can't read my mind.

4. My intended message passes through my personal filters and is now out in the space between us (I have spoken or signed the words, sent the email, etc.).

   This is the realm of <u>observable behavior</u> – it's what you see and hear. It includes words or signs, body language, where I look, etc.

5. Now the message has to pass through your personal filters. Whatever they are – and I have no way of knowing – they will affect how you receive and interpret my message.

6. By the time you interpret my message, it may be something quite different from what I intended, because of factors that neither of us can completely control. Your response is based not only on the content of my message, but on how it has been colored by my filters and yours.

7. You send a message back to me, and the whole cycle starts over again.

In order to close the gap, and make communication more effective, we need to <u>make our filters observable</u> to each other. We need to consciously seek clarity at all points. We need to explain our intentions and assumptions. We need to be transparent and authentic about whatever may be distracting or upsetting us.

Effective communication is based on taking what's inside you – what people cannot see and know – and making it part of the conscious conversation so that people can more easily understand your message and your intention.

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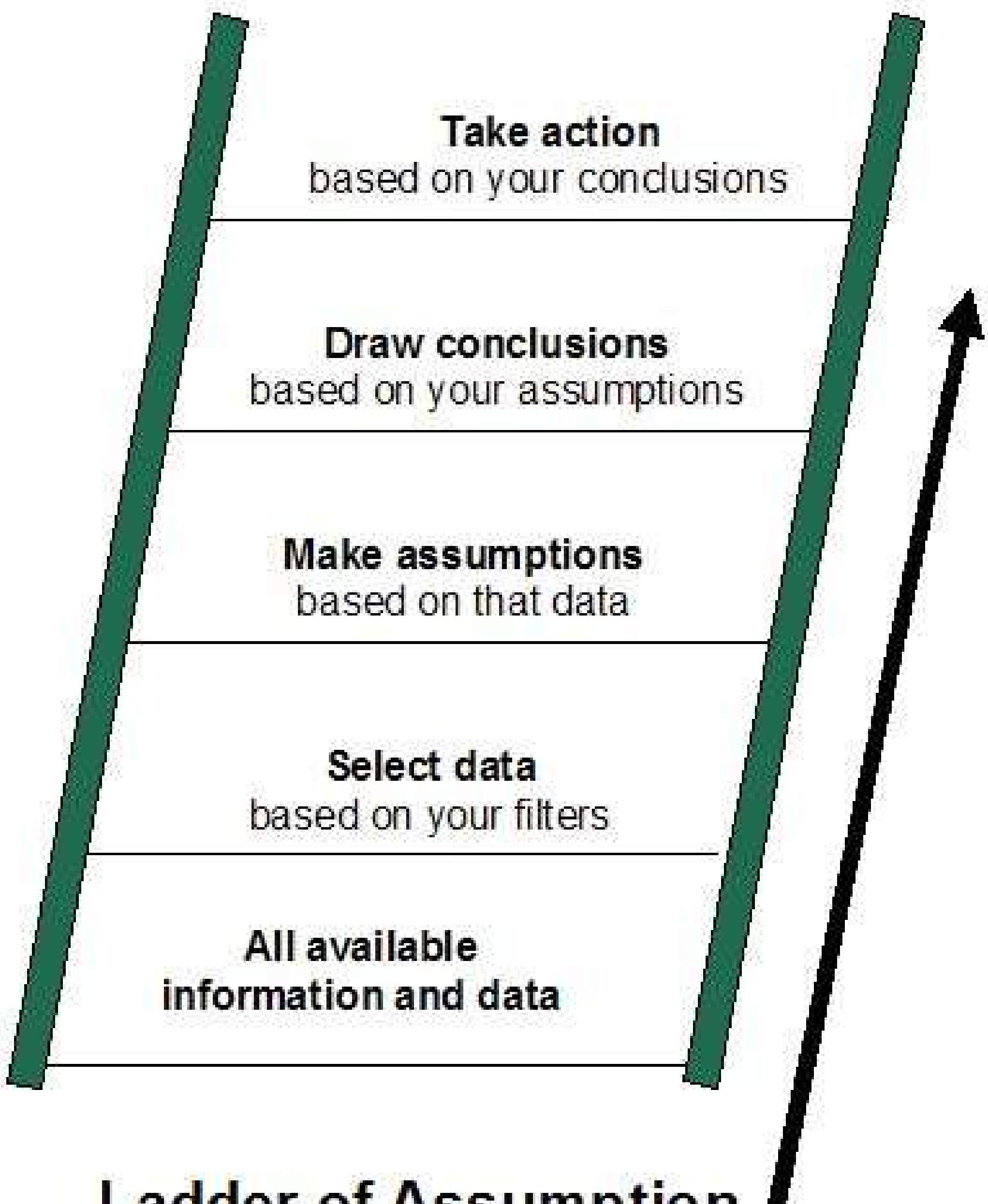


Ladder of Assumption

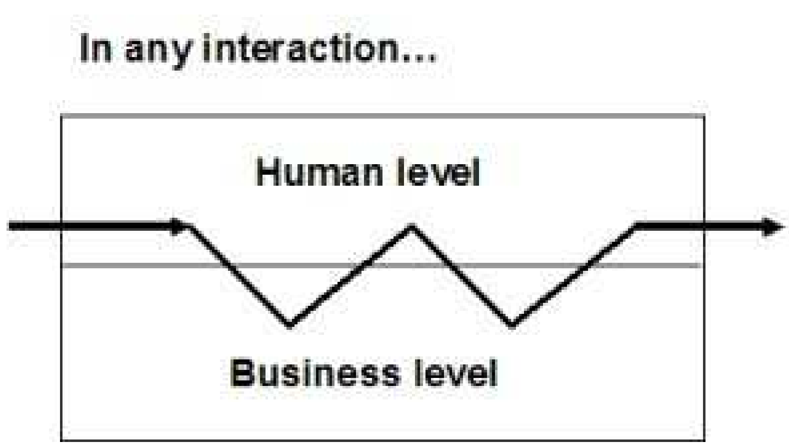
Human/Business Interaction Model

This is a highly effective model to use in any business interaction (in person, by phone or through email). The model is widely used in consulting and training, but I don't know the original source.

The human level is where you'll find many people's filters (see The Interpersonal Gap) and their emotional needs. The business level is where you'll deal with the purpose and information content of your interaction.

In order to have an effective interaction, you need to acknowledge and respect both levels.

The model is simple: <u>enter</u> and <u>exit</u> every business interaction at the human level. As you move through the conversation, revisit the human level periodically.



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Basic Communication Guidelines
(face to face, by telephone and through email)

Face to face

Talk in person as often as possible for individual communication. It's the richest and most complete communication interaction, since people can get body language and facial cues, as well as the verbal content.

If possible, talk face-to-face when:

- You need to ask for a favor or negotiate a result from someone you don't know well.

- You need to clear up a misunderstanding.

- You are delivering bad news (unless you're in a different geographical area).

- You expect (or are already experiencing) conflict or resistance.

- You are distributing or collecting information or data that is subject to interpretation or emotional response (input for an important decision, getting the background on why a project got derailed, discussing a process breakdown, etc.).

Telephone

When you work in the same physical space as the person you want to talk to, the telephone is the least effective way to communicate in general. Important issues should be handled face-to-face, and email is often better for delivering information because people can take their time absorbing it.

Use the telephone for informal situations such as quick questions, or to ask someone you don't know well if you can drop by to discuss something (and give them at least an idea of what the topic is) .

Unless absolutely necessary, do not use the telephone to:

- Deliver bad news (unless geographical distance requires it).
- Negotiate conflict.
- Conduct an important meeting (if it's that important, get everyone in the room or at least consider a video conference).

Email and documents

It usually effective to send information in written form as long as there's no particular emotional component. But remember that it's easy for people to fall into the interpersonal gap when they talk through email, because there are no body language, tone or facial cues. If you must use email or memos to deliver emotional content, or to communicate with people, you must prepare the email carefully.

We often use email to avoid a face-to-face discussion that we are intimidated about. We also often use email because "it's quicker." Both of these uses can be traps that actually cost you more trouble and time down the road.

When possible, use email or documents for:

- Distributing information or data that is not subject to interpretation or emotional response.
- Formally announce information that is already known to people, or is expected.
- Follow up with individuals after face-to-face conversations.
- Document the results of a meeting.

If you have a solid working relationship with someone, it may be okay to use email or documents for:

- Sending information that is open to interpretation or emotional response
- Raising an issue or concern.

NEVER use email or documents to conduct a power struggle, vent, or tell someone off.

Basic Elements of a Clear Business Communication

- A specific topic
- A specific goal
- A specific audience
- A specific headline
- Key information
- Giving direction and delegating
- Next steps

Topic
The most effective communication is about a single, specific topic at a time. Know what you want to talk about.

Goal
Why do you want to communicate about this topic? Do you want to deliver information, ask for a result, change a decision, solve a problem, or just vent? Know why you want to talk about this topic.

Audience
Who is affected by this topic? Who is this message for? That has a direct affect on your content and delivery. Know who you are talking to.

Headline
The headline tells your audience the topic, the goal and, if necessary, your particular perspective on it.

Key Information
Any information that your audience must have in order to understand and respond to your message. This may include:

- Key data
- Definition of specialized terms
- Background and context
- Assumptions
- Parameters or limitations
- Your (or others') perspectives
- Your (or others') recommendations

Giving directions and delegating
Do not expect people to read your mind.

- Set clear deadlines
- Be clear about any requirements for the format or structure of the result, the process, etc.
- Be clear about any constraints (e.g. budget, resources, time spent, etc.)
- Be very specific about what authority the person has to act on her own with regard to this work. Does she have to check all questions with you, or are there areas of the work where she may use her own judgment?
- Be clear that she can come to you with any questions or concerns.

Next steps
May include action items, deadlines, etc. If there are no next steps, say so.

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Delivering the message

- Enter on the human level
- State your headline right up front
- Deliver the information
- Discuss next steps and summarize
- Exit at the human level

Strategies and Tips for Being Clear

What stops us from being clear

- We don't acknowledge the Interpersonal Gap.
- We make assumptions.
- We don't know what we want to say.
- We worry more about being "right" or "authoritative" than having the actual conversation.
- We use fear (of conflict, hurt feelings, resistance, criticism, etc.) as an excuse to avoid topics or skim over them.

What you can do

- Set context. Let people know what the conversation is. ("I'm here to talk about X" is a good default way to start the business part of the conversation.")

- If someone else initiates the conversation, make sure you understand the context. Ask questions.

- Define terms.

- Articulate any assumptions, filters, limiting factors, concerns, wants, etc.

- If you have a goal or a hope, state it.

- Use examples.

- Check for understanding.

- Listen.

- Useful phrases:
    - Does this make sense?
    - Am I being clear?
    - Here's why this issue has come up.
    - I want to make sure you have all the information.
    - Let me make sure I understand this (then paraphrase).

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- What I hear you saying is (then paraphrase).
- It sounds like you're not happy about this. (Or, It sounds like you think this is the best approach).
- Help me understand _______ (when you don't get something and need to clarify)
- Can you give me an example?
- I'm assuming __________. Is that correct?
- Do you feel differently about this?
- Any questions?
- Do we have an agreement?

Strategies and Tips for Being Transparent

What stops us from being transparent

- We don't know why we've made a particular decision, so we cannot talk about our thinking.
- We don't know our own values, so cannot explain how they drive our actions.
- We are afraid that other people will challenge us.
- We are afraid that someone will find flaws in our thinking and we'll feel vulnerable.
- We are lying or hiding part of the truth (rather than being authentic and clear).
- We think it takes too much time to explain everything to everyone, and that people should just do as they are told.

What you can do

- Always offer explanation and context. Don't assume anyone can read your mind.

- Articulate your filters, your assumptions, your sources of information, you decision-making criteria, and your management process: why are you saying, thinking, doing, deciding as you are?

- Use example and story.

- Useful phrases:
  - Here's what I was thinking.
  - I'm not sure I agree, because I'm concerned about _______
  - I don't know (but I'll find out, does someone else know, what do you think?)
  - I'm wondering if _______________
  - That's a real question (I don't have an agenda here)
  - I'm not trying to play in your sandbox.
  - Please let me know if I'm stepping on your toes.
  - I'm not sure if you need to know about this. (Give the information). Would you like me to pass along this kind of thing in the future?

Strategies and Tips for Being Authentic

What stops us from being authentic

- We don't know how we feel.
- We are afraid—of others , of looking stupid, of being "inappropriate for work," of being vulnerable.
- It's not part of our company's culture, and it makes people uncomfortable.
- We stop listening, and therefore stop being able to have an authentic response to what's happening.

What you can do

- Tell the truth. Don't prevaricate (for example, don't say "I don't know" or "No, that's not a problem" when what you really mean is "I can't share that information right now.")

- Speak from your values. Don't hide behind the "party line" if it's not true for you. But don't use your values to manipulate or bludgeon others ("If you were really a team player, you'd be willing to work unpaid overtime to get this project done.") Being authentic is not a way to "win" a disagreement.

- Listen.

- Use leveling language. Language is a powerful tool when you want to be authentic without being gooey. It is possible to <u>express</u> emotion without <u>doing</u> emotion. Name your feelings, but don't bludgeon other people with them.

- Useful phrases:
    - It's really important to me that we ___________
    - I'm pleased / cautious / concerned about this because ___________
    - I made a mistake. I'm sorry.
    - Are you okay with this?

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Team Accountabilities

Your team has a particular job to do in the company. You should have a simple, clear statement that describes that job, and how you measure whether it is being done successfully.

This is <u>not</u> a mission statement – it's not an inspirational long-term vision of team greatness. It is a clear description of what your team absolutely must do for the company – what results the team must deliver in order for the company to be successful.

Keep it as simple as possible. You do not have to include every task your team performs. The point is your fundamental contribution to the company's success – the things that, if left undone, would damage the company.

Here are some examples of Team Accountabilities for different kinds of teams. These statements use plain language. They are specific enough that by reading them, anyone can know how to judge whether the team is delivering what it is accountable for.

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The Project Management Team is accountable for delivering products on time, to specifications, and within budget. We are accountable for keeping the product development process efficient.

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The Payroll Team is accountable for making sure all employees are paid correctly and on time.

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The Marketing Communications Team is accountable for clear, accurate and consistent messages to media, customers and the community.

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The Mailroom Team is accountable for delivering all internal mail on the day it is received; processing all outgoing mail and packages within 4 business hours; and managing courier services.

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Determining Priorities

An issue, project, problem or request is a priority if you can answer yes to one or more of these questions:

- Does it directly impact something my team is accountable for?
- Is it a team administration or team culture issue?
- Does it personally impact a member of my team?
- Does it directly impact a Group 1 individual's or team's ability to work with me?
- Does it directly support my manager?

Does it directly impact something my team is accountable for?

Making sure your team can do its job is always your first priority. If this issue affects that either positively or negatively, it's a priority.

Is it a team administration or team culture issue?

Team administration is everything needed to keep the team functioning smoothly from an organizational perspective: hiring and termination, training, performance coaching, performance reviews, rewards and recognition, regular team meetings, communicating business information, and so on.

Team culture is the group experience of being on the team – how team members interact with you and one another.

Anything that substantially affects the operation or group dynamic of your team is a priority.

Does it personally impact a member of my team?

You should make it a priority to address anything that substantially affects the ability of an individual team member to do their job. This includes offering special support such as cross-training or workload balancing to prepare for maternity or paternity leave, training in stress management, raising performance issues, or making time for a team member to discuss a concern.

Does it directly impact a Group 1 individual's or team's ability to work with me?

Anything that impacts handoffs or work process between your team and a Group 1 team or person should go on your priority list. This includes resolving concerns that are making work difficult, or improving process in order to make work easier.

Does it directly support my manager?

If your manager makes a direct request, ask her what the priority level is, and then put it on your list. That's how hierarchy works. If your manager is good, she'll only ask you to make a priority out of something that affects her ability to support you and your team.

Managing Priorities Quadrant Grid

This model was developed by Stephen Covey and is standard in business.

Quadrant 1 Important and Urgent Crises, problems, deadlines, daily "fires." ------- These things have to be handled – but if they are you do, they are all you will ever do. **Learn to spend time in Quadrant 2.**	Quadrant 2 Important and Not Urgent Preparation, prevention, relationship building, team-building, process negotiation, etc. ------- The more of this you do – the more effective you become at the human side of management – the less time you will spend in "crisis" mode. **Learn to live here.**
Quadrant 3 Not Important but Urgent Many phone calls, reports, emails, meetings and requests. ------- People will try to persuade you that these are Quadrant 1 activities. Use <u>your</u> criteria to determine your priorities, not theirs. **Learn to negotiate, delegate, streamline the request or say no.**	Quadrant 4 Not Important and Not Urgent If it feels like busywork, it probably is. ------- So don't do it. And if it's busywork for someone else, don't make them do it either. **Learn to say no.**

Quadrants 1 and 3 are where many managers spend their time. But being good in <u>Quadrant 2</u> is what makes managers effective over the long term.

Decision Models

Directive decision – A decision you make with no input from others, and no information apart from what your know, think and feel, and what you research for yourself.

Consultative decision – A decision you make yourself after seeking input from other people. You consult, but you decide.

Collaborative decision – You seek input from other people, and you all make the decision together. A group decision.

Consensus decisions are often confused with "everyone votes yes." Sometimes people think that if they do not agree with every detail of a decision, that there cannot be consensus. People spend valuable time trying to sell each other on these details (or force people into agreement). Or people using "withholding consensus" as a power play.

However, none of this is true consensus.

Consensus means:

- Everyone affected by the decision has had the chance to give input or feedback.
- Everyone understands and can explain the reasons for the decision that has been made.
- Everyone agrees to support the decision.

This definition allows people to agree in principle while differing on details. IT allows people to consent rather than be dictated to.

Try the **70% consensus rule**: if we can all agree with the decision at least 70%, we agree to support the decision 100%.

You can't always achieve consensus. However, consensus is always the goal of an effective manager, regardless of the decision model you use. You can even achieve consensus for a directive decision if you are willing to seek feedback and spend time making sure people understand the reasons for the decision.

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Process for Making Effective Decisions

1. Define the decision.

2. Define the stakeholders.

3. Define who should make the decision (is this a directive, consultative or collaborative decision?)

4. Communicate with stakeholders that a decision is on the table, including:
   - The decision to be made
   - Any background, context or criteria that will help people understand the issue
   - Who will be affected by the decision
   - Who is making the decision
   - What process you will use
   - A deadline (firm or approximate) for the decision
   - What kind of input you need

5. Make the decision.

6. Communicate the decision.

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Grid Tool

The Grid Tool is a group decision-making tool to prioritize a list of choices. It allows individual preferences to be combined into a group result. This means that everyone's input counts equally, and no one can force their individual agenda onto the group.

The approach of the grid tool is to evaluate each item on the list against every other item, resulting in a series of forced choices.

The tool is most efficient with 10 to 12 items or fewer, but it's possible to use the grid tool for a longer list.

1 2								
1 3	2 3							
1 4	2 4	3 4						
1 5	2 5	3 5	4 5					
1 6	2 6	3 6	4 6	5 6				
1 7	2 7	3 7	4 7	5 7	6 7			
1 8	2 8	3 8	4 8	5 8	6 8	7 8		
1 9	2 9	3 9	4 9	5 9	6 9	7 9	8 9	
1 10	2 10	3 10	4 10	5 10	6 10	7 10	8 10	9 10

How many times did you circle:

Item 1______
Item 2______
Item 3______
Item 4______
Item 5______

Item 6______
Item 7______
Item 8______
Item 9______
Item 10_____

(Remember to count down as well as across)

To use the grid tool:

1. Start with a list of choices (from group brainstorming, for example). Number the list of items.

2. Each person receives a blank grid similar to the sample (adapted to the number of items on the list).

3. Everyone fills out their own grid by looking at each pair of items and choosing one by circling it.

4. Everyone counts up the number of times they have circled each number. Remind people to count across the rows as well as down the columns.

5. Add up the individual totals for each item to obtain a group total for each item on the list.

6. The items with the most votes represent the group's collective judgment. Ask the group to do a "gut check" on the results, and discuss or amend as necessary.

Team Agreements

Basic elements of an effective team

- The team has a clear structure
- Everyone knows what the team is accountable for
- Everyone knows their role and responsibilities
- Everyone knows how their work will be evaluated
- Everyone knows what authority they have and how decisions are made
- Everyone is competent in their job
- The team has a clear culture
- Everyone knows how they are expected to behave on the team
- The team is a safe environment for people to make mistakes, express concerns, or work through disagreements
- Everyone feels valued and generally satisfied.

You put these elements into place by establishing team agreements that clearly define what people will do, and how they will work with each other.

Essential team agreements

- Organization chart
- Team accountabilities
- Roles and responsibilities for all members, including you
- A general statement that describes your management style, how you will evaluate team members (including yourself), and the culture you envision for the team
- Team member ground rules
- Manager ground rules
- Key process descriptions
- Information flow

Process for Creating Team Agreements

You can use this process whether you are coming into an existing team or forming a new team, and whether you are brand-new as the manager or have been in the role for a while.

1. Begin with an "orientation."
2. Meet individually with all team members.
3. Formalize team accountabilities.
4. Begin working on roles and responsibilities. This is a lengthy process, so it will continue while you're also handling the steps below.
5. Work with team to create team ground rules.
6. Work with team to create manager ground rules.
7. Work with managers and team to identify key team processes.
8. Identify what information the team needs and how to provide it.

<u>General notes on facilitating team agreements</u>
Make sure you organize your key talking points before these meetings. Write out your orientation speech and practice it. Don't be afraid to use notes in your meetings. These meetings are <u>important</u>, and it's particularly important that you are clear, transparent and authentic.

Make sure everyone gives input. If you believe that someone is withholding a concern or disagreement, circle around with them privately.

Make sure you get clear verbal agreement from each person on the team at the meetings where you approve the final versions of these documents.

Publish all final documents in your team email folder, or give hard copies to everyone.

Revisit these agreements periodically – just do a reality check with the team to make sure the agreements still reflect what they want. If changes are needed, make them using the same group process.

Be patient. It may take a while for the team to trust that you are serious about this.

Begin with an orientation

The orientation is a speech about who you are and what people can expect from you. At a minimum, it should include:

- The experience and skills you bring to the team.
- Your general values as a manager. You don't' have to phrase it as "my values" – just say something simple like, "Here's what's important to me as a manager," and then go on to talk about what those things are.
- The top-line view of how you will evaluate team members, including yourself.
- An overview of the decision-making process, including your commitment to including people in decisions that affect them as much as possible, and your definition of consensus.
- Your general expectations of team culture ("Here's how I want us to work together"). This may include general communication principles, sharing information and supporting one another, dealing with mistakes, disagreements, and concerns, etc.
- The purpose of team agreements, and that you'll be working with the team to create them.

Formalize team accountabilities

Draft your team accountabilities and get your manager's buy-in. Then review them with the team verbally before publishing them.

Meet individually with all team members

The purpose of this meeting is both to gather input and information, and to begin building individual relationships with team members.

Set aside at least an hour for each meeting. Ask the team member to tell you about their work history, their current job on the team, what they do and don't like about it, and any concerns. Answer any questions they may have from your orientation talk.

Begin working on roles and responsibilities

1. Work up drafts of roles and responsibilities for the various positions on your team. Start with team members first, then managers (including you). If you have

2. If you have middle managers on your team, meet with them to get their input on your descriptions. Or, give them the format you wish to use and ask them to prepare the first draft.

3. Meet with the individual(s) whose role is being described. It's fine to meet with these folks as a group if their descriptions are the same (for example, all accounts payable clerks). Make sure they understand that this document will be the basis for their performance review.

4. Address any comments or concerns and finalize the documents.

5. Provide a copy to the person, their manager and one for their personnel file.

Create team ground rules

1. Set up a special mandatory team meeting of an hour to brainstorm ground rules.

2. At the meeting, explain the concept of ground rules. Let the team know that they need to agree on rules for how team members should interact, and what kind of atmosphere the team wants to create. Make it clear that any team member can call out anyone – including you – who doesn't follow the rules.

3. Have a couple of suggested ground rules to get started, but make clear to the team that the end result will be their rules. If you have any rules that are non-negotiable, introduce those right away.

4. Lead the group in brainstorming. Don't worry about working by category – just let people talk about what they want.

5. Use multi-voting if necessary to identify the group's key ground rules.

6. Type up the draft and publish to the team. Set a deadline for comments and concerns.

7. At the next regular team meeting after the deadline, present the ground rules and ask the team to approve them.

8. Let the team know that any team member can request changes or additions to the rules at any future team meeting.

Create manager ground rules

1. Have a separate mandatory one-hour team meeting to brainstorm manager ground rules. Let the team know that they should expect all managers on the team to play by these rules.

2. Follow the same process for brainstorming, publishing, comment and review as for team ground rules (steps 3-8 above).

Key processes

1. Work with managers on the team and/or with the team directly to start a list of processes that most or all of the team <u>must</u> use. A <u>short list</u> is the goal. Do not include basic HR or company-wide processes. Include only processes that are essential to the team's overall work.

2. Delegate (through volunteers or assignment) the responsibility for writing up the process steps, publishing the draft to the team for comments, and finalizing the process information.

Information

1. Ask what information the team needs in general to meet its accountabilities (as opposed to specific information needed for individual jobs). This may be company information (such as financial or inventory data); information from other teams; or information flowing between team members.

2. Identify who is responsible for making sure each piece of information is flowing to the team.

3. If appropriate, also identify resources outside the team or within it who have expertise the team may need to call on.

Example Team Orientation Notes

These are actual speaking notes from a team orientation session. You're welcome to use anything you think is appropriate, but remember the speech should be in your own words and reflect your values and style.

***

Teams

There is a lot of talk at our company about "teams" but it's not always clear what people really mean when they talk about working on teams. So I want us to take some time today to clarify that. I have a few things to say about teams.

I have worked alone, as a part of a group, and as part of a really effective team. I think that working in a real team is the best work situation possible -- so much that when I have to work alone, as I have done a lot at our company, I still find myself building working relationships using a team model. So it's exciting for me to have the chance to work as part of this team. It's something I'm good at, and something that I can do for all of you - -I can help you develop the experience of working on a high performance team so that you know what it's like.

The elements of a real team are:

- We all know what our job is.
- We all know what each other's job is.
- We all know what our team goals are
  - Deliver product on spec
  - Deliver product on schedule
  - Reduce cost of goods through improving and streamlining processes.
- We know what decisions we can make and we have the resources to make them.
- We communicate clearly about commitments, requests, and problems.
- We respect each other's abilities and allow each other to make mistakes.
- We don't have to love each other in order to work well together. We just have to behave like a team -- communicate, clarify requests and assumptions, and deliver on commitments or give advance notice of changes.
- People who would never be best friends can have a lot of fun working together if there is clarity and respect.

Expectations

I have some basic expectations of all of us, including myself. It's part of my job to evaluate your performance and you have the right to know what my standards are in these areas.

– I'll be evaluating project managers and international product development on your product record – did things go out on time and on spec? If not, why not? How did you handle challenges? I'll ask your brand managers and your primary service team contacts to rate your project management and team skills.

– I'll evaluate the schedulers on the quality of our data, our schedules, and our tracking reports. I'll ask the service teams to rate how much our scheduling efforts help them in their own planning.

– I'll evaluate the managers on the team on how well they train, coach and mentor, as well as on their contribution to our strategic objectives – integrating domestic and international development, identifying development priorities and coming up with ways to improve the entire system.

– And I'll be evaluating myself on having the ongoing vision for where our team is going and the plan for getting there, for making sure you have clear goals and job responsibilities, for providing resources and training when you need them, and for building a strong team.

I put a heavy emphasis on communication and playing well together. Being clear and delivering on commitments mean that we don't have to all agree with each other all the time – we can still work well together regardless. So here are my goals for all of us:

- We are good communicators. That means we take more responsibility for good communication. We don't withhold information from each other or from other teams just because we are grumpy.

- We ask for help when we need it and we give help if we can, or say no clearly if we can't.

- We are allowed to make mistakes and so are other people. The way we handle mistakes is:
  – Identify what happened
  – Agree on how to fix it
  – Get over it and move forward

  - Deal with repeat patterns if they happen, but don't assume they will.

- We do not expect other people to read our minds.

- We work, where possible, on the consensus model. Everyone who is involved in a decision has input, everyone understands the reasons for the final decision, and everyone agrees to support the decision whether they agree with the actual decision or not. Sometimes we'll make a team decision. Sometimes I will make decisions without input – when I do that, I will always try to explain why. You always have the right to question a decision, but you have to understand that I won't always do what you would like me to.

- You all are empowered to make decisions about how your responsibilities are carried out. If you make a decision that I think is wrong for some reason, I'll let you know – but I will always support your right to make decisions within your own job area. If you aren't sure about something, ask for advice. If you aren't sure whether you have authority in a certain area, ask me and we'll figure it out.

- We all have lives. There will be some weeks where we'll all have stress, but in general we should be able to do a good day's work and go home without feeling overwhelmed. If you are feeling over your head, get me involved right away.

- The worst thing you can do with me is try to cover up bad news. I don't get angry when things go wrong, but I do get angry when people hide information and thereby make the situation worse. This doesn't mean you have to tell me every time something goes wrong on a project – but if something serious happens, I expect you to let me know right away. The absolute worst thing that you can do to me is set me up so that a brand manager comes to me about a problem, and I don't know anything about it. That will make me grumpy.

- I am flexible about work schedules and I believe that people are adults. If you need to do something, go do it. Make sure you have a proxy or that you let me or another manager know when you will be back, in case you are needed. Make personal phone calls. Go for walks. But please use this wisely – if I feel like your work isn't getting done and that you are taking advantage of me, I will lose trust in you and that's a difficult situation for everyone.

- We should all have as much fun as we can.

I also want to hear from you what you expect from me. I can't meet your expectations if I don't know what they are.

Let me know if you have any questions.

Team Accountabilities

Your team has a particular job to do in the company. You should have a simple, clear statement that describes that job, and how you measure whether it is being done successfully.

This is <u>not</u> a mission statement – it's not an inspirational long-term vision of team greatness. It is a clear description of what your team absolutely must do for the company – what results the team must deliver in order for the company to be successful.

Keep it as simple as possible. You do not have to include every task your team performs. The point is your fundamental contribution to the company's success – the things that, if left undone, would damage the company.

Here are some examples of Team Accountabilities for different kinds of teams. These statements use plain language. They are specific enough that by reading them, anyone can know how to judge whether the team is delivering what it is accountable for.

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Example: The Project Management Team manages the development of all for-sale products in all languages. We are accountable for delivering products on time, to specifications, and within budget. We are accountable for keeping the product development process efficient.

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Example: The Payroll Team is accountable for making sure all employees are paid correctly and on time.

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Example: The Marketing Communications Team is accountable for clear, accurate and consistent messages to media, customers and the community.

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Example: The Mailroom Team is accountable for delivering all internal mail on the day it is received; processing all outgoing mail and packages within 4 business hours; and managing courier services.

Roles and Responsibilities

You should have clearly documented roles and responsibilities for everyone on your team, including you.

You can't hold people accountable if they don't know what they are accountable for. – so the roles and responsibilities document should be comprehensive and specific. You don't need to go into micro-detail, but you do need to document all aspects of someone's job.

Roles and responsibilities should always be written in "I" language, so that the document becomes direct and personal for each team member.

You should write the document, although you should seek whatever input you need from the team (especially if you are new to the team).

Make sure the document includes:

- A high-level description of the team's accountabilities and the individual's role
- A detailed description of responsibilities
- What the team member is accountable for
- What authority the team member has.

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Example Team Member Roles & Responsibilities

Date ____________________

Name ____________________

Title _PROJECT MANAGER_

I report to ___________________________

My role:

The Project Management Team manages the development of all for-sale products in all languages. We are accountable for delivering products to brand specifications on schedule and within budget. We are also accountable for identifying and implementing the most efficient processes for these activities.

As Project Manager, I manage the overall product development for products or categories as assigned.

My responsibilities:

- I will manage development of all components of assigned products in English or in local languages, as assigned. I am accountable for delivering finished goods that meet brand team specifications and the product release schedule.
- For all assigned categories and products, I will maintain an in-depth understanding of the activities below. I should understand these things well enough to identify product development problems and recommend solutions
  - Product specifications for English and local languages
  - Game mechanics, intellectual properties and brand strategies
  - Internal product development process
  - Manufacturing and distribution process
  - Marketing and promotional materials required to package with product.
- I will lead cross-functional product development teams for the products I am assigned to:
  - I will maintain close and effective working relationships with representatives of product brand teams, creative teams, Research & Development, Imaging Services, Prepress, Production, Spine Design, Logistics, Sales, and other service teams
  - I will develop and maintain effective working relationships with outside design studios and/or licensors as necessary, including negotiation of roles and responsibilities, and approval processes

  - I will work with all teams to identify and resolve individual product development problems.
- I will create and maintain product development schedules. I will track the schedules and document any variances.
- I will maintain product development budget and cost of goods budget rollups, and manage budgets to within 5% tolerance of brand guidelines.
- I am the key communication resource for all product development information, including:
  - Specifications or content changes
  - Schedule changes
  - Problems or errors.
- I will document the development process for assigned categories and products, including:
  - Current process
  - Decision matrix for reviews and approvals
  - Specifications template
  - Cost estimate/budget management template
  - Approval and signoff checklists.
- I will accept temporary or permanent ownership of other products or categories as requested.
- I will perform other duties as assigned

My accountabilities:
- I have direct accountability for delivery of all assigned product components.
- I have quality accountability for all product components.
- I have product line revenue accountability to the extent of meeting release schedules and maintaining product quality.
- I have cost of goods accountability for maintaining product budget and margin overview and rollups to ensure COGS within 5% of brand tolerances.
- I will follow Project Management Team policy, practices and procedures, and will also participate in creating new policies and process as needed.

My authority:
- I have the authority to resolve product development issues, including authorizing additional resources and implementing contingency plans at additional cost. My scope of authority includes all aspects of domestic and international product development.
- I have the authority to enforce work deadlines for cross-functional team members with respect to products under development, but I do not have direct supervisory responsibility for those people.

Example Manager Roles and Responsibilities

Date ____________________
Name ____________________
Title MANAGER

I report to ___________________________

My role:

The Project Management Team manages the development of all for-sale products in all languages. We are accountable for delivering products on schedule, to specifications, and within budget. We are also accountable for identifying and implementing the most efficient processes for these activities.

As Manager of this team, I ensure the team meets its accountabilities. I build and maintain a successful team. I directly manage all team members. I am responsible for the budget.

My responsibilities:

- I will make sure the team has the long-term vision, strategy, plans, timelines, tools, training, policies and procedures we need to deliver on our accountabilities.
- I will manage, train, coach and allocate resources to team members as needed to support them in doing their jobs.
- I will manage the team budget according to company practices and requirements.
- I will identify and implement standard development processes, and negotiate process, roles and responsibilities with other teams in the company as necessary.
- I will maintain effective working relationships with company leadership, teams, employees and customers, including:
  - Understanding company strategy and goals
  - Participating in long-term product planning and product scheduling
  - Negotiating process, roles and responsibilities as necessary
  - Making agreements and committing resources on behalf of the Project Management Team.

My accountabilities:

- I have overall management accountability to the company for developing all for-sale products in all languages, including:
  - product developed to brand specifications
  - overall schedule responsibilities
  - cost of goods responsibility for all development activities.
- I am accountable to every member of the Project Management for managing consistently and in accordance with our team agreements.

My authority:

- I have authority to hire, terminate, reward, and discipline members of the Project Management team. I may request team members to take on additional duties or responsibilities.
- I have authority allocate our budget, set salaries and determine bonuses.
- I have authority to set and enforce product development policy.
- I have authority to resolve product development issues, including authorizing additional resources and implementing contingency plans at additional cost.
- I have authority to decline requests for specification and schedule changes once they are agreed to by brand teams.

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Team Ground Rules

Team Ground Rules are the basic foundation of team culture. Together, the team creates a set of behavior guidelines that they believe will:

- Make it easier for them to do their individual jobs.
- Make it easier to work together as a team.

General team ground rules can cover a number of areas:

- sharing information
- communication
- areas of authority or responsibility
- commitments to training and development
- handling mistakes
- raising concerns
- how to address interpersonal conflicts

All team members, including you, agree to follow the ground rules you establish. Every team member should be able to expect the same basic behavior from every other team member.

Remember, you don't make these rules – the team does. You should go into the brainstorming session with some suggestions as a starting point, and it's fine to have a few key non-negotiable rules, but allow the team to build the overall list.

Sometimes a team establishes ground rules and never again refers to them. They turn into empty words, rather than a living document that reflects the foundation of team culture. <u>Do not let this happen</u>.   Make sure that you do a periodic "check-in" at future team meetings to see if the ground rules are working well for people. Reinforce that you expect everyone to hold themselves and each other accountable for following these rules

Example Team Member Ground Rules

This example is based on ground rules established in group discussion by the members of a project management team responsible for managing the development of over 250 products in more than 20 languages.

This team chose ground rules that best supported the nature of their work. Your team's rules will vary, depending on the type of work and composition of the team, and may include other categories of behavior.

***

How we expect team members to behave:

Noise and Privacy

- Avoid extended loud conversations at our desks.
- Tell people if they are being too loud. Don't stew about it.
- Respect when someone says they are busy. Tell them what you want to discuss and ask when they are available to talk. You should both take responsibility for following up.

Communication

- Let each other know if something is bothering us.
  - Be polite and respectful.
  - Be direct.
  - No ultimatums.
  - Get a manager to facilitate the conversation if necessary.
  - Assume that we all have good intentions.
- Stay approachable and open.
- Keep helping each other. We all have different skills to share.
- Let the team know when you are absent, and identify a proxy.
- Share information about our priorities, responsibilities and workload.

Teamwork

- Ask for help if we feel overloaded.
  - Go to each other directly for information or particular help.
  - Go to a manager for "plate emptying" (getting tasks removed or re-assigned when you have too much to deal with on an ongoing basis).
- Maintain our common mission.
- Facilitate, don't dictate.
- Model our notions of good behavior to the rest of the company.

- If other teams' roles and responsibilities aren't clear to them or to us (as related to product development), we should
  - Help everyone play nicely together.
  - Help identify expectations.
  - Bring the players together to discuss and clarify.
  - Keep everyone focused on what their job is.
  - Stay objective in process discussions and negotiations between teams.
  - Get managers involved to resolve performance issues or global process issues. This is part of the job of managers on the PM team.
- We don't solve all the problems ourselves; we provide information to help people solve their own problems.

Example Manager Ground Rules

You'll notice that there are more rules for managers than for general team members in these examples. This isn't unusual, and don't be surprised if your team makes very specific requests of you as manager. It's your job to facilitate this process with a balance of being open to requests, and not letting the list get too specific or picky.

This example is based on ground rules established in group discussion by the members of a project management team responsible for managing the development of over 250 products in more than 20 languages.

This team had multiple levels of management. All managers, including the vice president, agreed to behave according to these rules. Every team member knew they could go to any manager on the team and expect consistent behavior.

All members of the team participated in setting these rules. The team chose ground rules they believed would help managers best support the work of the team. Your team's rules will vary, depending on the type of work and composition of the team, and may include other categories of behavior.

Sometimes a team establishes ground rules and never again refers to them. They turn into empty words, rather than a living document that reflects the foundation of team culture. <u>Do not let this happen</u>. Make sure that you do a periodic "check-in" at future team meetings to see if the ground rules are working well for people. Reinforce that you expect everyone to hold you (and any other managers on the team) accountable for following these rules

***

How we expect managers to behave:

<u>General management</u>

- Hire, fire, discipline, reward, and encourage.
- Managers are a role model for the group but are not always a part of the group. However, a manager is always part of the team. Managers have to model teamwork.
- Set clear roles and responsibilities.
- Set clear controls.
- Set priorities for employees.

- Manage employee workload. This includes providing help to deal with temporary work spikes, additional project workload, or changes in company policy that require changes in job or team processes.
- Foster a fun environment.

<u>What managers should know</u>
- Know the team's big picture – where is the team moving to, what are the team's priorities?
- Understand company operations and how decisions affect our team and other teams.
- Understand processes and tools for the areas you manage.
- Understand service teams' functions and processes.

<u>Working with project managers</u>
- Hands-off attitude. Allow people to do their job in the way that works best for the individual except where necessary to meet team standards.
- Delegate properly. Make sure people understand the work that is required, and then let them go.
- Resist the urge to do the work yourself.
- Get involved in hands-on details only when you need to learn a new area of the business; to assist in problem-solving; to get information for a decision; or to provide training.
- Balance between making suggestions and giving directions.
- Know when people need help. Know when people need smaller goals and more manager involvement, and then when they are ready to go it alone.

<u>Communication</u>
- Share information consistently, especially information that team doesn't have access to.
- Overcommunicate at first and then pull back as requested.
- Give context for information.
- Communicate important information verbally as well as in writing
- No mutual mind-reading. Everyone has to communicate. Employees have to also take responsibility for the relationship and sharing information with the manager.

<u>Development</u>
- Continually learn and encourage others to learn .
- Think about each employee's future and prepare them for it. Agree on a career path but let them think for themselves.
- All managers are committed to each employee's development. This includes helping the employee to identify goals, and creating a development plan for achieving those goals.

- Develop employee's skills both inside and outside of project management (big picture).
- Take care of the employee whether you like that person or not.
- Don't overload people with information. Stage the information and let people integrate what they have learned before moving on to the next stage. Teach people at a reasonable pace.
- Motivate and challenge people as individuals.
- Pay attention to people. Notice what they are doing on a daily basis.

<u>Decision-making</u>

– Listen. Hear all details and information first before jumping in.
– Be fair. Get all the information and perspectives you need to make a decision, then inform everyone of the decision.
– Don't make decisions in a vacuum. Consider all input, even if you can't give everyone the answer they want
– Explain decisions
– Act as mediator

<u>Performance issues</u>

- Be non-judgmental about someone's behavior. Identify problems and request behavior corrections.
- Separate out knowledge/training issues from behavior issues.
- Managers have same chance that employees do to receive input and change their behavior. Everyone on the team is allowed to make mistakes and grow from them.
- Handle mistakes calmly. Don't go nuts. Attack the problem, not the person. This makes the manager more accessible.

Key Processes

Work with the team to start a list of processes that most or all of the team must use. The goal is a <u>short list</u> of essential team-specific processes. Do not include basic HR or company-wide processes.

Delegate (through volunteers or assignment) the responsibility for writing up the process steps, publishing the draft to the team for comments, and finalizing the process information.

Don't get lost in the weeds on this. You don't necessarily need a complex process map that covers every decision tree. You do need agreement on the essential processes the team uses, and a good enough description of how they work to be used as an aid by a new team member, or for cross-training.

Key Information

People do not work well in an information vacuum. Ask your team what information they need in general to meet their accountabilities (as opposed to specific information needed for individual jobs). Identify who is responsible for making sure each piece of information gets to the team.

One strategy that works well is to set up a private "team folder" on your company's email system, accessed only by team members. Such a folder becomes a virtual bulletin board for information, updates, reminders and general messages to the team. It's each team member's responsibility to stay current with the mail in the folder.

The team email folder is also a good place to publish your team agreements, and to post ideas, issues etc. that you want team feedback on during a decision-making process (as well as giving people the choice to deliver their input privately to you instead).

Information your team needs may include:

- Reports on team performance (weekly or monthly sales figures, inventory levels, customer complaints, safety record, etc.)

- Reports from other teams if the information is applicable to your team's work (inventory levels, project plans, release schedules, etc.)

- The general state of the department, division and company. Many managers attend meetings with their managers or executives in which general information on the state of the business is presented. Share this information with your team in a regular email briefing.

- Articles or "how to" information that might benefit your team members, especially if the team has identified areas of special interest.

Don't discount the important of general company-level information – knowing the company's current financial situation, or the high-level concerns being faced by another department, are important to help everyone in the company understand the context they are working in.

If you attend any kind of manager-level meetings where managers from other teams are presenting information, make sure you share that information with your team. A brief bullet-point report is fine. It may feel like "too much work," but you'll be surprised at how it makes people feel included and more integrated with the company.

Behavior-Based Interviewing Process

Behavior-based interviewing is grounded in the idea that what people have done in past work situations demonstrates the skills, attitude and behavior they will bring to future work situations.

Traditional interviews use hypothetical questions -- what would you do in a particular situation? Behavior-based interviews ask the candidate to tell specific stories of their own experience in real-life situations -- "what did you do."

Here's the overview of how behavior-based interviewing works:

- You identify the essential job skills and the essential team skills that will make a person a good fit for the team

- You develop specific interview questions to reveal whether the candidate has those essential skills

- The interview is conducted by 2 – 5 people who take detailed notes

- The group rates the candidate in each skill area immediately after the interview, arriving at a consensus for each rating.

- Depending on circumstances, you either make an offer to your highest-rated candidate, or bring yin the 2 or 3 most highly-rated candidates for a second round of interviews.

This approach also creates a paper trail – a clear record of the skills you are evaluating and the interview data that backs up your evaluation. If someone questions the integrity of the process, you don't have to rely on your memory or defend your "gut instinct."

For this process, you need:

- A detailed job description
- An Interview Rating Sheet that identifies the essential job skills and team skills you are looking for
- Interview questions
- An interview panel

Job Description

This document overlaps with Roles and Responsibilities, but will include additional details. It's intended to function as a comprehensive description of the position within the company.

I think "you" language works best and is most clear (e.g. "you will lead marketing projects for Brand X"), but some companies insist on more formal language ("the successful candidate will lead…"). Keep it as plain as you can.

Providing a comprehensive job description to candidates is the first step in making the interview process clear and transparent to candidates. Include the job description in your announcement of the job opening, or make it available to candidates in advance of the interview. Make sure candidates know coming in what specific skills and experience you are looking for.

(However, do not give candidates an advance copy of your interview questions or rating system).

If you can avoid using resume-reading software to screen candidates, please do. There's no substitute for a human being reading a resume.

See example beginning on the next page.

Example Job Description

Here's an example job description of the same "Project Manager" job used in the Team Member Roles and Responsibilities example previously.

***

Title PROJECT MANAGER Department PROJECT MANAGEMENT

Exempt/Non-Exempt Exempt Reports to Product Development Director

General Position Summary:

The Project Management Team manages the development of all for-sale products in all languages. We are accountable for delivering products to brand specifications on schedule and within budget. We are also accountable for identifying and implementing the most efficient processes for these activities.

The Project Manager manages the overall product development for products or categories as assigned.

Essential Functions / Major Responsibilities:

- You will manage development of all components of assigned products in English or in local languages, as assigned. You are accountable for delivering finished goods that meet brand team specifications and the product release schedule.
- For all assigned categories and products, you will maintain an in-depth understanding of the activities below. You should understand these things well enough to identify product development problems and recommend solutions
  - Product specifications for English and local languages
  - Game mechanics, intellectual properties and brand strategies
  - Internal product development process
  - Manufacturing and distribution process
  - Marketing and promotional materials required to package with product.

- You will lead a cross-functional product development team
  - You will maintain close and effective working relationships with representatives of product brand teams, creative teams, Research & Development, Imaging Services, Prepress, Production, Spine Design, Logistics, Sales, and other service teams
  - You will develop and maintain effective working relationships with outside design studios and/or licensors as necessary, including negotiation of roles and responsibilities, and approval processes
  - You will work with all teams to identify and resolve individual product development problems.
- You will create and maintain product development schedules. You will track the schedules and document any variances.
- You will maintain product development budget and cost of goods budget rollups, and manage budgets to within 5% tolerance of brand guidelines.
- You are the key communication resource for all product development information, including:
  - Specifications or content changes
  - Schedule changes
  - Problems or errors.
- You will document the development process for assigned categories and products, including:
  - Current process
  - Decision matrix for reviews and approvals
  - Specifications template
  - Cost estimate/budget management template
  - Approval and signoff checklists.

Secondary Functions:

- You will accept temporary or permanent ownership of other products or categories as requested.
- You will perform other duties as assigned

Job Scope:

You have direct accountability for delivery of all assigned product components. You have quality accountability for all product components. You have product line revenue accountability to the extent of meeting release schedules and maintaining product quality. You have cost of goods accountability for maintaining product budget and margin overview and rollups to ensure COGS within 5% of brand tolerances.

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You will follow established policy, practices and procedures, and will also participate in creating new policies and process as needed. You have the authority to resolve product development issues, including authorizing additional resources and implementing contingency plans at additional cost. You scope of authority includes all aspects of domestic and international product development.

Supervisory Responsibility:
You lead cross-functional development teams consisting of representatives from R&D, Editing, Spine Design, Production, and possibly other members. You have the authority to enforce work deadlines for these team members with respect to products under development, but you do not have direct supervisory responsibility for those people.

Interpersonal Contacts:
Your contact is 95% internal except where licensors or design studios are involved (then outside contact may increase to 15%-20%). You must initiate and maintain working relationships with employees across a spectrum of service teams, and at a variety of staff and management levels (up to and including CEO/COO). Your interactions will focus on schedule and workload negotiation, dissemination of product specifications and brand team requirements, problem solving, process development, information exchange (including sensitive product development information). Contact includes phone, email and face-to-face interaction.

Project Manager Core Competencies
- Ability to develop and maintain effective working relationships with brand teams and service teams
- Product development skills
- Process development skills
- Budget accountability and budget management skills
- Scheduling
- Problem-solving
- Decision-making
- Negotiation
- Planning/Prioritizing
- Workload management
- Leadership of teams
- Meeting management

- Effective communication
- Playing nicely with others
- Understanding of our company business

Additional Job Skills Required:
- Computer skills (MS Project, MS Word, Excel)

Education and/or Experience:
- BA/BS or equivalent work experience required.
- 3-5 years previous experience required that demonstrates performance in majority of core competency areas described above
- 2 years or more of project management experience preferred
- Understanding of our product development process preferred

Job Conditions:
- Standard office working conditions.

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Behavior-Based Interview Template

Position: ____

Applicant: ____

Interviewer(s)____

Interview Date:____

OPENING

- Greet and welcome the candidate
- Describe the behavior-based interview process. Be ready to give an example of a "story answer" if necessary.
- Make sure the candidate has read the job description and ask if she or he has any questions.
- Describe the general role of the team within the company
- Describe how the position fits into the team structure (who will be managing the position, et cetera).

QUESTIONS

PROJECT MANAGEMENT
Briefly describe your project management experience, or any experience you feel applies.

PROJECT MANAGEMENT
What do you think are the most important characteristics of a good project manager? Why?

PROJECT MANAGEMENT, PERSONAL EFFECTIVENESS, CUSTOMER COMMITMENT
What appeals to you about project management work?

PERSONAL EFFECTIVENESS
Can you tell me about a project that required you to juggle priorities and manage multiple tasks? How did you keep yourself on track?

CUSTOMER COMMITMENT, QUALITY FOCUS
Describe a work experience when you've had to provide service to multiple people. What were the greatest challenges, and how did you handle them?

PROJECT MANAGEMENT, EFFECTIVE COMMUNICATION

Give me an example of a time when a project crisis happened, and how you responded.

QUALITY FOCUS

Please describe any experience you've had with developing or improving process.

EFFECTIVE COMMUNICATION

What's your definition of good communication? Please give me an example of how you have used communication skills to resolve a problem.

EFFECTIVE COMMUNICATION (CONTRARY INFORMATION)

Please give an example of a time when communication went wrong. What happened, and how did you address the situation?

CHANGE MANAGEMENT

Tell me about a time when you worked in a fast-changing environment. What did you like about it? What didn't you like about it?

QUALITY FOCUS, CHANGE MANAGEMENT

Tell me about an experience working in a job where you had to help develop and improve process, rather than having a well-defined process already in place. What was the greatest challenge?

PERSONAL EFFECTIVENESS (CONTRARY INFORMATION)

What's the biggest mistake you've made in a job. How did you handle it?

TEAM SKILLS
What are the most important things you look for in a team environment?

TEAM SKILLS
What are the most important things you bring to a team?

What questions do you have for us?

CLOSING:

- Tell the candidate about any next steps (such as a second round of interviews), and when to expect to hear about your decision.
- Thank the candidate and escort her or him to the lobby.

Interview Rating Sheet

Although you use the Interview Rating Sheet at the end of the interview process, you should work on it first when you are developing your interview materials. Defining what you specifically want to evaluate in the interview will help you develop the best questions.

The Interview Rating Sheet lists seven general categories of performance skills to evaluate. Following that, you'll find Category Definitions. You'll see from the definitions that the skills categories are intended to be broad. Don't worry about making them more specific – the questions you develop will narrow the focus.

You also have space on the sheet to identify specific types of technical knowledge and previous experience. Here's the place to get specific. If you're filling a public relations position, you should be interviewing for public relations experience.

When you've decided what skills, knowledge and experience you need to evaluate, proceed to developing specific questions.

The example Rating Sheet on the next page was used in the first round of interviews for the project management positions described in the previous Job Description.

Example Interview Rating Sheet

POSITION:

CANDIDATE:

DATE:

INTERVIEWER:

The performance skills to be evaluated include:	Very strong evidence skill is not present (0)	Strong evidence skill is not present (1)	Some evidence skill is not present (2)	Some evidence skill is present (3)	Strong evidence skill is present (4)	Very Strong evidence skill is present (5)	Insufficient evidence for or against skill
PERSONAL EFFECTIVENESS							Skill Unmeasured
EFFECTIVE COMMUNICATION							Skill Unmeasured
TEAM ORIENTATION							Skill Unmeasured
CUSTOMER COMMITMENT							Skill Unmeasured
QUALITY FOCUS							Skill Unmeasured
RESPECT FOR DIFFERENCES							Skill Unmeasured
CHANGE MANAGEMENT							Skill Unmeasured
COMPUTER SKILLS							Skill Unmeasured
							Skill Unmeasured
							Skill Unmeasured
The technical skills to be evaluated include:							
TECHNICAL KNOWLEDGE *PROJECT MANAGEMENT*							Skill Unmeasured
TECHNICAL KNOWLEDGE *(SPECIFY HERE)*							Skill Unmeasured
EXPERIENCE IN FIELD *PROJECT MANAGEMENT*							Skill Unmeasured
EXPERIENCE IN FIELD *(SPECIFY HERE)*							Skill Unmeasured

Recommendation: **Second interview ☐** **Hire ☐** **Not Hire ☐**

Reason for Recommendation:

Interview Rating Category Definitions

Personal Effectiveness (Adheres to professional work ethic: accountability, initiative, prioritization of work. Acquires knowledge on trends and issues affecting our industry. Commits to self-development and skill enhancement. Handles setbacks constructively.)
Possible Skill Areas to Probe:
- **Goal Setting** - Ability to define realistic, specific goals and objectives; to prioritize objectives
- **Organization and Time Management** - Ability to organize and schedule people and tasks; develop realistic action plans while being sensitive to time restraints and resource availability
- **Commitment** - Ability to start and persist with specific courses of action while exhibiting high motivation and sense of urgency in order to reach goals.
- **Industry Knowledge**
- **Personal/Professional Development/ Learning Ability**

Effective communication (Able to communicate with others, in both written and verbal form. Able to give and receive feedback. Uses facilitation/team communication skills.)
Possible skill areas to probe:
- **Verbal Communication** - Ability to clearly present information through the spoken word; influence or persuade others through oral presentation in positive and negative circumstances. Effective listening skills.
- **Written Communication** - Ability to write clearly and effectively present ideas; efficiently and accurately document activities. Effective comprehension skills.
- **Assertiveness** - Ability to maturely and confidently express one's opinions and feelings in spite of disagreement; accurately communicate and influence others regardless of their status of position.
- **Interaction** - Ability to communicate with others in a warm and helpful manner while simultaneously building credibility and rapport.

Team orientation (Contributes to team success. Resolves conflict. Cooperates with others. Balances personal and group needs. Adjusts work style to meet situation.)
Possible skill areas to probe:
- **Coping**- Ability to maintain a mature problem-solving attitude while dealing with interpersonal conflicts, personal rejection, hostility or time demands. **(See also Stress Tolerance under Change Management)**
- **Team Building/Energizing** - Ability to create positive motivation in individuals and groups; works with people in such a manner as to build high morale and group commitments to goals and objectives.
- **Team Player** - Ability to participate actively and openly with others in striving to accomplish the same goal(s); cooperatively and equally share ownership of work to achieve results.

Customer Commitment (Displays ongoing commitment to the customer. Recognizes various customer groups. Demonstrates genuine desire to help others.)
Possible Skill Areas to Probe:
- **Customer Focus**
- **Customer Service Experience**

Quality Focus (Produces quality work. Minimizes errors and rework. Finds ways to improve quality of output. Able to make sound decisions based on analysis and data.)
- **Possible skill areas to probe:**
- **Knowledge**/Use of Quality Tools and Methods
- **Ability to make decisions based on analysis and data.**

Respect for differences (Recognizes and respects differences in the workplace. Demonstrates commitment to the value of diversity.)
Possible Skill Areas to Probe:
- **Perceptivity** - Ability to interpret verbal and non-verbal behavior; to develop accurate perception and understanding of others' feelings, needs, values, and opinions; to be sensitive to and aware of personality differences and conflicts.

Change management (Able to work in an ever-changing environment. Participates in change process.)
Possible skill areas to probe:
- **Flexibility/Stress Tolerance** - Able to modify one's own behavioral style to respond to the needs of others while maintaining one's own objectives and sense of dignity; able to maintain a mature problem solving attitude while dealing with interpersonal conflict, personal rejection, or time demands. **(See Coping under Team Orientation)**
- **Tolerance of Ambiguity** - Ability to deal with unresolved situations, frequent change, delays or unexpected events; withhold action or speech in the absence of important information.
- **Reading the Organization** - Ability to recognize and use information about the organizational culture and key individuals to accomplish legitimate organizational goals; be aware of the timing, politics and group processes in managing change.
- **Visionary - Forward Thinking** - Ability to strategically and progressively plan what the company will look like in the future and what resources are needed to get there.

Technical Skills (Has the knowledge and the technical competence to perform the job. Finds creative solutions to problems.)
Possible skill areas to probe:
- **Technical Experience** - Has experienced as specified on position description.
- **Technical Knowledge** - Has knowledge as specified on position description.
- **Creativity/Innovation** - Ability to develop unique solutions to problems.
- **Problem Solving** - Ability to solve problems while exhibiting judgment and realistic understanding of issues.

Other Areas
- Policy and **Procedures (Ability to conform to established policies, procedures and practices; log work activities)**
- Decision **Making**/Judgment **(Able to make decisions quickly on available information and take action; make commitments and not change decisions when challenged; deal with emergencies when necessary)**
- **Leadership (Able to influence the actions and opinions of others in a desired direction; exhibits judgment in leading others to worthwhile objectives.)**
- **Management** – Supervision/Delegation/Technical Skills and Experience/Project Management
- **Tolerance of Ambiguity** - Ability to deal with unresolved situations, frequent change, delays or unexpected events; withhold action or speech in the absence of important information.
- **Reading the Organization** - Ability to recognize and use information about the organizational culture and key individuals to accomplish legitimate organizational goals; be aware of the timing, politics and group processes in managing change.
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- **Leadership (Able to influence the actions and opinions of others in a desired direction; exhibits judgment in leading others to worthwhile objectives.)**
- **Management** – Supervision/Delegation/Technical Skills and Experience/Project Management

Onboarding and training plan

The onboarding and training plan is essential for integrating a new team member into the position and the team. Developing this plan will take some time, but once you've created it, it serves as a template for any new member of the team.

You won't deliver all the information and training in this plan on someone's first day. However, you should have it completed within their first week.

Deliver the information in a logical order. For example, don't throw someone into learning a key process if they don't yet know the team accountabilities.

The plan includes:

- A brief orientation to the company, either in print or online (this may be available on your company's intranet). Many companies do formal orientations – that's fine, no need to duplicate effort. But make sure your new person gets some kind of general orientation.
- Review team accountabilities
- Review team ground rules
- Review manager ground rules
- Give the new person a copy of their roles and responsibilities (in the "I" language format we discussed in Session 5)
- 90-day goals (or, if your company has a formal probationary period, conform to that schedule). Structure the goals to answer the question, "How will we know that you've learned the basics of your job and are fully contributing as a team member?"
- The exception to this is if you've hired the person specifically to undertake an urgent project – in that case, set up very specific goals.
- A training plan for key team processes, specialized software, etc.
- A schedule for meeting key people outside the team that they will work with. Some of these may be formal meetings that you set up, and some may be informal "drop-ins."

Example Onboarding and Training Plan

Topic	Who?	When
Welcome to the company		
Official HR welcome	Heidi	Monday AM
Building tour	Juliane	Monday AM
Company & Industry overview	Juliane	Monday AM
Company history		
Industry overview and how we fit in		
How our company is organized		
Team overview		
Overview of our team: structure & members	Juliane	Monday PM
Team core values		
Team member ground rules		
Manager ground rules		
Overview of your roles & responsibilities		
90-day goals		
Product types : overview	Juliane	Tuesday
Review each major product category		
Company communication tools		
Email, meeting scheduler, intranet	Dave	Tuesday AM
Product development process: details		
Overview of the process	Juliane	Thursday
Schedules	Dave, Wendy	A-ongoing during first month
Hands-on training on process forms	Lori, Dave, Juliane	A-ongoing during first month
Hands-on training on time sheets, time tracker	Dave, Juliane	A-ongoing during first month
Meet with service team members and Brand Managers	Dave, Juliane	A-ongoing during first month

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Example 90-day Goals

Employee Name:______________ Manager's Name:_____________

Job Title: Project Manager___ Today's Date: _________________

You will be evaluated on these goals within one week of: _________________

General Project Management 90-day Goals

- Establish a clear and effective working relationship with representatives of brand teams, creative teams, Imaging Services, Prepress, Production, Spine Design, Logistics, Sales, and other service teams.
- Acquire a basic understanding of the product development process for your assigned products. Be able to explain what happens when, and why.
- Be able to explain the basic roles and responsibilities of Project Manager, Brand Manager, R&D, Editing, Spine Design, and Production
- Be able to explain the basic game mechanics of your assigned products.
- Be able to create and maintain development schedules for your assigned products.
- Assume direct responsibility for managing development of all components of your assigned products

Specific 90-day Job Goals

- Take over project management of all Brand A releases within the first 6-8 weeks, lead the project team, and oversee product development
- Finalize the Product X project schedule, form and lead the project team, and oversee product development
- Develop relationship with our licensor
- Develop the approval submission log and forms, and represent project management interests and concerns when communicating/meeting with licensor
- Receive product spec sheets for the next two Brand A releases; develop project schedules

Employee Signature _____________________ **Date** _____________

Manager's Signature _____________________ **Date** _____________

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Giving Performance Reviews

How to prepare for reviews

1. Familiarize yourself with your company's process and paperwork If your company uses only a numbers rating system, plan to supplement it with written reviews.

2. If your company process does not provide employees a chance to evaluate themselves, plan to ask for self-evaluations.

3. About a month out from the review period, remind your team that reviews are coming. Describe the review process for your team.   Make sure everyone understands what kind of review they will be getting (numerical, written, both). Ask if anyone has questions or concerns. Ask them to schedule a 30-60 minute appointment with you for their review.

4. Post a self-evaluation form in your team email folder. Give your team a voluntary or mandatory deadline for turning in the self-evaluation.

5. If you feel it's appropriate, ask the key relationships of an employee for formal or informal feedback on their performance. This can be formal or informal.

6. Prepare each employee's review.

A written review should include

1. Provide a clear summary statement of how the team member is doing in the job and on the team.

2. Give a specific assessment of their performance in meeting goals from the last review (skip this step if this is your first written review of the employee).

3. Highlight accomplishments, skills, improvements, and strengths. In other words, say what's good.

4. Address any concerns you have, one at a time, in specific detail. Begin with a statement of the concern. Give at least one specific example of it. Provide suggestions or action steps for addressing the concern.

5. If you have no performance concerns, say so in writing, and move on to suggest some next steps in development. Again, be specific. Take into account the employee's individual learning plan, if that's part of your development process.

Giving the review

1. Enter the review on the human level.

2. Briefly explain the process for the review meeting:
   - You will deliver your review.
   - The team member can ask questions at any point.
   - You'll make note of any questions, clarifications or disagreements.
   - Once you've agreed on changes, the team member will sign the review.
   - You'll deliver a signed copy to the team member as well as putting one in their personnel file.

3. State your headline <u>immediately</u>. Examples:

   - "You're doing a great job. I want to review some of the highlights and then talk about next steps for you.

   - "You're doing a great/good job in general. I want to review the highlights of your accomplishments and then talk about some areas that I'd like you to focus on."

   - "You're doing a good job in many areas, and there are also areas that I think you can improve. I want to review your strengths and accomplishments first, and then talk through the areas for improvement."

   - "I'm disappointed in your performance right now. You've had some accomplishments that I want to recognize, but I also have a number of areas of concern to discuss."

4. Talk through the review. Be alert for interpersonal gap cues (body language, etc.), and use all your communication skills. Reviews end up being something between a pronouncement and a conversation, but try to keep it as conversational as you can.

   However – the bottom line is that this is <u>your</u> review of the employee's work. If you and the employee cannot come to agreement on it, take whatever steps your company requires to document the disagreement.

5. A week or two after all the reviews are completed, ask the team to give you feedback on the review process.

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Self-Evaluation Template

Name:__________________________ Date:______________________

Please list the goals from your last review. How do you feel you have performed with regard to these goals? Please be specific.

How do you think you're doing overall in your job? What's going well? What would you like to be going differently?

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Example Performance Review

Employee	John Doe	Job Title	Project Manager
Manager	Jane Smith	Team	Project Management
Date	January 15, 2008	In Current Job since:	March 2007

Assessment of previous goals

- Manage development of Brand X products on time, to specification and within budget.

  John, you've done a consistently great job with a series of complex products and tight schedules, particularly with the back-to-back releases before the holiday season. Your brand team is happy with your work and with your project management style. The Brand Manager says that she is grateful for your "low-key communication style" and for the number of problems you've been able to resolve quickly and with a minimum of disruption.

  It's also one of your strengths that you know when to say "no" to a change request, and that you are able to make the brand team understand the decision even when they are disappointed. This was particularly important to meeting the holiday release schedules.

  You hit the ground running with this job back in March, and you've learned quickly. I appreciate the time you spent with various service teams to learn in detail about their work and how it contributes to the final product. It helped you build the relationships you need to solve problems quickly and keep things moving.

- Prepare product specifications and development schedules through Q2 2009.

  I understand this has been a moving target due to brand team indecision, and I know it's been frustrating for you. I share that frustration. However, it's our team's responsibility to have these specs and schedules so that our products don't collide in development, and so you will need to find more effective strategies to get this information.

- Identify, prioritize and lead process improvement efforts for Brand X product development.

  This was a tricky undertaking, given how many egos were involved. You set up the project speedily and executed it well. You included the right teams in each part of the process. The informal feedback I get from various departments is that people are supporting the revised process and think that it's definitely an improvement, although there are still some bumps (only to be expected with a new process). You've made a lot of people's work easier by doing a good job with this goal.

- Train Susan and Leon in the Brand X product development process so that they can act as backup for you if necessary. This includes helping them establish a working relationship with the brand team.

  John, neither the Brand Manager nor I feel entirely comfortable yet with the idea of Susan or Leon stepping in for you. I am concerned that although Susan and Leon are both effective project managers for Brand A products, they don't yet seem to have a handle on the daily details that need to be managed in order to keep Brand X on track, and haven't had enough face time with the brand team.

Overall performance assessment

John, you are doing a very good job. Our first priority as a team is to deliver products, and I always trust that this is your priority too. You demonstrate excellent skills at understanding the big picture, managing the details and working with a variety of people (and personality types) to get the job done. Your brand team and the service teams respect your expertise and enjoy working with you.

Your ability to build relationships and play nicely has helped you be successful in delivering products. I don't want you to change that. And I think you need to use your ability to say "no" to issues that crop up in everyday development, and apply it to the longer-term schedule issue. You need to help the brand team understand that you have the same responsibility and authority in this area.

In thinking about the difficulty with schedules, and also the training for Susan and Leon, I feel as though you don't want to jeopardize your good relationship with the brand team in particular by pushing too hard, or by introducing other project managers into the mix. If you feel this isn't accurate, then let's talk more about why you think you're having difficulty in these areas.

To be clear, I don't see these difficulties as evidence of bad performance – just the next steps in your development in this job. Overall, your performance is great, and I hope that you're satisfied with your work, happy in the job, and ready to continue growing.

I also very much appreciate having you on the team. You're supportive of other team members, you respect people's differences, and I have come to count on your cheerful "we can do it" attitude during times when the team's workload can seem pretty overwhelming.

Future goals for the next 6-12 Months

- As always, manage development of Brand X products on time, to specification and within budget.
- Build development schedules through the end of 2009 by March 15. I'd like you to trust in your good relationship with the brand team, and push them on this even if it feels uncomfortable. If you would like to brainstorm some strategies for this, let me know.
- Complete Susan and Leon's training. I'd like this to include some hands-on project management time for various components of at least one release, as well as involvement in planning meetings with the brand team. Your goal here is to have Susan and Leon feeling enthusiastic about the brand and confident in their ability to step in if there's an emergency; and to have the brand team feel confident as well.
- Continue to monitor the revised Brand X product development process to make sure the bumps get ironed out. You're responsible for the continued success of this process.
- Identify some training options (specific workshops or specific projects) you'd like to pursue this year. Set up time to talk with me about this by March 1 so we can negotiate to a final agreement about this goal.

Employee Signature ____________________ Date ____________

If you want to respond formally to this review, we will attach your comments to this document.

Manager's Signature ____________________ Date ____________

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Effective Business Conflict

The ability to have effective conflict is one of the characteristics of successful businesses and successful managers.

Three important things you can do to help minimize conflict within the team:

- Practice a clear, transparent decision-making process with your team. Much of the everyday conflict in business happens when people are excluded from decisions that affect them, or when the decision is communicated poorly.

- A lot of everyday workplace conflict stems from unclear lines of authority. Develop criteria and tools with the teams that you hand off work to, or that you receive work from. These tools could include a matrix of who is responsible for what decision, who has approval authority for changes to specifications or process, etc.

- Develop a conflict resolution process for the team, including how people can escalate conflict to you if necessary.

Key general strategies when you find yourself in conflict (on your team or with someone else in the company)

- Start from a common base. Make sure up front that everyone is working toward the same goals.

- Work with as much information as possible. Don't make assumptions about what the facts might be. The goal is to focus on issues rather than staking out emotionally-based positions.

- Consider as many options as possible, even (especially) ones you don't support.

- Use the 70% consensus approach.

- When you find yourself in a conflict situation with someone at work, step back and start a conversation about how you will resolve the conflict – try to agree with them on a process, criteria, what data you need, etc.

- Stay aware of the interpersonal gap and use your communication skills to keep everyone (including you) focused on the issues and aware that you intend no interpersonal attack. Be authentic and transparent about this.

- Step away from the need to "win." Help people around you re-define "winning" as "let's make the best decision for all of us."

- Remember to listen.

- If you start taking things personally yourself, either move into an interpersonal conflict-management mode (see below), or take a break from the conversation to regain your perspective.

These strategies won't prevent conflict, and they shouldn't. Different points of view are necessary to the overall success of the business. What these strategies will do is keep the focus where it belongs – on the decisions, not on the people.

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Homework Assignments due for Session 1

1. Readings:

    - **Becoming a Manager**, pp 1-45 (Introduction and Chapter 1)
    - "Why Your Employees Are Losing Motivation" by David Sirota, Louis A. Mischkind, and Michael Irwin Meltzer (online at Harvard Business School Working Knowledge website, http://hbswk.hbs.edu/archive/5289.html)
    - "The Human Side of Management" by Thomas Teal (in program notebook)
    - "The Five Minds of a Manager" by Jonathan Gosling and Henry Mintzberg (in program notebook)
    - "How to Build Your Network" by Brian Uzzi and Shannon Dunlap (in program notebook)

2. Think about what you hope to get out of this course. What would be the best possible outcome for you? Please begin a program journal by recording these thoughts.

    You can keep whatever kind of journal you want – paper, electronic, audio, visual, etc. But please keep one. Observing, reflecting and questioning are fundamental to this program. Taking the time to record your thoughts is critical to integrating the learning you do.

3. Introduce yourself on the program email list at least three days before the first session. In your post, please tell us a little about yourself, and include some of your thoughts about what you hope to get from the course.

Homework Assignments due for Session 2

4. Complete your Network Map for your Group 1 relationships. Then complete the Relationship worksheet to assess these key relationships, or use your own format.
   - List each Group 1 relationship.
   - Think about it carefully. Be clear and realistic about what is or is not working. Make detailed notes if necessary.
   - Assign a status – working well, needs maintenance, needs improvement, needs to be established.
   - Think about strategies you can apply to it.

5. Before the next session, take a step to initiate or strengthen one of your Group 1 relationships. Please note, it doesn't have to be the most important or troublesome one – you may want to wait until we've covered some of the key communication skills before you tackle a tough one. It's fine to choose something small and straightforward – the point is to know that the relationship is important and start taking <u>responsibility</u> for it.

6. Words and Meaning project.

   In the study of language, we say that words have <u>denotation</u> and <u>connotation</u>. Denotation is the literal meaning, the dictionary definition of the word. Connotation is the emotional meaning attached to the word. So, for example, the words *thin* and *scrawny* have similar literal meaning but carry different connotations. When we communicate, we have to be aware of both the literal meaning and the connotation of our words.

   Start by doing some online research about connotation until you're clear on what it means. If you find yourself confused, post a question to our email list and we'll all help each other out.

   Then think about what each of these words means to you:
   - Work
   - Manager
   - Team
   - Conflict
   - Communicate
   - Success

Write down your personal definitions of the words. What do they denote to you? What do they connote?

Then select 3 – 5 people (a mix of family, friends or neighbors, and co-workers). Ask if you may interview them for this project. It's better to do this in person or by phone if you can, but email is acceptable.

Do not talk to your interview subjects about "denote" and "connote." Just ask them how they would define each of the words, and what the words mean to them. Ask them what feelings they associate with the words.

It's fine to ask clarifying questions to be sure you understand correctly, but do not discuss or debate their definitions.

After you have completed all the interviews, write up your thoughts about the following questions:

A. Do these words mean the same thing to everyone (you and the people you interviewed)? Note any significant differences, or any patterns of similarity.

B. What conclusions do you take from this project that will benefit you as a manager?

<u>This project takes a lot of time. Plan ahead.</u>

7. Read the following and make notes in your journal about key ideas:
   - **Difficult Conversations**, pp xv-20 (Introduction and Chapter 1)
   - **Oxford Guide to Plain English**, pp 1-41
   - "Active Listening" article from MindTools: http://www.mindtools.com/CommSkll/ActiveListening.htm
   - "Guidelines for Active Listening and Reflection" from Sales Concepts: http://www.salesconcepts.com/nl0698c.htm

8. Become a regular reader of the advice columns of Carolyn Hax (her current and archived columns appear on *The Washington Post* website). She's an excellent model of many of the concepts we will discuss in Session 2. What do you think of her advice and the way she communicates it? What ideas and values do you see reflected in her advice? Write about this in your journal.

9. In your notebook is a list of managers in your company who have agreed to be learning resources for you. After Session 5, you'll interview one of these managers. After Session 6, you'll shadow the same manager for at least half a day.

   This week, please think about what manager you'd like to work with. Make contact with them, explain that you are in this program, and set up a 90-minute appointment for an interview during the period between Sessions 5 and 6.

10. Spend time before the next session observing people at work and in other parts of your life. Notice behavior that you believe reflects (or doesn't reflect) clarity, authenticity or transparency. Notice when people are behaving effectively (or not) in relationships.

    Record your observations in your journal – note the specifics, and be prepared to tell some of these stories in our next session. Also be prepared to talk about what you take from your observations that will benefit you as a manager.

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Homework Assignments due for Session 3

1. Post your Words and Meaning project writeups to the email list.

2. For more insight on the concepts we've talked about today, please review the following information in your program or online.
   - Mirror neurons (online at http://www.nytimes.com/2006/01/10/science/10mirr.html)
   - Interpersonal Gap (online at http://hprct.dom.com/2001/presentations/CrosbyHPRCT_INTERPERSONAL_GAP.pdf)
   - Ladder of Assumption (**The Fifth Discipline Fieldbook**, pp 242-263)
   - Satir modes and additional communication dynamics (**The Gentle Art of Verbal Self-Defense at Work**, pp 59-76)
   - Listening tips (**The Fifth Discipline Fieldbook**, p 391)

3. Return to your relationship assessment exercise from last time and take another step to initiate or strengthen a Group 1 relationship. This is the last time it will be a specific homework assignment, but please get into the mindset of reviewing and managing your relationships on an ongoing basis.

4. Readings:
   - **Oxford Guide to Plain English**, pp 54-81 and pp 125-142
   - **Difficult Conversations**, pp.25-43 (Chapter 2)
   - **Fierce Conversations,** pp.1-54 (Introduction, Chapter 1 and most of Chapter 2). Make sure you do this early! It is lengthy, and assignment #4 depends on having read it.

5. Do the activity (the "AND" practice) described on pp 31-32 of **Fierce Conversations** for a minimum of 24 hours. Reflect on the experience and write in your journal about it.

   This is a communication behavior activity. You may find it feels artificial to do it for an entire day, but please do it anyway. All of the communication behaviors you are learning will feel awkward as you begin to practice them, and sometimes they will backfire on you until you learn to integrate them into your personal style. Roll with it. If you get funny looks, explain you're doing management program homework.

6. Decide on at least one way to share your ongoing learning in this program with your team or co-workers. Focus on one skill or behavior introduced in this session; provide an overview of the concept; and ask for their help in observing you and offering feedback throughout the coming weeks. You should plan how and when

you will seek this feedback from the people helping you.

Let them know that you will be bringing back a skill or behavior from each session that you would like this kind of help with.

With this exercise, you are making yourself accountable to people you work with to learn and practice these skills. You are also beginning to model these behaviors and skills at work, and to influence people around you to do the same.

7. Spend time before the next session observing people at work (yourself and others). Notice communication behavior – people being clear, transparent, authentic (or not), using various communication modes, listening well or poorly.

   Record your observations in your journal – note the specifics, and be prepared to tell some of these stories in our next session. Also be prepared to talk about what you take from your observations that will benefit you as a manager.

Homework Assignments due for Session 4

1. In your notebook, you'll find handouts with more information on what managers generally communicate about and tips on delivering messages clearly, transparently and authentically. Please make sure to review them.

2. Share a concept, skill or behavior from this session with your team or co-workers and ask for their help in observing you and offering feedback.

3. Readings:
   - **Becoming a Manager**, pp. 47-85
   - **Difficult Conversations**, pp. 44-57.

4. Communication scenarios

   Develop a response to the communication scenarios provided with your homework sheet. Each scenario will specify whether you are responding in person or in email.

   For the in-person conversation, script your side of the conversation. For the email communication, write the full text of the email.

   Please write up your responses, along with a brief analysis of the factors you considered in your approach, why you made key decisions, and what concerns or issues you noted.

   Please post your responses to the group email list before the next session, early enough that others may read and comment on them. Please respond to each other's scenarios with feedback, requests for clarification, and suggestions.

5. Practice conversations.

   Pick a partner now to work with on this assignment.

   Schedule at least two brief conversations to practice your communication skills. In one conversation, you bring the topic and do the preparation; in the other conversation, you are the recipient of the communication. In both cases, work to apply the communication skills you have learned in Sessions 2 and 3, even if it means having to stop the conversation, back up, and try again.

   Please choose a legitimate business topic – in other words, talk about something real, not an artificial scenario. If you can work together on solving a business problem or improving a process, great. If you don't have a business reason to communicate, then a real personal topic is okay (a significant personal experience, seeking feedback on a social situation, planning a trip, etc.).

I prefer these be face-to-face conversations rather than written. The goal of this exercise is to practice staying clear, monitoring the interpersonal gap, and completing the communication in real-time (as opposed to having time to consider your response in email).

It'll probably feel awkward. Please do it anyway. You need to practice, and practicing with each other is safe.

At the end of the conversation, share feedback with each other and make notes of how it went.

6. Continue to observe communication behavior, with special attention to effective versus ineffective messages.

   Record your observations in your journal – note the specifics, and be prepared to tell some of these stories in our next session. Also be prepared to talk about what you take from your observations that will benefit you as a manager.

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Homework Assignments due for Session 5

1. Spend time thinking about your values as a manager. Make a list of these values. Please include clarity, transparency and authenticity on the initial list.

   Your management values, along with your accountabilities, will drive your priorities. You need to be transparent and clear about your primary values – that's why the list needs to be short. Of course you may have more values that sometimes come into play: we all do. But you must be clear on the values that drive you most as a manager before you can start making consistent and transparent decisions.

   Clarity, transparency and authenticity are core values of the Humans At Work^{sm} program, and I believe they should be driving values of all effective managers. But this is your values list, and your management experience. If you determine that none of the program values match your values as a manager, please be honest about that.

   If there are more than 5 or 6 values on your list, please use the grid tool to identify the top 5 (preferable) or 6 values.

   Once you have determined 5 or 6 driving values, please write a description of what each value means to you, with examples of personal experience. Why are these values important to you as a manager?

   Please email your document to the program list before the next session. Please read everyone else's list and respond as the spirit moves you, so that we create an ongoing discussion about values. The point of this is to practice being transparent about your values, and also to help each other be clear.

   You are free to re-work your values based on the email discussion.

   You'll be sharing your values with your team at some point after Session 5. Please hold off on sharing them until then, because there are still some steps for us to go through**.**

2. Develop a draft of your team accountabilities. If you wish, work with other program participants to help each other brainstorm about what your accountabilities are, and how to state them simply, clearly and measurably.

   Meet with your manager to review, discuss and agree on a draft of your team accountabilities. Do this with care and attention: these are the things your manager should be measuring you on.

You'll be sharing these accountabilities with your team at some point after Session 5. Please hold off on sharing them with your team until then.

3. Begin implementing effective meeting techniques in meetings you lead, including an agenda published prior to the meeting and timely follow-up. Let your team know what you are doing, and that you will be using these techniques in your meetings from now on.

   If you are not currently leading any meetings, ask someone who leads meetings that you attend if you can work with them to implement this process for their meetings (recording notes on flip chart, facilitating ground rules for longer or regular meetings, etc.)

4. Readings:
   - **The New Compleat Facilitator**, pp 34-65 (Chapters 4 and 5). Please note the great definition of consensus on p. 58.
   - **Becoming a Manager**, pp. 87-145 and pp. 283-302
   - **Difficult Conversations**, pp.58-82.

5. Observe how people at all levels of your company make decisions. Notice their process and their communication behavior. Record in your journal more examples of effective and non-effective decision-making, and what you can learn from these examples that will make you a more effective manager.

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Homework Assignments due for Session 6

1. Conduct the interview with the company manager that you selected and scheduled at the start of the program.

   Make sure you are prepared to introduce the purpose of the interview, to give the manager a brief overview of your program experience so far, and that you have questions ready.

   <u>I strongly suggest using a voice recorder</u> to capture the interview so that you can pay complete attention without having to take notes, and so you can revisit portions of the conversation as many times as you wish. It's also helpful to hear how you are communicating – can you hear yourself being clear, transparent and authentic?

   Let the manager know that you are prepared to listen to any stories, advice, feedback, suggestions for tools, etc. that they might wish to offer.

   Begin with the following questions:
   - What are the important things a really good manager does or doesn't do? (Encourage the manager to give examples from her own experience)
   - What do you like best about managing? (Ask for stories and examples)
   - What do you find challenging about managing? How do you deal with those things? (Ask for stories and examples)

   It's entirely possible these questions will fill the 90-minute interview time. But please be prepared with additional questions in case you need them – do not cut the interview short just because you've run out of questions.

   At the end of the meeting, ask the manager the best way for you to observe them in action sometime between Session 6 and Session 7. Decide on an activity or time period during which you will "shadow" the manager.

   Be sure to thank the manager for their help.

   Write up the most important learning points that you've taken from the conversation, as well as any thoughts about managing, team building, team culture, communication, management style, etc. Please post this to the group in email before the next session.

2. Draft your "orientation speech" for your team. If you are not currently a manager, then your draft will be somewhat more generic, but should still reflect your

management values and style (if it helps, invent a team for yourself and address it to them).

You can write this out in full, or make detailed talking notes, whatever is best. Remember that when you give the speech, you will also be publishing your notes – so please be sure that whatever form you use is clear enough for your team to understand when they read it.

You are free to exchange drafts and ask for each other's help and input – remember, this group is a safe zone for you to try out new skills and ways of expressing ideas.

I encourage you to practice with someone. It helps. You can also practice with an audio or video recorder. Or practice alone. The point is to say it out loud several times before you deliver it: this will make a real difference, I promise.

Please note: you do not need to give the speech to your team before the next session (although you certainly may, if you choose to). See Assignment #3 below, and work your orientation speech into that schedule as you think appropriate.

3. Develop a schedule to begin your team-building process with your team. It's up to you whether or not you begin the team-building before Session 6, but I encourage you to make a start before the program is done, so that you can get support in upcoming sessions if needed.

   If you have any concerns, get advice or help from another program participant or from the program leader.

4. In Session 7, you'll be talking about a project you'd like to accomplish at work – something related to your role as a manager. You'll be helping each other clarify, brainstorm and plan your projects.

   Begin thinking now about the project you'd like to accomplish. It should be an issue or challenge that is pressing, or that is longer-term but intimidates you or makes you feel overwhelmed (or all of the above!). It should be something that you feel you need to tackle in your role as a new manager – not busywork or something superficial, but also not something more suited to your VP or CEO.

   If you need help brainstorming about what project to select, seek input from someone else in the program, your manager, the manager you shadowed, or the program leader.

Please select your project and begin drafting a project statement. Please note, **this is due before Session 7** – you are being given a lot of notice because this assignment requires a lot of thought, and you will have a lot of homework after Session 6. If you wait until then to begin this project statement, you'll be squeezed.

Your Draft Project Statement should include:

- Description of your project
- The goal – what do you want to accomplish? Be specific.
- How will you measure success? How do you know you are "done"? Be specific.
- Why is this a priority? Be specific – it may be necessary to support your team members, streamline process, accomplish a team goal, strengthen a key relationship, or further your development as a manager in an important area.
- What are the benefits you expect? Be specific.
- What concerns do you have about undertaking this project? What are your obstacles? Be specific. Concerns or obstacles could include the impact on others, resistance from others, the skills you need to accomplish the project, etc.
- What kinds of help or support do you need to address these concerns or obstacles? This may be company-level support such as training, policies, etc. or individual support from key players.
- What are the key action steps to accomplish the goal?

If you get stuck at any point, write "I am stuck here" and, if possible, a brief description of why you are stuck (lack of information, lack of ideas, etc.).

E-mail your draft statement to the program list <u>before Session 7</u>. Read the other statements as they are published. Feel free to respond with comments, especially to give help in "stuck" areas.

NOTE: You <u>will not</u> be completing these projects as part of the program. You can start them when you're ready, and they'll take as long as they take. So it's important to get your plan done and start getting feedback/help as soon as possible if you want to take advantage of program time to help you shape your project.

5. Readings:

   - **Difficult Conversations**, pp.85-108
   - "Behavioral interviewing Strategies for Job-Seekers" by Katharine Hansen at http://www.quintcareers.com/behavioral_interviewing.html
   - "Why Your Employees Are Losing Motivation" by David Sirota, Louis A. Mischkind, and Michael Irwin Meltzer (online at Harvard Business School Working Knowledge website, http://hbswk.hbs.edu/archive/5289.html)
     You read this article before Session 1. Read it again and see if if resonates differently with you now.

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Homework Assignments due for Session 7

1. Shadow the company manager you interviewed after Session 5.

   If it's appropriate to the activity, and you have the permission of everyone involved, consider using a voice recorder to capture the experience so that you can pay complete attention without having to take notes. Otherwise, take notes.

   After the experience, either have an information conversation with the manager, or send them an email. Thanks them for their help, and asking if there are any points in particular that they suggest you take away from the experience.

   Please write about the most important learning points that you've taken from the experience, as well as any thoughts about managing, team building, team culture, communication, management style, etc.

   Please post this to the group before the next session.

2. Write a performance review of the worst manager you've ever had. You do not have to use a specific format, and you do not have to include a job description or any numeric evaluations. Just write it as if it were a draft of the comments you were going to include in a review document.

   Speak plainly.

   This is not a rant or a revenge letter (and it's not intended to be shown to the manager or otherwise published). It's a chance for you to practice being clear, specific and objective about someone's performance. It's also a chance to take a clear look at the behavior that characterized the poor performance.

   In the review, identify their <u>three</u> most important challenges as managers, and recommend improvement steps and goals. Limit yourself to three challenges – you're also practicing being concise.

   Also, identify at least one strength they already demonstrate, with suggested steps to help them develop that skill.

   Please post this to the group before the next session.

3. Read the pages of **Managing Transitions** I've given you. Then meet as a group to develop answers to the Test Case included with the pages. You may think

individually ahead of time about your answers, but your assignment is to come up with a group response.

Once you have finalized and recorded your responses, then open the sealed envelope. Review and discuss the author's answers.

Please make sure a member of the group records the group answers, and also records any key discussion points.

4. Remember that your Draft Project Statement (described in Homework at the end of Session 5) should be posted to the program group email list in time to allow for response before the next session.

   If you've already posted your draft statement and have received feedback, it's fine to begin revising your statement.

   Everyone will be expected to have a final project plan by Session 8.

5. Readings:

   - **Becoming a Manager**, pp.149-173 and pp.271-282.
   - **Difficult Conversations**, pp.111-146 . Also, please refresh your memory on the previous readings and any notes you took.
   - **"**How Management Teams Can Have a Good Fight**,"** Eisenhardt et al, *Harvard Business Review* (in program notebook)
   - "Want Collaboration?" Weiss and Hughes, *Harvard Business Review* (in program notebook)

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Homework Assignments due for Session 8

1. Read **Managing Transitions**, pp. 23-95. Then do the Practice Case exercise that begins on p. 121. Do this exercise individually.

2. Readings:

   - "Communities of Practice: A Brief Introduction" by Etienne Wenger (http://www.ewenger.com/theory/communities_of_practice_intro.html)
   - "Communities of Practice: Learning as a Social System" by Etienne Wenger (http://www.co-i-l.com/coil/knowledge-garden/cop/lss.shtm)

3. Revisit your vision statement of yourself as a great manager. Does it still apply? Revise if necessary to make it current.

   Revisit your values. Do they still apply? Revise if necessary to make them current.

   Spend time thinking about this program and reviewing your notes and materials. Select 5 ideas, tools or topics that have been meaningful to you in the program.

   <u>Write a personal essay</u> that includes the following:
   - Your current vision statement of yourself as a great manager
   - Your current values as a manager
   - The 5 ideas, tools or topics you selected as meaningful
     - Describe them in your own words.
     - Why they are important to managing well?
     - What are your goals for yourself in these areas?
     - How do you see yourself applying these ideas in your work and life?

   Email your essay to the group before the next session.

   In our final session, I'll be asking you all to share your vision of yourself as a manager, the values that are meaningful to you, and some points of the program that have been meaningful for you. You don't have to read your entire essay – it's fine to highlight a few of the key points – but I will want you to share your complete vision statement.

   You will already have read each other's essays posted to email. But it's important for you to publicly commit to your vision and to say whatever you are moved to say about what you've learned, what you've discovered, and what you want to do next. This is <u>your</u> opportunity to testify. Be ready.

4. Revise your draft project statement into a final project plan with the following components:

   - A clear, <u>brief</u> description of your project – what you will do, and why it is important. Use "I" language ("I will ____") as much as possible.
   - Your goal for this project – what you specifically intend to complete –and a target deadline.
   - The specific benefits you expect for yourself and your team as a result of this project.
   - Your specific measures of success.
   - Any areas of challenge or concern (whether regarding your management skills, company policy, potential conflict with other employees, etc.) and how you intend to address them.
   - Your specific action steps.

   Email this plan to the group before the next session.

5. Make a list of program concepts, ideas, or tools you still feel uncertain about.

   Be specific: what information do you want to help you feel more grounded in any particular area, or what concerns or questions would you like to discuss? What would you like to practice more (in exercises or role play)? This should include any areas of your project you're feeling stuck on or anxious about.

   We will discuss as many of these questions or concerns as we can in Session 8. <u>Please prioritize your list</u> so your most pressing questions have a better chance of being addressed.

   Please email your list to the program group <u>as early as possible</u> so everyone has time to review them and prepare for the session. You will be each other's resources for this discussion – sharing information and ideas, and helping each other clarify concepts or brainstorm solutions.