

PNHRS Core Competencies Project: Development Resource Guide (DRG)

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Overview

Introduction:

This Development Resource Guide (DRG) is a practical tool to support you in planning and managing your on-the-job development in a way that you can self-manage the objectives, pace and outcomes that provide you and your agency with the most value. The DRG is a primary resource for planning your development. It provides you with suggestions for development activities related to all core competencies that have been identified for superior performance in Development Services sector roles.

This guide will assist you in generating ideas and providing direction as you create and implement a personal action plan for developing your competencies. It is not intended to be an exhaustive list of possibilities, but rather a starting point for your own individual development plan. Use this document as a resource to help your self-development rather than as a list of activities which must all be accomplished.

Competency Development

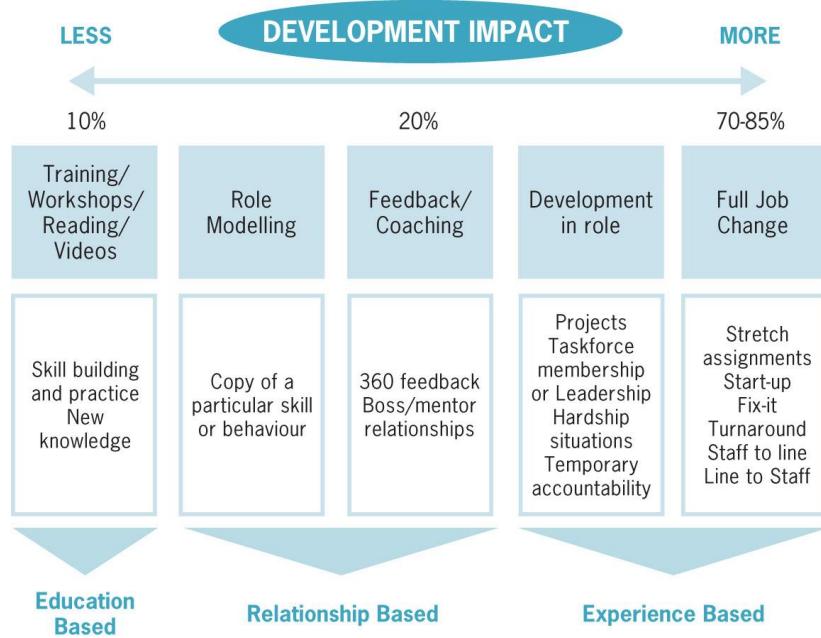
Where Development Takes Place

When planning your personal development, your feedback may come from a number of different sources including, but not limited to, your performance review, career development discussions with your manager or mentor, 360° feedback, self-assessment, and mentoring/learning programs. The development actions in this guide will help you build an impactful action plan to further your personal and professional growth.

Research indicates that competency development takes place through a combination of:

- On the job experience, development in role and challenging job assignments (70-85% of learning occurs by this method).
- Relationships and feedback from others you work with. This includes bosses, peers, subordinates, mentors, multi-rater and individual assessments (10-20% of learning occurs by this method).
- Role modeling and off-the-job learning. This includes community involvement, industry associations, etc. (10-15% of learning occurs by this method).
- Training, workshops and formal education (10% of learning occurs by this method).

The graphic below illustrates the development impact of these various activities:



Remember that different people have different ways of learning. There is no one way that is better than another. The important factor is to determine what works best for you. Feel free to tailor the suggested developmental activities or to build on them to better fit with your role.

You will note that detailed and extensive suggestions have been provided for on-the-job learning opportunities. Research has shown that the most powerful learning occurs on the job through planned experiences and, therefore, this guide places significant focus in this area. Formal training and self-development experiences are often useful as support, or reinforcement activities.

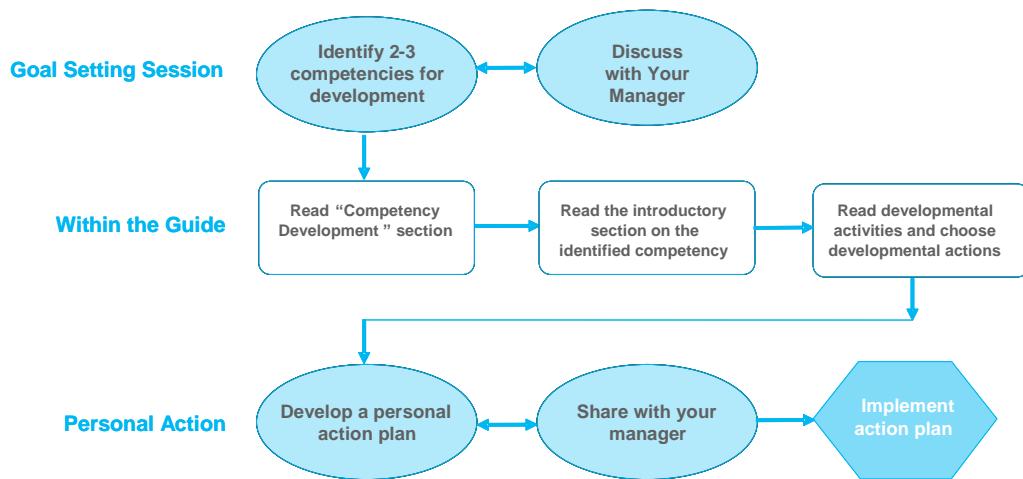
Planned on-the-job activities require discipline and perseverance on the learner's part, but can result in significant payoff. You are encouraged to experiment with these activities in developing your competencies.

The Competency Development Process

Competency development is about learning new behaviours or refining current behaviours – things you can see or hear being done, not what you can infer – to improve on the job and overall organizational performance. It also means abandoning old behaviours and/or taking on new ones.

Realize that competency development involves examining your behaviours and sometimes your assumptions about yourself and the world around you. This takes time and it requires that you try new behaviours that might be uncomfortable at first. You may not be entirely successful at first using these new behaviours. That is uncomfortable for adult learners who want to feel competent in their work and with their peers. This discomfort is part of the learning process. Be patient with yourself and allow yourself the time to learn. Avoid the urge to abandon new behaviours if they do not immediately come easily. Feedback is a critical part of gaining perspective when developing competencies, so be sure to involve your manager or mentor as you progress.

The following flowchart can assist you to establish and monitor progress of your development plan:



Once you have reached your development goals, restart this process by identifying new competencies for development. If you have reached all of your current competency target levels, consider looking at the next level up.

Building a Development Plan

Here are some tips in maximizing the development planning process:

- ***Spend time planning and be focused in the activities you try.*** The clearer you are about what you are trying to do and why, the more energy you will put into actually implementing your development plan.
- ***Focus on competency areas that are most relevant to you, your current job and/or the next step in your career path.*** You need to decide which competencies you will develop and what activities you will undertake both on and off the job.
- ***Consult with others.*** You will want to involve your manager and perhaps a coach/mentor throughout the process both for support and to provide valuable feedback on your progress. Others can provide feedback too, such as your peers, or experts in the competency you are developing. Don't be afraid to ask others to assist in your development.
- ***Build in milestones and assess your progress.*** As you design your development plan, be sure to set up some key milestones that will act as yard posts for measuring your progress and keeping you on track.
- ***Discuss what you learn*** with others and get their ideas and feedback.
- ***Keep at it.*** Learning new behaviours is challenging. Recognize that particularly during the early stages of developing a competency, you may appear to regress and be seemingly "worse" as you attempt to do things in a different way. Understand that this is often a normal part of the process, and in the end, you will be more effective and satisfied in your work.

Using the Development Resource Guide

The Development Resource Guide is designed to assist you in creating a personal development plan. It includes on-the-job activities that can be incorporated into daily work experiences that can assist in developing a particular competency. The on-the-job activities are intended to provide individuals with ideas for development. They are not intended to be comprehensive in nature. Feel free to choose those that best match your individual learning style, as well as to adapt others to create your own.

What can be found in the Development Resource Guide?

The DRG is not a book to read from start to finish. Rather, if you have a development need, you should go directly to the section related to the particular competency and level at which you want to focus, then pull the activities that best suit your development needs.

The DRG is organized by competency and their associated levels. For each of the competencies, the guide gives you:

- A definition of the competency with examples of what “This Means” and what “This Doesn’t Mean”;
- A mix of activities you can do on your own and/or with others (including peers, co-workers, manager/supervisor and other key stakeholders) to help develop the competency;
- Books, videos and movies that will assist you in recognizing, understanding, and developing the competency and are available at your local library, bookstore and video store.

Advocating for Others (AFO)

Definition:

Individuals demonstrating the competency “**Advocating for Others**” show through their behaviours and inclination to champion a cause or issue and try to get others to support it (i.e., trying to win the support of others).

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ consciously considering the type of impression you will make on others - how clients will respond to your appearance, tone of voice, and body language 	<ul style="list-style-type: none"> ▪ acting how you like without considering how it will affect other people's impressions (and hence, your ability to get the job done)
<ul style="list-style-type: none"> ▪ using new and different approaches to make a point 	<ul style="list-style-type: none"> ▪ using the same argument over and over (“I told them again and again but they just didn't get it”)
<ul style="list-style-type: none"> ▪ considering the point of view of the other people involved so that you will know how to bring them on-side 	<ul style="list-style-type: none"> ▪ telling it “like it is” from your own point of view and blaming the other person if they don't respond as you would like
<ul style="list-style-type: none"> ▪ thinking about how people will respond before you present an argument or some information 	<ul style="list-style-type: none"> ▪ thinking exclusively about your own needs and not considering the needs of those to whom you are talking
<ul style="list-style-type: none"> ▪ anticipating an opportunity and then positioning it so that both sides see the benefit 	<ul style="list-style-type: none"> ▪ missing opportunities or presenting opportunities without emphasizing the benefits to each side
<ul style="list-style-type: none"> ▪ building support for your position over time by developing relationships, testing ideas, and finding allies 	<ul style="list-style-type: none"> ▪ being so concerned of the value that you see in your position that you neglect others' concerns or feedback over time
<ul style="list-style-type: none"> ▪ considering specific situations, areas of potential resistance and identifying strategies that will achieve the desired outcome 	<ul style="list-style-type: none"> ▪ trying to convince a group of colleagues by relying exclusively on facts and logic in your arguments

Continued on next page

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none">▪ considering the situation and personality of each client and identifying what will work to convince them (using simple examples, involving a third party, being formal or informal)	<ul style="list-style-type: none">▪ giving up after a single attempt at trying to convince someone ("they didn't seem to care so I didn't even try")
<ul style="list-style-type: none">▪ drawing on a variety of people, including outside experts, to set the stage for getting your ideas accepted	<ul style="list-style-type: none">▪ working to convince a group of colleagues by relying exclusively on facts and logic in your arguments
<ul style="list-style-type: none">▪ meeting with key decision-makers before an important meeting to solicit input and gain support	<ul style="list-style-type: none">▪ relying solely on decision makers' formal authority to expedite a major decision
<ul style="list-style-type: none">▪ preparing for meetings by considering the needs of the audience and tailoring your presentation accordingly	<ul style="list-style-type: none">▪ presenting points that are not relevant to your audience's (manager, staff or customer) situation and needs
<ul style="list-style-type: none">▪ identifying areas of potential resistance and developing strategies to overcome the resistance and achieve the desired outcome	<ul style="list-style-type: none">▪ thinking that any issues will resolve themselves

Developmental Activities

Level 1-2 Activities

Think about the process of getting to the result, not just the end result.

- Don't let your eagerness to achieve a certain result be a barrier to achieving it.
- When people seem reluctant to buy in to a good idea, instead of thinking about how great the end result will be, focus on the process, which will put you on the right track of thinking about the people involved and how you need to persuade or influence them.

Use simple persuasion techniques.

- Spend at least one hour per week reviewing policies and procedural information to ensure that the information remains fresh in your mind and that you are able to use it effectively when working with clients or colleagues.
- Establish key messages that you can use when advocating for clients.
- Take time in preparing your data, facts and detail pieces before putting your suggestions forward to the agency, family or clients. Prepare your presentation in a way in which it communicates the information clearly and logically.

Do a dry run before presenting an important issue or idea.

- If you do not know how people will react to a planned idea or proposal, do not be afraid to ask a few team members first.
- Take note of their response and plan how you will adjust or reframe your proposal to have the intended impact.

Invite your supervisor/manager to observe you in a meeting or an interaction with a client/family where you know you will need to be persuasive.

- Get detailed feedback on how you performed in terms of Advocating for Others.
- Ask for his or her observations on how the audience reacted in the meeting.

Reflection Tip:

- * Compare his/her feedback with your own sense of the audience's reactions.
- * If there are differences, discuss them.

Ask some of your peers whom you trust and respect to give you feedback on your ability to Advocate for Others.

- Use the following guidelines when asking for feedback:
 - ⇒ What have they observed that makes you successful in advocating for others (ask them for specific examples)?
 - ⇒ What areas do you need to work on?
 - ⇒ What suggestions do they have to help you improve on how you advocate for the clients and families you serve?
 - ⇒ Practice. Look for opportunities to give speeches and presentations.
 - ⇒ Volunteer to be a guest speaker at a community event for a topic that you are passionate about.
 - ⇒ Present an information session to other colleagues in your agency.

Reflection Tips:

- * Compare their feedback with your own self evaluation.
- * Keep track of the areas that they mention. Track progress over the next couple of months. Go back to those individuals in 3-6 months, and ask if they've noticed an improvement.

Develop your speaking style to better persuade others.

- Record yourself next time you make a presentation to a group. (Be sure to get the group's permission before you tape the session.)
- Review the tape and ask yourself:
 - ⇒ Did the tone and pattern of my voice match my words and the meaning I was attempting to convey?
 - ⇒ Did the pace of my speaking make communication clear?
 - ⇒ Did I use a level of language that was appropriate to my audience (e.g., did I use unnecessary technical jargon that my audience might not have understood?)?
 - ⇒ Could I have said or done anything different to have made my presentation more powerful and persuasive?

Reflection Tips:

- * Review what it was that you actually said. Ensure you were precise and used specific evidence to support your ideas. If you didn't, reflect on what alternative methods could have been used.
- * Ask peers if their ideas/information were clearly presented – ask for their input as to how their concepts/ideas could have been presented more clearly or with greater impact.

Flowchart your presentation/information.

- Think about the information you want to present or communicate to your audience. Is there a logical flow?
- Start with your more general points and then “narrow the funnel” to provide more specific detail.
- Once you have created the flowchart, review it to ensure that you have not missed any steps which, although they may seem obvious to you, may be critical to your audience’s understanding.
- Rehearse your presentation and think about the connections you may need your audience to make in order to gain their agreement. Once you have identified which connections are most critical, you can plan a couple of different ways of helping your audience make these connections.

Observe other people who you feel are skilled in advocating for or influencing others.

- Ask for guidance from your colleagues on how you might improve your advocating and influencing abilities.
- Before observing others, pause to consider which techniques you use most frequently, and the degree of success that you achieve with each of them.
- Ask questions to understand why they chose the activities/techniques they did. Ask questions about techniques they chose not to use – why were those not appropriate for this situation?
- Identify the activities or techniques they use in encouraging people to follow a course of action.
- Make a list of the techniques/actions the individual uses during your period of observation, and then discuss this list with the person.

Reflection Tips:

- * *Pause to consider the degree of success they achieved with each of their influencing techniques.*
- * *Think about your own comfort zone – which of the techniques would you be comfortable using? How could you adapt/use pieces of the techniques? Remember that they may feel stilted when you initially try to use them – you may want to practice them with colleagues or friends first.*

Consider the following more advanced persuasion techniques.

- Role play difficult conversations (with colleagues or your manager) where you must advocate for the client. Seek feedback about your effectiveness.
- Use multiple concrete examples, visual aids, demonstrations, witnesses or written/oral testimonials, etc., in order to persuade.

Develop your skills in preparing and delivering motivational and engaging speeches and presentations

- Be precise and use specific evidence to support your ideas. Use multiple examples to illustrate your key points. Analogies and metaphors are also helpful in building clear pictures in the minds of your audience.
- Close your presentation by repeating your key ideas. Recall the purpose of your presentation and the images you have used.

Develop an influence plan to establish common ground between the agency's needs and the needs of the clients

- During the planning stage, spend plenty of time identifying who you must get support from and how you can most effectively influence them.
- Until this becomes second nature, outline the steps you will take and what you will communicate in your approach to all the key players. Review and follow this influence plan as you proceed to accomplish your objective.

For any given initiative, develop a “Plan B” (and even a “Plan C”)

- Identify alternative actions/tactics for gaining approval.
- Determine alternative resources.
- Consider the costs and benefits of not taking any action.
- Consider all the pros and cons of the course of action you are recommending.

Reflection Tip:

** Are there any different arguments that could be used to support your proposition?
From your point of view, could the proposition be presented differently?*

Reflect on the outcome of your attempts to convince others after meetings/presentations and think of additional actions you could have taken to have changed the outcome

- Realistically assess how successful you have been.
- If possible, take additional action. If not, commit yourself to using better and more influential techniques next time.

Reflection Tips:

* *What worked well? What didn't work well? Why?*

* *Constant practice and on-going reflection on what you did will lead you to develop higher levels of this competency.*

Ask your manager/supervisor for an opportunity to prepare and present a proposal to senior management

- Share your ideas about Advocating for Others with your manager before the meeting. Incorporate his/her suggestions.
- Remember to ask for feedback after the presentation.
- Over-prepare for the presentation and plan multiple strategies.

Reflection Tip:

* *Keep track of the techniques you used, and the reaction to them.*

Talk to people who are highly influential

- Ask them about specific situations and what they did or would do.
- Ask them for their top three skills they bring into every influencing situation.

Reflection Tip:

* *You will find that influential people think a lot about how others will respond and are thoughtful in selecting an approach that will achieve the desired result.*

Form a group with colleagues to share successful experiences and best practices in Advocating for Others

- Identify specific situations and the techniques that lead to successful outcomes.
- Recognize the specific techniques and behaviours others have used that have resulted in success.
- Prepare ideas or something actionable that can be shared with others (e.g., a tip sheet).

Reflection Tips:

- * *Gather information from your colleagues. Which techniques do others find are most effective?*
- * *Ensure that the techniques used are in line with organizational values.*
- * *Were their experiences successful for you? Reflect on why or why not?*

Level 3 -4 Activities

Try to understand a point of view that is different than your own

- After an interaction with a person who has disagreed with your position, try to put yourself in his or her shoes. Imagine what that person was thinking or feeling at the time.
- Determine whether you can summarize their concerns.
- Think about what information or approach you could use to address their concerns.
- Consider what you could say that will make them feel that you understand their concerns and can see things from their perspective.
- Then use the information you have gathered to try another persuasion attempt.

Carefully plan your influence strategy

- When trying to advocate for or persuade someone, take into account his/her background and perspective.
- Think about his or her needs and issues.
- Tailor your arguments to these aspects rather than to what is important to you.
- Present your solutions in a logical order from least important point to most critical, pertaining to the audience's needs/issues.
- Reiterate how you have taken into account the listener's perspective before finishing your presentation.
- Customize your data or information.
- When you use data or information to substantiate your position on something, make sure that it addresses issues of specific interest to your audience.
- Do not forget to emphasize how the information you use addresses their specific interests.
- Choose carefully the appropriate medium with which to make your impact. Is an e-mail followed by a phone call appropriate or should this be face-to-face?

Adjust your communication style to best fit the individual based on their style, background, or job level

- Ask a manager to identify a situation where they had to modify their communication style to fit an individual.
- Have him/her outline the nature of the situation and the approach they used.
 - ⇒ Why was it effective or not effective?
 - ⇒ What worked and why?
 - ⇒ What could they have done differently?
- Identify a current or future situation in which you will have to adapt your communication style to fit an individual.
- Determine your approach using information from your conversations with your manager. Pay attention to unspoken concerns, to ensure you have a complete understanding of the individual's needs.

Analyze your audience before a presentation in order to win support from others. Consider the following:

- ⇒ What are the main questions or concerns your audience has? List these concerns.
- ⇒ Identify two or three of the benefits your audience will derive from what you are proposing.
- ⇒ Speak to other people who may know how you can get your ideas accepted by your audience.
- ⇒ Anticipate the objections or arguments your audience will have.
- ⇒ Write down two possible responses for each objection or argument.
- Provide a brief overview or summary of the information you will be presenting before you discuss your main ideas.
- After the presentation, think of additional actions you could have taken to have improved the outcome, even if the presentation was a success.
- If possible, follow up on these actions. If not, commit yourself to using them in your next presentation or discussion.

Reflection Tip:

* Reflect after the meeting about how accurate your analyses were. What was accurate, what wasn't? Why? What would you do differently next time?

Understand the importance of informal power structures

- Become a student of recognizing who the “real” decision makers are in your department/agency/sector.
- Establish relationships with colleagues who have access to key players or thought leaders.
- Take a long-term approach to influencing a key decision-maker or client, strategically building relationships and support from those throughout the network in order to positively impact the decision/client.

Create a network by modeling co-operation with your peers

- Foster a co-operative relationship by being sensitive to times your peers need your help and responding; even when the issue may be of no direct interest to you.
- Draw on this co-operative relationship when you need support to get something done in the future.

Draw on authorities when making your point

- In order to establish credibility when presenting ideas about a subject, consider citing a manager, respected individual or expert third party who shares your point of view.
- If your audience agrees that this individual is a source of authority, refer to him/her frequently as supportive of your perspective and consider asking them to be present when you anticipate opposition.
- The authority does not have to be a manager. It could be a colleague or a third-party source (e.g., a publication, well-known academic scholars, or a reliable set of statistics).

Learn to influence through others

- Lay the groundwork for presentations or important meetings by holding “pre-selling” sessions with key stakeholders who will need to be influenced. This will help you gain a keener insight into any particular objections or resistance that exists, so you can address these issues thoroughly instead of having to address them in the moment.
- Identify key influencers affecting you and your area. Assess the quality of your relationships with them and, where necessary, develop a plan to improve particular relationships. Think about ways you can use them to further impact the work that you do.

In the face of resistance use your bench strength to your advantage

- Write down the names of each of the individuals who presently support your idea and those who do not.
- Solicit the assistance of those who support your idea in persuading the others. This may include asking them to speak directly to the opponents or asking for their suggestions for the best way to persuade them.
- If some opponents to the idea cannot be persuaded in this manner, identify individuals not involved in the decision who have strong relationships with the opponents and solicit the same assistance from them.
- Try these new strategies and make note of what works best.

Reflection Tip:

** Share your indirect influence strategies with your manager. Do they have any additional suggestions?*

Level 5 Activities

Develop your sense of appropriate timing when considering a complex proposal or implementation of a large scale initiative

- Consider some of the following suggestions:
 - ⇒ Think about what else is going on in the agency or sector. How does the timing of your initiative relate to other key priorities?
 - ⇒ Draw a timeline on a piece of paper.
 - ⇒ Visualize the end outcome as well as the logical starting point.
 - ⇒ Fill in what you perceive to be the key milestones that need to be accomplished to reach the desired outcome.
 - ⇒ Identify whose support you require to implement your ideas by reviewing an organizational chart and indicating the key decision-makers, gatekeepers, and influential supporters at each milestone.
 - ⇒ Identify the informal lines of communication to which you have access.
 - ⇒ Track your progress by comparing actual outcomes to your original timeline and key milestones.

Reflection Tip:

** Gather information about the current priorities of the key decision makers. Does your timeline align with their priorities?*

Get comfortable working with a long time horizon

- It can take years for a good idea to be accepted. Keep this in mind when you are trying to persuade the organization to make a major change.
- Plan a strategic approach for accomplishing your objective that includes periodically sharing milestone checklists with a manager to keep you on task.
- Do not give up on your good ideas if there seems to be little progress and ask your manager to share their coping strategies for dealing with slow decision-making authority.
- Continue to build behind the scenes support and stress to others that it might be a long time before the idea can move forward and not to be discouraged.

Reflection Tips:

** Ask your manager about their experiences with large scale changes – how long on average have they had to work at it before it yielded results?
* It might help to keep a journal so that you can keep track of the stories shared by your manager, as well as where they now stand on the issue.*

Develop your negotiating style with others by following this exercise:

- Identify an opportunity to negotiate an issue with someone.
- Consider your usual or typical negotiating style based on one of the categories below (be “brutally honest” with yourself):
 - ⇒ **Win/Lose:** where you typically see yourself winning and the other party losing in the process;
 - ⇒ **Lose/Lose:** where you typically see both yourself and the other party losing in the process;
 - ⇒ **Lose/Win:** where you typically see yourself losing or giving in during the process;
 - ⇒ **Win/Win:** where you typically see both yourself and the other party being satisfied with the outcome of the process.
- Think about the other party’s position. What will his or her key points be? How will you respond?
- Meet with someone whose negotiating skills you would classify as win/win.
 - ⇒ With this person, review the current situation and your typical approach to negotiating.
 - ⇒ Ask how you and the other party can move closer to a “win/win” agreement.
 - ⇒ Practice the negotiation.
 - ⇒ Meet with the other person(s) to negotiate, using the feedback you received during your conversation.
 - ⇒ Find a goal which both you and the other person can agree and focus on, and maintain the focus on the common objective.
 - ⇒ Monitor your own thoughts and feelings throughout the discussion. Note the reactions you are having to what the other person says. Use this information to help you manage the negotiation process.

When implementing any new strategy or major initiative, consider the impact on all those involved, both internally and externally

- Identify the individuals or groups impacted and keep them informed.
- Whenever possible, make a personal visit to key influencers and stakeholders and talk to them about:
 - ⇒ the current changes
 - ⇒ the importance of these changes
 - ⇒ what the changes mean to them
 - ⇒ how they can become involved in the transition
- Actively solicit the advice and commitment of key stakeholders before implementing the new strategy or initiative.
 - ⇒ Remember that different stakeholders will have different issues and needs. Once you have the information, take some time to consider the ways in which you can best meet the priority needs of each group, while still maintaining a workable solution or proposal.
- Ask key stakeholders to actively promote the new strategy or initiative on your behalf. Justify your request to them - sell them on the changes so they can sell others.

Books and Videos

The Power of Persuasion: How We're Bought and Sold, by Robert V. Levine (John Wiley & Sons, 2006).

This book offers an incisive new take on the mindsets of those who prod, praise, debase, and manipulate others to do things they never thought they'd do – and are sometimes later sorry they did.

Presenting to Win: The Art of Telling Your Story, by Jerry Weissman, (New Edition: Prentice Hall, 2006; Original: Financial Times Prentice Hall, 2003).

It's time to learn how to make your presentations unforgettable and irresistible. This book shows readers how to connect with even the most high-level audiences and transform presentations from dry recitals of facts into compelling stories with a laser-sharp focus on what matters most: what's in it for the audience.

The Story Factor: Inspiration, Influence, and Persuasion through the Art of Storytelling, by Annette Simmons (New Edition: Basic Books, 2006; Original: Basic Books, 2002).

Showcasing over a hundred examples of effective storytelling drawn from the front lines of business and government, as well as myths, fables, and parables from around the world, Simmons illustrates how story can be used to persuade, motivate, and inspire in ways that cold facts, bullet points, and directives can't.

Influence without Authority, by Allan R. Cohen and David L. Bradford (John Wiley and Sons, 2005).

This classic work, now revised and updated, gives you powerful techniques for cutting through interpersonal and interdepartmental barriers, and motivating people to lend you their support, time, and resources. It presents a clear model and effective, practical strategies for convincing and influencing those around you in order to accomplish important workplace goals-to the benefit of you, your colleagues, and your organization.

Leadership, by Rudolph W. Giuliani (New Edition: Hyperion, 2005; Original: Talk Miramax Books, 2002).

This highly anticipated book from New York's once controversial, now beloved former mayor opens with a gripping account of Giuliani's immediate reaction to the Sept. 11 attacks - including a narrow escape from the original crisis command headquarters - and closes with the efforts to address the aftermath during his remaining four months in office.

Changing Minds: The Art and Science of Changing Our Own and Other People's Minds, by Howard Gardner (Harvard Business School Press, 2004).

Drawing on decades of cognitive research and compelling case studies—from famous business and political leaders to renowned intellectuals and artists to ordinary individuals—Gardner identifies seven powerful factors that impel or thwart significant shifts from one way of thinking to a dramatically new one.

Face to Face Communications for Clarity and Impact, by Harvard Business School Press Staff (Edited by Harvard Business School Press, 2004).

Culled from Harvard Business School Publishing's respected newsletters *Harvard Management Update* and *Harvard Management Communication Letter*, this text offers tips on eye contact, asserting oneself in uncomfortable situations, speaking directly, and giving constructive criticism, this is the essential guide to using the spoken word more effectively.

How To Prepare, Stage, and Deliver Winning Presentations, by Thomas Leech (New Edition: AMACOM, 2004; Original: AMACOM, 1993).

This book will show you how to make your presentations more effective, speed up the frequently tedious and costly process of putting together a presentation, and make the giving of the presentation itself a much more enjoyable experience for you and your audience.

Brag! The Art of Tooting Your Own Horn Without Blowing It, by Peggy Klaus (Warner Books, 2003).

A renowned communication expert introduces a subtle and effective way of selling your best asset – yourself – without turning off those you're trying to impress.

Difficult Conversations: How to Discuss What Matters Most, by Douglas Stone, Bruce Patton and Sheila Heen (The Penguin Group, 1999)

Based on fifteen years of research at the Harvard negotiation Project, *Difficult Conversations* walks you through a proven step-by-step approach for how to have your toughest conversations with less stress and more success. It shows you how to prepare yourself; how to start the conversation without defensiveness; and how to keep it constructive and focused regardless of how the other person responds.

Franklin and Winston: An Intimate Portrait of an Epic Friendship (John Meacham, 2003).

This book chronicles the friendship of Franklin Roosevelt and Winston Churchill, two of the most influential men of the 20th Century. The author makes the point that, were it not for this close bond between the two great leaders of the Western democracies, the entire history of World War II, and the subsequent peace, might have been quite different.

Leading Out Loud, by Terry Pearce (New Edition: John Wiley & Sons, 2003; Original: Jossey-Bass Publishers, 1995).

*In this book you will **not** learn how to gesture effectively or use meaningless sound bites to please an audience. You will learn that the power to move lies in authentically tapping your own values and experiences in preparing a speech, and making sure that what you say conforms to what you believe, even when it displeases your audience.*

Talk Your Way to the Top: How to Address Any Audience Like Your Career Depends on It, by Kevin R. Daley, Laura Daley-Caravella, (McGraw-Hill Trade, 2003).

This book is about people who have to speak in front of critical listeners as part of their business lives, and introduces you to a number of situations common to everyday business. It then details the skills you need to communicate without fear and make the best impression – whether you are speaking to an audience of 1 or 1,000.

Maxwell 3-in-1: The Winning Attitude, Developing the Leaders Around You, Becoming a Person of Influence, by John C. Maxwell (Thomas Nelson, Inc., 2003).

This all-inclusive volume contains three books in one. Maxwell 3-In-1: The Winning Attitude, Developing the Leaders Around You, Becoming a Person of Influence from John C. Maxwell reveals how individuals can expand their abilities and develop leadership qualities. The volume covers a lot of ground, from interacting with people more effectively and communicating more efficiently, to adopting positive and helpful attitudes.

Words That Change Minds, by Shelle Rose Charvet (New Edition: Success Strategies, Inc., 2003; Original: Kendall/Hunt Publishing Company, 1997).

This book provides technology that will help you recognize how a person is motivated (or motivates himself), and how a person would like to organize their work. It is clear that once you have information, it becomes “easy” to organize work in such a way that they get the kind of job that will fit.

Working the Room: How to Move People to Action through Audience-Centered Speaking, by Nick Morgan (Harvard Business School Press, 2003).

This book illustrates a practical, three-part process—focusing on content development, rehearsal, and delivery—geared toward engaging an audience on every level: emotional, intellectual, and physical.

Crucial Conversations: Tools for Talking When Stakes are High, by Kerry Patterson, Joseph Grenny and Ron McMillan (McGraw-Hill, 2002).

This book offers readers a proven seven-point strategy for achieving their goals in all those emotionally, psychologically, or legally charged situations that can arise in their professional and personal lives.

The Power of Corporate Communication: Crafting the Voice and Image of Your Business, by P.A. Argenti and J. Forman (McGraw-Hill, 2002).

Corporate communication involves much more than just motivating employees and dispensing good PR. It represents a tool to be leveraged and a process to be mastered. *The Power of Corporate Communication* shows managers and executives how to communicate effectively with fellow employees from the mailroom to the boardroom, and even between organizations and across industries.

Getting Things Done When You Are Not in Charge, by Geoffrey M. Bellman (2nd Edition: Berrett-Koehler Publishers, 2001; Original: Berrett-Koehler Publishers, 1993).

This book shows readers how to make things happen in any organization regardless of their formal position. The book shows how to use the author's "Getting Things Done" model to accomplish great things right now, right where you are.

The Influence Edge: How to Persuade Others to Help You Achieve Your Goals, by Alan Vengal (Berrett-Koehler Publishers, 2001).

This book shares the lesson that to be successful, the ability to influence others – especially others over whom you have no control – is a must. You have to build alliances and persuade people, not boss them around. The ability to influence people isn't something you're born with – it's a skill that you can acquire.

The Power of Indirect Influence, by J.C. Tingley (AMACOM, 2001).

This insightful book looks at ways people can alter their communication skills to exercise influence over other people. It teaches a six-step program for readers to determine whether a person should use indirect or direct influence in any given situation. The author reveals the dynamics of influence and power. It also teaches readers to recognize what motivates others.

The Persuasion Handbook: Developments in Theory and Practice, by James Price Dillard and Michael Pfau (Sage Publications, 2001).

This handbook provides readers with cogent, comprehensive summaries of research in a wide range of areas related to persuasion.

Say it With Charts: The Executive's Guide to Visual Communication, by Gene Zelazny (McGraw-Hill Trade, 2001).

A chart that once took ten hours to prepare can now be produced by anyone with ten minutes and a computer keyboard. What hasn't changed, however, are the basics behind creating a powerful visual - what to say, why to say it, and how to say it for the most impact. In this book, Zelazny reveals time-tested tips for preparing effective presentations.

Winning 'Em Over: A New Model for Managing in the Age of Persuasion, by Jay A. Conger (Simon and Shuster, 2001).

In this book, Conger champions the cause of "teamwork" over "hierarchy" as the proper paradigm for effective leadership in our changing corporate environment. The key, he writes, is using constructive forms of persuasion rather than old-style methods of command to gain levels of commitment and motivation that otherwise might prove unattainable. Conger lays out four steps--building credibility, finding common ground, developing compelling positions, and connecting emotionally--that he contends will help managers more effectively direct their employees toward this goal.

Exercising Influence: A Guide for Making Things Happen at Work, at Home, and in Your Community, by B. Kim Barnes (Barnes & Conti Associates, Inc., 2000).

This book contains practical ideas and tools for exercising influence in all aspects of life to accomplish more with less effort. Readers will learn how to create work, family, and community relationships that are more balanced and mutually rewarding, and to take charge of their lives in a powerful, ethical, and productive way.

Artful Persuasion: How to Command Attention, Change Minds, and Influence People, by Harry A. Mills (AMACOM, 1999).

The book provides fresh insights and practical guidelines that peel away the mystery behind the elusive art of persuasion. This book reveals how the world's most persuasive politicians, advertisers, salespeople, and spin doctors work their magic.

Influence: The Psychology of Persuasion, by Robert B. Cialdini (New Edition: Quill, 1999; Original: Harper Collins: 1993).

This book explains the six psychological principles that drive our powerful impulse to comply to the pressures of others and shows how we can defend ourselves against manipulation.

How to Win Friends and Influence People, by Dale Carnegie (2nd Edition: Pocket, 1998; Original: Simon & Schuster, 1982) – also available on audio CD.

This is a classic book on influencing others that provides helpful information for you to develop this competency.

Becoming a Person of Influence: How to Positively Impact the Lives of Others, by John C. Maxwell and Jim Dornan (Thomas Nelson, 1997) – also available on audio CD.

A motivational text on self-improvement, Becoming a Person of Influence provides the reader with the necessary information about personal development in order to become a successful leader, mentor and/or manager with the ability to motivate and influence others.

Building Strategic Relationships, by William Bergquist, Jule Between & David Muel (Jossey-Bass Publishers, 1995).

This book shows how successful alliances are launched, developed, and concluded within the corporate world and between corporate entities.

Credibility: How Leaders Gain and Lose It, Why People Demand It, by James M. Kouzes & Barry Z. Posner (Jossey-Bass Publishers, 1995).

This is a guide to help managers understand the fundamental importance of credibility for building personal and organizational success, and for fostering trust within work, family and the community.

Successful Negotiation: Effective 'Win-Win' Strategies and Tactics, by Robert B. Maddux (Crisp Publications Inc., 1995).

This book reviews concepts that can be applied in any negotiation situation.

Getting to Yes: Negotiating Agreement Without Giving In, by Roger Fisher and William L. Ury (Penguin Books, 1994) – also available on audio CD.

This book provides direct methods for negotiating in personal and work-related situations. It also provides helpful techniques for resolving conflict and making a positive impact.

Getting Past No: Negotiating Your Way from Confrontation to Co-operation, by William Ury (Bantam Books, 1993) – also available on audio CD.

A practical 5-step method for negotiating with anyone - even the most difficult person who won't say "yes".

Managing at the Speed of Change, by Daryl Conner (Villard Books, 1993).

High level Impact and Influence is often closely related to the management of change. Daryl Conner, a long time practitioner of change management, looks at how people respond to change. These insights can be helpful in learning when and how to convince people.

You've Got to be Believed to be Heard, by Bert Decker (Griffin, 1993).

This book yields improved public speaking - selling of products, ideas and individuals. Included are techniques that hold the audience's attention.

The video, "Conveying Information", by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).

Get your listener's attention and keep it. How to get the attention of your listeners using three simple techniques. How to organize your information to make it easy for the listener to understand. How to check for an understanding and make sure the other person has received your message accurately.

The video, "Exercising Personal Power", by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).

This video shows how to influence others to gain better positioning. How to appreciate the limitations of position power. How to use your skills, knowledge, experience, qualifications and expertise to influence others. How to influence people by offering 'rewards'.

The video, “Getting to Yes – Video Workshop”, by Learncom (International Tele-Film, 1-800-561-4300, www.itf.ca).

Based on the international best-seller and featuring Dr. Roger Fisher, William Ury and Bruce Patton of the Harvard Negotiation Project and Conflict Management Inc. This two-video program demonstrates a pragmatic and systematic approach to implementing interest-based negotiation, a powerful strategy for effectively pursuing your interests while simultaneously building long-term relationships.

The video, “I Wasn’t Prepared For That”, by Video Arts (International Tele-Film, 1-800-561-4300, www.itf.ca).

Presentations must be tailored to suit the intended target audience. This program shows viewers how to prepare a presentation for a variety of audiences by giving them simple rules to develop confidence in planning and making presentations.

The video, “Stand and Deliver”, by Mind Resources (International Tele-Film, 1-800-561-4300, www.itf.ca).

This entertaining, step-by-step guide to improving your presentation skills reveals easy techniques to improve your confidence, vocal skills, body language, content relationship with your audience, use of technology - and management of nerves!

The movie, “Akeelah and the Bee”.

A young girl from South Los Angeles tries to make it to the National Spelling Bee.

The movie, “Erin Brokovich”.

Based on the real-life story of the title character played by Julia Roberts. Brokovich is a feisty legal clerk (watch how she gets her job!) who is instrumental in exposing the misdeeds of a powerful corporation which has exposed families to disease-causing industrial residue. Watch how she impacts her boss, the opposing legal teams and the individual families and community affected by the residue.

The movie, “Gandhi”.

Observe how one individual tries to influence a society and what happens.

The movie, “Glory”.

This film is the story of the first black regiment recruited to fight in the Civil War. Notice the level of Impact and Influence the Colonel has on the regiment.

The movie, “Gung Ho”.

An illustration of more and less effective means of influencing people and organizations.

The movie, “Hoosiers”.

The coaching style of influence is evident in this movie about a basketball team.

The movie, “Man Without A Face”.

This movie stars Mel Gibson who provides a positive influence on a boy by capturing his imagination and interest in creative ways.

The movie, “Mona Lisa Smile”.

In this movie, Julia Roberts plays the role of Katherine Watson a non-conformist teacher at a private school who encourages her students to pursue their individuality.

The movie, “Mr. Holland’s Opus”.

This film is about a composer who takes up teaching music. Notice how he uses Impact and Influence with his students.

The movie, “Patton”.

This is the classic movie on Persuasive Influence. It shows how one individual was able to mobilize thousands to change the course of the Second World War.

The movie, “Remember the Titans”.

In this movie, Denzel Washington plays the role of Coach Boone, the newly hired head coach of the Titans high school football team and is set in 1971 during the time of forced integration in the South of the United States. Watch how the displaced head coach Yost, who was white, stayed on reluctantly, as an assistant coach, just to keep the original team from walking off.

The movie, “Runaway Jury”.

In this movie, based on a John Grisham novel, watch how the character played by Gene Hackman hand picks a jury and attempts to control the verdict they deliver. Equally impressive in their impact and influence skills are the characters played by John Cusack and his accomplice Rachel Weisz who swing the jury to a totally different end result than that desired by Hackman.

The movie, “The Shawshank Redemption”.

This is a movie about prison life. Notice the Impact and Influence Andy has on the warden, the guards and on his fellow prisoners.

The movie, “Silkwood”.

Take note of the impact and influence skills Meryl Streep among her co-workers, the organization and authorities.

The movie, “Twelve Angry Men”.

Watch the Jimmy Stewart character influence the other jurors to reconsider the evidence. The setting is a jury deciding on a murder case - the first vote is 11 guilty and 1 not guilty; by the end the verdict is not guilty.

The movie, “Twelve O’clock High”.

In this classic move, pay particular attention to the influence efforts of General Prichard on Frank Savage as contrasted with the less effective attempts of Keith Davenport on Savage.

The movie, “Wall Street”.

This movie depicts a person in the midst of multiple sources of influence, and shows how effective some techniques can be.

The movie, “Working Girl”.

This film demonstrates how the Melanie Griffith character changes the way she is perceived in the organization by putting forward her ideas to the right people.

Collaboration (COLL)

Definition:

Collaboration is about communicating with others both within one's team as well as with individuals, agencies and organizations outside one's immediate work area or span of control (e.g., with community partners and stakeholders) to create alignment within and across groups. It is not only encouraging but expecting collaborative efforts and information sharing across agency/organizational lines toward shared outcomes.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ working co-operatively with team members, clients, families, stakeholders and community partners to reach common goals 	<ul style="list-style-type: none"> ▪ assuming others will support your own objectives
<ul style="list-style-type: none"> ▪ demonstrating personal commitment towards team goals 	<ul style="list-style-type: none"> ▪ putting personal goals ahead of team goals
<ul style="list-style-type: none"> ▪ encouraging the exchange of information and flow of ideas with others 	<ul style="list-style-type: none"> ▪ using excuses (e.g., time, cost) as ways to exclude others from discussion or adding their ideas to the project
<ul style="list-style-type: none"> ▪ keeping others informed and up-to-date about any relevant or useful information 	<ul style="list-style-type: none"> ▪ attending team meetings without contributing
<ul style="list-style-type: none"> ▪ defending the team's reputation when others criticize 	<ul style="list-style-type: none"> ▪ keeping quiet or ignoring critical comments about your team members
<ul style="list-style-type: none"> ▪ showing respect for team members by speaking of them in positive terms 	<ul style="list-style-type: none"> ▪ expressing negative expectations and opinions of team members
<ul style="list-style-type: none"> ▪ bringing group issues out in the open which may be personally threatening or difficult to deal with 	<ul style="list-style-type: none"> ▪ only offering opinions on others' behaviour without being willing to examine your own short comings
<ul style="list-style-type: none"> ▪ regularly soliciting input in team meetings or circulating reports for comments; then amending reports or actions as a result of the input 	<ul style="list-style-type: none"> ▪ going through the motions of soliciting input but never applying or synthesizing the information gathered
<ul style="list-style-type: none"> ▪ seeking the skills, ideas and viewpoints of other team members 	<ul style="list-style-type: none"> ▪ choosing to work on your own to finish the job rather than seeking the assistance of others

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<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ showing respect for others' intelligence by integrating their perspective into project plans and tasks 	<ul style="list-style-type: none"> ▪ believing that what others have to say is irrelevant and inappropriate
<ul style="list-style-type: none"> ▪ being willing to help resolve conflict among team members 	<ul style="list-style-type: none"> ▪ preferring to be left alone to get on with your work
<ul style="list-style-type: none"> ▪ willingly sharing work and knowledge with others 	<ul style="list-style-type: none"> ▪ withholding information or ideas
<ul style="list-style-type: none"> ▪ supporting and encouraging other team members when they make a contribution 	<ul style="list-style-type: none"> ▪ engaging in win-lose competition with other members of the team
<ul style="list-style-type: none"> ▪ supporting and encouraging team members 	<ul style="list-style-type: none"> ▪ placing blame or making judgements about other team members
<ul style="list-style-type: none"> ▪ removing organizational obstacles that might impact the team's effectiveness 	<ul style="list-style-type: none"> ▪ being ignorant to team conflict and ignoring questions to help move the team forward
<ul style="list-style-type: none"> ▪ organizing special events with the express purpose of promoting a sense of "team" 	<ul style="list-style-type: none"> ▪ focusing on ensuring each individual does his/her own job and avoiding "time wasting" team meetings or "frivolous" get-togethers

Developmental Activities

Level 1-2 Activities

Work to improve the functioning of your team.

- Assist team members to understand one another better.
- Share information about work being done; discuss work histories, specific skills, successes and talents of others.

Demonstrate cooperation in working with others.

- Place emphasis on listening actively, drawing out the interest, concerns, needs and objectives of others.
- Demonstrate that you are listening and taking others seriously by restating what you are hearing and reflecting back your understanding of what others are communicating.
- Avoid taking control of the agenda, or being the first to make suggestions, instead, try playing different roles within the group.
- Even when engaged in task-related discussions or meetings, place extra emphasis on listening actively.
- Openly address and seek support to resolve conflict among team members as soon as it surfaces.
- Emphasize people's common goals and how everyone depends on each other.

Seek feedback from your employees, colleagues and manager on your collaboration behaviours.

- Ask a colleague to observe and critique your performance in team settings.
- Ask for and note his or her observations and perceptions of when you have effectively collaborated to solve problems, and when you have missed opportunities to do so.
- Analyze your colleague's feedback in relation to your own analysis of your behaviour to identify patterns or tendencies you exhibit that impede effective collaboration.
- Take measures to improve upon those actions
- Develop an action plan for positive change and monitor your progress by asking for periodic feedback on your overall effectiveness as a team member.

Keep a record of your contributions in meetings, informal team gatherings, and other team settings for one month.

- Determine your overall impact in each situation.
 - ⇒ Did you contribute a great deal or very little?
 - ⇒ Was the effect of your participation positive, negative, or neutral?
 - ⇒ Write down why you think your participation turned out to be positive, negative or had no impact.
- Closely scrutinize your attitudes and behaviours in team situations. Add to the lists above to gain a clearer understanding of your level of effectiveness in team situations.
- Evaluate and determine the reasons for your performance.
- Seek additional information to either confirm or challenge the conclusions you have drawn about your own behaviour.
- Develop an action plan for positive change.

Spontaneously offer to help someone.

- Make a little time to help a team member, especially if there is someone new in your work area or span of control.

Reflection Tip:

** By helping others, you will establish good will with your team members so that they will be willing to return the favour in the future.*

Emulate a role model.

- Work with your manager/supervisor to identify someone in the team or agency who demonstrates a capacity to be an excellent team player.
- Arrange to spend time with this person. Observe this person and make note of what they do to encourage, facilitate and support collaboration and team morale.
- If the person is on the same team as you, ask him/her to observe you and give you feedback and suggestions about how you could improve your collaboration skills.
- Hold follow-up meetings for feedback and additional coaching at least quarterly to track your progress and maintain your motivation.

Reflection Tip:

** Does the individual have specific developmental suggestions for you? Are you surprised by any of your areas that need development? Why?*

Listen productively during team meetings.

- Don't answer your own questions; practice remaining silent for at least 10 seconds after you ask a question.
- If you disagree with someone in a team meeting, first acknowledge that person's point of view before offering your opinion.
- Summarize objectively differing points of view on issues and explicitly acknowledge that there is a difference of opinion.
- Ask for the group's help when there appears to be conflict in the group.

Reflection Tip:

* Share these guidelines with the team before a meeting. Then take time at the end of the meeting to discuss the impact that they had.

Make an effort to participate on a project that will require a high level of collaboration with others.

- Be sure to take advantage of this opportunity to improve your collaboration skills.
- Prior to beginning the project, create a list of behaviours and actions which you believe a good team member needs to demonstrate – group/team “norms” and review these with the team.
- Look for opportunities to help other project team members, even if it falls outside the scope of the original project.
- Meet with members of your team during or after the project to discuss how you demonstrated collaboration and whether you fulfilled your initial list of behaviours.

Reflection Tips:

* Which behaviours were most difficult to achieve? Why do you think this was?

* Ask for feedback on your behaviour from other members of the project team.

Work collaboratively with others.

- Work on responding to others in a helpful, supportive manner. Take the time to understand their needs and what it would take to assist them effectively by probing and asking follow-up questions.
- Think about your strengths and how you can support others by drawing on these strengths. Actively participate in team meetings or volunteer to serve on a special project team.
- In meetings, take responsibility for updating team members who were absent.

Identify someone who is known as having strong collaboration skills so that you can learn from them.

- Once you have identified a person who has strong collaboration skills, observe them in interactions with others.
- Take notes on what you see and, after an interaction, ask them questions to understand their thinking behind the actions they took.
 - ⇒ What did they say to the individual?
 - ⇒ What did they do?
 - ⇒ How did they identify common ground?
 - ⇒ What did they learn from the individual?
- Discuss with the person the techniques and approaches they used to ensure they understood the perspective of the other person.
- Discuss how to look for opportunities and anticipate the issues or concerns your colleagues are facing.

Reflection Tip:

** What outcomes do you see this individual benefiting from because of certain relationships? Be sure to understand how the individual decided they wanted to build this relationship in the first place.*

Avoid destructive messages such as:

- **Communicating Through Someone Else** - a statement that expresses dissatisfaction indirectly to the person but through someone else.
- **Communication Shut-down** - a statement or action that cuts off discussion with no plan to continue.
- **Discounting** - minimizing another person's comments by inappropriate reassuring, distracting or humouring.
- **D-J-A** - person defends what was said, justifies it & attacks back. Frequently used when a person feels defensive.
- **Double Bind** - sending a message where the words say one thing but the body language or attitude convey a different meaning.
- **Judging/Blaming** - placing blame or making judgements about another person; often involves finger pointing.
- **Mind Reading** - assuming that your perception of a confusing message is right without clarifying or assuming the other person can read your mind.

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- **Mixed messages** - sending a message where the words say one thing but the body language or attitude convey a different meaning.
- **Premature Advice** - offering immediate advice to someone without showing concern for their feelings, listening, or helping them problem-solve.
- **Silent Treatment** - feeling resentment of anger toward another, but not addressing it directly with that person.
- **Threatening** - expressing an intention to do harm.
- **'You Shoulds'** - statements like "You should do this..." which sound parental and insinuate that I know better than you.

Reflection Tip:

* Share this list with a peer, and then ask them to evaluate your collaboration skills.

Conduct a self-audit.

- Check yourself to ensure that you speak positively about the strengths and capabilities of others and refrain, whenever possible, from criticizing others.
- Monitor the way in which you speak about your clients, families and members of your team.
- Refrain from engaging in conversations with others who do not follow these guidelines, withdrawing from discussions about the weaknesses of co-workers.
- Strive to deal directly with individuals with whom you are displeased rather than complaining to others.

Help team members improve their understanding and cooperation with one another.

- Help team members to understand, appreciate, and use differences among themselves to arrive at better solutions and to do better work.
- Discuss work histories, specific skills, successes, and talents.
- Share best practices and information about work being done.

Spend time talking with your peers about individuals who are good at collaborating with others.

- Use real life examples of excellence, describing the skills and behaviours demonstrated by these individuals.
- Talk about the value collaboration brings to the organization.
- Identify and discuss the consequences of NOT working together to get a job done.
- Think about how collaboration makes a difference to your success, personally.

Reflection Tip:

** The key to this exercise is to figure out what motivates individuals to initiate and develop their relationships and partnerships and to support each other on an ongoing basis.*

Improve your relationship with colleagues in other departments or agencies, community partners etc.

- Set a goal to have at least one conversation each week with someone outside your team/work area.
- Find out more about their key priorities, special projects/initiatives and any areas of common interest.
- Offer to work together to address any issues that may affect both of you.
- Keep in touch with these people over time.

Reflection Tip:

** Be sure to find out what interests the individual, as well as what interests you have in common. It may be useful information at a later date.*

Arrange a secondment to another function, agency or region.

- Speak to your manager or supervisor about helping you to identify an opportunity to transfer to another function or region for a limited period of time.
- Before your secondment, develop a set of objectives outlining what you want to get out of the experience and take back to your existing work area.
- Ask your manager or supervisor and your peers for input on your objectives. See if there is information or ideas they would like to obtain through your experience.
- When you return from your secondment, organize a meeting with your team to communicate what you have learned and provide an opportunity for others to ask questions about your experience.

Reflection Tip:

** Did you meet the objectives you set out to achieve? Why or why not? Are there lessons you may be able to pass on to others who may be exploring a secondment opportunity?*

Evaluating the effectiveness of the team.

- Help employees identify both strengths and areas where your team needs to develop.
- Consider using the following evaluation criteria:
 - ⇒ Clarity of purpose
 - ⇒ Communication
 - ⇒ Problem solving
 - ⇒ Decision making
 - ⇒ Client Service Orientation
 - ⇒ Quality of work
 - ⇒ Feedback
 - ⇒ Adaptability
 - ⇒ Conflict resolution
- Review the evaluation criteria among the team and monitor progress.
- For each criterion rate your team using the following scale:
 - ⇒ 1 = Team is Not at all Effective
 - ⇒ 2 = Team is Slightly Effective
 - ⇒ 3 = Team is Effective In Some Situations but Not Others
 - ⇒ 4 = Team is Effective Most of the Time
 - ⇒ 5 = Team is Effective All of the time
- Use the rating number to indicate the order of priority for your team's developmental needs. For example, if you rated Conflict Resolution as 1, this is among the first areas that should be focused on for development.
 - ⇒ Focus on only a few developmental areas at one time.

Level 3-4 Activities

Monitor your positive statements about colleagues and team members.

- Monitor the way in which you speak about the members of your team. Check yourself to ensure that you speak positively about the strengths and capabilities of others and refrain, whenever possible, from criticizing others in your conversations.
- Keep a log of the number of positive and negative things you say to (or about) other team members for two weeks. Compare the number of positive statements to negative, and commit to increasing the number of positive statements and decreasing the number of negative statements.
- Deal directly with individuals with whom there is potential conflict.
- Be practical. Engage in conversations with others who do not follow guidelines, and withdraw from discussions about the weaknesses of team members and colleagues.

Make a list of the key strengths and limitations of each person on your team.

- Look for opportunities and plan projects that will build teamwork and co-operation within and across teams.
- Seek your manager's assistance to find opportunities to maximize team member strengths and to provide developmental opportunities.

Reflection Tip:

** Consider what opportunities exist to match people so that the people on your team are learning from each other.*

Take an integrated approach to decision making.

- Identify a current, pressing problem or a decision that needs to be made and with which you are having difficulty.
- Meet with your team and describe the current situation. Provide your assessment on the root causes and possible solutions.
- Solicit input on the problem and be clear about what you feel are the key decisions that must be made by your team.
- Summarize the results of your discussion and prepare a plan to implement the solutions you have identified.

Lead open dialogue and information sharing among your team members.

- Circulate current department/agency information regularly, including status reports, strategic documentation and any other information to help your team.
- Encourage team members to identify what information resources they need to achieve their individual and team objectives.
- Work to provide access to these resources.

Solicit the opinions from all team members when working with a team to make a decision.

- Avoid taking significant action or making an important decision until the opinions of all the team members have been heard and all members agree to support the decision.

Show a willingness to support team decisions.

- Identify one of your ongoing projects which would particularly benefit from involving others working together as a team.
- Identify which individuals are or will need to work together on this project.
- Invite these individuals to a meeting in order to:
 - ⇒ Get feedback on your existing project plan and objectives
 - ⇒ Obtain input on how your project might impact the wider sector/network
 - ⇒ Identify synergies where your project might help to meet objectives of other functional groups or regions
- Organize a team meeting for the express purpose of deciding how the project will be conducted. Prior to the meeting, obtain two flipcharts or a room with a whiteboard.
- Ask the team, at the beginning of the meeting, to generate a list of the key decisions that need to be made and write this list on one of the flipcharts or on one side of the whiteboard.
- Ask the team for their views on the best answers to each decision.
- Ensure that you contribute your own views to this list but, in general, say as little as possible. Rather, focus your contribution on encouraging each member of the team to contribute to the discussion.
- Record their suggestions on the other flipchart or the other side of the whiteboard. Again, say as little as possible about yourself and encourage others to speak. Where you agree, say so and personally endorse the decision. Where you disagree, explain why and provide a more effective answer.
- Make a brief note of the decisions that were made and give a copy to everyone who was at the meeting.

Continued on next page

- Identify individuals who you think can provide a different perspective on this project.
- If appropriate, establish a more permanent representative group to further explore cross-functional interests and potentially expand the project scope to include other functions or regions.
- Support the team decision even when it is different from your stated point of view, unless it has serious implications. In this instance, indicate that you will be requesting your supervisor/manager to participate in the decision-making process.

Reflection Tips:

- * *What did you learn about the needs, concerns and priorities of other functions or regions?*
- * *Can any of these individuals provide input on other projects you are responsible for?*

Solicit opinions from other functional groups and regions.

- Solicit input from other groups as appropriate regarding how your team can help others to realize their goals.
- Host a forum to keep each other up to date on activities in your team, the agency and the sector.
- Consider the information, ideas and suggestions you receive when setting your own priorities and objectives.
- Consider whether it would be appropriate to establish a project team with members from various departments, agencies or regions in order to tackle a common issue.

Reflection Tip:

- * *Observe the interaction of the group while they are discussing pieces of information. Is everyone participating?*

Encourage and solicit input.

- In meetings, ask for input from all team members and encourage everyone to participate in the discussion. Deliberately draw out input from less vocal members of the team. Make an attempt to incorporate all relevant input into action plans.
- Facilitate, rather than direct, group discussions. Ask for input from everyone on your team. Encourage all team members to participate in discussions, by drawing out their opinions. Build on others' ideas and incorporate their suggestions into "game plans" wherever possible. Be supportive of others' participation, even if you do not agree with their viewpoints.
- The next time you are in a meeting or making a joint presentation with others, be careful not to dominate the discussion. Allow these others to have equal time to express their ideas and thoughts. Recognize their input and expertise as valuable.
- Appreciate diversity. Every individual is different and needs to be understood and allowed to be different. Do not stifle someone because they do not conform to your thinking. Think about someone who traditionally has a different viewpoint than you. Ask for their input when brainstorming and use them as a sounding board for your ideas.

Reflection Tip:

**Solicit input from team members on how to best realize departmental and organizational goals. Consider all of the ideas and suggestions you receive. Allow them to have an impact on priorities, objectives and approaches, and make sure to explain why some of their suggestions cannot be used.*

Develop your team problem solving skills.

- Identify a current, pressing problem which your team is having difficulty overcoming/solving (e.g., interpersonal conflict among team members; inability to meet deadlines).
- Meet with your manager and describe the current situation.
- Provide your assessment on the root causes and possible solutions to the impasse.
- Ask for your manager's input on how best to resolve the problem.
- Summarize the results of your discussion and prepare a plan to implement the solutions you have identified with the support of your manager.

Practice the following skills and behaviours in situations of potential conflict in your team.

- Ask for everyone's input and highlight the different perspectives and opinions.
- Be aware of the interpersonal progress of the group and reinforce positive behaviours.
- Coach them to avoid repeating negative behaviours over and over.
- Emphasize people's common goals, and how everyone depends on each other.
- Encourage open discussion for the group to come to a compromise.
- Encourage positive perception between team members by coaching others to be concise.
- Have the group develop its own rules of conduct/norms.
- Help to define the problem by coaching others to be concise and stick to facts.
- Insist on true consensus within the team (where it makes sense).
- Practice good listening skills.
- Treat each person and their opinions with respect.
- Use group pronouns (we, us, ours).
- Warn team members to avoid situations where people give in out of sheer exhaustion.
- Thank members for their participation and contribution.

Reflection Tip:

** When does conflict typically arise within your team? What could be put in place to help prevent the conflict from escalating?*

Look for opportunities to acknowledge team and individual success, formally or informally.

- Encourage and support team celebrations at the completion of a new, difficult or challenging task or project.
- Let individual team members know your appreciation through personal memos or face-to-face communication.
- Recognize the contributions of team members in public forums, referencing specifically what individual members did well.
- Use formal communication channels to acknowledge successful team performance.

Reflection Tip:

** Recognition does not only have to come from the team leader. Reflect on your opportunities to recognize the performance of your peers.*

Create a forum for knowledge sharing.

- Ask for volunteers from across functions, agencies or regions to form a committee that will establish an appropriate forum for knowledge sharing.
- Work with the committee to clarify design criteria for a knowledge sharing process, system or platform. You should discuss:
 - ⇒ what knowledge is currently available
 - ⇒ existing gaps in knowledge
 - ⇒ what gets in the way of knowledge sharing
 - ⇒ what can be done to overcome that
 - ⇒ available resources (e.g. access to technology)
- Agree on an action plan and accountabilities for the implementation of the process, system or platform the committee has suggested.
- Develop guidelines for knowledge sharing that can improve the exchange of ideas and best practices. Share these widely among relevant groups.

Reflection Tip:

** What have you included in your design to accommodate knowledge sharing with those in remote regions?*

Improve the quality and depth of the relationships you have with other teams, community partners, agencies and regions.

- List the individuals outside of your team with whom you have regular contact.
- Use the scale below to evaluate the quality of your relationship with each individual on the list:
 - ⇒ 1 = Poor relationship (i.e., there is a current serious problem which has not been resolved)
 - ⇒ 2 = Adequate relationship (i.e., strictly business/transaction oriented)
 - ⇒ 3 = Reasonably good relationship (someone who provides you with consistent feedback and ideas and who feels open to contacting you with issues)
 - ⇒ 4 = Extremely good relationship (a close colleague you trust to explore organizational issues and identify synergies)
- Identify any barriers that get in the way of your relationships and specific actions you can take to remove these barriers.
- Set a date for improving the relationship with each individual on your list that falls into category 1 or 2. Do any of the barriers that you've just identified apply?
- Define a plan for nurturing the relationships that fall into category 3.
- Keep doing what you're already doing with the relationships that fall into category 4!
- Monitor your progress against your goals.

Reflection Tip:

* When evaluating which relationships to put the most energy into, consider the business benefits to both yourself and the other individual.

Keep regular contacts.

- Make sure you keep up with the people you have met through conferences, meetings, and client visits.
- Speak or meet regularly to keep in touch over common issues that impact the wider agency and sector.
- Discuss new opportunities and approaches within each of your functions/regions.
- Review your achievements and challenges.

Reflection Tip:

* How do your peers manage to keep their networks “live”?

List all the individuals in your internal network.

- Specify which team, function, agency, region they are from. Analyze your network to determine whether your network is representative of a variety of functional groups and regions.
- Identify the kind of role each person occupies in your network. For example, information source, expert advisor, supporter, ideas generator, coach or mentor.
- Ask yourself if there are any roles you would like to see expanded or added.
- Make a conscious effort to identify and get to know people who can fill the gaps.
- Ask for their input on your projects and if they could help you achieve objectives.
- Try to return the favour by offering your assistance or identifying areas where you may help the individual achieve some of their goals.

Reflection Tip:

** Monitor whether you are using your network appropriately to further the long-term success of your agency and other groups*

Initiate and support relationships.

- Bring colleagues from other functions and regions together to generate ideas aimed at building alliances and looking for synergies (e.g., fundraising, a new process, etc.).
- Identify alternatives and evaluate each against an agreed set of criteria. Be sure that the criteria weigh the benefit that the alternative will bring to the wider organization, as opposed to each function or region individually.
- Determine an action plan that will help implement the best alternatives to achieve your group's goals.

Organize a team building event.

- Encourage team members to assist you in organizing the event if they have time.
- Make the event fun for everyone and include elements that require people to co-operate and work together as a team.
- Solicit advice from the team to ensure the event will appeal to everyone.

Reflection Tip:

** Did the climate in your team improve during and after the event? Why or why not?*

Create group symbols and ceremonies.

- Simple things like a weekly team lunch or a monthly award for the funniest story can help foster the feeling of being a team.

Books and Videos

Mastering Virtual Teams, by Deborah L. Duarte & Nancy Tennant Snyder (New Edition: Jossey-Bass Publishers, 2006; Original: Jossey-Bass Publishers, 1999).

This revised and expanded second edition includes a CD-ROM packed with useful resources that allow virtual teams to access and use the book's many checklists, assessments, and other practical tools quickly and easily. The authors provide updated guidelines, strategies, and best practices for working cross-culturally and cross-functionally, across time and distance, to see a project through.

The Fifth Discipline: The Art and Practice of the Learning Organization, by Peter M. Senge & Bryan Smith (New Edition: Currency, 2006; Original: Doubleday, 1994).

This book describes the secret of how to get teamwork in your teams. It argues it is a learning process, with your people aiming high, then learning to create the results they desire.

The Power of We: Succeeding Through Partnerships, by Jonathan H. Tisch & K. Weber (John Wiley & Sons. 2005).

The CEO of Loews Hotels, Tisch preaches a management philosophy of cooperation: forging partnerships with employees, customers, shareholders and communities.

Effective Teamwork: Practical Lessons from Organizational Research, by Michael A. West (Blackwell Publishing, 2004).

This book examines the factors which affect team functioning both positively and negatively. For the second edition, the book has been updated to include new chapters on creating teams and conflicts in teams; new sections on introducing teamwork, on virtual team working and team working across national boundaries, on emotions in teams, and on trust within and between teams; and more material on team leadership, on the sorts of tasks that are best done by teams, and on the relationship between working in teams and mental health.

Teach Your Team to Fish: Using Ancient Wisdom for Inspired Teamwork, by Laurie Beth Jones (New Edition: WaterBrook Press, 2004; Original: Crown Business, 2002).

This book offers dozens of stories from the Bible showing how Jesus managed his team of disciples and other followers, with suggestions for how to apply these lessons to real-world teambuilding and management problems. The book gives examples of companies in which teams work well together and offers lessons that can help team leaders everywhere sustain themselves and achieve their common goals.

Creative Collaboration: Simple Tools for Inspired Teamwork, by Bruce Honig & Alan Rostain (Thomas Nelson, 2003).

This book is filled with activities designed to get your team's creative juices flowing: from warm-up exercises to team energizers. Each activity includes a time estimate, needed supplies, suggested group size, and hints and examples for the team leader.

Lessons Learned: Shaping Relationships and the Culture of the Workplace, by Roland Barth (Corwin Press Inc., 2003).

An informal discussion of interpersonal behaviour on the job. A loose autobiographical essay on the author's lessons learned about relationships at work.

The Wisdom of Teams: Creating the High-Performance Organization, by Jon R. Katzenbach & Douglas K. Smith (New Edition: Harper Collins, 2003; Original: Harvard Business School Press, 1993).

Use this practical approach to ensure success with your teams. Examine reasons why some team efforts fail and avoid them. Learn what to expect as you study the team performance curve.

Virtual Teams That Work: Creating Conditions for Virtual Team Effectiveness, by Cristina B. Gibson & Susan G. Cohen (John Wiley & Sons, 2003).

This book offers a much-needed, comprehensive guidebook for business leaders and managers who want to create the organizational conditions that will help virtual teams thrive. Each chapter in this book focuses on best practices and includes case studies and illustrative examples from a wide variety of companies.

8 Lies of Teamwork, by Michael Wachter (Corporate Impact, 2002).

This book exposes the myths surrounding teamwork and the sources of organization resistance that often prevent teamwork from succeeding. It provides you with a tested and proven teamwork foundation you can use to set teams free to overachieve in your business.

Cross-Functional Teams: Working with Allies, Enemies and Other Strangers, by Glenn M. Parker (New Edition: John Wiley & Sons, 2002; Original: Jossey-Bass, 1994).

This top expert on teamwork provides tips on easing the interactions of cross-functional teams. This new edition contains fresh examples and additional case studies of successful cross-functional teams from IBM, Parke-Davis, Xerox, Boeing, BOC Gases, government agencies, and more.

Team Troubleshooter: How to Find and Fix Team Problems, by Robert W. Barner (Davies-Black Publishing, 2001)

Barner, with 20 years of experience in team management, sets out to help managers resolve team performance problems. In addition, he aims to educate team members, coach team leaders, assist in problem solving, and provide tools for team development. His theories are built upon five underlying assumptions, including individuals are important in team performance, teams are their own best problem solvers, and all teams operate within standard team dynamics and performance restrictions.

How to Make Collaboration Work: Powerful Ways to Build Consensus, Solve Problems, and Make Decisions, by David Straus & Thomas C. Layton (Berrett-Koehler Publishers, 2002).

Collaboration is an everyday practice that many people find to be a frustrating, even exhausting, experience. How to Make Collaboration Work provides a remedy: five principles of collaboration that have been tested and refined in organizations throughout the world. Author David Straus shows that these methods can help any group make better decisions and function more effectively.

Leading Teams: Setting the Stage for Great Performance, by J. Richard Hackman (Harvard Business School Press, 2002).

This book outlines what leaders can do to structure, support, and guide teams in a way that enhances the social processes essential to collective work. The book also offers a new and provocative way of thinking about and leading work teams in any organizational setting.

The Five Dysfunctions of a Team: A Leadership Fable, by Patrick M. Lencioni (John Wiley & Sons, 2002) – also available on audio CD.

Lencioni begins by telling the fable of a woman who, as CEO of a struggling Silicon Valley firm, took control of a dysfunctional executive committee and helped its members succeed as a team. Story time over, Lencioni offers explicit instructions for overcoming the human behavioural tendencies that he says corrupt teams (absence of trust, fear of conflict, lack of commitment, avoidance of accountability and inattention to results).

The 17 Essential Qualities of a Team Player: Becoming the Kind of Person Every Team Wants, by John C. Maxwell (Thomas Nelson, 2002) – also available on audio CD.

This book takes the pain out of knowing what makes a team tick. If you want to have a better team, you have to develop better players. Great team players, like great teams, are formed from the inside out.

Building the Emotional Intelligence of Groups, by Vanessa Urch Druskat, Steven B. Wolff (Harvard Business Review, 2001).

The management world knows by now that to be effective in the workplace, an individual needs high emotional intelligence. What isn't so well understood is that teams need it, too. Citing such companies as IDEO, Hewlett-Packard, and the Hay Group, the authors show that high emotional intelligence is at the heart of effective teams.

Leading Beyond the Walls: Wisdom to Action Series (The Peter F. Drucker Foundation for Nonprofit Management), by Frances Hesselbein, Marshall Goldsmith & Iain Somerville (New Edition: John Wiley & Sons, 2001; Original: Jossey-Bass Publishers, 1999).

In this book, twenty-nine great thinkers examine leaders adept at establishing partnerships, alliances, and networks both within and outside their organizations. They address the challenge of leading in an age when the old rules and conventional boundaries no longer exist.

Managing Strategic Relationships: The Key to Business Success, by Leonard Greenhalgh (The Free Press, 2001).

In this book, the author asserts that the primary job of the manager is no longer to plan, organize, direct, or control. Instead, he argues, today's successful managers are primarily negotiators who are judged on their ability to foster, coach, protect, and support collaborative relationships, as well as manage conflict, with peers, workers, bosses, suppliers, customers, regulators, competitors, and stakeholders.

High Five! The Magic of Working, by Kenneth Blanchard & Sheldon Bowles (Harper Collins, 2000).

This book combines the spellbinding charm of a timeless parable with cutting-edge information about why teams are important and what individuals and organizations can do to build successful ones.

The Handbook of Interpersonal Skills Training: 16 Complete Training Modules for Building Working Relationships, by Bob Wall (McGraw-Hill Trade, 2000).

Bad communication, lack of trust, and poor interpersonal skills are often the key cause of weakness and inefficiency in an organization. This book contains twenty complete training modules or lesson plans to help trainers teach managers and employees how to improve productivity through better working relationships.

The New Why Teams Don't Work: What Goes Wrong and How to Make it Right, by Harvey A. Robbins & Michael Finley (Berrett-Koehler, 2000).

This updated book includes completely new material on team intelligence, team technology, collaboration vs. teamwork, team balance, teams at the top, the team of one, plus all new and updated examples.

The Radical Team Handbook, by John C. Redding (Jossey-Bass Publishers, 2000).

Among other innovations, the radical team method is designed to generate creative thinking, encourage risk-taking, and greatly bolster team learning to produce exceptional results. Redding translates the findings of his project into a guide you can use to create radical teams for your organization and put them to work.

Building Trust at the Speed of Change: The Power of the Relationship-Based Corporation, by Edward M. Marshall (AMACOM, 1999).

This book offers a breakthrough model for building organizations that can swiftly and effectively respond to rapidly changing business needs. It's a model that values principle over power and people over processes--and that focuses on integrity, trust, and collaboration. His approach treats the workforce not as a cost or liability, but as an intellectual asset and irreplaceable resource.

Remaking Teams, by Theresa Kline (Jossey-Bass Publishers, 1999).

This book includes a variety of techniques for improving teamwork, team exercises and tools for diagnosing teamwork and includes a summary of years of research on teams and their role in organizations.

Turning Team Performance Inside Out: Team Types and Temperament for High-Impact Results, by Susan Nash (Davis-Black Publishing, 1999).

In this book, the author defines the five critical characteristics essential to team effectiveness: strategy; clear roles and responsibilities; open communication; rapid response to change; and effective leadership – and details how each is influenced by the personality types and temperaments of the team members as individuals.

Driving Fear Out of the Workplace: Creating the High-Trust, High-Performance Organization, by Kathleen D. Ryan & Daniel K. Oestreich (New Edition: Jossey-Bass Publishers, 1998).

This book confronts the fears that permeate today's organizations in order to help them become the high-trust, high-performance organizations of tomorrow. It explains how fear prevents people from doing their best, how fear operates in organizations, and how to build business relationships without fear.

Conversationally Speaking: Tested New Ways to Increase Your Personal and Social Effectiveness, by Alan Garner (New Edition: McGraw-Hill, 1997; Original: McGraw-Hill, 1988).

This book provides a set of techniques for initiating contact with others, how to ask conversation-promoting questions, and how to achieve more rewarding relationships with others.

Organizing Genius: The Secrets of Creative Collaboration, by Warren Bennis & Patricia W. Biederman (Addison Wesley, 1997).

This book uncovers the elements of creative collaboration by examining six of the century's most extraordinary groups and distill their successful practices into lessons that virtually any organization can learn and commit to in order to transform its own management into a collaborative and successful group of leaders.

The Performance Factor: Unlocking the Secrets of Teamwork, by Pat MacMillan (Broadman and Holman Publishers, 2001)

Team resource expert Pat MacMillan discusses the characteristics of a high performance team and how to implement a new paradigm of leadership to bring any organization to greater efficiency.

Achieving Consensus: Tools & Techniques, by Eileen Flanigan & Jon Scott (Crisp Publications, 1996).

This easy-to-read book discusses the ability to work together, make decisions together, and implement them. It explains the importance of reaching group consensus and alignment, in order to help the team succeed.

Managing Disagreement Constructively, by Herbert S. Kindler (New Edition: Crisp Publications Inc., 1996; Original: Crisp Publications Inc., 1989).

Introduces strategies for handling conflicts between individuals and groups.

Team Players and Teamwork, by Glenn Parker (New Edition: Jossey-Bass Publishers, 1996; Original: Jossey-Bass Publishers, 1990).

This book defines 12 characteristics that distinguish effective teams and team players. Ineffective team styles are also highlighted and discussed.

Team Talk: The Power of Language in Team Dynamics, by Anne Dannellon (Harvard Business School Press, 1996).

Team Talk analyzes team conversations and their organizational contexts to explain why cross-functional team work is so challenging for professional employees. Drawing on interviews and observations of teams in Fortune 200 companies, Dannellon lets readers listen in on actual team conversations to explore the inherent paradoxes of team work.

The Team Handbook, by Peter R. Scholtes, Barbara J. Streibel, & Brian L. Joiner (New Edition: Oriel Inc., 1996; Original: Oriel Inc., 1993).

This is a best-selling comprehensive resource book that organizations around the world use to teach people how to be effective team members. In addition, it contains tools and methods that teams use in their work.

Team Effectiveness and Decision-Making in Organizations, by Richard Guzzo, Eduardo Salas & Irwin Goldstein (Jossey-Bass Publishers, 1995).

This book provides the latest research perspective on teams: their nature, function, effectiveness, decision making process, and ability to change the face of organizational life.

Leading Teams: Mastering The New Role, by John H. Zenger, Ed Musselwhite, Kathleen Hurson, & Craig Perrin (Irwin Professional Publishing, 1994).

This resource, written for team leaders, provides practical approaches for sharing leadership in teams.

The Discipline of Teams, by Jon R. Katzenbach and Douglas K. Smith (John Wiley & Sons Inc. 2001)

In The Discipline of Teams, Jon Katzenbach and Douglas Smith present significant insights on team performance that they have gained in the near-decade since the publication of Wisdom. They explore the two critical disciplines that drive performance in small groups, providing concrete steps that groups can take to ensure the use of the right discipline at the right time. They also address new developments such as virtual teaming and global teaming that both amplify the importance of team performance and present new challenges to achieving it.

Wilson (New Edition: Jossey-Bass Publishers, 1993; Original: Jossey-Bass Publishers, 1991).

Through examples and question/answers, this book provides insight into the practical problems of creating and implementing self-directed teams.

Classic Readings in Self-Managing Teamwork, by Rollin Glaser (*Organizational Design and Development*, 1992).

This is a compilation of articles and chapters from magazines, periodicals, journals and books culled by Dr. Glaser.

Coaching Self-Directed Teams, by Peter R. Garber (*Organizational Design and Development*, 1992).

This book draws a compelling analogy between the roles of a coach of a professional football team and the leader of a self-directed team. The book tackles head on the skills and strategies that team leaders and team members need to build a winning team.

Teamwork: The Team Member Handbook, by Price Pritchett (*Pritchett & Associates*, 1992).

This book issues the 16 guidelines for turning any group into a tightly-knit, high-powered team capable of achieving outstanding results.

Strength in Numbers, by Leslie Bendaly (*McGraw-Hill Ryerson Ltd.*, 1990).

A useful resource for enhancing team participation, defining leadership and increasing openness and cooperation.

Effective Group Problem Solving: How to Broaden Participation, Improve Decision Making & Increase Commitment to Action, by William M. Fox (*Jossey-Bass*, 1987).

The book discusses how to improve efficiency, minimize interpersonal problems, and produce results when working in groups.

Groups That Work (and Those That Don't): Creating Conditions for Effective Teamwork, edited by Richard Hackman (*Jossey-Bass* 1981).

This book describes different kinds of functional and dysfunctional groups and explains principles of group functions.

The video, "America3: The Power to Create" (Owen Stewart Performance Resources Inc., 1-800-263-3399, www.owenstewart.com).

This program uses the experience of the crew of America3 to highlight the key strategies for creating a winning team: turn setbacks into opportunities, focus on common goals, and understand the value of communication - the formula the won America's Cup, yachting's most coveted prize. In 1992, the crew of America3 won the Americas Cup by overcoming obstacles and focusing on teamwork, technology and talent.

The video, "Building The Perfect Team", by Video Arts (International Tele-Film, 1-800-561-4300, www.itf.ca).

The ideal team is composed of individuals whose skills complement each other. But finding the right members is a difficult challenge. This video shows how to identify people in terms of their team role and discusses how to compose a team with the correct mix of players.

The video, "Five Star Teamwork", by Workplace Publishing (International Tele-Film, 1-800-561-4300, www.itf.ca).

This new program features the remarkable team at the Four Seasons Restaurant in New York City - for 40 years one of the top-rated destination restaurants in the world - and the principles they live by.

The video, "Groupthink2e" (Owen Stewart Performance Resources Inc., 1-800-263-3399, www.owenstewart.com).

This video explains why well-informed group members go along with the majority. Eight symptoms (rationalization, shares stereotypes, self-censorship, mind-guarding and direct pressure, illusions of morality, invulnerability and unanimity) are discussed.

The video, "How to Deal with Difficult People" (Career Track Publishing, 1-800-780-8476, www.pryor.com).

This video is concerned with showing how to foster teamwork and co-operation. It illustrates powerful techniques for managing difficult people.

The video "Mining Group Gold" (Owen Stewart Performance Resources Inc., 1-800-263-3399, www.owenstewart.com).

This video and the accompanying book show how the principles of Total Quality Management are now being assigned to group interaction from bringing out the best in every participant - resulting in higher collaboration, more efficient and productive teamwork and more qualitative group decisions than ever before. This video is an adaptation of Thomas A. Kayer's best-selling book, Mining Group Gold.

The video, “The Abilene Paradox” (Owen Stewart Performance Resources Inc., 1-800-263-3399, www.owenstewart.com).

This film will help you and your organization approach this worthwhile goal in a way that is both engaging and entertaining. Viewers will understand the tendency of groups to take actions that their individual members do not support, and see the consequences of mismanaged agreement. Viewers will learn to work toward consensual group decision making in which communication is open and the climate is supportive for everyone involved.

The video, “Team Building”, by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).

This program describes the five characteristics of effective teams and what each team member must do to build the team.

The video “Team Building: What Makes A Good Team Player?” (Owen Stewart Performance Resources Inc., 1-800-263-3399, www.owenstewart.com).

This video and leaders’ guide discusses several elements that can prevent teams from succeeding. The film then makes recommendations on how to build and maintain an organizational team based on the principles of Quality Circles and Total Quality Management.

The video “Teamwork Essentials”, by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).

How can teams work better? How can they cope with change? What exactly is team building? What are the key communication skills that all team members need to master? This 4-part series analyzes and demonstrates fundamental skills for teams in these four key areas. The series is designed to help team member develop skills in communicating, presenting ideas clearly, managing change, and reducing stress. This ensures that all levels of your organization are equipped with the skills to achieve higher levels of performance.

The video “Workteams and the Wizard of Oz”, by Advanced Knowledge Inc. (International Tele-Film, 1-800-561-4300, www.itf.ca).

The universally loved film classic serves as the basis for an entertaining and informative training film illustrating the power of teamwork. It’s a magical and entertaining journey into what makes teams successful. This is a powerful and unusual tool for teaching the principles of productive teamwork and leadership skills that make it happen.

The movie, "A League of Their Own".

This film is about a women's baseball team.

The movie, "Glory".

This film is the story of the first black regiment recruited to fight in the Civil War. Notice how the regiment develops as a team.

The movie, "The Italian Job".

See how one group of master thieves, led by Donald Sutherland, cleverly steal \$35 million in gold bars from a safe in Venice only to have it stolen from them again. See how this group works as a team to pursue the villain to get the gold back.

The movie, "Mr. Holland's Opus".

This film is about a composer who takes up teaching music. Notice how he works with his team - the orchestra.

The movies, "The Mighty Ducks", "The Dirty Dozen", "Cool Runnings" or "The Great Escape".

These are all films about collaboration and teamwork. Notice the importance of working toward a common goal.

Creative Problem Solving & Decision Making (PSDM)

Definition:

Creative Problem Solving and Decision Making is the demonstration of behaviours that enable one to identify and solve problems by understanding the situation, seeking additional information, developing and weighing alternatives, and choosing the most appropriate course of action given the circumstances. Problems can be solved by breaking the issue into smaller pieces or by identifying patterns or connections between situations that are not obviously related. It involves the willingness to and demonstration of behaviours associated with taking a creative approach to problems or issues. It includes “thinking outside of the box” to go beyond the conventional, and to explore creative uses of resources.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ thinking through a problem before offering a solution 	<ul style="list-style-type: none"> ▪ jumping to a conclusion without thinking through the facts
<ul style="list-style-type: none"> ▪ breaking down complex problems to identify root cause(s) 	<ul style="list-style-type: none"> ▪ addressing only the surface issue, ignoring other possible deeper causes
<ul style="list-style-type: none"> ▪ prioritizing required information to help determine when you can make a sufficiently informed decision 	<ul style="list-style-type: none"> ▪ waiting for all the information to be clear before evaluating options
<ul style="list-style-type: none"> ▪ thinking about the chain of events that led to a problem 	<ul style="list-style-type: none"> ▪ explaining problems in a vague, general way, e.g. “that procedure always goes wrong”
<ul style="list-style-type: none"> ▪ waiting for all the information before evaluating options 	<ul style="list-style-type: none"> ▪ evaluating options before getting all relevant information
<ul style="list-style-type: none"> ▪ reflecting on past successes and failures to identify recurring trends 	<ul style="list-style-type: none"> ▪ missing the larger picture by focusing too much on case-by-case details
<ul style="list-style-type: none"> ▪ thinking ahead about the outcome of an action (“If I do A, then B and C will also happen”) 	<ul style="list-style-type: none"> ▪ solving the immediate problem without thinking about other problems that may follow - the longer term impact

Continued on next page

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none">▪ looking for the common factors in different situations and using/modifying previously successful approaches to meet the unique needs of the situation.	<ul style="list-style-type: none">▪ “re-inventing the wheel” with every situation and overlooking common sources of difficulty, to focus on the peculiarities of each situation.
<ul style="list-style-type: none">▪ responding to changes or constraints by formulating new concepts or approaches.	<ul style="list-style-type: none">▪ assuming that changes or constraints are inevitable and that you just have to adapt
<ul style="list-style-type: none">▪ looking at “big picture” patterns, which may not be obvious to others and knowing how this will impact several areas/departments across the agency to solve problems and develop services or approaches.	<ul style="list-style-type: none">▪ getting stuck on a single line of reasoning by focusing in on the detailed components of a problem.

Developmental Activities

Level 1-2 Activities

Identify your problem-solving approach.

- Map out your problem-solving approach. What are the possible alternatives to be taken at each step?
- Identify areas where you are strong and areas where you need to develop.
- Work on the areas you have identified to strengthen in your problem-solving approach.

Think about your approach to problem solving.

- When faced with an issue or problem, break the problem down into manageable parts. Ask questions to increase your understanding of the events that have led to the current situation, then think of the various ways the situation could be resolved.
- Before selecting a solution, think ahead to the impact of your choice. What are the potential consequences of your decision or action? What are the next steps that may be required for the solution to be successful? Who will the decision (or action) affect? What might their reaction be?
- Re-evaluate your approach to the problem, if necessary, to achieve a desired outcome.

“Brainstorm” potential solutions to a problem before you draw conclusions or make a decision.

- Choose a challenging problem that you are currently facing that you have not yet resolved.
- List all the possible solutions that come to mind. For example, if you have difficulty identifying possible solutions consider using creative visualization techniques. Picture yourself with the client. Imagine what you might say and what he or she might say to you.
- Do not evaluate or critique any of the solutions or suggestions until you have exhausted all possible ideas.
- End your “brainstorming session” by identifying the best solution and next steps.

Reflection Tip:

** Take a moment to think about the “big picture”. Do any additional solutions come to mind within this larger context?*

Ask for feedback.

- Ask your manager to identify specific times where you either showed or did not show good Creative Problem Solving & Decision Making
- Ask him/her to specify what it was about your behaviour which made a particular impression on them.
- Get your manager to talk through how he or she would have tackled the issue.
- Take note of these suggestions and try to apply them in future circumstances.

Reflection Tip:

Is there a pattern to situations where you avoid using problem solving skills?

Identify a recent problem that was successfully resolved.

- Plan to meet with the people involved in the problem resolution.
- Find out how they dealt with the problem or situation. Ask the following:
 - ⇒ How did they overcome these difficulties?
 - ⇒ What were the resources that they used?
 - ⇒ What difficulties did they encounter?
 - ⇒ What were the specific outcomes of their efforts?
- Use this information when you are confronted with similar problems or situations.

Clarify the details of a problem.

- When working/thinking through a problem, break it down into its component parts.
- Organize data, input, and ideas in a format so that you can understand all of the different pieces of the puzzle and how they relate to each other.
- Once the problem has been clarified, investigate the situation further to identify the contributing factors.

Level 3-4 Activities

Develop your thinking with simple creativity exercises and conceptually-oriented games.

- Pick a common item and identify 20 different uses for it (e.g., a fork, a drinking glass, a computer terminal).
- Consider any two unrelated items and create a list of reasons why they are similar (e.g., a pen and a coffee cup, a telephone and an orange).
- Play games like Pictionary, Balderdash or Charades.
- Practice doing cryptic crosswords or reading detective novels. Look for the clues and for links between the pieces of information you have.

Reflection Tip:

** During these exercises, consider what patterns you are seeing or applying.*

Develop alternative ways of looking at a problem.

- Select a problem which you are genuinely interested in understanding or resolving. The problem should be of limited scope and you should be familiar with its past history, i.e., what has led up to the problem and previous attempts, if any, to resolve it.
- Describe the problem in a brief statement. For example, you might state the problem as: “The staff turnover within a particular area has steadily increased over the past two years,” or “Measures of customer service satisfaction are not improving despite our new incentive programs.”
- Identify the key factors in the problem from your perspective.
- Imagine you are going to tell someone a story about the problem. What are the three or four key characteristics or details you would want to convey?
- Identify the key factors of the problem from the perspective of others. Ask yourself the following questions:
 - ⇒ How would others/supervisors/managers/directors view this problem? What factors would they see at their level?
 - ⇒ How would the supervisors/managers/directors in other departments view this problem? What factors would they see from their perspective?
 - ⇒ How would staff in other departments within the agency view this problem? What factors would they see?
 - ⇒ How would clients view this problem? What factors would they see?
- Prepare a summary of your findings.
- Identify the immediate steps you could take on your own to help resolve the problem. Take the first steps.

Re-think your approach to problem solving.

- When faced with an issue or problem, break the problem down into manageable parts. Ask questions to increase your understanding of the events that have led to the current situation, then think of the various ways the situation could be resolved.
- Before selecting a solution, think ahead to the impact of your choice. What are the potential consequences of your decision or action? What are the next steps that may be required for the solution to be successful? Who will the decision (or action) affect? What might their reaction be?
- Reevaluate your approach to the problem, if necessary, to achieve a desired outcome.

Engage in careful decision-making.

- Resist the urge to make quick decisions about how a problem should be solved without fully exploring your options.
- Make sure you consider the unique facts about the situation before making a final decision. Develop a list of pros and cons when evaluating a potential solution. Be meticulous in listing as many pros and cons as possible. Ensure that you consider both short- and long-term effects.
- Then, estimate the costs and benefits of each attribute. After you have done this for each pro and con on your list, summarize your analysis in a single “bottom line” number (equal to the total estimated costs minus the total estimated benefits).
- Use this methodology to perform comparative analyses of alternative solutions.

Conduct a problem prevention analysis.

- Talk to your manager to identify problems which may arise in your business department over the next few months. Only ask for a brief description, not the potential causes or solutions.
- List the possible causes for each problem you have identified with your manager. Describe how you would further analyze the problem to identify true root causes and recommend possible solutions to prevent the problem from occurring.
- Review your analysis with your manager. Ensure your investigation and solutions are accurate and implementable.

Look ahead for opportunities and problems.

- Conduct a scenario planning session with your team:
 - ⇒ Describe the possible scenarios.
 - ⇒ Lead team members through the process of identifying what could happen in the next six months (either positive or negative) that could take them off their track, regarding planned actions.
 - ⇒ Lead them in developing a plan to handle these situations if they should arise.
- Assess whether the forecasts actually materialized and were effectively dealt with.

Establish a problem solving task force in your department.

- Identify a problem within your department that, if resolved, would benefit everyone.
- Extend an invitation to all those directly affected by the problem to meet once a month to participate in a brainstorming session.
- Work collaboratively to list all of the potential causes of the problem and practice prioritizing their importance to the underlying problem.
- Guide the group when you feel there is a lack of consensus or uncertainty.
- After reaching consensus on the potential causes of the problem, create a preliminary list of solutions and explore the pros and cons of each solution.

When you are faced by new, difficult or expensive problems, think through the chain of causes leading to the problem.

- Write down the chain of causes leading to the problem (e.g., "A" occurred because of "B", "B" occurred because of "C"). It is important to actually write it down or draw a diagram. Most people cannot keep all the details of a complex situation in their heads.
- Find ways to break the problem chain (e.g., more or different resources, modification of timelines, different tactics) and forge new links which help to improve performance.
- Work together with your manager/team to implement the solution in a feasible manner.
- Advise your manager of what you think can be done to help people avoid the problem in the future.

Expose yourself to new ideas.

- Surfing the internet and reading journals and periodicals will help to keep you updated with developments in the external world.
- Always be on the lookout for new ideas that you can implement in your workplace.

Identify and eliminate the root cause of a problem.

- Identify a problem in an ongoing client or other work-related situation that you are having difficulty solving.
- Write a brief description of what the problem is and what are its consequences.
- Break the problem into its component parts by clearly identifying:
 - ⇒ General problem areas relating to the overall issue (e.g., poor communication, failure to delegate, inadequate procedures) and how they relate to each other.
 - ⇒ The root cause(s) of the problem (Note: be sure to distinguish between a true root cause vs. a symptom or consequence of a root cause).
- Write down a plan of action you will take to address each root cause, with a completion date for each action.

Talk to others to get their ideas on issues, situations, problems, potential opportunities.

- Get another person's perspective.
- Talking through a problem or situation is a good technique for stimulating thought and developing insight. Getting another view point adds more ideas and energy.
- Think about how that perspective is similar and/or different from yours.
- Practice identifying the key themes which sum up your views on an issue and communicate them as simply and clearly as you can.
- Look for patterns in the two perspectives that generate a conclusion or third perspective on the issue.

Reflection Tip:

** Talking through a problem or situation is a good technique to stimulating thought and developing insight. Getting another viewpoint adds more ideas and energy.*

Lead a problem solving group.

- Use your intuition when making decisions in the group. When you feel there is lack of consensus or uncertainty in the group, pause, and make a decision. Consider the following examples for a group session:
 - ⇒ Freeing up extra time among team members for competency development
 - ⇒ Managing workflow
 - ⇒ Holiday scheduling
 - ⇒ Team roles and accountabilities
 - ⇒ Cross-team responsibilities
- Use the following outline to structure an agenda for the meeting:
 - ⇒ Prepare a clear statement of the problem. Work with the group to write a sentence or phrase that clearly states what the problem is.
 - ⇒ Brainstorm a list of possible ideas about the problem. This list may include causes, solutions, action steps, processes or decisions. Do not critique any ideas until the group has exhausted the list of possibilities.
 - ⇒ Identify the best way to move forward with the assistance of the group.

During the next two weeks make a list of unexpected client problems or issues that come up and think through the possible trends or patterns.

- Examine the list and try to identify any common themes or similarities, and ask yourself the following questions:
 - ⇒ Have I seen this type of problem before?
 - ⇒ What do I already know that may help me to solve the problem?
 - ⇒ What may be the cause of the problem?
 - ⇒ Is there anything that could have prevented the problem from occurring? If yes, what action could have prevented it?
 - ⇒ Is there anything I could have done to speed up my understanding of the problem?
- Note these themes on a piece of paper.
- Take action to make use of these identified trends in order to overcome similar situations in the future.

Level 5 Activities

Incorporate several perspectives into your problem-solving approach.

- Identify individuals who are most affected by a problem.
- Ask them for information about the nature of the problem and for suggestions about possible solutions.
- Imagine that you have no constraints in solving this issue or problem -- What would you do? Why would you do it? What prevents you from acting on the ideas you have?
- Talk to people who are not familiar with the issue you are grappling with. This may include those from totally different areas of expertise or disciplines -- what kinds of things do they come up with?
- Try to picture what you are trying to achieve. What does it look like? Is there anything you would like to change? What one thing would you like to change in that picture? Will the courses of action that you have generated allow you to achieve your goals?
- Take the results of these approaches and try to come up with some creative solutions to your problem.
- Bounce your ideas off trusted colleagues and the individuals affected.
- Try to learn from and incorporate the comments you have collected. Make notes to yourself regarding some of the things that have helped you to become more creative.

Reflection Tips:

- * Be sure to gather enough information that you understand the background to the problem.
- * What sort of thought processes did those people use to break down or conceptualize the problem?
- * Think about what situation this particular problem reminds you of. Are there any interesting similarities or differences between the current and past situations? What can you learn from them?
- * Ask for specific feedback regarding the feasibility of the approaches you have defined.

Gather benchmark information about a current agency problem.

- Work with your manager or peers/team to identify a problem which needs to be addressed within the agency.
- Volunteer to work on developing a solution for the problem.
- Find out how others within and outside your department have dealt with similar problems or situations.
- Document your findings and share them with the appropriate manager and co-workers/group(s). These can include:
 - ⇒ Summarizing a new trend/technique and presenting it to others.
 - ⇒ Doing a competitive analysis.
 - ⇒ Studying history and drawing business parallels.
 - ⇒ Participating in a cross-functional project.

Reflection Tip:

** Reflect on which of these alternatives would be most appropriate, considering the organization's vision, values and current organizational strategy.*

Search for patterns or themes to a current problem before you draw conclusions or make a decision.

- Choose a challenging problem that you are currently facing with a customer that you have not resolved.
- List all the possible solutions that come to mind.
- Do not evaluate or critique any of the solutions or suggestions until you have exhausted all possible ideas.
- Assess the symptoms and see if you can identify common themes or root causes.
- Develop an action plan to address the root cause.
- Present your findings to key stakeholders, along with your proposed solutions.
- Brainstorm all the possible solutions that come to mind.
- Assess the symptoms of the problem and see if you can identify common themes or root causes.
- Choose several solutions based on how well they address the root cause.

Reflection Tip:

** Do you feel that these information gathering steps allowed you to generate a better quality solution? Reflect on the changes that you would make to this process the next time you used it.*

Identify a difficult problem or situation where there are several alternative courses of action you can take to resolve it. Follow the steps below:

- Write down the problem using the chart in the example shown below.
- List the criteria you will use to evaluate each alternative down the left side of the chart. Examples of criteria can include:
 - ⇒ Resource costs (e.g., time, people, capital)
 - ⇒ Customer satisfaction
 - ⇒ Political risk
 - ⇒ Efficiency
- Identify several possible alternatives to resolve the problem. Write these across the top of the chart.
- Determine how well each alternative meets each criteria. Assign a weight for each alternative against each criteria using the scale below:
 - ⇒ 1 = Alternative does not meet criteria
 - ⇒ 2 = Alternative minimally meets criteria
 - ⇒ 3 = Alternative somewhat meets criteria
 - ⇒ 4 = Alternative fully meets criteria
 - ⇒ 5 = Alternative exceeds criteria
- Total the weight scores for each alternative at the bottom of the chart.
- Determine the pros and cons of each alternative on the chart.
- Select the alternative which best meets your most important criteria.

Example

Problem: Which house to buy?

CRITERIA	ALTERNATIVE 1 <i>St. Albert House</i>	ALTERNATIVE 2 <i>Edmonton South House</i>	ALTERNATIVE 3 <i>Downtown Condo</i>
Cost	4	3	3
Location	2	3	4
Resale Value	4	3	2
Distance From Work	2	3	4
Etc....	--	--	--
Total	--	--	--

Reflection Tip:

* Think about how you might “short-cut” this process and use it more frequently for slightly less difficult problems.

Develop alternative ways of looking at an issue.

- Select a business area issue that you are genuinely interested in understanding or resolving. The problem should be of limited scope and you should be familiar with its past history (i.e., what has led up to the problem and previous attempts, if any, at resolving it).
- Describe the problem in a brief statement.
 - ⇒ For example, you might state the problem as: "The staff turnover in my particular business unit has steadily increased over the past two years" or "Measures in customer satisfaction are not improving despite our new service programs".
- Identify the key factors in the problem from your perspective.
 - ⇒ Pretend you are going to tell someone a story about the problem. What are the three or four key characteristics or details you would want to convey?
- Identify the key factors in the problem from the perspective of others. Ask yourself the following questions:
 - ⇒ How would management in other areas view this problem? What factors would they see from their perspective?
 - ⇒ How would customers view this problem? What factors would they see?
- Prepare a summary of your findings. Identify any immediate steps you could take on your own to help resolve the problem. Take the first steps.

Reflection Tip:

* Which "others" did you consider in this exercise? Are there any additional "others" that might have different viewpoints that could be valuable to understand?

Use a lateral thinking approach to generate novel solutions to a complex problem

- Identify a problem that seems difficult or impossible to solve.
- To get a different perspective on the problem, try breaking the elements up and recombining them in a different way (perhaps randomly).
- Check your assumptions, especially about who, what, when, where, why?
- Challenge what you believe are "facts" by considering what you think are facts with regard to this problem, and investigate what differences and advantages it would make if they were not facts. You could try to imagine what would be the case if the facts were totally wrong. Or you could try to modify the fact and see whether that now fits into the current situation better than the original one.
- If you find that your new consideration simply doesn't fit, then consider what advantages this hypothetical situation might have and how you might be able to incorporate them into your current solution

Assess the costs and benefits of a plan.

- Identify a difficult business/organizational situation you are going to have to confront over the next few days or weeks and list the choices of action you have.
 - List the most likely significant consequences for each choice (use the table shown in the example at the end of this exercise).
 - Rate the importance of each consequence. Use a five-point scale:
1 (not very important) to 5 (very important).
 - Label each consequence as a cost (-) or as a benefit (+).
 - Make a rough estimate as to the likelihood of each consequence. Use 0% (certain the consequence won't happen) to 100% (certain the consequence will happen).
 - Multiply the importance rating by the likelihood value for each consequence and sum the total (see the example following).
- ⇒ Example: Should we introduce a new line of service to our already busy schedule?

Consequence	Importance	Likelihood	Total
Improve service	+4	100	400
Positive response by customers	+3	50	150
Increased stress level	-5	100	-500
TOTAL			+50

In this example, the analysis indicates the benefits outweigh the costs for this particular choice of action.

- Repeat the above analysis for each choice of action you have identified.
- Select the option with the highest totals once you have completed the totals for each option.
- Review your analysis with your manager and ask for his or her input. Add any other consequences you both identify and repeat your analysis.
- Ensure nothing important is missing and commit to your course of action.
- Keep a written record of the decisions you make based on this technique.

Reflection Tip:

** Take note of the thought processes that your manager uses in deciding if there are any additional consequences. Ask him/her to “think out loud”, in order to share their evaluation process with you.*

During the next two weeks make a list of unexpected client problems or issues that come up and think through the possible trends or patterns.

- Examine the list and try to identify any common themes or similarities, and ask yourself the following questions:
 - ⇒ Have I seen this type of problem before?
 - ⇒ What do I already know that may help me to solve the problem?
 - ⇒ What may be the cause of the problem?
 - ⇒ Is there anything that could have prevented the problem from occurring? If yes, what action could have prevented it?
 - ⇒ Is there anything I could have done to speed up my understanding of the problem?
- Note these themes on a piece of paper.
- Take action to make use of these identified trends in order to overcome similar situations in the future.

Seek out creative thinkers.

- Identify people who are considered highly creative within your agency.
- Arrange a meeting(s) to discuss how they approach issues and identify new ideas or solutions. Incorporate some of their ideas into your own work.
- Read about creative thinkers from the past and present, e.g., Einstein, Galileo, Steven Spielberg, George Lucas, etc.

Practice identifying key themes to simplify complex ideas

- When you read a book or article, practice identifying two or three themes or conclusions (e.g. at the end of each chapter, and then at the end of the book). This will encourage you to take an overview and to simplify complex ideas.
- When presenting information to other people, look for ways of summarizing and simplifying. Identify the key messages or information and try to present them on a single page (perhaps visually).
- When presenting information verbally, give the headlines first, and then add any necessary detail.

Reflection Tip:

** Take the time to check your assumptions. Are you being open-minded, flexible and creative in your questioning? Once you reach a viable solution, explore how you might be able to refine it or replace it with a better solution.*

Redefine a complex problem

- When you are getting stuck with a problem, see if you can find a different way of looking at it: seek to find out what the real issue is, which may not be the obvious one.
- Question ‘what, where, when, who, why, how’ to understand the problem more deeply, and reformulate it in light of your new insights.
- Work with your team to challenge these assumptions and boundaries.

Books and Videos

Rational Choice and Judgement: Decision Analysis for the Decider, by Rex Brown (Wiley-Interscience, 2005).

This book takes an innovative approach to decision analysis that moves away from cumbersome, quantitative methods to give students and professionals' decision-making tools that can be applied immediately. Simple decision-making models are integrated into the thinking process to add logical rigor.

Critical Thinking: Tool for Taking Charge of Your Professional and Personal Life, by Richard W. Paul & Linda Elder (Prentice Hall, 2002).

Critical Thinking is about becoming a better thinker in every aspect of your life as a professional, as a consumer, citizen, friend, parent, and even as a lover. Drs. Richard W. Paul and Linda Elder, leaders of the Center for Critical Thinking, identify the core skills of effective thinking, then help you analyze your own thought processes so you can identify your weaknesses and overcome them.

Smart Choices: A Practical Guide to Making Better Decisions, by John S. Hammond, Ralph L. Keeney & Howard Raiffa (Broadway, 2002).

Authors Hammond, Keeney and Raiffa, among the world's best-known experts on resolving complex decision problems, have created a set of techniques for assessing your options more clearly and effectively, ultimately empowering you to make smarter choices. Their step-by-step procedures combine solid research with practical experience and common sense to help you specify your objectives, identify creative alternatives, make reasoned trade-offs, clarify uncertainties and evaluate the risks.

Critical Thinking: An Introduction to Analytical Reading and Reasoning, by Larry Wright (Oxford University Press, 2001).

Extensively classroom-tested, this book provides a guide to identifying and articulating the central patterns found in reasoning and in expository writing more generally. Understanding these patterns of reasoning helps to analyze, evaluate, and construct arguments and to easily comprehend the full range of everyday arguments found in ordinary journalism.

The Art of Thinking: A Guide to Critical and Creative Thought, by Vincent R. Ruggiero (Longman, 2006).

This unique text offers strategies for critical and creative thinking and includes many opportunities for practicing these fundamental skills. It will help readers think "outside the box" and to become more effective writers, speakers, and communicators.

Six Thinking Hats, by Edward de Bono (New Edition: Little Brown & Company, 1999; Original: Penguin Group, 1987).

Using case studies & real-life examples, the author shows how each of us can become a better thinker through deliberate role-playing. He outlines a brisk, disciplined approach that both individuals & businesses (from start-ups to major corporations) can adopt to create a climate of clearer thinking, improved communication, & greater creativity.

Imagination Engineering: How to Generate and Implement Great Ideas, by Paul Birch & Brian Clegg (New Edition: Prentice Hall, 2007; Original: Prentice Hall, 1996).

These British authors bring their past years of experience promoting creativity within British Airways, as well as in software design and review, to this latest in a long line of works on enhancing creative skills. The authors have conceptualized their process into the stages of surveying, building, way-marking, and navigating. Each stage is highly structured, with many tools or activity exercises, an explanation of the techniques of the tools, and practical examples.

The Way We Think: Conceptual Blending and The Mind's Hidden Complexities, by Gilles Fauconnier & Mark Turner (Basic Books, 2003).

Conceptual blending, a process that operates below the level of consciousness and involves connecting two concepts to create new meaning, can be used to explain abstract thought, creativity and language. The book shows how this blending operates, how it is affected by (and gives rise to) language, identity, culture and invention, and how we imagine what could be and what might have been.

The Five Faces of Genius: Creative Thinking Styles to Succeed at Work, by Annette Moser Wellman (Penguin USA, 2002).

Having researched the lives and techniques of past and present geniuses for this book, the author helps workers at all levels build and refine their working styles.

Conceptual Blockbusting: A Guide to Better Ideas, by James L. Adams (New Edition: Perseus Books, 2001; Original: Addison Wesley Longman, 1990).

Bestselling guide to overcoming creative blocks and unleashing a torrent of great ideas. Updated for a new generation of problem solvers.

The Ultimate Book of Business Creativity: 50 Great Thinking Tools for Transforming Your Business, by Ros Jay (New Edition: Capstone Pub, 2001; Original: John Wiley & Sons, 1999).

This book brings together for the first time, tools for generating breakthrough ideas. It will inspire you to think about your business in a radically different way.

Cross-Train Your Brain: A Mental Fitness Program for Maximizing Creativity and Achieving Success, by Stephen D. Eiffert (New Edition: Amer Management, 1999; Original: AMACOM, 1998).

When you change the way you think, you can change your life. That's the message and the goal of the dynamic mental workout. This book shows readers how to break through the constraints of career pigeonholing, tedious routine, and rote learning to recapture the power of their true creative natures.

Breakthrough Thinking: The Seven Principles of Creative Problem Solving, by Gerald Nadler (New Edition: Prima Lifestyles, 1998; Original: Prima Publishing, 1994).

This book presents some novel ideas on how to approach problems based on the thought processes of great thinkers. It includes exercises you can do to practice their suggested approach. While the book can be a bit dry, most people will find some of the ideas useful.

Flash of Brilliance: Inspiring Creativity Where You Work, William C. Miller (Harper Collins Ltd., 1998).

Flash of Brilliance describes how to foster creativity in corporate America and boost the bottom line in the process. In this book, creativity consultant William C. Miller argues that the most successful companies encourage inspiration and innovation and allow people to make a difference.

Jamming: The Art and Discipline of Business Creativity, by John Keo (Harper Collins, 1997).

In this book, Kao shows how high-performance companies around the world have learned the lessons of creativity to leap ahead of their obsolete competitors. They have learned to make creativity tangible and actionable, they practice a new managerial mindset, and they have learned to leverage information technology to enhance creative collaboration.

The Mind Map Book: Radiant Thinking, by Tony Buzan with Barry Buzan (New Edition: Guinness Publishing: 1996; Original: BBC Books, 1993).

This book explains both the fundamental operation of the human brain in terms of its thinking processes and explains how to release its untapped power. A key goal is to accelerate the ability to learn, remember and record information. The Mind Mapping technique allows you to make the best of all your mental resources, as well as helping you to maximize your brain power.

Brain Boosters for Business Advantage: Ticklers, Grab Bags, Blue Skies, and Other Bionic Ideas, by Arthur B. Van Gundy (Jossey-Bass Publishers, 1994).

When a hard-to-solve problem needs a custom-made solution, and the idea mavens are fresh out of ideas, this book comes to the rescue. *Brain Boosters for Business Advantage* is a resource book of 101 individual and group idea generation techniques.

The Ideal Problem Solver: A Guide for Improving Thinking, Learning & Creativity, by John D. Bransford & Barry S. Stein (W.H. Freeman, 1993).

This book incorporates a wealth of research on thinking and creativity. A detailed framework for tackling problems is provided. It is ideal for developing one's critical thinking, learning & memory skills, and creative problem solving.

Use Both Sides of Your Brain, by Tony Buzan (New Edition: Plume Books, 1991; Original: Dutton, 1976).

This book contains practical ideas on how to learn more effectively and efficiently, solve problems and improve your memory.

The Art of Problem Solving: Accompanied by Ackoff's Fables, by Russell L. Ackoff (John Wiley & Sons Ltd., 1987).

This book uses a unique perspective to overcome the deficiencies of a purely scientific approach to managerial decision making. The book explores the creative art of problem solving, presenting material in a discursive style.

Intelligence Applied: Understanding and Increasing Your Intellectual Skills, by Sternberg & J. Harcourt, (Brace Jovanovich, 1986).

This book is probably the best single source of information that treats conceptual thinking as one of the competencies involved in intelligent behaviour. On the one hand, it provides a sound and convincing explanation of why such an intellectual competency must be treated in terms of the context in which it occurs. On the other, it provides many practical exercises the reader can employ to understand intellectual competencies better and to improve his or her skills.

The Einstein Factor: A Proven Method for Increasing Your Intelligence, by Win Wenger & R Poe. (New Edition: Gramercy Books, 2004; Original: Prima Lifestyles, 1995).

New research suggests that the superior achievements of famous thinkers may have been more the result of mental conditioning than genetic superiority. Now you can learn to condition your mind in the same way and improve your performance in virtually all aspects of mental ability, including memory, quickness, IQ, and learning capacity.

Smart Choices: A Practical Guide to Making Better Decisions, by John S. Hammond, Ralph L. Keeney & Howard Raiffa (Broadway, 2002).

Authors Hammond, Keeney and Raiffa, among the world's best-known experts on resolving complex decision problems, have created a set of techniques for assessing your options more clearly and effectively, ultimately empowering you to make smarter choices. Their step-by-step procedures combine solid research with practical experience and common sense to help you specify your objectives, identify creative alternatives, make reasoned trade-offs, clarify uncertainties and evaluate the risks.

Master Thinker, by Edward deBono (Audio Literature, 2000).

This audio CD resource provides an introduction to different thinking styles. Exercises for practice are included.

Thunderbolt Thinking, by Grace McGartland (New Edition: Bard Press, 2000; Original: Bard Press, 1993).

This book motivates you to unlock your flexibility, awareness, courage and humour and tells you how to use these traits to bring you fantastic results. She also helps you save time and money by showing you how to reshape traditional meeting methods. This book helps you approach your business problems with some very powerful new techniques, tools and practical guidance.

The Managerial Decision-Making Process, by E. Frank Harrison (New Edition: Houghton Mifflin Company, 1999; Original: Houghton Mifflin Company: 1994).

The Managerial Decision-Making Process focuses directly on decisions made by middle and upper levels of management in organizations of all types. The book develops senior-level management decisions in a process model using concepts from psychology, sociology, philosophy and economics.

The Thinker's Toolkit. Fourteen Skills for Making Smarter Decisions in Business and in Life, by Morgan D. Jones (New Edition: Crown Publishing Group, 1998; Original: Random House, 1995).

This book highlights the reasons why it is so difficult for us to think analytically, and teaches a variety of useful skills to beat biases and beliefs when making decisions. Written by a former head of the Analysis Training Branch at the Central Intelligence Agency, Jones applies brain-toughening exercises to typical business problems.

Goals and Goal Setting, Larrie A. Rouillard (New Edition: Crisp Publications, 1997; Original: Crisp Publications, 1993).

A step by step manual on setting goals and breaking them down into specific action plans. Learning how to recognize the value of goals and the importance of fundamental goal setting is easy with this book guiding you.

In Search of Solutions: 60 Ways to Guide Your Problem-Solving Group, by David Quinlivan-Hall (Jossey-Bass Incorporated Publishers, 1993).

This book shows how you and your team can tackle problems systematically and creatively.

The Complete Problem Solver: A Total System for Competitive Decision Making, by John D. Arnold (John Wiley & Sons Ltd, 1992).

This book provides down-to-earth examples of fail-safe, systematic problem-solving processes. It is highly readable and provides good tips on how to tackle virtually every challenge a leader or employee might face.

Detective stories like “Agatha Christie”, “Ellery Queen”, “Ruth Rendell” or “John Grisham”.

Many detective stories provide a practical and pleasant way to exercise Insightful Analysis skills. They often provide a variety of clues that the reader must fit into a pattern to explain “who done it, why, and how?”

The video, “Decisions, Decisions”, by Video Arts (International Tele-Film, 1-800-561-4300, www.itf.ca).

In this video, experts show a manager (played by John Cleese) how he has ignored or neglected the basic principles of decision making. They then show him how their own decisions would have turned out if the manager had been in their place. The manager learns that decision making is a process rather than a single step. The video vividly demonstrates that consultation and communication are essential in the decision making process.

The video “Discovering the Future, The Business of Paradigms”, by Charthouse (International Tele-Film, 1-800-561-4300, www.itf.ca).

The host and author talks about how existing paradigms can limit our thinking and talks about creating new paradigms to reshape and achieve new levels of performance.

The video, “Mindworks Series: Forced Connections”, by Producers Media International (International Tele-Film, 1-800-561-4300, www.itf.ca).

Helps you generate new ideas by breaking the logical patterns in your thinking and taking you outside your current reality and then forcing you to apply new thought processes to a challenge. It is effective for generating ideas that would never be reached by a logical or analytical process.

The movie “Apollo 13”.

This powerful and engaging film demonstrates how a group of people demonstrated exceptional organizational commitment to save the lives of the three astronauts. In particular not the commitment demonstrated by the mission control commander and his team.

The movie “Murder on the Orient Express” or “Death on the Nile”.

Try to solve the mystery from the clues. If you need time to puzzle things out, stop the movie while you think.

The movie “Veronica Guerin”.

This movie highlights the life and work of an investigative journalist who single handedly worked to bring attention to the problems of drug related crime in Ireland. Focus on how she investigated the crimes and uncovered a tangled web of relationships to ultimately get to the key players in the Irish underworld of drug lords.

The movie, “Good Will Hunting”.

In this movie, Will Hunting, a janitor at MIT, has a gift for mathematics which is discovered by one of the professors. However, Will's choices and direction have led him away from success in life and so a psychologist tries to help him with his gift and his life. Consider how Will and the psychologist resolve obstacles through careful problem solving.

The video “Why Didn’t I Think of That?”, by American Media (International Tele-Film, 1-800-561-4300, www.itf.ca).

Cultivating the creative spirit requires tools to help view surroundings in a new light. Stretch your employees' thinking skills with the 10 challenges presented in this mind-expanding video.

Television programs, “CSI”, “CSI: Miami”, “Law and Order” or “NCIS”.

Follow with expert investigators as they solve crimes using their analytical thinking and information seeking skills.

Developing Others (DEV)

Definition:

Developing Others involves a genuine intent and passion to foster the long-term learning or development of others through encouraging, managing performance and coaching, in order to fulfill the current and future skill requirements of both individuals within the profession and the organization. Developing Others is not limited to formal positions of authority.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ making positive comments regarding staff's /employee's current and expected abilities and potential to learn and develop 	<ul style="list-style-type: none"> ▪ giving only negative feedback and/or criticizing personal traits
<ul style="list-style-type: none"> ▪ actively tracking direct reports' performance and progress on development plans 	<ul style="list-style-type: none"> ▪ conducting only annual performance reviews
<ul style="list-style-type: none"> ▪ ensuring that there is a clear understanding of roles, accountabilities and specific expectations 	<ul style="list-style-type: none"> ▪ assuming direct reports know what is expected of them
<ul style="list-style-type: none"> ▪ actively monitoring the quality of others' work, giving on-the-job instructions and training, or other practical support, as a means of enhancing performance 	<ul style="list-style-type: none"> ▪ taking a "no news is good news" approach
<ul style="list-style-type: none"> ▪ taking the time to work with staff on developmental strategies 	<ul style="list-style-type: none"> ▪ putting off dealing with developmental planning
<ul style="list-style-type: none"> ▪ acting as a mentor by spending time with staff who are trying to develop their competencies 	<ul style="list-style-type: none"> ▪ simply reviewing employee progress through their written work or what others say
<ul style="list-style-type: none"> ▪ providing behavioural feedback and support to someone after a setback 	<ul style="list-style-type: none"> ▪ telling other people what an individual should have done differently but not telling the individual directly

Continued on next page

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none">▪ assigning appropriate and helpful work experiences and training to foster the learning and development of direct reports	<ul style="list-style-type: none">▪ assigning the same tasks to the same people all the time and giving direct reports solutions to problems before they have had the opportunity to solve them themselves
<ul style="list-style-type: none">▪ designing significantly new processes for teaching traditional materials	<ul style="list-style-type: none">▪ waiting for someone else to design new or innovative training processes
<ul style="list-style-type: none">▪ Seeking out work opportunities that will challenge your direct reports, enable them to learn new skills, and empower them to take the lead in developing themselves	<ul style="list-style-type: none">▪ keeping tight control over your direct reports' actions and only assigning work that you know they will do well and efficiently because they have done similar assignments many times before

Developmental Activities

Level 1-2 Activities

Review your current workload and assess which tasks could be delegated to staff members.

- Select an employee for the assignment who demonstrates the competencies required for the task. Make it clear that the purpose of delegating the task is to make the employee more comfortable with increased responsibility.
- Provide clear direction and parameters for action when delegating.
- Monitor and coach regularly.
- Keep a record of the decisions you make.

Reflection Tip:

** When delegating, ensure that the employee understands that the purpose of the assignment is to develop his/her ability to take on new responsibilities, not simply to do your work.*

Identify challenging developmental/learning opportunities for your direct reports to facilitate their growth.

- Talk to each of your direct reports to get a sense of where their interests lie, and where they believe they can add more value to the area than they are currently providing.
- Refer to their most recent performance appraisals as an indication of the sorts of activities they could become involved in, based on their experience and capabilities.
- Look for challenging assignments that will provide them with greater exposure in the organization and opportunities to develop their skills and abilities. This could include standing in for you at meetings, acting on cross-functional task forces or becoming involved in special projects. Remember that these opportunities may exist outside your department/business unit, as well, and could benefit the broader organizational mandate.
- Propose these opportunities to your direct reports, explaining why you think it is important for them to develop in these areas (be as specific as you can), and encourage them to take a risk.
- Ensure you are available to support them throughout the activity with time and advice.

Reflection Tip:

**Discuss ways you have both learned from these experiences and do what you can to implement successful patterns in your next assignment.*

Develop a system for sharing best practices.

- Share events or examples that illustrate the types of behaviours you desire from your staff. Encourage others to share similar stories.
- Post or circulate letters or reports that provide positive feedback to illustrate and emphasize the desired behaviours.
- Share ideas of best practices you have observed with others and at department meetings.
- Set up a file of good examples of client correspondence that all employees can access.

Review your ideas for development with your manager.

- Before you arrange to meet with a direct report to discuss their development, meet with your manager and review your plans.
- Ask for input on the best way to approach any issues you are having with your direct reports.

Provide task-specific guidance and advice.

- Make the time.
- Spend adequate time with direct reports when assigning roles or projects.
- Ensure roles and responsibilities are established clearly at the beginning of each project.

Give “how-to” instructions.

- For new tasks and responsibilities you are going to assign, consider how you want the job done and what steps need to be taken to obtain desired results.
- Think through the best way to explain those steps to your staff and create clear instructions.
- Provide your staff with clear detailed instructions of what needs to be done and why.
- Explain how the task will be done.
- Together, formulate an action plan to implement any development required to perform the task or responsibility.

Reflection Tip:

* Use your Interpersonal Relations and Respect skills to ensure that your staff understands the instructions. Reflect on areas of miscommunication – is there anything you could do to make the instructions more clear?

Use learning strategies when giving directions.

- Whenever you assign tasks to others or tell others how to perform a task, always include the context and rationale for the actions you would like them to take.
- When delegating tasks, include a discussion about the individual's needs in terms of training, information, tools, etc., to complete the assignment.
- Before assigning tasks, make a list of the key points you want to cover with the person. Use this to guide your discussion.

Reflection Tip:

* *Develop techniques to verify that others have understood the instructions. Reflect on areas of miscommunication – what additional explanation would help to clarify the instructions?*

Meet with direct reports regularly.

- Discuss their understanding of their roles and responsibilities.
- Ask direct reports what kind of support they need.
- Use these meetings to increase ownership of the task and provide support.
- Ensure there is no ambiguity in the tasks to be accomplished.

Ask probing questions to help you understand the person and determine his or her performance and/or development needs

- Use questions to begin a dialogue that will take you closer to the heart of the problem(s) and solution(s), such as
 - ⇒ “Have you tried _____?”
 - ⇒ “What do you think is the best way to _____?”
 - ⇒ “What do you think would happen if _____?”
 - ⇒ “How do you feel about your profess to date?”

Reflection Tip:

* *Think about how you can create a partnership from the very beginning. Set the person at ease, by reviewing the purpose of the discussion and its positive benefits for both parties.*

Provide advice for expanding knowledge of direct reports.

- When you read an interesting article or book of interest, pass it on to your staff
- Direct your staff to informative websites and other information sources to expand their technical knowledge

Reflection Tip:

** Speak with your peers about how they encourage their direct reports in these areas.*

Work with direct reports to identify the strengths and development needs that they will need to work on over the next year.

- Meet individually with each member of your staff
- Ask each individual to describe in his/her own words their proposed development opportunities
 - ⇒ What are the individual's goals?
 - ⇒ What skills/behaviours must the individual demonstrate to reach those goals?
- Agree on a plan that incorporates both your input and the employee's/ direct report's suggestions.
- Commit to providing that support (e.g. training courses, books, your time, etc.)
- Discuss how you can support the individual in his or her development.
- Provide your perspective on the development plan.

Level 3-4 Activities

Track the number of positive and negative comments you make over a two week period, noting the context in which the comments were made.

- Record the number of positive and negative comments you made over a 2-week period, and review your notes. For each negative comment, decide if it was appropriate and necessary.
- For those negative comments that were necessary, revise the comment so that it conveys the same information, but has a positive tone and can be perceived as constructive criticism.
- Carefully consider comments before delivering feedback to ensure that it is delivered as constructive criticism.
- Make a concerted effort to steadily increase the amount of positive feedback you provide so the ratio of positive to negative is about 3 to 1.

Reflection Tip:

** What feedback was specific, descriptive and immediate? Were you able to engage in a two-way conversation about the ways the employee could improve?*

Encourage the sharing of resources across the organization.

- Keep abreast of developments and projects in other areas that may provide staffing and development opportunities.
- Provide job assignments that will increase individuals' exposure to different areas and management experience.
- Share your current talent pool, identify gaps.
- Identify opportunities to share resources for the benefit the organization as a whole.

Reflection Tip:

** What implications do new developments in other areas have for your area? How can you prepare your staff for these implications?*

Arrange to meet and work with people who are good at coaching.

- Ask your manager to identify someone in the organization who has successfully developed people over the years.
- Getting regular feedback is one of the best ways for you to learn. Ask to be coached on your coaching.

Examine your own style of supporting and coaching team members/others/your direct reports in assignments or regular job responsibilities. Ask yourself the following questions:

- Do I express positive expectations of my direct reports?
- Do I give individuals/my direct reports an opportunity to think and act independently?
- Do I tell people/my direct reports what to do or do I give them the overall objective and let them determine what to do?
- Have I identified appropriate times to provide direction to my direct reports and times when I should be leaving them to function on their own?

Reflection Tips:

- * Reflect on each of these activities. How often would you estimate that you do them? Are there opportunities to use them that you are missing?
- * Ask peers and your manager if they have any comments or suggestions.

Assist employees/direct reports in enhancing their confidence in their abilities.

- Be frank, providing negative as well as positive feedback, while ensuring that you make clear what the individual can do to improve.
- Be supportive of your employees'/staff's efforts to try new ideas, test new abilities, or exercise authority.
- Give specific, behaviourally based feedback about their performance and demonstrate how to practice important skills.
- Make a point of spending some time with your employees/direct reports and observing how they practice their skills.
- Provide support in their skill development in the form of financial resources, time, reinforcement, and encouragement.

Reflection Tips:

- * Acknowledge successes and progress along the way.

Determine where to focus your coaching efforts.

- Use the management planning grid below to determine the extent of involvement you should consider giving to your team and each individual given their skills, knowledge, competencies, and their willingness to adapt to change.

Management Planning Grid

<p><i>Hi</i></p> <p>Knowledge and Ability</p>	<ul style="list-style-type: none"> ▪ Encourage expression of feelings ▪ Ask for ideas and suggestions ▪ Provide moderate feedback ▪ Be direct in conveying consequences ▪ Hold frequent group meetings 	<ul style="list-style-type: none"> ▪ Encourage sharing of ideas, suggestions, options ▪ Ask group to decide frequency of meetings ▪ Delegate important responsibilities
<p><i>Lo</i></p> <p>Knowledge and Ability</p>	<ul style="list-style-type: none"> ▪ Give information and direction ▪ Provide detailed instructions and moderate feedback ▪ Monitor closely ▪ Be direct in conveying consequences ▪ Hold frequent group meetings 	<ul style="list-style-type: none"> ▪ Encourage discussion and sharing ▪ Provide detailed instruction and high levels of feedback ▪ Hold frequent meetings ▪ Involve in brainstorming, idea generation on specific issues ▪ Delegate “safe” responsibilities

Reflection Tips:

* Which quadrant are you most comfortable functioning in? Which quadrant is most appropriate for your team? What do you need to do to move from your current quadrant to the desired quadrant?

Maintain a development file on each of your employees/ your direct reports.

- Keep track of successes (e.g., achieving goals), failures (e.g., not upholding commitments), development needs (e.g., improving problem solving skills), and how you have agreed to help.
 - ⇒ Remember that it is often easier to focus on times when an individual has made a mistake than it is to remember their successes. Set aside a short time every week and think about a specific individual's performance in the last two weeks. Think about someone else the following week. This ongoing record will be an invaluable source of information when you are preparing for your employees' performance reviews.
- Ensure that your notes are behavioural and specific, including actions taken by the individual, attitudes displayed, dialogue, impact of behaviour on results, etc.
- Identify how you can help and take action.
- Provide feedback frequently and as close in time to the actual event as possible.
- Reference your file during annual reviews and formal coaching sessions.
- Use this file during the performance review process.

Reflection Tip:

** Be sure to recognize and reinforce improvements in performance, especially in the early stages.*

Practice giving feedback.

- Ask for feedback about your own skill at providing feedback.
- Role-play giving positive and developmental feedback with a peer who has good coaching skills or with an experienced employee whose opinion you respect.
- While working with your direct reports/employees, request feedback from them about what you can do to improve your ability to give feedback.

Reflection Tips:

** Practice making your feedback non-evaluative, specific and behavioural. Avoid general statements, since they do not provide meaningful information sufficient for development.*

** Keep track of their comments, and make a conscious effort to address them.*

Be supportive of your employee's/staff's/direct report's efforts to try new ideas, test new abilities, or exercise authority.

- Provide support in the form of financial resources, time, feedback, reinforcement, encouragement, and other forms of coaching.
- Remember to tailor your support to the individual's learning style.
- If a new idea or project does not work, be sure to offer reassurance.
- Maintain open communication with the individual so that they'll feel comfortable approaching you with any questions or concerns.

Reflection Tip:

* Speak with your peers about how they encourage their direct reports in these areas.

Practice different styles of coaching.

- Identify an employee whom you have had trouble developing.
- Think of different approaches you could take in coaching that employee.
- Practice using the different approaches.
- If there are no immediate results, keep at it. It will take you some time to develop skill in the new style of coaching. Ask your colleague for ideas related to the approaches.

Reflection Tips:

- * What is your style of coaching? What did you do to adapt your style to fit the needs of each employee?
- * In each use, ask yourself if coaching will improve the situation? Determine the extent to which the employee is motivated to learn and improve, and then you'll be better able to determine if coaching is the appropriate way forward.

Identify the unique issues, concerns and motivators of each of your direct reports/employees.

- Discuss how to tailor your approach to get the best out of each direct report.
- Record the number of positive and negative comments you make.
- Think about the positive and negative feedback in behavioural rather than personal terms and think of how positive expectations can be expressed when supporting people in their development.
- Write this information down and review it with your supervisor/manager. Assess what issues, concerns or challenges come up when someone is supporting someone else or providing them with feedback.

Reflection Tip:

- * What feedback was specific, descriptive and immediate? Were you able to engage in a two-way conversation about the ways the employees/direct report could improve?

Involve your direct report/employee to prepare for coaching by asking him/her to appraise his/her own work performance.

- Ask the employee to appraise his/her performance against stated goals, by answering the following questions:
 - ⇒ To what extent have you achieved your goals?
 - ⇒ Which, if any, goals you have exceeded?
 - ⇒ Are there particular goals with which you are currently struggling?
 - ⇒ What is getting in the way of your progress toward your goals (e.g., lack of training, resources, direction from me, etc.)?

Reflection Tips:

- * Use these questions to help you identify the most appropriate approach for coaching this individual.
- * Consider whether you are preparing this person for a new job or a higher level of responsibility and focus your efforts on the appropriate competencies for this future opportunity.

Seek out unique development opportunities.

- Seek out unique development opportunities, both internally and externally that will stretch the capabilities of your employees. Following are some examples:
 - ⇒ Have team members participate in cross-functional task forces, temporary lateral assignments, job rotations, etc.
 - ⇒ Ask your team to prepare a budget that would represent the goals and priorities of the department.
- Ask your team to recruit and select the next opening available with the group. Offer some selection interviewing training as development experience.

Arrange challenging assignments for people.

- Look for opportunities that will stretch people rather than just safe bets.
- Accept that there will be mistakes and failures. If none of your team ever fail at a task, maybe you haven't been giving them challenging enough assignments.
- Accept that these assignments will cause some anxiety to your staff. If people are not concerned that the assignment may be too big for them, it is not a real challenge. If they are concerned, help them work through the project requirements and make sure they have the necessary resources to do a good job.
- Monitor an employee's performance on competencies you are helping them to develop and give them feedback during coaching sessions.
- Frequently observe their behaviours in order to provide an objective assessment of their strengths and weaknesses. Keep a journal to record your thoughts regarding their development needs and progress on the competencies they are working on.
- Think about how to deliver your feedback before the coaching discussion so that it is non-evaluative, specific, and behavioural.
 - ⇒ Describe the behaviour you are recognizing and avoid general statements such as "You did a good job". General statements do not provide meaningful information sufficient for development.
- Ask the employee about their thoughts on your feedback.
- Guide them to commit to a development effort.

Reflection Tip:

** Have them keep their own journal. Compare what is recorded in each of your journals. What overlaps? What doesn't? What could be done to address these differences?*

Develop a continuous improvement mindset by including feedback (both positive and negative) as a regular, expected part of all meetings.

- Use special award programs, or other, less formal means, to recognize significant, special efforts.
- Whether it is positive or negative, to be effective, feedback needs to be timely, specific and behavioural, rather than general and judgemental.
- Focus on the work, not the person, and give specific examples, e.g., the comment, "You have not developed a succession plan for your area," is much less likely to arouse defensiveness than the comment, "You're not doing your job."
- Be frank, providing negative feedback as well as positive, while ensuring that you make clear what the individual can do to improve. Be prepared to outline the resources or other support you can provide to the employee in order to assist in his/her development.
- Incorporate best practices discussions into all regular meetings, so that staff can share their successes and learnings.

Reflection Tip:

**What coaching techniques have you used in the past to help employees reach their full potential? What hasn't been effective? Why? What has been effective? Why?*

Consider the following points when providing coaching to address a performance problem with a direct report.

- Does the person agree there is a problem? If not, consider how you might need to reposition the issue to help them recognize that a problem exists and to consider the steps needed to resolve it.
- Does the person recognize that the responsibility for improvement lies with him or her, not you? Emphasize that you will provide encouragement and feedback.
- Encourage the person to come up with alternatives. Solutions generated by the individual are more likely to be accepted.
- Be sure to recognize and reinforce improvements in performance, especially in the early stages.
- Take quick action if tough decisions are required (involve HR appropriately).

Reflection Tips:

- *Gather information from your peers about how they handle similar difficult situations. What works for them? What should be avoided?*
- *Be sure to recognize and reinforce improvements in performance, especially in the early stages.*

Level 5 Activities

Create and implement long term plans for developing your employees.

- Write down some clear goals that you would like to achieve in developing employees over a longer term period (one to three years). For example, you might set a goal to develop new employees so that over time they would be comfortable in taking the lead in a group project, able to deal effectively with even the most difficult client cases, and regularly approaching work in an analytical way.
- Track their progress over time and assess how well you are doing.
- Remember to be patient with them and yourself. It takes time for someone to mature and develop.
- Recognize your successes. If an employee you have developed is promoted or handles a project particularly well take a moment to recognize a supporting role.

Use strong team members to help other team members in need of development.

- Encourage strong team members to share their skills and knowledge with those in need of development.
- Set up a buddy system for mentoring within your group, or even outside your group.
- Allow team members and mentors to set up their own process for mentoring.
- Ask each team member to identify a possible mentor who has demonstrated strength in the areas the team member needs to develop.
- Discuss each team member's development needs with them and ensure there is alignment on development needs and goals.
- Identify those team members that are in need of development and set up one-on-one discussions with each.
- Monitor the results of the process for 3 months

Develop a supporting atmosphere by including feedback (both positive and negative) as a regular, expected part of all meetings.

- Give feedback that is specific and behavioural, rather than general and judgemental.
- Describe the behaviour of others in objective and specific terms.
- Focus on the work, not the person and give specific examples (e.g., the comment, "You've missed the last two deadlines" is much less likely to arouse defensiveness than the comment "You're lazy").
- Be frank, providing negative feedback as well as positive.

Schedule periodic individual discussions with your employees to discuss their career goals. Address such issues as:

- What are their goals?
- What skills and competencies must they develop to reach their goals?
- What opportunities for job expansion or promotion exist?
- What do you see that supports or contradicts these goals?
- Are their goals realistic?
- Are their goals challenging enough?
- What can you and the organization do to help staff achieve their career goals?
- Build development plans with employees that take the answers to these questions into consideration, and provide regular feedback on progress toward career goals.

Grow the talent pool of your direct reports by providing developmental challenges.

- Allow team members and mentors to set up their own process for mentoring.
- Ensure that you are available to support them throughout the activity with time and advice.
- Give your direct reports an opportunity to present a business case to the senior staff/senior employees
- Give your direct reports experience by letting them stand in for you on various occasions.
- Keep abreast of developments (e.g., new project start-ups, new mandates) in other areas that may provide development opportunities.
- Monitor the results of the process by asking for feedback from team members and mentors after 3 months.
- Send them to executive management meetings in your place.
- Talk to each of your employees to get a sense of where their interests lie, as well as where they believe they can add more value to the organization than they are currently doing.

Reflection Tips:

- * *Recognize that the best mentor for an individual may not be the technical expert in the area, and may not even be a member of your department.*
- * *Develop techniques to verify that others have understood the instructions. Reflect on areas of miscommunication – what additional explanation would help to clarify the instructions?*

Foster an environment where your direct reports take ownership of the development of their respective teams.

- Address such issues as:
 - ⇒ What are their personal and team goals?
 - ⇒ What skills must they personally develop to reach their team goals?
 - ⇒ What do you see that supports or contradicts these goals?
 - ⇒ Are their goals challenging enough?
 - ⇒ What can you and the organization do to help direct reports achieve their goals?
- Ask them to identify objectives or targets that will help deliver to your overall profit plan.
- Ask your direct reports to provide you with regular updates on their progress. If a key result is falling short of target, work with them to identify specific actions to get it back on track.
- Schedule regular individual discussions with employees/direct reports who have performance coaching responsibilities to discuss the progress of their teams as well as the achievement of their own personal goals.
- Set challenging but realistic objectives and target deadlines with your direct reports.
- Start with objectives where there is a high probability of attainment to build momentum and the individual's confidence in his/her own abilities.

Reflection Tip:

** Remember that you are acting as a role model, as well as a coach for this employee/direct report. Consider how you are asking questions, assigning responsibility and monitoring the employee's/ direct report's success. They may very well use this format as the model to which they refer when they are in similar coaching situations.*

Take on the role of a mentor to help someone in the organization advance his/her career.

- Seek out an opportunity to mentor someone in the organization who is not a direct report.
- Be prepared to invest time and energy to support and guide the personal and long term professional growth of the individual over one to two years (or more).
- Think about how you will contribute to the individual's long-term development and what roles you are willing and capable of taking on. For example by:
 - ⇒ Acting as a sponsor and opening doors for the individual that would otherwise be closed
 - ⇒ Challenging and encouraging new ways of thinking and acting and pushing the individual to stretch his or her capabilities
 - ⇒ Providing exposure and visibility by steering the individual into assignments that make him or her known to top management
 - ⇒ Being a role model and demonstrating the kinds of behaviours, attitudes and values that lead to success in the organization
 - ⇒ Coaching and counseling the individual through difficult professional dilemmas
 - ⇒ Supporting the individual and respecting their need to balance their personal and professional lives.
- As your mentoring relationship progresses, evaluate the degree to which you have enabled the individual to broaden his/her perspective and organizational knowledge, and, in turn, given him/her the opportunity to contribute at a higher level
- Be prepared to end the mentoring relationship once the individual is ready to move on.

Provide rehearsal opportunities for direct reports who have coaching responsibilities.

- Some employees may want to practice giving feedback or assessing performance, before they do it with team members or direct reports. Offer to play the role of the employee who is receiving coaching.
- Discuss which areas of the process concern the employee most, and the reasons for their concern (e.g., lack of practice, sensitivity to personal dynamics, history of unsuccessful/ uncomfortable coaching sessions, etc.).
- Discuss the guidelines or patterns you have identified in your own practice of coaching or assessment. Make sure you allow plenty of opportunities for questions and analysis of the situation the employee is facing. The purpose is not to make a “coaching clone” but rather to give him/her some possible approaches to the situation, and some idea as to what to look for, to know whether the session is going well or needs to be redirected.
- Role-play the situation, responding in a number of ways so that the employee gets practice in dealing with different kinds of responses. Do not make it too easy or too hard for him/her to try out the guidelines you have discussed; it needs to feel realistic. Allow opportunities to “stop the action” if he/she needs to ask other questions or check on the direction of the process.
- Check back with the employee after he/she has held the real session. Help them to go through the same process of self-examination as you did, so they gain from their experience, and can begin to internalize the guidelines and indicators of success or difficulty.

Reflection Tips:

- * Consider the times when you have been in similar situations. When these sessions worked best, what had you done? Are there patterns in your responses or presentation of feedback or coaching that have been particularly helpful for you to utilize? What factors did you consider before deciding on your approach? Structure the results of your self-assessment into guidelines and share them with others.
- * Remember that you do not have to solve the employee’s problems; he or she needs to do that for him/her in order to truly learn. By acting as a “guinea pig” and providing some insight into how you have approached similar situations and the types of indicators or information you look for in those situations, you are providing him/her with learning support.

Books and Videos

Coaching, Counselling and Mentoring: How to Choose the Right Technique to Boost Employee Performance, by Florence M. Stone (2nd Edition: AMACOM, 2007; Original: AMACOM, 1999).

People are the most important asset to an organization. This book will show you the benefits to coaching, mentoring and counselling your employees to achieve the best results for your organization.

Coaching Life Changing Small Group Leaders, by Bill Donahue and Greg Bowman (Zondervan, 2006).

This book focuses on coaching leaders. It is a particularly useful resource to managers/leaders who are responsible for coaching direct reports who have their own small teams.

Coaching for Leadership, by Marshall Goldsmith and Laurence Lyons (New Edition: John Wiley & Sons, 2005, Jossey-Bass/Pfeiffer, 2000).

This is a collection of original essays on executive coaching and mentoring contributed by prominent academics and practitioners. The material is of particular value to human resource professionals, trainers, and executive coaches.

Coaching for Meaning: The Culture and Practice of Coaching and Team Building, by Vincent Lenhardt (VHPS Palgrave, 2004).

This book focuses on the concept of a leader as a bearer of meaning and purpose within the organization, and the significance of this coaching and team building. The author presents tools for the development of managers as coaches and models for how to achieve this.

Behavioural Coaching, by Suzanne Skiffington and Perry Zeus (McGraw-Hill Book Company, 2003).

This book presents a coherent definition and model of behavioural coaching based upon scientific, validated behavioural principles.

High Performance Leadership: Creating, Leading and Living in a High Performance World, by Graham Winter (John Wiley & Sons Canada, 2003).

This book is a powerful, proven and easy-to-implement approach to leadership that is essential in the fast and competitive business environment of the 21st century.

The book is based on a hugely successful leadership and team development process which has been tested in over 50 organizations.

Learning to Solve Problems: An Instructional Design Guide, by David H. Jonassen (John Wiley & Sons Canada, 2003).

This book describes models for designing interactive learning environments to support how to learn and solve different kinds of problems. Using a research-based approach, the author shows how to design instruction to support three kinds of problems: story problems, troubleshooting, and case and policy analysis problems.

Managing Employee Well-Being: A Guide for Human Resources Managers, by Donald Currie (Spiro Press, 2003).

This book helps managers to recognize the organizational advantages of having a healthy, contented workforce. Business success depends not just upon the knowledge and skills of employees but also their ability and desire to apply them.

Managing the Mavericks: Nurturing Key Talent, by Kaye Thorne (Spiro Press, 2003).

In order to stay competitive, organizations need people who can generate ideas, and challenge the status quo; they need mavericks. But mavericks can be difficult to manage. This book identifies the key characteristics of mavericks, and shows how organizations can attract them.

Coaching and Counselling, by Marianne Minor (New Edition: Crisp Publications Inc., 2002; Original: Crisp Publications Inc., 1989).

This booklet helps to fine-tune your skills as a motivating manager, supervisor, or advisor. Learn the differences between counselling and coaching--and when to apply each technique for the best results. Hands-on chapters help you identify your weaker coaching and counselling skills and build upon your stronger ones.

Coaching for Performance: Growing People, Performance and Purpose, by John Whitmore (3rd Edition: Nicholas Brealey, 2002).

This book is a definitive guide to mastering the skills needed to help people unlock their potential and maximize their performance in the art of coaching.

Managers as Mentors: Building Partnerships for Learning, by Chip R. Bell (Trade Paperback: Berrett-Koehler., 2002).

Chip R. Bell takes the mystery out of mentoring, teaching leaders how to give and take advice, coach and counsel effectively, develop new approaches to team meeting management, and more. This book will be particularly helpful for managers and others who have suddenly been told to coach, rather than manage their employees.

The One Minute Manager, by Kenneth Blanchard & Spencer Johnson (Trade Paperback: Zebra Bouquet, 2002; Original: Berkley Publishing Group, 1987) – also available on audio CD.

This book discusses how specific feedback in the form of short, one-minute praising or reprimands can be used to increase productivity, profits, and job satisfaction.

Putting the One Minute Manager to Work, by Kenneth Blanchard & Spencer Johnson (Berkley Publishing Group, 2002) – also available on audio CD.

Putting the One Minute Manager to Work is a companion to The One Minute Manager, written in the same easy-going style. By offering practical guidelines, it helps you implement the lessons and secrets discussed in the first book, making your staff and company more productive.

Be Your Own Mentor: Strategies from Top Women on the Secrets of Success, by Sheila Wellington and Betty Spence (Random House, 2001).

Written by the president of Catalyst, a research organization that studies women in the workplace, this book underscores the importance of mentors for women who want to break through the “glass ceiling.” It also advocates that women develop an executive presence, gain organizational visibility, and create a powerful network. The book is based on interviews with successful women in a number of industries, including Hewlett-Packard’s Carly Fiorini, Avon’s Andrea Jung, and lawyer Zoe Baird.

Executive Coaching: Developing Managerial Wisdom in a World of Chaos, by Richard R. Kilberg (APA, 2000).

The author provides a holistic view of coaching, showing how systems can be integrated into real-world coaching problems. In the complex and unpredictable world of business, Kilburg offers a practical and tangible guide for coaches to learn more about how to have a meaningful impact on behaviour. He uses case studies, tables, and models for easy comprehension of a complex topic.

The Mentor’s Guide, by Lois Zachary (Jossey-Bass, 2000).

This coffee table-sized book examines the process of mentoring from beginning to end: from assessing one’s readiness to becoming a mentor to the natural conclusion of the mentoring relationship.

The Complete Guide to Coaching at Work, by Suzanne Skiffington and Perry Zeus (McGraw-Hill Book Company, 2000).

This book offers beginners an introduction to coaching, with a step-by-step blueprint of successful coaching methods, models and tools. It includes insights on how to permanently enhance personal and organizational effectiveness, performance, and growth in the workplace.

Action Coaching: A Dynamic Method to Link Individual and Organizational Growth, by David L. Dotlich and Peter C. Cairo (Jossey-Bass Publishers, 1999).

This book instructs those at the executive, managerial, and group levels how to become coaches. The book demonstrates how to move people from heightened self-awareness to improve performance and how to go beyond that to a significant performance breakthrough and even major attitudinal changes that open new career vistas.

Coaching for Commitment, by Dennis C. Kinlaw (Jossey-Bass Publishers, 1999).

In today's employee-centered organizations, the opportunities for leadership no longer rest with managers and supervisors alone—everyone needs to be a coach! All coaching seeks to improve performance and improve the working environment for everyone. This book will give you some advice and tips on how to make coaching your responsibility.

Coaching for Improved Work Performance, Revised Edition, by Ferdinand Fournies (McGraw Hill, 1999).

Specifically geared to those who manage people, this book provides valuable and practical tools to deal effectively with employee performance and to re-direct inappropriate behaviour of "problem" employees.

Masterful Coaching Fieldbook, by Robert Hargrove (Jossey-Bass Publishers, 1999).

This book provides easily accessible steps for developing coaching skills. By showing managers how to encourage employees to think and work better together, the dry theory is stripped away and real conversational protocols are provided.

Mentoring At Work: Developmental Relationships in Organizational Life, by Kathy E. Kram (University Press of America, 1988).

Harvard Business School professor Linda Hill has described this volume as "the most comprehensive and in-depth analysis of developmental relationships currently available."

Giving and Receiving Criticism: Both Critical & Positive, by Patti Hathaway (Crisp Publications, 1997).

A useful guide to help develop skills in receiving and providing feedback. It shows how to get rid of negative connotations and use feedback communication as a vehicle for growth. The author uses case studies to illustrate her stance on gender, self-image, and criticism.

High Flyers: Developing the Next Generation of Leaders, by Morgan W. McCall, Jr. (McGraw-Hill Ryerson College Division, 1997).

This book is particularly relevant to recognizing and long-term coaching of high potentials, including the effective use of developmental assignments. Full of vivid, real-life examples, "High Flyers" explains how to link a firm's business strategy with the kinds of experiences people need if they are to lead a company in fulfilling its mission.

Tao of Coaching, by Max Landsberg (Harper-Collins Canada Ltd., 1997).

Motivate people by transforming them into all-star managers and employees. Managers should become coaches, whose responsibility to enhance the performance and learning abilities of others. The Tao of Coaching offers a global strategy for every manager to lead a winning team.

Improving Workplace Performance through Coaching, by Karen Lawson (Interligne, 1996).

This book presents coaching techniques to help employees to achieve their best. You will learn how to go from boss to coach, how to conduct coaching sessions and develop solutions, and how to develop your own personal action plan.

The video, "1001 Ways to Energize Individuals", by Business Advantage Inc. (International Tele-Film, 1-800-561-4300, www.itf.ca).

This video offers some simple ideas, tips, and strategies to help make exceptional employee performance a reality. It is focused on helping managers to connect with their employees, encourage creativity, and integrate challenge into their work.

The video, "The Art of Coaching in Business", (Greylock Associates, 888-279-4857).

This video program will help managers from the shop floor to the boardroom learn how coaching impacts the bottom line and how to use a coaching process to improve their associates' performance. Experts in the fields of business, sports, music and dance share their wisdom and experience about what it takes to coach successfully. The video is organized around 7 coaching issue and provides key summary insights into each of these key issues.

The video, “Breaking the Delegation Barrier” (International Tele-Film, 1-800-561-4300, www.itf.ca).

Delegation may be one of the most vexing problems for managers to deal with. This film explores the fear of loss of authority and of mistakes being made when managers delegate to their employees.

The video, “The Changing Role of Supervisor”, by Business Advantage Inc. (International Tele-Film, 1-800-561-4300, www.itf.ca).

This video uses a comical and dynamic series of dramatized vignettes interspersed with commentary from international consultants Jeff Dwar and Connie Winter who provide serious messages that will encourage discussion on issues ranging from management's fear of losing control to employees, to planning for complete empowerment and involvement.

The video, “The Coach”, by American Media (International Tele-Film, 1-800-561-4300, www.itf.ca).

This program deals with spotting opportunities for coaching, tailoring training to suit the individual, demonstrating, encouraging and reviewing progress.

The video, “Coaching and Performance Feedback Series”, by QMR (International Tele-Film, 1-800-561-4300, www.itf.ca).

This three part series focuses on the difficult task of performance improvement interviews, proper coaching methods, and giving feedback.

The video, “Coaching for Success”, by FT Knowledge (International Tele-Film, 1-800-561-4300, www.itf.ca).

Developing New Skills in Partnership. Set in a publishing company, this two-video package uses a variety of examples to demonstrate the importance of coaching in all sorts of roles. By exploring the working relationships within this company the positive effects of proper coaching techniques are illustrated. This package will provide practical advice on how to improve everyone's effectiveness and performance.

The video, “Coaching for Top Performance”, by AMA Video (International Tele-Film, 1-800-561-4300, www.itf.ca).

More managers are being called on to act as coaches, to provide the direction and vision that enable great work to be done. This video shows viewers how to acquire the necessary skills to become more effective as coaches and how to evoke superior performance in a team environment.

The video, “Coaching from the Heart”, by Training Edge (International Tele-Film, 1-800-561-4300, www.itf.ca).

The winningest coach in the history of pro football and one of the world's top management consultants team up to reveal five coaching secrets that have made them successful. They share principles from their recent book "Everyone's a Coach". Make your teams stronger and your coaches better with these principles for management success.

The video, “Coaching on the Job”, by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).

A four-step technique is presented to ensure that tasks are explained, understood and learned.

The video, “Coaching Through Facilitation: The New Way to Manager”, by Videolearning Systems (International Tele-Film, 1-800-561-4300, www.itf.ca).

This video explores how managers/leaders bring members of their team to the point where they can handle all the responsibilities of the job. This involves a management style that emphasizes facilitation, whereby employees draw from their own knowledge, experience and reasoning to reach decisions.

The video, “Coaching To Encourage Flexibility”, by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).

This video illustrates the common psychological reactions to change and gives practical “how to’s” for dealing with these reactions, including exploring concerns, “reframing” and the importance of modeling flexibility.

The video, “The Courage To Coach”, by American Media (International Tele-Film, 1-800-561-4300, www.itf.ca).

This program is a common sense approach to confronting tough employee performance situations and outlines a five-step process for coaching that will work.

The video, “Dimensions of Coaching”, by Workplace Publishing (International Tele-Film, 1-800-561-4300, www.itf.ca).

This video shows how coaching is different than supervising. Viewers will also learn the eight coaching style preferences and how to apply them. Also included, an effective four-step coaching process explained and demonstrated.

The video, “Empowering Others Part 1 of 2” (AMA Partnership Services on Empowerment).

Giving others what they need to do their jobs. Uses real life examples of empowerment at work. Part 2 deals with empowering yourself.

The video, “Feedback Solutions Series”, series of 4 (International Tele-Film, 1-800-561-4300, www.itf.ca).

This video-based training package sets the scene for creating a “feedback culture” - one in which giving and receiving feedback becomes a part of your normal day-to-day activities.

The video, “Giving Feedback - Advanced Skills” (International Tele-Film, 1-800-561-4300, www.itf.ca).

Learn practical “how-to’s” for handling difficult feedback situations.

The video, “Great Beginnings: The Employer’s Perspective”, by Mind Resources (International Tele-Film, 1-800-561-4300, www.itf.ca).

This video will help managers and supervisors to design an induction program which will help orientate new employees, produce an employees handbook, create good corporate impressions and many more.

The video, “The Helping Hand”, by J. Cleese (video, 38 min.).

Reviews the essentials of coaching in an easy to understand presentation.

The video, “Painless Performance Improvement”, by Media Partners Corp. (International Tele-Film, 1-800-561-4300, www.itf.ca).

This video provides managers with a simple and proven technique to help team members improve their own poor performance without the drama, pain or conflict often associated with performance issues.

The video, “The Practical Coach”, Media Partners (International Tele-Film, 1-905-842-4428).

From getting good work repeated, to correcting poor work in a positive way, to turning dead-end performances around, this program offers sensible advice for coaches who care.

The video, “Practical Coaching Skills for Managers” (CareerTrack Publications, 1-800-488-0928) [2 hrs. 57 min].

This video will help you understand the difference between coaching and managing, and give you “best practices” to get new employees up to speed, fast. It will also give help in giving effective feedback, and how to turn team conflict into positive change.

The video, “Productive Counselling”, by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).

This video teaches techniques for handling an unmotivated employee or gaining commitment for improved performance.

The movie, “Chariots of Fire”.

This film about training for the Olympics has numerous scenes of coaching and development, focusing on the person rather than just the task.

The movie, “Good Will Hunting”.

This is a story about making someone see his opportunities in the future.

The movie, “The Karate Kid”.

This is the story of an adolescent who learns how to fight and how not to fight. There is a good depiction of empowerment along with development.

The movie, “Dangerous Minds”.

This movie is based on the true story of an ex-Marine who takes a job in a tough inner-city school. Using your competency dictionary, find at least five examples of Michelle Pfeiffer demonstrating the Developing Others competency with her students.

The movie, “Remember the Titans”.

In this movie the key character Herman Boone, played by Denzel Washington, pulls a rag tag team of high school football players together and takes them to the State Championship.

Fostering Independence in Others (FIO)

Definition:

Fostering Independence in Others is about enabling others to be self-sufficient and to nurture self-determination. It is also the sharing of responsibility with individuals and groups so that they have a deep sense of commitment and ownership. .

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ making positive comments regarding individuals, employees and families' current and expected abilities and potential 	<ul style="list-style-type: none"> ▪ giving only negative feedback and/or criticizing personal traits
<ul style="list-style-type: none"> ▪ providing practical support to instruct, guide and support others in a helpful manner 	<ul style="list-style-type: none"> ▪ relying on others to "figure things out" themselves.
<ul style="list-style-type: none"> ▪ making the time to establish clear communication and expectations of those individuals you work with and serve 	<ul style="list-style-type: none"> ▪ thinking that everyone will automatically understand what you mean and what is expected of them
<ul style="list-style-type: none"> ▪ letting others make mistakes in a non critical setting; trusting their judgement skills and abilities while showing respect for their intelligence 	<ul style="list-style-type: none"> ▪ controlling everything; second guessing everyone
<ul style="list-style-type: none"> ▪ assigning appropriate work experiences and training to front-line workers to establish a learning environment that promotes empowerment in others. 	<ul style="list-style-type: none"> ▪ assigning the same tasks to the same people all the time and giving front-line workers solutions to problems before they have had the opportunity to solve them
<ul style="list-style-type: none"> ▪ coaching others within the agency on the principles behind effective delegation 	<ul style="list-style-type: none"> ▪ assuming colleagues know how to delegate and when delegation is and is not effective.

Developmental Activities

Level 1-2 Activities

Record the number of positive and negative comments you make over a two-week period when interacting with individuals, employees and families.

- Carefully consider comments before delivering feedback to ensure that it is delivered positively or as constructive criticism.
- For those negative comments that were necessary, change the comment so that it conveys the same information, but has a positive tone and can be perceived as constructive criticism.
- Get some external feedback on how much positive/negative feedback you give.
- Make a concerted effort to steadily increase the amount of positive feedback you provide so the ratio of positive to negative is about 3 to 1.
- Review the above, and for each negative comment, decide if it was appropriate and necessary.

Give “how-to” instructions.

- For new tasks and objectives you are going to assign, consider how you want the job done and what steps need to be taken to obtain desired results.
- Think through the best way to explain those steps to employees and clients and create clear instructions.
- Provide clear detailed instructions of what needs to be done and why.
- Explain how the task will be done.
- Together, formulate an action plan to implement the development activities.

Reflection Tip:

** Use your interpersonal relations and respect skills to ensure that everyone understands your instructions. Reflect on areas of miscommunication – is there anything you could do to make the instructions more clear?*

Meet with your team regularly.

- Discuss understanding of roles, responsibilities and expectations.
- Ask individuals what kind of training support they need to be successful.
- Use these meetings to increase ownership of the task and provide support.
- Ensure there is no ambiguity in the tasks to be accomplished.

Assist clients and colleagues in enhancing their confidence in their abilities.

- Make a point of spending some time with both your clients and colleagues and observe a new skill they are trying to learn.
- Be supportive of their efforts when trying new ideas and testing new abilities, or exercise authority.
- Be frank, providing negative as well as positive feedback, while ensuring that you make clear what they can do to improve.
- Provide support in their skill development in the form of time, reinforcement, and encouragement.

Reflection Tips:

**Acknowledge successes and progress along the way.*

**Ask for regular feedback on how you could be more supportive.*

Give recognition its due.

- Make a practice of recognizing particular efforts made by others, noting the contribution of the effort to the overall goals you have established.
- Be sure that you include all individuals who participated in the success, such as colleagues, community partners and family members etc.
- Select an appropriate time to publicly recognize someone who has performed well.

Reflection Tip:

**Did your public praise make the individual feel stronger and more capable?*

Work with current clients to identify the strengths and development needs that they will need to work on over the next year.

- Meet with each client currently under your supervision.
- Ask the individual to describe his or her proposed areas for developmental focus.
 - ⇒ What are the individual's goals?
 - ⇒ What skills/behaviours must the individual demonstrate to reach those goals?
- Agree on a plan that incorporates both your input and their suggestions.
- Discuss how you can support and empower the individual in his or her development.
- Commit to providing that support (e.g. courses, books, your time, etc.)

Demonstrate respect for others.

- Monitor the way in which you speak about your clients/partners and members of your team.
- Check yourself to ensure that you speak positively about the strengths and capabilities of others and refrain, whenever possible, from criticizing others in your conversations.
- Strive to deal directly with individuals with whom you are displeased rather than complaining to others.
- Refrain from engaging in conversations with others who do not follow these guidelines, withdrawing from discussions about the weaknesses of team members.

Seek out unique development opportunities for others.

- Seek out unique development opportunities, both inside and outside of your department, that will stretch the capabilities of others. Following are some examples:
 - ⇒ Participate in cross-functional task forces, temporary lateral assignments, job rotations.
 - ⇒ Ask the team to prepare a budget that would represent the goals and priorities of the department and the overall business.
 - ⇒ Work with your team to recruit and select the next opening available with the group. Offer some selection interviewing training as a developmental experience.

Level 3-4 Activities

Identify someone within, or external to, your agency who is effective at delegating.

- Talk to this individual about what they do and apply those techniques you think would be helpful for your situation.

Review your current workload and identify routine tasks that could be delegated.

- Make a practice of delegating routine tasks.
- Ask your team if your instructions are clear and understandable.
- Recognize your employees for work well done.

Reflection Tip:

**Do you create a work environment that supports delegation?*

Involve others in the decision-making process.

- When you have a decision to make that will have an impact on members of your department or clients outside your agency, include them in the decision making process by explaining the situation or opportunity to them and soliciting their points of view on pro's and con's of the issue.
- Clarify at the beginning of the meeting that you will make the final decision (if that is indeed the case) but that you want to make sure you have considered all options and implications before doing so.
- If there is dissent among individuals about the final decision, try to deal openly with the issue and engage those involved in problem solving to make the decision palatable.

Delegate some meaningful “stretch assignments”.

- Discuss some stretch assignments with your team members.
- Don't limit the stretch assignments to operational tasks.
- Encourage independent behaviour on a new innovative project.

Show willingness to delegate full authority

- Identify an ongoing issue and the individuals who will need to work together on this issue. Delegate decision-making authority.
- Invite these individuals to a team meeting to decide how the issue will be tackled. Prior to the meeting, obtain two flipcharts or a room with a whiteboard.
 - ⇒ At the beginning of the meeting, ask the team to generate a list of the key decisions that need to be made and write this list on one of the flipcharts or on one side of the whiteboard.
 - ⇒ Add your own views to the list but, in general, focus your efforts on encouraging each member of the team to contribute to the discussion.
 - ⇒ Next, ask the team for their views on the best answers to each decision.
 - ⇒ Record their suggestions on the other flipchart or the other side of the whiteboard. Where you agree with the advice, say so and personally endorse the decision. Where you disagree, explain why.
 - ⇒ In the end, however, support the team decision even if it may be different from your own point of view, unless it has serious implications. When the meeting is over, make a brief note of the decisions that were made and give a copy to everyone who was at the meeting.

Analyze your effectiveness in pushing decision making to the lowest possible level within your team by asking yourself the following questions:

- Who do I delegate to/depend on?
- Am I restricting myself to one or two people?
- Am I making all the decisions?
- Can I delegate more accountability to my team members?
- Do I interfere by offering unsolicited input to individuals to whom I have given accountability?

Reflection Tips:

- * What is your goal in giving responsibility to this individual for this task? Is it a test? A developmental opportunity? A recognition that they are capable of more.
- * Did you provide enough support for this to be a success?

Nominate a person to undertake your role when you are away for a significant period of time.

- Ensure they have a degree of decision-making authority so that the delegation of your role represents a real developmental challenge.
- Ask the individual seconded to your role to keep a log of the challenging situations he/she encounters and how these were addressed.
- Schedule time upon your return to fully debrief successes and challenges that were experienced during your absence. Discuss the learnings that came out of this experience.

Reflection Tip:

**The focus of this assignment should be on developing the person's capability to manage and lead others. Did the secondment accomplish this goal?*

Level 5 Activities

Examine your own style of supporting and coaching team members and direct reports in assignments or regular job responsibilities. Ask yourself the following questions:

- Do I express positive expectations of my direct reports?
- Do I give individuals and direct reports an opportunity to think and act independently?
- Do I tell individuals and direct reports what to do or do I give them the overall objective and let them determine what to do?
- Have I identified appropriate time to provide direction to my direct reports and to those I am coaching/developing, and time when I should be leaving them to function on their own?

Reflection Tip:

** Reflect on each of these activities. How often would you estimate that you do them? Are there opportunities to use them that you are missing?*

** Ask peers and your manager if they have any comments or suggestions.*

Use strong team members to help other team members in need of support and development.

- Encourage strong team members to share their skills and knowledge with those in need of development.
- Set up a buddy system for mentoring within your group, or even outside your group.
- Allow team members and mentors to set up their own process for mentoring.
- Ask each team member to identify a possible mentor who has demonstrated strength in the areas the team member needs to develop.
- Discuss each team member's development needs with them and ensure there is alignment on development needs and goals.
- Identify those team members that are in need of development and set up one-on-one discussions with each.
- Monitor the results of the process by asking for feedback from team members and mentors after 3 months.

Develop a continuous improvement mindset by including feedback (both positive and negative) as a regular, expected part of all meetings.

- Describe the behaviour of others in objective and specific terms.
- Be honest, providing constructive, as well as positive feedback, while ensuring that you make clear what the individual can do to improve.
- Focus on the work, not the person, and give specific examples, e.g., the comment, "You have not developed a succession plan for your area," is much less likely to arouse defensiveness than the comment, "You're not doing your job."
- Incorporate best practices discussions into all regular meetings, so that staff can share their successes and learnings.
- Be frank, providing negative feedback as well as positive, while ensuring that you make clear what the individual can do to improve. Be prepared to outline the resources or other support you can provide the direct report with in order to assist in his/her development.
- Use a special award programs, or less formal means, to recognize special efforts.

Encourage direct support workers, caregivers, and educators to transfer knowledge and skills to the clients they serve to maximize their potential and self sufficiency.

- Model the necessary behaviours for direct support workers, caregivers and educators and demonstrate how to design effective and fully inclusive services for clients.
- Share the following key considerations with your direct reports to increase the likelihood that they are not just helping, but empowering clients:
 - ⇒ **Only introduce age-appropriate/individual appropriate activities based on their situations** – All lesson plans, activities and events involving clients should be age-appropriate in nature. Remember, all interactions and teaching practices effect public perception towards persons with disabilities.
 - ⇒ **Normalization** – Avoid specialized classes, events and unnatural learning environments wherever possible. Promote learning through natural opportunities in real-life situations.
 - ⇒ **Dignity of risk** – Avoid sheltering clients so they can experience true growth and development and develop informed decision making skills to make individualized decisions.

Reflection Tips:

* To create an empowering environment for clients, they should be encouraged to get jobs, access public transportation, go on dates, become volunteers and participate in recreational/sporting activities.

Foster an environment where your employees take ownership of the development of their respective teams.

- Schedule regular individual discussions with employees who have engagement, management or performance counseling responsibilities to discuss the progress of their teams and the achievement of their own personal goals.
- Ask your employees to provide you with regular updates on their progress. If a key result is falling short of target, work with them to identify specific actions to get it back on track.
- Set challenging but realistic objectives and target deadlines with your employees.
- Start with objectives where there is a high probability of attainment to build momentum and the individual's confidence in his/her own abilities.
- Remember that you are acting as a role model, as well as a coach for your employees. Consider how you are asking questions, assigning responsibility and monitoring the member's success. They may very well use this format as the model to which they refer when they are in similar coaching situations.

Books and Videos

Individualized Service Plans: Empowering People with Disabilities, by Paul Spicer (Authorhouse, ISBN: 9781420822748)

The unique feature of *Individualized Service Plans: Empowering Persons with Disabilities*, is its multi dimensional approach to the field of developmental disabilities. The publication, which includes steps to writing a service plan as well as hundreds of prewritten goals, represents the global nature of a person with a disability and provides a roadmap for the dedicated service provider. The publication acts as a resource library for agencies and staff members in charge of creating residential, day support, and LCF service plans.

Coaching, Counseling and Mentoring: How to Choose the Right Technique to Boost Employee Performance, by Florence M. Stone (2nd Edition: AMACOM, 2007; Original: AMACOM, 1999).

People are the most important asset to an organization. This book will show you the benefits to coaching, mentoring and counseling your employees to achieve the best results for your organization.

Coaching Life Changing Small Group Leaders, by Bill Donahue and Greg Bowman (Zondervan, 2006).

This book focuses on coaching leaders. It is a particularly useful resource to managers/leaders who are responsible for coaching direct reports who have their own small teams.

1001 Ways to Reward Employees: 100's of New Ways to Praise!, by Bob Nelson (Workman Publishing Co, 2005).

Looking for innovative ways to recognize employee development? This book will assist you in finding the right recognition or reward for succeeding in a developmental activity. Use rewards to foster development.

Coaching and Feedback for Performance, by Duke Corporate Education (Dearborn Trade Publishing, 2005).

This book offers a step-by-step guide for how to develop talent within an organization. It helps managers develop a coaching strategy with direct reports and to use regular feedback throughout the coaching process.

Coaching for Meaning: The Culture and Practice of Coaching and Team Building, by Vincent Lenhardt (VHPS Palgrave, 2004).

This book focuses on the concept of a leader as a bearer of meaning and purpose within the organization, and the significance of this coaching and team building. The author presents tools for the development of managers as coaches and models for how to achieve this.

Behavioural Coaching, by Suzanne Skiffington and Perry Zeus (McGraw-Hill Book Company, 2003).

This book presents a coherent definition and model of behavioural coaching based upon scientific, validated behavioural principles.

Coaching for Performance: Growing People, Performance and Purpose, by John Whitmore (3rd Edition: Nicholas Brealey, 2002).

This book is a definitive guide to mastering the skills needed to help people unlock their potential and maximize their performance in the art of coaching.

Managers as Mentors: Building Partnerships for Learning, by Chip R. Bell (Trade Paperback: Berrett-Koehler., 2002).

Chip R. Bell takes the mystery out of mentoring, teaching leaders how to give and take advice, coach and counsel effectively, develop new approaches to team meeting management, and more. This book will be particularly helpful for managers and others who have suddenly been told to coach, rather than manage their employees.

The 17 Indisputable Laws of Teamwork: Embrace Them and Empower Your Team, by John C. Maxwell (Nelson Books, 2001).

Building and maintaining a successful team is no simple task. Even people who have taken their teams to the highest level in their field have difficulty recreating what accounted for their successes. Is it a strong work ethic? Is it "chemistry"? What tools can you wrap your hands around to build - or rebuild - your team?

Empowerment Takes More Than a Minute (2nd Ed.), by Ken Blanchard (Berrett-Koehler, 2001).

This book presents a game plan for empowering employees by defining three essential keys: sharing information, creating autonomy through boundaries, and replacing hierarchy with teams. Revised throughout, this edition uses more contemporary examples and language to address concerns specific to younger employees.

Empowering Employees through Delegation, by Robert B. Nelson (McGraw-Hill Publishing, 1993).

This book helps you harness the power of your direct reports by learning how to empower them through delegation. Empowering Employees through Delegation explains everything a manager needs to know about how - along with what, when and to whom - to delegate successfully.

The video, “Breaking the Delegation Barrier”, (International Tele-Film, 1-800-561-4300, www.itf.ca).

Delegation may be one of the most vexing problems for managers to deal with. This film explores the fear of loss of authority and of mistakes being made when managers delegate to their employees.

The video, “The Changing Role of Supervisor”, by Business Advantage Inc. (International Tele-Film, 1-800-561-4300, www.itf.ca).

This video uses a comical and dynamic series of dramatized vignettes interspersed with commentary from international consultants Jeff Dwar and Connie Winter who provide serious messages that will encourage discussion on issues ranging from management's fear of losing control to employees, to planning for complete empowerment and involvement.

The video, “Coaching and Performance Feedback Series”, by QMR (International Tele-Film, 1-800-561-4300, www.itf.ca).

This three part series focuses on the difficult task of performance improvement interviews, proper coaching methods, and giving feedback.

The video, “Empowering Others - Part 1 of 2” (AMA Partnership Services on Empowerment).

Giving others what they need to do their jobs. Uses real life examples of empowerment at work. Part 2 deals with empowering yourself.

The video, “Giving Feedback - Advanced Skills” (International Tele-Film, 1-800-561-4300, www.itf.ca).

Learn practical “how-to’s” for handling difficult feedback situations.

The movie, “Good Will Hunting”.

This is a story about making someone see his opportunities in the future.

The movie, “The Karate Kid”.

This is the story of an adolescent who learns how to fight and how not to fight. There is a good depiction of empowerment along with development.

Holding People Accountable (HPA)

Definition:

Holding People Accountable is about communicating in a direct way what one wants or requires of others. It includes giving directions, setting limits, and holding people accountable for performance, insisting on high performance, confronting problem employees, and using appropriate positional authority to ensure performance with the long-term good of the organization in mind. It involves being firm and assertive, and stepping up to difficult decisions.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ giving clear instructions as to what you expect from others 	<ul style="list-style-type: none"> ▪ giving assignments without deadlines or with unclear quality requirements
<ul style="list-style-type: none"> ▪ setting and communicating standards for performance 	<ul style="list-style-type: none"> ▪ assuming people know the standards
<ul style="list-style-type: none"> ▪ working with staff to set standards for performance 	<ul style="list-style-type: none"> ▪ assuming staff know what is expected of them
<ul style="list-style-type: none"> ▪ holding people accountable to deliver against high standards and confronting them when their performance is not up to standard 	<ul style="list-style-type: none"> ▪ being reluctant to risk upsetting an employee by telling them when their performance is inadequate
<ul style="list-style-type: none"> ▪ a “clear and firm approach” to what must be done in a crisis situation or when other means of influence have not succeeded in achieving important results 	<ul style="list-style-type: none"> ▪ ordering staff around in an inappropriate manner, showing little respect
<ul style="list-style-type: none"> ▪ coaching people to take accountability for their own performance 	<ul style="list-style-type: none"> ▪ assuming people won’t do anything unless you tell them to
<ul style="list-style-type: none"> ▪ directing others to take actions that will contribute to department/agency success, based on your position 	<ul style="list-style-type: none"> ▪ using the power of your position to have others perform tasks that are unnecessary or unrelated to future department/agency success
<ul style="list-style-type: none"> ▪ saying “no” when someone makes an unreasonable request 	<ul style="list-style-type: none"> ▪ refusing to set limits on other people’s behaviour

Continued on next page

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none">▪ clearly explaining to others when their expectations are unreasonable or are at odds with the strategic direction of the agency	<ul style="list-style-type: none">▪ complaining about inappropriate requests from others but not directly talking to them about it
<ul style="list-style-type: none">▪ reviewing progress against milestones and providing timely feedback	<ul style="list-style-type: none">▪ disempowering employees through micro-management
<ul style="list-style-type: none">▪ knowing when corrective or disciplinary action is necessary and taking action accordingly	<ul style="list-style-type: none">▪ issuing repeated warnings and allowing poor performance to continue

Developmental Activities

Level 1-2 Activities

Provide clear direction when delegating tasks

- Delegating tasks employees/direct reports helps them develop their skills and frees up some of your own time for new activities. When delegating it is important to provide clear, specific direction to them and monitor their performance.
- Ask others for feedback on the clarity and completeness of your direction during a task or assignment.
- Ask them to summarize the objectives and instructions to be sure that they are clear to them.
- Monitor performance and be sure you check in from time to time to address questions and check on progress.

Think about your performance in terms of holding others accountable. Are there areas where you have difficulty creating accountability?

- Consider the following reasons for avoiding holding people accountable and try out some of the suggested actions:
 - ⇒ You have difficulty determining what to do (e.g., preparing the agency's/department's operating plan). Try breaking down the task or assignment into specific steps before explaining it to others.
 - ⇒ You rely on others for direction before you have determined what to do. Determine why you rely on others (e.g., for additional information) and take that action on your own.
 - ⇒ You second guess yourself and lack confidence in the direction (e.g., performance management decisions). Try standing by your course of action once you have made it.
 - ⇒ You use tentative language when communicating direction or saying "no." Try to tape record yourself or ask others for feedback on the words you use and the mode of delivery.
 - ⇒ You are unclear about your own standards and limits for high performance and for acceptable behaviour. Ask yourself what your standards are. List them.
 - ⇒ You are afraid of how others might react to you being directive with them. Recognize that not everyone will like your direction or your decisions.

Observe your manager dealing with a performance issue

- Note the effective techniques he or she uses with the person.
- Debrief the interaction afterward. Describe what you observed and ask your manager to explain what he or she was thinking and feeling at the time.

Maintain clear communication

- Clearly communicate how each person's role contributes to the overall success of the group.
- Establish "ground rules" for interaction between group members so that the team works cohesively to accomplish its goals.
- Help the group stay focused on its common goals. It is essential to continually clarify roles and responsibilities as they change or evolve based on the needs of the agency, clients and the sector as a whole.

Set clear performance objectives for direct reports

- These objectives should be SMART:
 - ⇒ Specific: describe what the end result will look like.
 - ⇒ Measurable: expressed in quantifiable terms.
 - ⇒ Achievable: the goal is realistic.
 - ⇒ Relevant: linked to organization or department goals.
 - ⇒ Time-Bound: provide target completion dates.
- Clearly communicate objectives and standards to employees. Ask for their input.
- Compare performance to the standards you have set in each area of accountability on a regular basis (e.g., quarterly, annually), and provide feedback.

Set clear performance standards

- Set performance standards with your subordinates for their key tasks.
- Ensure that each member of the team understands the reasons that a level of performance is required (e.g., the consequences to the agency/department of poor performance).
- Monitor peoples' performance regularly against the standards and discuss performance that is lower than required.
- Make sure that you also comment on and reward performance that meets or exceeds the standards.

Identify a mentor who successfully sets clear goals/objectives and expectations and then holds people accountable for achieving them.

- Observe his or her behaviour; note the techniques used.
- If possible, meet with the individual to discuss their approach to tasking work, delegating, and ensuring things get done to the standard expected.
- Try to model their behaviour when you need to provide direction or are discussing a performance issue or concern.
- Assess whether you have been successful in implementing these new techniques.
- Discuss your assessment with your mentor and ask for further feedback and advice.

Reflection Tip:

** What do you need to do to modify or alter your behaviour to ensure you are setting clear goals and creating accountability?*

Develop a plan for dealing with a situation where you will need to firmly say “no” to an unreasonable request

- Review your relationships and identify an employee or colleague whom you feel sometimes makes unreasonable requests or whom you feel goes beyond appropriate limits of behaviour.
- Prepare a plan for dealing with the situation the next time it occurs so that you are able to firmly say “no” to an unfair request.
- Practice your plan for handling the situation with a peer/another co-worker, asking them to play the role of the other person and allow him or her to be very persistent with the request.
- Keep notes of the outcomes in a learning journal.
- Adjust your plan after the practice session and implement it the next time you are faced with this situation.

Reflection Tips:

** What patterns or themes do you see when addressing performance issues?
* What can you do to gain commitment from the individual responsible for their actions?*

Develop a decision chart for your different roles

- List all the key decisions that you make in your department/agency (e.g., operational procedures, staffing). Write these down on the left side of a piece of paper.
- List the names of all the people in your area involved in making decisions with you. (Write these across the top of the paper).
- Determine the individual's role in making each decision. Use the following symbols:
 - ⇒ **R:** This person is primarily responsible for making the decision.
(Responsible)
 - ⇒ **A:** This person must approve any decisions made. **(Approves)**
 - ⇒ **C:** This person must provide input to you before making a decision.
(Contributory)
 - ⇒ **I:** This person must know the final decision. **(Informed)**
- Use the decision chart to determine the accountabilities and expectations of others. Periodically review and update the decision chart.
- Communicate the decision chart to your direct reports, incorporating their feedback, where appropriate.

Create ways of monitoring progress

- Determine what information you require to monitor performance levels in your team. You should consider:
 - ⇒ What information needs to be shared with your team?
 - ⇒ How you can encapsulate key performance information for your team in an interesting or unique manner?
 - ⇒ When should check points happen?
- Work with your information technology department to develop reports that will help you to track and communicate this information over time.

Reflection Tip:

** What performance trends are you seeing that you were not able to detect before?*

Rehearse stating the consequences of poor performance

- When considering the performance of individuals and the team, consider the consequences of not achieving planned performance.
- Focus on the impact of poor performance for the team and for individuals within it, as well as for the organization
- Be prepared to discuss these openly with direct reports by rehearsing what you will say to clearly convey the consequences.

Reflection Tip:

**After your discussion, ask yourself whether the message you delivered was clear and had the impact you intended.*

Keep track of situations where you feel you were strong (or weak) at setting expectations for an individual or team.

- Using the input of your colleagues, review each situation and identify those where you could have been more firm or clear on expectations.
- Ask your colleagues to consider your situation and determine whether you were sufficiently (or overly) directive.
- Flipchart a list of the techniques or strategies with your colleagues that would improve situations where you should have been more directive, setting firmer limits.
- Plan how you will more effectively hold others accountable for doing what you have asked them to do.
- Ask your direct reports for feedback on specific situations. Refer to the “This Means/This Doesn’t Mean” section to generate specific questions to help you probe for feedback.

Reflection Tip:

**What actions or steps will you take in the future? What will you change?*

Level 3-4 Activities

Ask your manager to give you feedback on how you handle performance problems or issues with employees.

- Identify the different types of situations where you have had difficulty controlling your emotions.
- Ask your manager to describe what he or she has observed you doing or saying (probe your manager for specific examples), and for suggestions on how you might handle these situations more effectively in the future. Note your manager's suggestions and apply them the next time you face a difficult situation.
- Meet with your manager periodically to review your progress.

Identify someone whose performance, while not bad, falls short of the high standards they should be achieving. Commit to raising the standard.

- Ask for input and views from the individual to uncover any unknown obstacles to effective performance.
- Ask the individual to prepare an appropriate improvement plan, or prepare one together.
- Decide how you will monitor the individual's performance.
- Discuss your actions with your manager or Human Resources, if appropriate.
- Explain clearly to the individual that you intend to raise the standards and that you expect them to achieve this higher standard of excellence. Review the specifics and your expectations with the individual.
- Jointly agree on a review plan.
- Monitor their performance and follow up.
- Prepare what you are going to say and provide feedback to the individual.

Use these guidelines to prepare to deliver a difficult message to a colleague or direct report about his or her performance.

- Begin with a “when you” statement. Example: “when you arrive late for meetings...”
- Describe what that person’s behaviour means to you. Example: “...I have to try to answer questions that are relevant to your department and then fill you in on the issues you’ve missed and keep the meeting on track at the same time.”
- Explain what you’d like to have happen. Example: I’d appreciate if you’d start getting here on time...”
- Explain why the issue is important. Example: “I’m telling you this because it’s not the first time, and it means we can’t run the kind of productive meetings we’re supposed to.”
- A “because” statement shows how doing what you ask will alleviate the problem. Example: “because it will allow both of us to do our jobs right - something I’m sure you want as much as I do.”

Reflection Tip:

** Reflect on how this approach will help you advocate your own interests and performance expectations objectively and constructively.*

Develop comfort discussing results and team performance with a superior

- Include team performance as a regular item on your agenda when meeting with your manager.
- Before each meeting, prepare a summary of successes and areas in which improvements are needed.
- Outline to your manager in concrete terms what your expectations are of the team with respect to raising their level of performance.
- Leverage your manager’s experience and insight when helping your team better articulate a personal goal/objective to meet higher performance expectations.

Clarify team priorities and standards of performance

- Hold a meeting to increase understanding and buy-in for team goals.
- Work with your team to brainstorm existing and future projects and initiatives.
- Prioritize these projects and initiatives together based on specific criteria such as:
 - ⇒ How directly they relate to the team's wider strategic goals.
 - ⇒ The impact they should have on team performance.
 - ⇒ Timing and likelihood of measurable results.
- Jointly create key performance indicators for each project/initiative and performance standards for the team as a whole.
- Agree on mechanisms and accountabilities for measuring performance against these criteria over time.
- Record the outputs from your meeting in a Team Performance Plan.

Reflection Tip:

** Were there members of the team that were less enthusiastic participants in the process? What can you do to individually ensure their understanding of priorities or commitment to performance?*

Try these coaching techniques to get a better effort from a direct report/employee who works fast but makes too many errors:

- Convey to the direct report/employee your expectations and high standards that you wish to see in their work.
- Avoid correcting mistakes yourself, even if you feel it would be easier. Draw mistakes to your direct report's/employee's attention and communicate the consequences of poor performance.
- Be clear with your direct report/employee that poor quality work not only has a negative impact on the department but also the agency as a whole.

Reflection Tip:

** Keep track of their performance over time. Be sure to always reward noticeable improvements and address setbacks immediately.*

Prepare for a difficult conversation with an employee/direct report, where the possible consequences of non-performance will be discussed

- Write a purpose statement for the task or assignment. Be sure to include:
 - ⇒ the objectives
 - ⇒ key steps to completion
 - ⇒ date and time by which the task or assignment should be completed
 - ⇒ clearly stated consequences of succeeding or failing to succeed
- Discuss the task or assignment with the direct report/employee, emphasizing the consequences of non-performance.
- Ask the direct report to summarize the objectives and instructions to ensure they have clearly understood the expected outcomes.

Reflection Tips:

- * What performance standards or expectations did you set with the direct report?
- * What communication process do you have in place to monitor progress and to ensure the task is completed correctly?

Assess whether you are creating an environment where people feel individually and jointly accountable for performance

- Ask for feedback from your team, either at a team meeting or by survey, to see if they think people feel personally accountable for helping the team to meet its stated goals and objectives.
- Do you feel that you have a good understanding of the unique concerns, issues and motivators that affect individuals' performance?
- Do team members notice when they lose focus or lower their performance standards? Do they address it with you or with the individual directly?
- Do team members celebrate team and individual success, giving credit where credit is due?

Reflection Tip:

- * What do you do to encourage this positive behaviour in your team?

Level 5 Activities

Conduct a thorough review of all employee performance records, including any performance improvement plans (if applicable) before initiating the termination of an employee

- Meet with Human Resources to gather all of the employee's performance records, including any outstanding performance improvement plans.
- In reviewing these employee records, ensure there is alignment and consistency between observed and documented behaviours and performance problems.

Arrange a time to meet with your manager to role play a termination discussion you will have with an employee/direct report.

- Develop a script of what you want to convey to the employee during the conversation.
- Include documented behavioural and performance-based evidence in the script you produce.
- Provide your manager with the script in advance of meeting so he/she can become familiar with the issues and prepare for the role play accordingly.

Reflection Tip:

** What feelings/behaviours do you anticipate during the termination discussion?*

Take clear and concise action to rectify behavioural problems

- Always discuss the "how" not the "who" of the issue.
- Ensure the implications/outcomes of further performance deficiencies are clearly understood by the individual.
- Help people see the gaps between what is required and what they have achieved.
- Put formal plans in place as needed.
- Once all other remedies are exhausted, have the courage to terminate an employee for the betterment of the department, agency and team.

Reflection Tip:

** Make a note of dealing with behavioural problems and situations where you are less effective. What could you do to create accountability more consistently?*

Books and Videos

Discipline Without Punishment: The Proven Strategy that Turns Problem Employees Into Superior Performance, by Dick Grote (New Edition: AMACOM, 2006; Original: AMACOM, 1995).

Grote explores ways to build superior performance and helps managers prepare and conduct better coaching sessions. He shows readers how to avoid confrontational, anger-provoking situations that can lead to bad relationships and even violence, how to salvage potentially good employees who have gone astray, and many other ways to build superior performance.

Crucial Confrontations, by Kerry Patterson, Joseph Grenny, Ron McMillan & Al Switzler, (McGraw-Hill, 2004) – also available on audio CD.

Crucial Confrontations teaches skills to increase confidence in facing tough issues. Learn to: Permanently resolve failed promises and missed deadlines; Transform broken rules and bad behaviours into productive accountability; Strengthen relationships while solving problems.

Coward's Guide to Conflict: Empowering Solutions for Those Who Would Rather Run than Fight, by Timothy Ursiny (Sourcebooks Trade, 2003) – also available on audio CD.

The Coward's Guide to Conflict gives strength, techniques, motivations and challenges to the people who need it most. With an open, step-by-step approach, it shows you how to prepare, maintain your integrity and work toward resolution.

Fierce Conversations: Achieving Success at Work and in Life, One Conversation at a Time, by Susan Scott, (New Edition: Berkley Trade, 2003; Original: Viking Press, 2002) – also available on audio CD.

Fierce Conversations illuminates the path to a new degree of authenticity, a new way of expressing who you are and what you believe, as a person and a leader. In it, Scott explains the keys to regularly engaging in frontier conversations with yourself, colleagues, clients, friends, family, and the unknown future emerging around you.

How to Become a Great Boss: The Rules for Getting and Keeping the Best Employees, by Jeffrey J Fox, (Hyperion Press, 2002) – also available on audio CD.

Fox gives advice on how to become, and remain, a great boss. Fox's advice is delivered in snappy, to the point chapters that zero in on his creative advice.

The One Minute Manager, by Kenneth Blanchard & Spencer Johnson (Trade Paperback: Zebra Bouquet, 2002; Original: Berkley Publishing Group, 1987) – also available on audio CD.

This book describes management and coaching techniques of goal setting and performance planning, and praising or reprimanding effectively to encourage positive behaviour.

Putting The One Minute Manager To Work, by Kenneth Blanchard & Spencer Johnson (Berkley Publishing Group, 2002) – also available on audio CD.

Putting The One Minute Manager to Work is a companion to The One Minute Manager, written in the same easy-going style. By offering practical guidelines, it helps you implement the lessons and secrets discussed in the first book, making your staff and company more productive.

The Power of Positive Confrontation: The Skills You Need to Know to Handle Conflicts at Work, at Home and in Life, by Barbara Pachter & Susan Magee (Marlowe & Company, 2001).

This step-by-step guide will show you how to assess your usual confrontational style; identify the main reasons why you may not be confronting; understand the consequences of not confronting or confronting negatively; learn how to evaluate another persons behaviour in a conflict situation; master the three essential steps of polite and powerful behaviour; recognize verbal and non-verbal factors that can help ensure a positive confrontation.

The Assertiveness Workbook: How to Express Your Ideas and Stand Up for Yourself at Work and in Relationships, by Randy J Paterson, (New Harbinger Publications, 2000).

This self-directed program teaches readers to speak up and say what they mean at work and at home. Written supportively, it uses proven cognitive behavioural techniques to help individuals build self-confidence, set boundaries, and determine appropriate responses.

Difficult Conversations: How to Discuss What Matters Most, by Douglas Stone, Bruce Patton & Sheila Heen (Guinness Publishing , 2000) – also available on audio CD.

This book walks you through a proven step-by-step approach for how to have your toughest conversations with less stress and more success. It shows you how to prepare yourself; how to start the conversation without defensiveness; and how to keep it constructive and focused regardless of how the other person responds.

Zapp! The Lightning of Empowerment: How to Improve Productivity, Quality and Employee Satisfaction, by William C. Byham with Jeffrey Cox (New Edition: Ballantine Books, 1997; Original: Ballantine Books, 1992) – also available on audio cassette.

In this book, you will find specific strategies designed to help you encourage responsibility, acknowledgement, and creativity so that employees feel they "own" their jobs. It's all here, in an accessible guide for the successful managers of tomorrow.

Managing Assertively: How to Improve Your People Skills, by Madelyn Burley-Allen (New Edition: John Wiley & Sons, 1995; Original: John Wiley & Sons, 1993).

This book will show you how to: use eight essential building blocks to become a more effective manager; overcome self-defeating behaviour; handle criticism to maintain self-esteem; state limits and expectations to clarify assignments; become a more effective listener, and receive and give positive feedback. You can learn how to resolve conflict and defuse interpersonal problems that crop up on-the-job.

Management Plus: Managing Productivity Through Motivation, Performance and Commitment, by Robert A. Fazzi (Irwin Professional Publishing, 1994).

This book provides general guidelines for managing performance. It provides a proven system for managing and motivating staff to achieve their highest level of efficiency and productivity. Through the "Functional Management Model," readers will learn how to detect and meet the needs of employees so that they will be happy enough to do a great job.

The Control Theory Manager, by William Glasser (Harper Collins, 1994).

Integrating his own theories with those of W. Edward Deming, who is renowned for his study of Japan's management practices, Dr. William Glaser details a revolutionary management approach that enables companies to achieve maximum quality and efficiency and successfully compete in the global marketplace.

Egos and Eggshells: Managing for Success in Today's Workplace, by Margot Robinson (Harper Collins Publishers, 1993).

This book looks at how to manage people who are "tough" or sensitive. The focus of the book is learning how to empower employees through effective communication, delegation, team building, and performance appraisal.

The Art of Helping, Vol. VII, by Robert R. Carkhuff (Human Resources Development Press, 1993).

This book serves as a personal guide and reference for anyone wishing to learn about effective helping. Prescriptions are well tested and well researched.

The video, “Assertiveness Skills for Managers and Supervisors” (CareerTrack Publications, 1-800-780-8476, www.pryor.com).

Understand how to get the results you want and manage with confidence and authority.

The video, “Dealing with Employee Discipline and Performance Problems” (CareerTrack Publications, 1-800-780-8476, www.pryor.com).

This practical program deals with real-life problems and solutions. You'll find out how to deal decisively with performance issues.

The video, “Feedback Solutions Series” by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).

This video-based training package sets the scene for creating a “feedback culture” - one in which giving and receiving feedback becomes part of your normal day-to-day activities.

The video, “Giving Feedback, Advanced Skills” by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).

Learn practical “how to’s” for handling difficult feedback situations.

The video, “How to Delegate Work and Ensure it's Done Right” (CareerTrack Publications, 1-800-780-8476, www.pryor.com).

Becoming a smart delegator is a great way to get more done quickly and move up in your career. Learn how to assign work and responsibilities effectively.

The video, “Managing Problem People Series” by Video Arts (International Tele-Film, 1-800-561-4300, www.itf.ca).

This series shows how managers and team leaders should deal with problem people to improve performance.

The video, “The Goal: The Dramatic Story” by American Media (International Tele-Film, 1-800-561-4300, www.itf.ca).

Based on the best-selling business book by Eli Goldratt. Stimulate ongoing improvement and increased productivity through better and faster methods of decision making. This is the story of how manager Alex Rogo transforms his mediocre division into a money-making machine using the principles of continuous improvement. He and his team also have to deal with measurements and improvements frequently found in organizations that thwart attainment of the company's true goals.

Initiative (INT)

Definition:

Initiative is about taking action, proactively doing things and not simply thinking about future actions. The time frame of this scale moves from addressing current opportunities or problems (being reactive) to acting on future opportunities or problems (being proactive). People with this competency are action-oriented – they act in the present to create value in the future.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ being resilient and dealing productively with obstacles 	<ul style="list-style-type: none"> ▪ letting the situation take control of your actions
<ul style="list-style-type: none"> ▪ anticipating and preparing for a specific opportunity or problem that is not obvious to others 	<ul style="list-style-type: none"> ▪ adopting a “wait and see” attitude or assuming someone else will point out the opportunity or problem
<ul style="list-style-type: none"> ▪ resolving potential service crises before they happen 	<ul style="list-style-type: none"> ▪ waiting until the client calls you
<ul style="list-style-type: none"> ▪ determining in advance when you need to contact a client to obtain needed information before a problem arises 	<ul style="list-style-type: none"> ▪ waiting until a client has lost their service before they contact you for service
<ul style="list-style-type: none"> ▪ questioning the way things are done and taking action that will lead to improved performance 	<ul style="list-style-type: none"> ▪ accepting the status quo and believing that improvement is an evolutionary process that will occur naturally
<ul style="list-style-type: none"> ▪ recognizing things that should be done of which your manager/colleagues may be unaware and bringing it to their attention 	<ul style="list-style-type: none"> ▪ doing your job as specified by your manager/team regardless of problems you can foresee
<ul style="list-style-type: none"> ▪ staying current with developments in your own and related fields to identify trends or emerging issues which apply to agency practices 	<ul style="list-style-type: none"> ▪ focusing on work from one target to the next, without looking to see what else may be “coming down the pipe”
<ul style="list-style-type: none"> ▪ utilizing resources to meet current and future agency/organization/business goals, with a view and tie-in to the tactical and strategic aspects of the department. 	<ul style="list-style-type: none"> ▪ using resources to achieve present goals without thinking of future implications

Developmental Activities

Level 1-2 Activities

Keep an open mind about suggestions from others

- Resist saying no to suggestions before you have had time to consider the idea.
- List all of the positive aspects of the suggestion/idea.
- List all of your concerns.
- Determine if the suggestion(s) is/are consistent with your department's and the agency's strategy and direction.
- Ask yourself "What is the worst thing that could happen if this fails?" Decide whether you are willing and able to take that risk.

Reflection Tip:

** If the suggestion isn't appropriate in its initial form, spend some time thinking about how it would need to change in order to become appropriate.*

Capitalize on opportunities to move forward with your vision and initiatives

- Identify any specific issues or challenges that continuously resurface and impede progress in your agency.
- Think about how you could leverage the frustration and lack of success in addressing the issue or challenge to promote making changes.
- Plan to advocate your change views at the next available opportunity.

Find out more about your organization/agency

- Take the initiative to understand your agency better. For example, you might want to find out about what different jobs do, or you might want to find out more about the information systems that support various functions within the agency.
- Whatever it is you find interesting, the important thing is to take the initiative on your own to find out more than would normally be required in your job.
- Then, chat with your colleagues about opportunities for making the department and agency more efficient.
- Arrange to meet with your manager to discuss the ideas you acquired.
 - ⇒ Do not be discouraged if the ideas are not implemented. As you think of, and discuss ideas, you will get a better sense for those which are practical in your organization.
- Assess the number of suggestions you make over time.

Reflection Tip:

* Can you think of any opportunities you might have within your job to demonstrate or utilize this new knowledge?

List instances where you have shown initiative

- Write a list of anything you can remember doing that showed initiative. For example:
 - ⇒ “on my own initiative, organized the filing so that everyone can find the information more easily”
 - ⇒ “went over and welcomed a new employee, plus shared some written material I thought would be helpful”
 - ⇒ “I showed real persistence when Mr. X couldn’t solve the problem and I kept asking different people until I found the answer”
- Each week add to the list even if you only think of one or two things.

Look for ways to challenge the status quo

- Consider targeting a key process or function for which your team is accountable.
- Look for more effective ways to execute that process or function.
- Take proactive and sustained actions to remove any roadblocks that are impeding the process, and replace them with a more efficient approach that will improve the process.
- Ask your colleagues, team and manager for feedback on this new process.

Reflection Tip:

* Sometimes a new process will impact people differently. Reflect on the varying impact of your new process throughout your team.

Think about where your time goes

- Create an estimate of what you should spend your time on each week, then keep a log of what you actually spend your time doing. Compare reality and your estimation. Have you underestimated in particular areas?
- List any obstacles that are diverting your attention from the priorities.
- Identify strategies for overcoming the obstacles.
- Based on this review, take immediate action.

Reflection Tips:

* Consider the patterns which are emerging in your analysis – do they indicate a ‘blind spot’ for you?
* Where do obstacles come from? Are they internal? External? Personal? Which ones can you remove? Which ones must you simply work around? Is there any existing systems/support which would help you do this?

Develop an ability to “bounce back” quickly after a setback.

- Think of a recent initiative that has stalled.
- Identify all obstacles that were currently impacting the initiative.
- Review the priority of the initiative. Given the present state of the obstacles you've just identified, is it still worth pursuing?
- If you decide to pursue the initiative, examine each obstacle individually, and list potential methods of removing or minimizing their impact.

Reflection Tips:

- * Discuss the stalled initiative with your peers. Do they have any additional insight into the present obstacles?
- * Consider who else could be involved to aid in dealing with the obstacles. Do the obstacles impact different members of your team differently? What could you do to assist the team members?

Ask your manager what problems and opportunities he/she foresees arising in your department and across the agency

- Note how your manager thinks about the future; pay attention to the kinds of things he or she looks for in future opportunities.
- Consider how these ideas affect your current plans and priorities and take appropriate action to modify your plans to align them with the goals of your manager and the agency.

Join a task force to address an important and timely problem

- Brainstorm ideas with the task force and identify actions to overcome the problem.
- Every member of the task force should take responsibility for and set timelines in carrying out those actions.
- Agree on accountabilities and next steps.
- Have the confidence to suggest “on the spot” decisions to the task force.

Level 3-4 Activities

Take a longer-term project or assignment that you have become involved in and invest time to look ahead for potential problems

- Look ahead over the next 4-12 months. Consider each of the projects you are working on or plan to work on and determine which project you anticipate encountering the most difficulties?
- Break down that project or assignment into all the critical tasks and key milestones.
- Analyze each task and identify any potential areas of risk
- Identify the potential obstacles and analyze the root cause of each obstacle. Develop a plan. Identify the actions you can take to lessen or overcome the problem before you encounter it.
- Write out these actions in a plan, delegating responsibilities where appropriate, with targeted completion dates for each step. Put the plan into action and keep a note of your progress.
- Review your task break-down, risk analysis and alternatives with your manager.
- Implement an action plan to address those risks.

Identify future resources needed to meet goals

- On an ongoing basis, but particularly when new initiatives are introduced or planned, identify the resources needed to accomplish your goals, seeking input from project team members.
- Identify the things you are able to obtain on your group's behalf and take action.
- Be clear about any constraints that exist in terms of providing required resources and engage the group in problem solving to develop plans to overcome obstacles or shortages of resources.
- Identify any constraints that exist in terms of providing required resources.
- Engage the group in problem solving to develop plans to overcome obstacles or shortages of resources.

Reflection Tip:

** Is this initiative similar to a previous one? If so, can you call upon past resources/experiences when anticipating the needs of the project?*

Look ahead over the next 4-12 months to identify opportunities and problems

- Conduct a scenario planning session with your colleagues/team:
 - ⇒ Describe the possible scenarios.
 - ⇒ Work through the process of identifying what could happen over the course of the next year (either positive or negative) that could put you, your colleagues and your team off track, regarding planned actions.
 - ⇒ Work together in developing a plan to handle these situations if they should arise.
- At a later time, assess whether the forecasts actually materialized and if they were effectively dealt with.

Level 5 Activities

Develop an action plan for each of your key long-term initiatives.

- Prioritize your initiatives based on the following questions:
 - ⇒ Is it important to the department/agency's strategic objectives?
 - ⇒ Is it realistic or achievable in the expected time frame?
 - ⇒ Is it challenging, innovative and of moderate risk?
- Identify the performance measures that you will use for each initiative.
- Write down the specific goals that you want to accomplish for each initiative and the date by which you want them accomplished.
- Develop an action plan to support each of your goals.
- Identify resources required, time frames and plans for overcoming anticipated obstacles. Share these action plans with your colleagues and make sure they understand their role in implementing these action plans.
- Regularly monitor progress against goals for yourself and the department. Adjust resourcing, as required.
- Recognize appropriate progress made toward goals and do what is necessary to ensure that goals are met and align with your department/agency's strategy.

Test a new idea or concept that you have read about or learned from some other source.

- Determine its application within your department and agency by following the steps listed below:
 - ⇒ Develop a plan for its implementation, even if you believe the idea may not be supported.
 - ⇒ Test the plan with a manager and get their feedback.
 - ⇒ Identify key learnings from the exercise.
 - ⇒ What changes are necessary to the plan to make it viable?
 - ⇒ Assess the feasibility of the plan and determine if there is merit to proceed further (i.e., is the market trend identified expected to last?)

Assess the implications of implementing longer-term plans

- Identify a complex issue you are going to have to address over the next 1-2 years and list the choices of action you have.
- List the most likely/significant consequences for each choice (use the table shown in the example at the end of this exercise).
- Rate the importance of each consequence using a five-point scale:
 - ⇒ 1 (not very important) to 5 (very important)
 - ⇒ Label each consequence as a cost (-) or as a benefit (+).
 - ⇒ Make a rough estimate as to the likelihood of each consequence. Use 0% (certain the consequence won't happen) to 100% (certain the consequence will happen).
 - ⇒ Multiply the importance rating by the likelihood value for each consequence and sum the total (see the example following).

Example: Should we introduce a new program to our already busy spring schedule?

Consequence	Importance	Likelihood	Total
Improve Service	+4	100	400
Positive response by clients	+3	50	150
Increased stress level	-5	100	-500
TOTAL			+50

In this example, the analysis indicates the benefits outweigh the costs for this particular choice of action.

- Repeat the above analysis for each choice of action you have identified.
- Select the option with the highest totals once you have completed the totals for each option.
- For that option, document the steps that you will need to take to increase the impact and likelihood of positive consequences and decrease the impact and likelihood of negative consequences.
- Review your analysis with your manager and ask for his or her input. Add any other consequences you both identify and repeat your analysis.
- Ensure nothing important is missing and commit to your course of action.
- Keep a written record of the decisions you make based on this technique.

Identify a situation where there are several possible courses of action you can take to move ahead with your vision and initiatives.

- Use a chart with the headings below:

Criteria	Option 1	Option 2	Option 3

- Write down the situation.
 - ⇒ List the criteria you will use to evaluate each option down the left side of the chart. For example:

Criteria	Option 1	Option 2	Option 3
Resource costs (e.g., time, people, capital)			
Political Risk			
Efficiency			

- Identify several possible options to the problem. Write these across the top of the chart.
- Determine how well each option meets each criteria. Assign a weight for each option against each criteria using the scale below:
 - ⇒ 1 = Option does not meet criteria
 - ⇒ 2 = Option minimally meets criteria
 - ⇒ 3 = Option somewhat meets criteria
 - ⇒ 4 = Option fully meets criteria
 - ⇒ 5 = Option exceeds criteria

Criteria	Option 1	Option 2	Option 3
Resource costs (e.g., time, people, capital)	1	2	3
Political Risk	4	5	2
Efficiency	3	2	1
TOTALS:			
Pros/Cons			
Selection			

- Total the weight scores for each option at the bottom of the chart.
- Determine the pros and cons of each option on the chart.
- Select the option which best meets your most important criteria.

Conceptualize and articulate your vision of an initiative or new direction.

- Review all the events surrounding a new initiative in your department/agency, such as changes to the strategy.
- Anticipate the reasons behind potential resistance to the initiative and think about what actions you can take to alleviate that resistance.
- Build a persuasive case for the initiative that is personally meaningful to people and develop a communication plan to articulate the initiative. Present the message to a select group for feedback on the content. Make any necessary changes.
- Implement the communication plan to your organization as well as others who will be impacted. Ensure the vision is visible to all staff. Develop multiple two-way communication channels so that you can effectively monitor the organization's reaction to the message and make yourself available to answer any questions.

Books and Videos

Seven Habits of Highly Effective People, by Steven R. Covey (New Edition: Free Press, 2004; Original: Free Press, 1990) – also available on audio CD.

This book provides thought provoking ideas on clarifying your personal values and how to translate them into your daily and weekly activities. An excellent read. This book has been made into an audio cassette.

How to Mind Map, by Tony Buzan (Harper Collins, 2002).

This is an essential book for anyone who wishes to use their brain to its full potential. It explains how to unleash and harness the brain's untapped power. This practical pocket guide explains everything you need to know about Mind Maps and shows how they make it easy to: Get started on and plan a project; Think up brilliant ideas; Remember things; Save time.

Please Don't Just Do What I Tell You! Do What Needs to be Done: Every Employee's Guide to Making Work More Rewarding, by Bob Nelson and Kenneth H. Blanchard (Hyperion, 2002).

This book (available in hardcover and digital) explains how to take the initiative and make one's job better or one's customers happier. The author's basic point is one of empowerment: think bigger, figure out "what needs to be done" beyond the confines of your job description and do it.

Adversity Quotient at Work: Finding Your Hidden Capacity for Getting Things Done, by Paul G. Stoltz (HarperCollins, 2001).

This book teaches readers how to hire and retain highly motivated and talented workers, develop employees to their full potential, and create a leadership culture that encourages all to put forth their best efforts and maximize their performance capabilities.

1001 Ways to Take Initiative at Work, by Bob Nelson (Workman Publishing Co., 1999).

This book features stories of successful employees who developed self-leadership in the workplace. The author offers quotes, case studies and real-life examples to show readers how to take risks, set goals and ultimately, become better employees.

Effective Project Planning and Management: Getting the Job Done, by W. Alan Randolph & Barry Z. Posner (Prentice-Hall, 1998).

You will learn to start with realistic project goals and objectives, to plan and track progress and to use strategies for keeping projects on schedule. You will also learn how to use scheduling tools like GANTT, CPM, and PERT. And you will learn the art of communicating on projects, handling disagreements, creating teamwork, facilitating creativity and leading people on project teams.

Little Book of Big Motivation, by Eric Jensen (Fawcett Book Group, 1994).

This book contains 180 simple ways to overcome obstacles and realize your goals.

If it Ain't Broke...BREAK It, by Robert Kriegel & Louis Patier (Warner Books, 1992).

Using examples of the experiences of people in a variety of organizations, the authors present ways to increase productivity and quality through simple, effective tools that encourage initiative and risk-taking.

The video, "Courageous Followers, Courageous Leaders" (Owen Stewart Performance Resources Inc., 1-800-263-3399).

This film is based on the book, "The Courageous Follower—Standing Up To and For Our Leaders," by Ira Chaleff. In this absorbing portrayal of Chaleff's Four Dimensions of Courageous Followership, vignettes will demonstrate the courage to serve, the courage to assume responsibility, the courage to challenge and the courage to leave.

The video, "Empowering People" by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).

Uncover the secrets of how to get people motivated to take more initiative, be more responsible and reach their potential.

The video, "Empowering Yourself" by Ash Quarry Productions (International Tele-Film, 1-800-561-4300, www.itf.ca).

Learn the key mind set changes that will result in more initiative, better problem solving, willingness to learn and confidence to speak out.

The video, "Making the Difference Series: Continuous Improvement" by FT Knowledge (International Tele-Film, 1-800-561-4300, www.itf.ca).

Continuous improvement, through the eyes of the customer, is a fact of organizational life - no company can afford to stand still. By using their initiative, employees can ensure that improvements are made continuously.

The movie “Erin Brockovich”.

Based on the real-life story of the title character played by Julia Roberts. Brokovich is a feisty legal clerk (watch how she gets her job!) who is instrumental in exposing the misdeeds of a powerful corporation which has exposed families to disease-causing industrial residue. Focus on how she finds ways to get around seemingly insurmountable obstacles in her quest for justice.

The movie “Places in the Heart”.

A young widow is determined to survive as a cotton farmer.

Interpersonal Relations & Respect (IRR)

Definition:

Interpersonal Relations and Respect involves dealing with people in a respectful and sensitive manner. It implies truly listening, understanding, accepting and respecting the opinions, feelings, perspectives and motivations of others. It is also the demonstrated willingness to use this knowledge to shape one's own responses and to show a concern for the welfare, dignity and feelings of others.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ seeking first to understand, then be understood; deferring judgement on what someone is saying and instead focusing on finding out more 	<ul style="list-style-type: none"> ▪ jumping in with a solution when someone is starting to express their concerns
<ul style="list-style-type: none"> ▪ encouraging colleagues/clients to elaborate when they mention a concern 	<ul style="list-style-type: none"> ▪ trying to brush over a concern and move on to the next point
<ul style="list-style-type: none"> ▪ demonstrating interest when someone mentions an issue that concerns them; recognizing and understanding non-verbal behaviour (e.g., eye contact and body posture) 	<ul style="list-style-type: none"> ▪ giving lip service to concerns but then ignoring the issue that has been raised; accepting what is said at face value without considering non-verbal cues
<ul style="list-style-type: none"> ▪ recognizing deeper needs or concerns of a client or colleague that they may not be divulging (i.e. looking for the emotional content of what is being said) 	<ul style="list-style-type: none"> ▪ responding only to what a client or colleague is telling you or ignoring the feelings underneath the words
<ul style="list-style-type: none"> ▪ thinking beyond the immediate issue to look at root causes of underlying behaviour 	<ul style="list-style-type: none"> ▪ focusing on solving someone's immediate problem
<ul style="list-style-type: none"> ▪ understanding a client or colleague enough to predict and prepare for his or her reactions 	<ul style="list-style-type: none"> ▪ not being prepared for possible reactions and therefore not being able to deal with them effectively

Continued on next page

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none">▪ focusing on the individual circumstances that are driving someone's behaviour and tailoring your response accordingly	<ul style="list-style-type: none">▪ relying on stereotyped explanations to account for someone's behaviour and giving canned responses
<ul style="list-style-type: none">▪ Exploring the surrounding environment and the impact on an individual's behaviour	<ul style="list-style-type: none">▪ Ignoring the interrelationships between the individual, culture, community and past experiences

Developmental Activities

Level 1-2 Activities

If you believe you are not a good listener, try to diagnose the reasons why.

- When listening to others, force yourself not to engage in distracting activities and instead give your full attention to the conversation.
- If you are very busy and feel you don't have time to spend on conversations:
 - ⇒ Invest some thought in how you can manage your time so that you can get your work done but still listen effectively when it is important.
 - ⇒ For example, to work without interruptions, set time aside and hold all calls; then when you do take calls or have meetings you can give them your full attention.
- If you do not believe the person to whom you are talking will tell you anything useful:
 - ⇒ Challenge yourself to find something interesting in every conversation. You will have to practice paying close attention to the other person to achieve this goal.

Increase your use of non-verbal behaviours when speaking with others.

- Use the **SOLER** technique:
 - ⇒ **S:** Sit **squarely**, with your arms and legs uncrossed.
 - ⇒ **O:** Maintain an **open** posture.
 - ⇒ **L:** **Lean** slightly forward in the direction of the speaker.
 - ⇒ **E:** Maintain **eye contact** (be sensitive-some people are uncomfortable with extended eye contact).
 - ⇒ **R:** Stay **relaxed**. Pay particular attention to how you are holding your shoulders and neck.
- Nod your head to indicate you are listening and understanding.

Ask your manager/supervisor or colleagues to observe your behaviour when obtaining important information from others in the agency.

- Ask for feedback on your interpersonal relations and respect skills. Make sure the feedback refers to a specific behaviour or example of something that you did or said which demonstrated the competency effectively or ineffectively.
- Ask your manager/supervisor what you could have done differently. Make sure he or she explains the reasoning behind their suggestions.

Pay attention to the non-verbal cues of others during your next conversation.

- The next time you have an opportunity, watch people communicate. Try to determine what emotions are being communicated that may not come across in words alone. Some common non-verbal cues are:
 - ⇒ Arms or legs crossed (anger, withdrawal or resistance).
 - ⇒ Facial expressions (different emotions depending on the exact expression).
 - ⇒ Hands folded (thinking, weighing of alternatives).
 - ⇒ Lack of eye contact (detachment, boredom, fear).
- After conversations, assess whether you were paying attention to non-verbal cues and try to determine whether your interpretation of them was accurate.

Note: Remember that these are only examples. People of different backgrounds may be sending different messages with the same non-verbal behaviours. Check your initial assessments with the individual before acting on them.

Reflection Tip:

** How valid were your assumptions? Did you really understand what the person was trying to communicate?*

Ask clarifying questions.

- Learn to ask clarifying questions of the people with whom you are communicating. This enables you to gather important information, and conveys your interest in what they have to say.
- Consciously increase the number of open-ended questions and probes you use in conversations for the next month to draw out the needs/interests/concerns/objectives of others for the next month.
- Monitor the number of open-ended questions or probes (e.g., "What do you think about...? Why did you feel that? How would you have approached...? Tell me more about...") you use with others over a one-day period.
- Pay attention to the difference in reactions you get from others when you use open- or closed-ended (yes or no) questions.
- Assess your progress in using the above.
 - ⇒ Has it led to greater understanding of team members?
 - ⇒ Has it led to greater understanding of clients?

Reflection Tip:

** Check the accuracy of your information. Are there certain areas that led you astray?*

Identify someone who is good at interpersonal relations. Arrange to spend some time observing what he or she does and says.

- After an interaction with a client or colleague, ask the individual what he or she was thinking during the conversation.
- Try to use the same sort of reasoning in your next interaction, and monitor the other person's response to it.

Reflection Tip:

** Would some of those techniques work for you? Why? or Why not?*

Keep a log of situations where you felt you demonstrated effective interpersonal relations and respect skills.

- Pay particular attention to critical incidents that provided opportunities for you to 1) identify underlying concerns that are not explicitly stated by others 2) hear the emotions that accompany an expressed statement. After you have engaged in this activity for a few months, review what you have written to gain insight into your interpersonal relations and respect skills.
- Pay special attention to situations when someone approached you to express his or her feelings. (e.g., Did you feel too busy to talk and essentially brush the person off?)
- Reflect on the situations to identify where you could have listened more actively (e.g., were there any situations in which you were feeling time pressured, and perhaps didn't listen as actively as you could have?)

Increase your use of paraphrasing in conversations but keep in mind that it needs to be in an effort to understand versus to be understood.

- Practice using paraphrasing as a way to check your understanding of what the other person is saying.
- Monitor the number of times you use paraphrasing in conversations with others (e.g., rephrasing another person's ideas, facts and/or feelings and feeding it back to check understanding).
- Consciously increase the number of times you paraphrase in conversations for the next month. Be conscious of not interrupting as you are doing this.
- To effectively paraphrase, be sure to:
 - ⇒ Use a questioning tone (rather than asserting that you already know).
 - ⇒ Be careful not to alter their words to suit your meaning (which is a technique of arguing, not listening).
 - ⇒ Be conscious not to interrupt as you are doing this.

⇒ Observe how the person you are speaking with has reacted to how you have paraphrased what they've said.

Explore with your manager what they are thinking and feeling and resolve to make changes for improvement

- Explore with your manager what they are thinking or how they are feeling about current situations related to things such as work volumes, strategic direction, technology changes, community volunteers, etc...
- Probe to uncover their perceptions regarding the issue and then their personal thoughts and feelings.
- Where appropriate, ask for recommendations.

Level 3-4 Activities

Practice your ability to assess and provide feedback of underlying concerns and feelings in a group.

- Identify an upcoming meeting or activity you will be attending where there is likely to be disagreements or potential conflict.
- During the meeting, make a conscious effort to:
 - ⇒ Listen to what is being said without immediately responding.
 - ⇒ Observe the body language of individuals in the group.
 - ⇒ Note who is talking and not talking.
 - ⇒ Determine if what is not being said is more important than what is being said.
- Based on your observations, determine what you believe to be the underlying root problems or issues driving the behaviour of the group.
- Express your observations to the group and assist them in resolving the issue or problem.

Try to understand a point of view that is different from your own.

- After an interaction with a person who has disagreed with your position, try to put yourself in his or her shoes. Imagine what that person was thinking or feeling at the time.
- Think about how your interpersonal relations skills contributed to both positive and negative feelings the person might be experiencing. Jot down what you would do differently to make the interaction more positive, and use that information to develop a plan for the next time you interact with that person.
- Listen and determine whether you can summarize their concerns. Repeat their concerns to confirm you heard them correctly. Ask for further details on particularly important or innovative points.
- Don't try to solve others' problems by offering a solution or your judgement of their opinions. Instead, try to say things that will make them feel that you understand their concerns and can see things from their point of view.

Consider the inferences you make about others.

- Create a log that includes some implicit inferences about people and their views that go beyond the explicit content and emotion outwardly demonstrated.
- Ask people, if appropriate, if you were correct in what your view of their underlying views, feelings, and thoughts may have been.

Use your communication skills to determine what is contributing to, or hindering a colleague's ability to make choices.

- Speak to a colleague who has made a complaint or asked for assistance.
- Discuss a list of options that would benefit your colleague. Try to identify the issues which are most important to him/her. Use this information to move towards a narrowing of the list of options.
- Find out the nature of the problem and his/her expectations. Reflect on whether you need additional information in order to understand the underlying issues or context.
- Paraphrase your colleague's problem and needs in order to ensure that you have understood him or her.
- Throughout these discussions, try to understand your colleague's strengths, weaknesses and deeper feelings by putting yourself in his or her shoes.

Reflection Tip:

* You will have to "read between the lines" here to identify unspoken concerns. Use non-verbal cues to guide you.

Adjust your communication style to best fit the individual based on their style, background, or job level.

- Identify a situation where you had to modify your communication approach to fit the individual.
- Outline the nature of the situation and the approach you used.
 - ⇒ Why was it effective or not effective?
 - ⇒ What worked and why?
 - ⇒ What would you have changed?
- Identify a current or future situation in which you will have to adjust your communication style to fit the individual.
- Determine your approach using information from the analysis you just did.
- Try to identify unspoken concerns or feelings that would allow you to be more sensitive to the individual's needs but at the same time present a compelling/persuasive message to the individual.

Reflection Tip:

* Reflect on the success of your approach. What were the differences between the situation you analyzed and the situation you just prepared for? What would you do differently next time?

Explore with your team what they are thinking and feeling and resolve to make changes for improvement.

- Explore with your team what they are thinking or how they are feeling about current situations related to things such as work volumes, policy changes, technology changes, events, etc.
- Probe to uncover their perceptions regarding the issue and then their personal thoughts and feelings, with caution. Probe further to identify any underlying issues or history that might be influencing each individual.
- Ask for recommendations, where appropriate, within identified constraints such as budget and staffing levels.

Make a consistent effort to fully appreciate the perspectives of others

- Make a routine (i.e., once a week) of casual "walk-about" in your department, the agency and the community. Use the opportunity to gather information, not give it.
 - ⇒ Ask open-ended questions to test assumptions and focus your questions as much as possible on the needs of the individuals you meet along the way (e.g., how things are going, what difficulties are being encountered, what has changed over time and what, if anything, you can do to help).
 - ⇒ Restate and/or summarize what you hear, where appropriate, to show that you are listening and are in sync with their needs
 - ⇒ Focus not only on the individual but on the circumstances that surround the individual which may explain their behaviours.
- Later, make a brief written summary of each individual's expressed concerns and in your next "walk-about" use this knowledge to produce a greater impact.

Increase multicultural awareness.

- Identify the major cultures within your agency and community.
- Identify any seminars/conferences or newsletters targeting these groups and attend or subscribe to familiarize yourself with the issues.
- Use these forums to identify potential underlying issues and needs of any stakeholders that play a large role in your day-to-day work routines.

Bring in external speakers.

- Actively work at engaging respected speakers from the community to present on their cultural issues and concerns.
- Arrange team events and departmental meetings a few times a year to attend these speaking engagements.

Books and Videos

Body Language, by Julius Fast (*M. Evans and Company*, 2002).

This book will help you to learn about recognizing non-verbal cues to how a person is feeling.

The Business of Listening: A Practical Guide to Effective Listening, by Diane Bone and Michael Crisp, editor (*Raincoast Books*, 2000).

This book shows you how to improve listening skills through a step-by-step program and evaluation exercises.

Communicate to Win: 12 Key Points for Success, by Heinz Golmen (*Northern Typesetting Company Ltd.*, 1995).

This book presents a 12-point plan for communication success. A chapter is devoted to each rule, including listening, with four key questions and four case studies to highlight good and bad practices.

Emotional Intelligence – Why it can Matter More Than IQ, by Daniel Goleman (*Bantam Books Canada*, 1997).

The Western cultures esteem analytical skills measured by IQ tests: but there is clearly more to success and happiness, even in technological societies, than IQ alone. Goleman has written one of the best books on the nature and importance of other kinds of intelligence besides our perhaps overly beloved IQ.

How to Talk to Anyone, Anytime, Any Where: The Secrets of Good Communication, by Larry King (*Crown Trade Paperbacks*, 1995).

Learn how to start a conversation, give speeches and presentations, improve listening skills, put people at ease, and discover the key to effective business meetings.

Listening: The Forgotten Skill, by Madelyn Burley-Allen (*Wiley*, 1994).

This book describes how you can master the essential but often-neglected art of listening. Aided by examples, exercises and drawings, it takes you step-by-step through a 12-point program to acquire active, easy-to-follow techniques to project interest, overcome language barriers, interpret body language clues, ask questions constructively, and get others to listen to you.

Managing Emotions in the Workplace (*The Canadian Management Centre, 1997*).

This reference manual contains a number of activities designed to help the user increase their self-awareness of emotional triggers at work. Subsequent exercises teach strategies for better emotional control (e.g., effective listening, identifying emotionally charged situations).

PDI's Successful Manager's Handbook, (1992).

Fostering Open Communication (pp. 127-139).

Listening to Others (pp. 140-155).

Encouraging Others to Express Contrary Viewpoints (pp. 130-131).

Working With Emotional Intelligence, by Daniel Goleman (*Bantam Books Canada, 2000*).

The author of the astonishing international best-seller "Emotional Intelligence" now shows how success and leadership in today's workplace demands more EQ ("Emotional Quotient") than IQ--and writes the definitive book to demonstrate how it can work for everyone.

The video, 'How to Listen Powerfully' (*Career Track Publications*).

This video teaches you how to sharpen concentration and hear more of what people are saying. This two volume series includes instruction on listening with an open mind, how to "decode" a message and reveal the truth, and how to summarize a conversation to make sure you have heard the truth.

The video, 'Interviewing: More Than A Gut Feeling' (*Diffusion Prologue, 1994*).

This video shows the viewer how to plan an interview, build rapport, evaluate skills objectively, use silence effectively and uncover past work behaviours.

The movie, 'The Awakening'.

This film shows how paying close attention to what people do can lead to deep interpersonal understanding even of severely retarded people. Most of the clues observed are non-verbal.

The movie, 'The Inn of Sixth Happiness'.

In this film, watch the unusual interpersonal understanding and strength that Ingrid Bergman shows. This film shows how the competency develops out of an intense concern and caring for others.

Leading Others (LO)

Definition:

Leading Others is about taking on the role of leader of a team or other group. It involves providing inspiration, clarity and direction through a compelling vision of the future. This includes ensuring that those who are led work together and are provided with the required resources and motivational support. Leaders measure their success through the success of others.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ soliciting and utilizing the skills, ideas and opinions of team members 	<ul style="list-style-type: none"> ▪ going through the motions of soliciting input but never synthesizing or utilizing the gathered information
<ul style="list-style-type: none"> ▪ supporting and encouraging team members 	<ul style="list-style-type: none"> ▪ placing blame on or making judgements about other team members
<ul style="list-style-type: none"> ▪ bringing group issues out in the open which may be personally threatening or difficult to deal with 	<ul style="list-style-type: none"> ▪ only offering opinions on other group members' behaviour without being willing to examine your own shortcomings
<ul style="list-style-type: none"> ▪ keeping team members informed about decisions and explaining the rationale behind them 	<ul style="list-style-type: none"> ▪ dictating orders and giving incomplete information
<ul style="list-style-type: none"> ▪ clearing away bureaucratic barriers or other problems that are making it difficult for your team to get things done 	<ul style="list-style-type: none"> ▪ getting stuck in these barriers yourself or not believing you can do anything about them
<ul style="list-style-type: none"> ▪ actively promoting the mission and goals of the department as it relates to the strategic direction of the agency 	<ul style="list-style-type: none"> ▪ delegating tasks to others without providing them with an understanding of the ultimate goal
<ul style="list-style-type: none"> ▪ "walking the talk" by demonstrating the actions you expect from other team members 	<ul style="list-style-type: none"> ▪ creating rules or policies for the team which you do not follow (i.e., "do what I say, not what I do" mentality)
<ul style="list-style-type: none"> ▪ actively working to make sure your team is well regarded by other departments and agencies 	<ul style="list-style-type: none"> ▪ missing opportunities to showcase your team members' unique strengths and accomplishments

Continued on next page

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none">▪ communicating a team vision and working with the team to develop shared goals to achieve the vision	<ul style="list-style-type: none">▪ believing that if you want it done right you need to do it yourself
<ul style="list-style-type: none">▪ painting an exciting picture for the team of its mandate and doing things that create some enthusiasm to achieve it	<ul style="list-style-type: none">▪ focusing on strictly task-based activities to reach your goal

Developmental Activities

Level 1-2 Activities

Listen during team meetings

- Don't answer your own questions. Practice remaining silent for at least 10 seconds after you ask a question.
- If you disagree with someone in a team meeting, first acknowledge that person's point of view before offering your opinion.
- Summarize objectively differing points of view on issues and explicitly acknowledge that there is a difference of opinion.
- Ask for the group's help when there appears to be conflict in the group.

Use regular team meetings as an opportunity to share information and ideas

- Ensure the team has the information required to complete their day to day work.
- Include information on the "big picture" - events in the department that will help team members understand the goals of the agency.
- Explore as a group, ideas about how to improve team results and how the team can contribute to agency objectives.
- Keep brief notes on the ideas put forward.
- Determine, as a group, ways by which these ideas can be put into practice.

Reflection Tip:

** Periodically review the effectiveness of team meetings. Are all team members attending? Do they actively engage in decision making? Why or why not?*

Ask for regular feedback on your leadership style from your supervisor/manager to ensure you are enabling the team to function optimally

- Ask others to identify specific behaviours you need to start doing or stop doing to improve your leadership effectiveness.
- Focus on changing one of these behaviours for a period of time and observe the impact these new behaviours have on others.

Reflection Tip:

** Remember not to argue or defend your behaviour - it may make others reluctant to provide honest feedback in the future.*

Establish a work environment with clear direction where team members have performance objectives

- These objectives should be (**SMART**):
 - ⇒ **Specific**: describes what the end result will look like.
 - ⇒ **Measurable**: expressed in quantifiable terms.
 - ⇒ **Attainable**: the goal is realistic.
 - ⇒ **Relevant**: linked to organization or unit goals.
 - ⇒ **Timeframe**: provide target completion dates.
- Ask team members for their input when developing the objectives.
- Compare performance to the standards you have set in each area of accountability on a regular basis (e.g., quarterly, annually).
- Take action to meet with those people who have difficulty meeting the objective criteria and provide support around ways of improving performance.

Reflection Tip:

** Asking for input is critical. Getting team input during the creation of the objectives will:*

- ⇒ *Build team morale*
- ⇒ *Ensure better buy-in to the objectives*

Conduct a self-audit to enhance team effectiveness

- Be open to feedback from your team members regarding your performance - accept it and learn from it.
- Check yourself to ensure that you speak positively about the strengths and capabilities of others and refrain, whenever possible, from criticizing others in your conversations.
- Monitor the way in which you speak about members of your team and clients
- Strive to deal directly with individuals who do not follow these guidelines:
 - ⇒ Be clear about the impact of negative talk on the overall performance and perception of the team
 - ⇒ Work with the individual to try to uncover the reason for his/her negative comments. There are many assumptions that can be made regarding the motivation for a particular action - which assumptions is the individual making? Is there a good reason for making these assumptions? How could the individual check the assumptions for accuracy?
 - ⇒ When necessary, simply state that the expression of negative expectations will not be tolerated, and indicate the implications for the individual for continuing with these actions.

Avoid destructive messages that could harm team effectiveness

- **Communication Shut-down** - a statement or action that cuts off discussion with no plan to continue.
- **'You Should' Statements** - like "You should do this" which sounds parental and insinuates that I know better than you.
- **Discounting** - minimizing another person's comments by inappropriate reassuring, distracting or humouring.
- **Threatening** - expressing an intention to do harm.
- **Communicating Through Someone Else** - a statement that expresses dissatisfaction indirectly to the person but through someone else.
- **Mind Reading** - assuming that your perception of a confusing message is right without clarifying or assuming the other person can read your mind.
- **Silent Treatment** - feeling resentment or anger toward another, but not addressing it directly with that person.
- **Double Blind** - sending a message where the words say one thing but the body language or attitude convey a different meaning.
- **Judging/Blaming** - placing blame or making judgements about another person; often involves finger pointing.
- **Premature Advice** - offering immediate advice to someone without showing concern for their feelings, listening, or helping them problem-solve.

Reflection Tip:

* *Dealing with others equally and effectively improves team relationships and its effectiveness. Share this list with your team members, and have them give you feedback and suggestions on how to eliminate some of these behaviours.*

Take specific steps to keep all team members focused on achieving the ultimate goals and objectives

- Ensure that each person understands how his or her role contributes to the overall success of the project and of the group.
- Remember that the team must work cohesively to accomplish its goals.
- Help the group to stay focused on its common goal.

Reflection Tip:

* *What communication vehicles did you use? How effective were they? What could you use next time instead?*

Ask team members to evaluate the effectiveness of the team. Ensure that they identify both strengths and weaknesses

- Evaluation criteria may include the following:
 - ⇒ Clarity of Purpose
 - ⇒ Problem Solving
 - ⇒ Decision Making
 - ⇒ Change
 - ⇒ Client Focus
 - ⇒ Quality of Work
 - ⇒ Conflict Resolution
 - ⇒ Work Processes
 - ⇒ Feedback
- Rate your team using the following scale for each criterion:
 - ⇒ 1 = Team is Not at all Effective
 - ⇒ 2 = Team is Slightly Effective
 - ⇒ 3 = Team is Effective in Some Situations but Not Others
 - ⇒ 4 = Team is Effective Most of the Time
 - ⇒ 5 = Team is Effective All of the Time
- Review results every three months. Plan to spend some time working on the areas that fall into level 1 or 2 on the scale.
- During the review, consider the evaluation criteria. Should anything else be added to the list? Are any criteria no longer relevant?
- Repeat the exercise every three months to see if perceived team effectiveness is improving.

Reflection Tip:

** Track the progress; examine it to see if there are any patterns to the weaker areas. Discuss these areas with the team.*

Quickly identify issues that may hinder team effectiveness and bring them into the open

- When faced with an issue, problem, or opportunity, make an effort to identify all stakeholders involved.
- Ask each person to describe his or her understanding of the situation, solicit ideas for resolution, and identify each individual's needs and expectations.
- Listen carefully to each person's input and thank the parties for their involvement and contribution.

Reflection Tip:

* Encourage others within the team to do this, too.

* Have the individuals work with you on these activities. Involvement in identifying the issues will lead to greater commitment to the ideas generated.

Practice the following skills and behaviours to manage conflict among your team in a positive way

- Emphasize people's common goals, and how everyone depends on each other.
- Treat each person with respect.
- Help to define the problem by coaching others to be concise and stick to facts; coach them to avoid repeating the same points over and over.
- Insist on true consensus.
- Warn team members to avoid situations where people give in out of sheer exhaustion.
- Use group pronouns (we, us, ours).
- Always thank members for their participation.

Give recognition its due.

- Make a practice of recognizing particular efforts made by others during department meetings, noting the contribution of the effort to the overall goals of your group.
- When selecting performance for recognition, be sure that you are including all individuals who participated in the success, such as colleagues, outside partners, those who provided back up, etc.
- Look for opportunities to showcase team members' achievements to the rest of the department and agency.

Celebrate team successes to increase future performance

- List all of the reward strategies your manager used with his/her team over the past year.
- Rank these strategies in order of their effectiveness in motivating and engaging the team.
- Share your list with your manager to find out their thinking behind delivering the highest ranked reward strategies? The lowest ranked strategies?
- Following a successful team accomplishment, refer back to your list of reward strategies and select the most appropriate methodology to celebrate the team's success.
- Look for opportunities to visibly celebrate individual and team successes.
- Let individual team members know your appreciation through personal memos or face-to-face communication.
- Recognize the successes of individual contributors and teams in public forums (e.g., management team meetings) by providing the specifics of what was done well.
- Use formal communication to acknowledge successful team performance.

Reflection Tip:

** Speak with your colleagues to find out how they like to celebrate. Be aware that members of your team will like to be recognized for their successes in different ways.*

Level 3-4 Activities

Identify the resources the team needs to accomplish their goals

- Identify the things you are able to obtain on their behalf and take action.
- Identify any constraints that exist in terms of providing required resources.
- Be clear about any constraints that exist in terms of providing required resources, and develop plans to acquire resources for the team to accomplish their goals.

Reflection Tip:

** Can someone on your team obtain the missing resources needed to accomplish the goal?*

Ask your supervisor/manager to identify some mentors who have strong leadership skills

- Identify someone in the agency/department who demonstrates the capacity to be an excellent leader.
- Arrange to have regular conversations with at least one of these mentors.
- Observe this person in action and make note of what he/she does to encourage, facilitate and support teamwork and team effectiveness/morale.
- Make a point of discussing specific issues in your department.
- Model your behaviours after your mentor's and use any suggestions he or she might have.
- If the person is on the same team as you, ask him/her to observe you and give you feedback and suggestions about how you could improve your teamwork skills.
- Hold follow-up meetings for feedback and additional coaching at least quarterly to track your progress and maintain your motivation.

Reflection Tip:

** Talk with others who work with this person to find out which activities are considered to be most effective.*

Increase your exposure to colleagues and other supervisor/managers whose managerial style is significantly different from your own

- Talk to them about their jobs and the behaviours they use to manage their people.
- Identify those techniques or behaviours you would like to integrate into your own managerial approach.

Analyze your effectiveness in pushing decision-making to the lowest appropriate level and practice delegation

- Review the activities on your tactical calendar that your team must accomplish in the next month.
- Identify the team members to whom you have assigned each responsibility.
- Indicate the degree of authority the person has in doing the work.
- Adapt your leadership performance accordingly.
- Analyze your results by asking yourself the following questions:
 - ⇒ Do I give primary authority to only one or two people?
 - ⇒ Am I making all the decisions?
 - ⇒ Can I assign some work to someone at a lower level?
 - ⇒ Do I over manage by giving people who do not need help ideas about solutions or how to proceed?

Reflection Tip:

* Time spent on individual contributor activities (e.g., writing a report, doing an analysis, negotiating with a supplier) is time spent away from leading and motivating your team.

Establish “buy-in” and commitment to department and agency goals.

- Share information with your direct reports to ensure that they have the contextual information necessary to set and attain group and individual goals.
- Solicit input from direct reports. Avoid taking significant action or making an important decision until the opinions of all direct reports have been heard.
- Explore ideas about how to improve group results. Discuss issues that could help or hinder the ability of the group to reach their targets. Keep an open mind about all the issues, and positively reinforce members of the team who take risks in suggesting new ways of approaching tasks.
- If you can not implement a suggestion, make the reasons for this clear to your direct reports. This will aid group members in evaluating and targeting future suggestions.

Clarify the team’s mission.

- Initiate a process with your team to either develop or re-visit a mission statement for your department and/or agency.
- Include feedback, where appropriate, from clients in the discussion to ensure that your mission meets their expectations as well.
- Post the final product prominently and refer to it regularly in department meetings when agreement has been reached.

Instill into others your passion for an agency initiative and encourage others to develop commitment.

- Identify opportunities with your department and emphasize how the current work effort is related to the agency initiative.
- Involve direct reports and other stakeholders from the beginning (i.e., solicit input and insight, communicate the vision; involve them in the development of the plan).
- When goal setting with your direct reports, ensure that they are referencing the initiative as one of the goals to which their specific efforts will deliver.
- Talk to other departments and ask what they are doing to support the initiative.

Level 5 Activities

Look at your department from another perspective.

- Get a sense of how others (peers, clients and similar organizations) see your department by asking how they view your operations and deliverables.
- Examine your department's objectives, processes, people capabilities and technology in light of the information you gather.
- Share this information and any recommendations you have for changes based upon this information with the appropriate group(s).
- Incorporate any feedback and develop an action plan based on decisions made.

Spend time developing and living up to a personal vision.

- Observe the behaviour of visionary leaders in your agency or the wider sector as inspiration.
- Use books, course material and other references to help you to label and recognize these behaviours.
- Over the next several months, develop a personal vision of what you believe a manager/team leader/ director/supervisor should be.
- Document your personal vision of a leader in your own terms.
- As you develop confidence in your vision, communicate it to the team.
- Test if the vision is realistic by practicing it in your daily work.

Develop your skills in preparing and delivering motivational and engaging speeches and presentations to the Board and/or Executive Director

- Use the following guidelines in preparing your speech or presentation.
 - ⇒ Begin your speech or presentation with a strong and explicit statement of purpose. Answer the question "Why are we here?" "What do we need to achieve?"
 - ⇒ Provide an overview of what you intend to address. Answer the question "What is it we are going to talk about?"
 - ⇒ Give the appropriate background so that the audience understands the context. If necessary, explain any technical terms or concepts.
- Constantly monitor the audience's reaction to adjust your tempo and maximize the effect of points that seem to arouse interest.
- Where possible, personalize the information you are presenting in order to help convey your passion for the message and alignment with overall vision.

Conceptualize and articulate your vision of a change initiative.

- Create a written and verbal presentation of your vision.
- Deliver a presentation of your vision to your department either in small groups or a large group session. Rehearse the presentation with colleagues for feedback on your presentation style.
- Put together a communication plan to ensure the vision is visible to all staff. (For example posters or pamphlets)
- Look for opportunities in your everyday work to express your commitment to the vision. For example, talk to other departments and ask what they are doing to deliver the change.

Reflection Tip:

- * *What actions did you take to communicate your vision and then “walk the talk”?*
- * *What resistors or obstacles existed when delivering the message and what did you do to overcome them?*

Create a clear and effective team vision for change that captures the hearts and minds of employees.

- John Kotter identifies six characteristics of an effective vision. Review these characteristics and incorporate as many as you can as you draft your vision and strategy. Effective visions:
 - ⇒ Convey an imaginable picture of what the future will be like.
 - ⇒ Appeal to the long term interests of people.
 - ⇒ Consist of realistic, attainable goals.
 - ⇒ Are clear enough to guide decision making.
 - ⇒ Are flexible enough to allow individual initiative as well as adjustments to changing circumstances.
 - ⇒ Are easy to explain.

Reflection Tips:

- * *What defines an explicit vision or mission?*
- * *What have you done to generate excitement and commitment among employees?*
- * *What actions have you taken to convey a vision for change?*

Books and Videos

Death by Meeting: A Leadership Fable about Solving the Most Painful Problem in Business, by Patrick Lencioni (Jossey-Bass, 2004)

In his latest page-turning book of business fiction, best-selling author Patrick Lencioni provides readers with another powerful and thought-provoking book, this one centered around a cure for the most painful yet underestimated problem of modern business; bad meetings. And what he suggests is both simple and revolutionary for leaders.

The First 90 Days: Critical Success Strategies for New Leaders at All Levels, by Michael Watkins (Harvard Business School Press, 2003).

Watkins offers proven strategies for moving successfully into a new role at any point in one's career by providing a framework for transition acceleration that will help leaders diagnose their situations, craft winning transition strategies, and take charge quickly.

Why Smart Executives Fail: And What You Can Learn from Their Mistakes, by Sydney Finkelstein (Portfolio, 2003).

A definitive study of executive failures-why they happen and how to prevent them.

The Leadership Pill: The Missing Ingredient in Motivating People Today, by Ken Blanchard, Marc Muchnick (Free Press, 2003).

Destined to be a transforming experience for countless readers, The Leadership Pill shows business managers at any level how to apply the right techniques for getting both results and the commitment of their people, even when the pressure to perform is high.

Heroic Leadership: Best Practices from a 450-Year-Old Company That Changed the World, by Chris Lowney (Loyola Press, 2003).

This book examines organizational principles derived from the history and teachings of the Jesuits and applies them to modern corporate culture. Based on the four core values of self-awareness, ingenuity, love, and heroism, this book identifies practices that sixteenth century priests developed to foster strong leaders and achieve longevity.

The Leadership Challenge, 3rd Edition, by James M. Kouzes and Barry Z. Posner (Jossey-Bass, 2003).

In this edition, the authors emphasize that the fundamentals of leadership are the same today as they were in the 1980s, and as they've probably been for centuries.

Primal Leadership: Realizing the Power of Emotional Intelligence, by Daniel Goleman, Richard Boyatzis and Annie McKee (Audio Renaissance, 2002).

This book explores the consequences of emotional intelligence for leaders and organizations. The authors argue that a leader's emotions are contagious, and must resonate energy and enthusiasm if an organization is to thrive.

High Performance Leadership: Creating, Leading and Living in a High Performance World, by Graham Winter (John Wiley & Sons, 2002).

This book is a powerful, proven and easy-to-implement approach to leadership that is essential in the fast and competitive business environment of the 21st century. The book is based on a hugely successful leadership and team development process which has been tested in over 50 organizations.

The Five Dysfunctions of a Team: A Leadership Fable, by Patrick M Lencioni (Jossey-Bass, 2002).

Lencioni begins by telling the fable of a woman who, as CEO of a struggling Silicon Valley firm, took control of a dysfunctional executive committee and helped its members succeed as a team. Story time over, Lencioni offers explicit instructions for overcoming the human behavioural tendencies that he says corrupt teams (absence of trust, fear of conflict, lack of commitment, avoidance of accountability and inattention to results).

How to Become a Great Boss: The Rules for Getting and Keeping the Best Employees, by Jeffrey J Fox (Hyperion Press, 2002)

Fox gives advice on how to become, and remain, a great boss. Fox's advice is delivered in snappy, to the point chapters that zero in on his creative advice.

The Leader's Voice: How Communication can Inspire Action and Get Results, by Boyd Clarke, Ron Crossland (SelectBooks, 2002).

With this book, business executives and others can acquire the much-needed skills effective leaders use to manage change in turbulent times.

Implementing Mentoring Schemes, by Nadine Klasen and David Clutterbuck (Butterworth-Heinemann, 2001).

This book provides a comprehensive, up-to-date guide on mentoring schemes. The book illustrates the importance of mentoring schemes for organizations.

Best Practices in Organization Development and Change: Culture, Leadership, Retention, Performance, Coaching, by Louis Carter, David Giver and Marshall Goldsmith (Editors) (Jossey-Bass/Pfeiffer, Book and CD-ROM Edition, 2001).

This book is a state-of-the-art resource that presents the most important ideas and effective strategies from experts and top companies in the field. Comprehensive in scope, the book addresses the five most important organization development or human resource development topics – organization development and change, leadership development, recruitment and retention, performance management, and coaching and mentoring – and offers a practical framework for design, implementation and evaluation.

The Spirit of Leadership: Optimizing Creativity and Change in Organizations, by Robert Spitzer (Executive Excellence, 2000).

Many organizations have invested in the skills and structures of change, but have forgotten the more intangible quality of spirit. As a result, their changes have been short-lived, their adaptability slow, and their ability to move to the "next level" nonexistent. The absence of spirit (even with all the right skills and structures) has prevented these organizations from developing a self-motivated desire to change for the common good. Indeed, the absence of spirit has led to abject resistance to change.

First, Break all the Rules: What the World's Greatest Managers Do Differently, by Marcus Buckingham, Curt Coffman (Simon and Schuster, 1999).

In seven chapters, the two consultants for the Gallup Organization debunk some dearly held notions about management, such as "treat people as you like to be treated"; "people are capable of almost anything"; and "a manager's role is diminishing in today's economy." "Great managers are revolutionaries," the authors write. "This book will take you inside the minds of these managers to explain why they have toppled conventional wisdom and reveal the new truths they have forged in its place.

The 21 Indispensable Qualities of a Leader: Becoming the Person Others Will Want to Follow, by John C Maxwell (Thomas Nelson, 1999).

John C. Maxwell now provides a concise, accessible leadership book that helps readers become more effective leaders from the inside out. Daily readings highlight twenty-one essential leadership qualities and include "Reflecting on It" and "Bringing It Home" sections which help readers integrate and apply each day's material.

The Leadership Moment: Nine True Stories of Triumph and Disaster and Their Lessons for Us All, by Michael Useem (Three Rivers Press, 1999).

This book presents some surprisingly effective profiles to show how others have responded when push truly comes to shove. Among them is the story of how flight director Eugene Kranz worked calmly and efficiently to return the endangered Apollo 13 astronauts safely back to Earth.

Movies for Leaders: Management Lessons From Four All-time Great Films, by Colleen Striegel and Shaun O'L. Higgins (New Media Ventures Inc., 1999).

This book is the first volume in a series of self-study guides aimed at helping managers cope with difficult situations and improve day-to-day performance. This guide uses the movies "Hoosiers", "The Wizard of Oz," "Moby Dick" and "The Bridge on the River Kwai" to help managers sharpen their leadership skills, train their staffs to lead, think through key leadership issues and enliven their business presentations.

Ethics, the Heart of Leadership, by Joanne B. Ciulla (Praeger Publishers, 1998).

This book explores the ethical dynamics between leaders and followers in business and in society as a whole. The reader will gain a better understanding of the complex moral interaction of leaders and followers and why healthy moral relationships between leaders and followers are central to effective leadership.

Team Building: How to Motivate and Manage People (Career Track Publishing, 1995).

In this three-volume video program, managers learn how to turn conventional work groups into teams. Management expert Mark Sanborn leads the viewer step-by-step through the team-building process including how to structure the team and set objectives.

The video, 'America3: The Power to Create' (Owen Stewart Performance Resources Inc, www.owenstewart.com, 1-800-263-3399)

This program uses the experience of the crew of America3 to highlight the key strategies for creating a winning team: turn setbacks into opportunities, focus on common goals, and understand the value of communication - the formula the won America's Cup, yachting's most coveted prize. In 1992, the crew of America3 won the Americas Cup by overcoming obstacles and focusing on teamwork, technology and talent.

The video and book, “FISH! Catch the Energy. Release the Potential” (Charthouse Learning, www.charthouse.com, 1-800-328-3789)

This best-selling video and supporting book profiles Seattle's World Famous Pike Place Fish as an otherwise ordinary fish market that's extraordinarily successful. The work is hard and the hours are long - yet these employees make a personal choice to bring amazing passion, playfulness, commitment and a positive attitude to work every day. The "Fish Philosophy" provides a powerful message on how to create a culture that maximizes both employee and customer satisfaction.

The movies, “The Lord of the Rings – The Fellowship of the Ring”, “The Lord of the Rings – The Two Towers”, “The Lord of the Rings – The Return of the King”.

Take a journey with Frodo Baggins and the entire ensemble cast of the movies in this trilogy as they work their way through Middle Earth to destroy a dangerous ring. The epitome of "good against evil" there are a range of leaders and leadership styles demonstrated throughout all three movies. Perhaps one of this trilogy's most important lessons is that leadership is something that lies in each one of us and that it is not necessarily dependent on hierarchical position.

The movie, “Master and Commander – The Far Side of the World”.

Watch how Jack Aubrey (played by Russell Crowe) leads his vessel in a titanic and epic struggle of the seas during the Napoleonic Wars.

The movie, “Whale Rider”.

Despite the discouragement of her gruff and disapproving grandfather (who nearly disowns her because she is female and therefore traditionally disqualified from leadership), 12 year-old Pai (played by Keisha Castle-Hughes) is convinced that she is a tribal leader and sets out to prove it.

The movie, “Apollo 13”.

Look for examples of effective leadership behaviours, both in space by the mission commander (played by Tom Hanks) and on the ground by the manager of mission control.

The movie, “Crimson Tide”.

This dramatic thriller is set aboard a submarine. Watch the differing leadership styles of the two lead characters. Note how different crew members respond to the leadership styles.

The movie, “Glory”.

This film is the story of the first black regiment recruited to fight in the Civil War. Notice how the regiment develops as a team.

The movie, “Churchill”.

This is a picture of a great leader in times or war, who could bring people together to fight, but lost his focus in peacetime.

The movie, “Gandhi”.

In this movie, Gandhi advocates and leads social change through his inspirational religious beliefs and teachings.

Managing Change (MC)

Definition:

Managing Change is about supporting a change initiative that has been mandated within the agency and/or sector. It involves helping employees and individuals and their families understand what the change means to them. People with this competency willingly embrace and champion change.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ enthusiastically adopting new policies or procedures 	<ul style="list-style-type: none"> ▪ wanting to do things the way you have always done them
<ul style="list-style-type: none"> ▪ willing to operate in a dynamic and changing environment 	<ul style="list-style-type: none"> ▪ resisting any change that will impact your work
<ul style="list-style-type: none"> ▪ publicly describing a need for change 	<ul style="list-style-type: none"> ▪ getting frustrated because one thinks change should happen
<ul style="list-style-type: none"> ▪ repeating the need for change 	<ul style="list-style-type: none"> ▪ saying things once and assuming all is understood and that change will follow
<ul style="list-style-type: none"> ▪ recognizing “where” change needs to happen 	<ul style="list-style-type: none"> ▪ changing for the “sake of change” with no focus
<ul style="list-style-type: none"> ▪ defining and expressing a vision for change 	<ul style="list-style-type: none"> ▪ complaining about the way things are
<ul style="list-style-type: none"> ▪ challenging the status quo 	<ul style="list-style-type: none"> ▪ believing things will never change
<ul style="list-style-type: none"> ▪ proactively searching out opportunities to talk about change in both formal and informal settings at all levels of the agency and across the sector 	<ul style="list-style-type: none"> ▪ engaging the agency in a one-time-only communication and expecting everyone to accept the change
<ul style="list-style-type: none"> ▪ taking personal action to reinforce or support the pending changes in tangible ways (e.g., budgeting, resource allocation) 	<ul style="list-style-type: none"> ▪ expecting others to change their behaviour to support pending changes without demonstrating any commitment through personal actions
<ul style="list-style-type: none"> ▪ being an advocate for change that will help the agency accomplish its strategic objectives 	<ul style="list-style-type: none"> ▪ keeping ideas about changes you think will benefit the organization to yourself and getting frustrated

Developmental Activities

Level 1-2 Activities

Identify a current change initiative that you believe is important.

- Get involved with the group and department responsible for the change initiative.
- Ask and watch for ways they get others involved.
- Take any opportunity to put yourself in a position of presenting this cause or idea to others.
- Practice expressing your “passion” for this change.

Think about all the possible implications of a change initiative you are planning or for which you are responsible for implementing

- Assess the scope and impact of the intervention.
- Identify the individuals or groups who will be affected by it.
- Anticipate different problems that may arise and the approaches you could take to address potential problems. Identify the individuals who need to be involved.
- Keep a reserve contingency plan. Act when you first hear of a problem, not later.

Probe for understanding of major initiatives or changes in your department.

- Review with your manager the events leading up to a significant decision in your department or agency.
- Probe for informal decision-making processes or agency constraints or norms which led to the decision.

Practice being flexible.

- The next time you disagree with someone on how something should be done; consider doing it the other person’s way.
- Make a point of identifying the positive aspects of others’ way of doing things.
- Go out of your way to find people who have points of view different from your own. Encourage them to express their opinions and resist expressing your point of view immediately. Instead, ask them more questions to understand what they are thinking and why.
- Try to see the world through their eyes.

Respond to change enthusiastically.

- Suppress any desire to complain the next time you are asked to change the way in which you work.
- Practice adopting a positive attitude and you will find that the new demands on you will be less stressful.
- Use this as an opportunity to loosen the ideas stuck in your mind about how things "should be" or "used to be", by:
 - ⇒ Physically changing your frame of reference. For example, sit in a different seat in your next department meeting.
 - ⇒ Daring to be positive. Instead of listing all the reasons that something won't work, look at the situation "through a different pair of glasses".
- Take personal responsibility for the choices you have amongst alternatives by:
 - ⇒ Daring to be different and open-minded. Ask a co-worker to exchange responsibilities for a day or shift from your normal work routine.

Reflection Tip:

* Ask yourself questions like: *How does this situation look from your new viewpoint? What else do you see? What insight have you gained into your own sense of personal responsibility to this change?*

Get feedback from your colleagues on your adaptability to change.

- Tell your colleagues that you are trying to improve your adaptability to change. Ask them to give you immediate feedback when you are or are not being flexible.
- Resist the temptation to defend your point of view if your colleagues say you are not being flexible enough. Thank them for their feedback and consider the possibility that they may be right.

Reflection Tip:

* Reflect on the situations where peers have indicated you've been less flexible. Do you understand why they feel that way?

Level 3-4 Activities

Create a meaningful graphical representation of the change initiative to help reinforce it and drive it forward.

- Think through the change initiative and identify the 4 or 5 key dimensions/principles around the change.
- Think about key words that represent the principles of the change initiative and picture in your mind an ‘image’ that would help ground the change for people.
- For example: the Iceberg Model of competencies is an image that helps drive the different dimensions of human behaviour. Using this iceberg repeatedly in communication helps crystallize the principles for people.
- Use this image to continually reinforce your change initiative.

Apply ‘Human Change’ management practices in your implementation of change.

- Recognize that all new initiatives require you to think of the change you are bringing forward and how it will be received by the stakeholder, what is the value it brings for them.
 - ⇒ Have a clear...
 - ⇒ Understanding of the business case for change
 - ⇒ Mobilize the agency to action by painting a clear picture of change
 - ⇒ Ask if there is a...
 - ⇒ Need for compliance or
 - ⇒ Commitment
 - ⇒ Have an understanding of personal response to change
 - ⇒ Ask what resistance you will face and take action
 - ⇒ Need to monitor how things are going
 - ⇒ Get out there and communicate, communicate, communicate
 - ⇒ Ensure you have a plan

Reflection Tip:

** Sometimes those who are most critical at the beginning can end up becoming your biggest supporters.*

Convey and reinforce accurate information about the change.

- Hold regular meetings.
 - ⇒ Be clear about objectives and expectations for the meetings.
 - ⇒ Prepare and communicate the agenda.
 - ⇒ Be straightforward, honest and thorough when presenting information.
 - ⇒ Include both the positive and negative implications for staff in what you are discussing.
- Establish multiple communication methods.
 - ⇒ Create bulletin boards to show progress.
 - ⇒ Pass along memos regarding the change when the information would be of interest to others.
 - ⇒ Consider the use of a communication team for your department to ensure that all staff are informed. The communications team should consist of members who are known to be strong communicators.
- Share information from other departments.
 - ⇒ Reinforce to staff that they aren't in this alone.

Create a clear and effective change vision.

- When creating a vision of change for the future, make sure it has the following characteristics:
 - ⇒ it conveys an imaginable picture of what the future would look like
 - ⇒ it appeals to the long-term interests of people
 - ⇒ it consists of realistic, attainable goals
 - ⇒ it is clear enough to guide decision making
 - ⇒ it is flexible enough to allow individual initiative as well as adjustments to changing circumstances
 - ⇒ it is easy to explain.

Reflection Tip:

** Check in with those affected by the change periodically to see how they are doing with what is required. Ask them what they feel the next logical steps should be and encourage them to share their thoughts.*

Level 5 Activities

Translate the vision for change into a plan for the department/agency.

- Determine the sequence of changes that will occur in your department/agency.
 - ⇒ Understand what work needs to be done in advance of each of the changes to ensure smooth implementation.
 - ⇒ Where the changes are inter-related in a complex way, consider making a “picture” for employees to follow, such as a flow diagram.
- Assign key responsibilities for the changes.
 - ⇒ Determine which employees are critical to the success of each of the elements of change.
 - ⇒ Consider if they have the capability to take responsibility for that aspect of the change. If not, decide who can take on the responsibility.
- Decide on an appropriate timeline for the changes.
 - ⇒ Balance the need to maintain on-going operations/productivity levels with the desire to complete the change as quickly as possible and establish key dates for the completion of the different components of your change plan.
 - ⇒ Understand the impact of missing any of these dates on the rest of the plan.

Use networks to position change.

- Build relationships:
 - ⇒ Establish a network of individuals in other agencies and across the sector to keep up-to-date on their issues and priorities.
 - ⇒ Maintain regular contact to stay up-to-date on their operations and future plans and to keep from focusing too much on your own specific change initiatives.
- Participate in committees or task forces.
 - ⇒ Look for opportunities to get involved in internal/external forums working on new initiatives. Your participation helps to build your networks and facilitate the sharing of expertise around change efforts throughout the organization.

Reinforce your “passion” for a change initiative and encourage others to develop commitment.

- In communication with others, always emphasize how the current work effort is related to the change.
- When setting goals with others, ensure that they are referencing the change as one of the goals to which their specific efforts will deliver.

Complete a force field analysis of your change initiative.

- Consider your goal and the movement towards that goal
 - ⇒ What is the situation now?
 - ⇒ What is the situation as you would like it to be? (the ideal)
- Chart out the driving forces pushing you towards the achievement of the goal, the forces which push toward improvement.
- Chart out the restraining forces pushing against the achievement of the goal, the forces which resist improvement and keep the problem a problem.
- Review both lists, and underline those forces which seem to be most important right now, and which you think you might be able to affect constructively, the 2 or 3 driving forces and the 2 or 3 restraining forces.
- For each restraining force you have underlined list some possible action steps which you might be able to plan and carry out to reduce the effect of the force or eliminate it completely. Brainstorm with others on your team.
- Do the same for each driving force you underlined. List all the action steps which come to mind which would increase the effect of each driving force.
- To begin moving towards your change effort, look to those points where some stress and strain exist. Increased stress may lead to increased dissatisfaction, which may, in turn, be a motivation for change. Sometimes an attempt to increase a driving force results only in a parallel increase in the opposing force. Consider whether the change would be managed more easily by reducing a resisting force. Review the action steps you have listed, and underline those which seem promising.
- List the steps you have underlined. Then for each action step list the materials, people, and other resources which are available to you for carrying out the action.
- Think about how your action steps and resources fit into a comprehensive action plan. Eliminate those items which do not seem to fit into the overall plan, add any new steps and resources which will round out the plan, and think about a possible sequence of action.
- Plan a way to evaluate the effectiveness of your action program as it is implemented. Think about this now, and list the evaluation procedures you will use.

When implementing any new strategy or major initiative consider the impact on all those involved, both internally and externally.

- Identify the individuals or groups impacted and keep them informed.
- Whenever possible make a personal visit to key influencers and stakeholders and talk to them about:
 - ⇒ the current changes
 - ⇒ the importance of these changes
 - ⇒ what the changes mean to them
 - ⇒ how they can become involved in the transition
- Actively solicit the advice and commitment of the key stakeholders before implementing the new strategy or initiative.
- Ask key stakeholders to actively promote the new strategy or initiative on your behalf. Justify your request to them -- sell them on the changes so they can sell others.

Set expectations of continuous personal growth.

- Foster a continuous change mindset.
 - ⇒ Communicate the “business case” for change to your employees.
 - ⇒ Help them understand that change is here to stay. Continual and accelerating change and improvement are the new organization realities.
 - ⇒ Communicate the value of change to your department/agency.
- Clarify roles.
 - ⇒ Build in the expectation of continuous improvement and look for evidence that it is occurring.
 - ⇒ Let employees know they have a role in identifying improvements and enhancing processes and procedures.
- Anticipate the impact.
 - ⇒ Identify the anticipated impact of change on the team. Although a change may negatively impact some employees, especially in the short term, the overall impact will be positive for the community, clients, employees, and stakeholders.

Identify an opportunity to improve or change a current function, process or procedure within your department or agency.

- Assess the scope and impact of the intervention.
- Identify the individuals or groups who will be affected by it.
- Think about how this change will benefit them and what reasons they may have for dismissing the change.
- Work on anticipating different problems that may arise and the approaches you could take to address potential problems. Identify the individuals who need to be involved in the solution and solicit their input and buy-in.
- Build your business case for the change by preparing a proposal that includes the benefits and obstacles to overcome, a list of required resources, timelines, and return on investment, for review with the key stakeholders involved.

Reflection Tip:

** Talk to members who have been involved in past improvement initiatives – what made them successful? What stood in the way or undermined their efforts before or during implementation? Consider these factors as you move forward.*

Books and Videos

Within Complex Environments, by C. Shawn Burke (Jai Press Inc., 2006).

This book takes a multi-disciplinary approach to increasing our understanding of adaptability within complex environments by integrating cutting-edge work done by experts in the field and compiling it in one volume. Specifically, the volume takes a systems approach in that chapters describe the manifestation and antecedents of adaptability at individual, team, and organizational levels.

Ping: A Frog in Search of a New Pond, by Stuart Avery Gold (Georgetown, 2005).

In the tradition of "Who Moved My Cheese?" here is a parable about change, overcoming obstacles, and making a leap of faith. A frog named Ping represents everybody who has encountered a setback, needs to take a risk, or is struggling with the challenges of change—that is to say, he is all of us. The Owl Ping meets in his journey is the mentor who helps him find meaning and leap to new heights. The adventure they embark on together is both engaging and revealing.

The Dance of Change: Mastering the Twelve Challenges to Change in A Learning Organization, by Peter M. Senge et al. (Doubleday, 1999).

In this book, Senge outlines potential obstacles (such as initiating transformation, personal fear and anxiety, and measuring the immeasurable) and proposes ways to turn these obstacles into sources of improvement.

Who Moved my Cheese? An Amazing Way to Deal with Change in Your Work and in Your Life, by Spencer Johnson, Kenneth H. Blanchard (New Edition: Vermilion, 1999; Original: Putnam Publishing Group, 1998).

Change affects everyone, and Who Moved My Cheese? Shows readers how to deal with change and “win”. Written in a parable form, this “quick read” makes the point that we have to be alert to changes in our lives and to be prepared to search new ways of doing things, and that there’s no single way to deal with change.

Champions of Change: How CEOs and Their Companies are Mastering the Skills of Radical Change, by David A. Nadler (Jossey-Bass Publishers, 1998).

In this book, the core principles shared by successful change managers – involvement, commitment, valid information, informed choices and integrated change are established.

The Leader's Change Handbook: An Essential Guide to Setting Direction and Taking Action, by Jay A. Conger, Gretchen M. Spreitzer & Edward E. Lawler, eds. (Jossey-Bass Publishers, 1998).

Charged with fascinating case studies, action strategies, and unbeatable advice, *The Leader's Change Handbook* features fresh works by Christopher Bartlett, Michael Beer, John Kotter, David Nadler, Ron Heifetz, Susan Mohrman, Bob Quinn and other distinguished contributors. What it offers is a uniquely coherent, cutting-edge approach to leading today's organizations.

Taking Charge of Change: 10 Principles for Managing People and Performance, by Douglas K. Smith (Perseus Press, 1997).

This book distills the complexities of managing change into ten clear management principles. Emphasis is placed on linking assessable performance goals and change to help overcome employee resistance and create buy-in. *Taking Charge of Change* provides useful, practical guidance for anyone experiencing or championing change.

Communicating for Change, by Roger D'Aprix (Jossey-Bass Publishers, 1996).

This book shows you how to avoid the communication breakdowns that sabotage attempts at change, and cause employees to lose faith in their leaders and the system itself. Learn how communications can be used strategically to connect an organization's vision, mission and business goals to the forces and opportunities in the marketplace -- the driving force behind all change.

Leading Change, by John P. Kotter (Harvard Business School Publishing, 1996).

Despite the best efforts of management, change programs are more likely to fail than to succeed, because, according to Kotter, most organizations are over managed and underled. This book provides an eight step process for leading, rather than managing change. It includes developing and communicating a vision for the future, empowering all employees, generating and building on short-term wins and making change stick in the organizational culture.

The Human Side of Change: A Practical Guide to Organization Redesign, by Timothy Glapin (Jossey-Bass Publishers, 1996).

A step-by-step action plan for the change process including setting goals for change, establishing measurement criteria and providing feedback, rewards, and recognition.

The Change Leader: Using a Gestalt Approach with Work Groups, by H.B. Karp (Jossey-Bass Publishers, 1995).

This book is a practical, basic guide to leading individuals and groups through change, from a Gestalt perspective. Step-by-step, this reference guide shows you how to lead change efforts and implement them with maximum results.

Real Change Leaders, by Jon Katzenbach (Times Business, Random House, 1995).

An easy to understand book that explores the characteristics and skills that people must develop in order to bring about organizational change. This book focuses on middle managers as the “energizing lynchpin” between customers, employees and senior executives. Real Change Leaders is the product of collaboration by a seven person McKinsey & Company team.

You Don't Change a Company by Memo, by Marti Smye (Key Porter Books, 1994).

This book represents an accessible and practical guide to implementing organizational change.

Managing at the Speed of Change, by Daryl Conner (Villard Books, 1993).

This book focuses on “how to change” not “what to change” and how to respond quickly. It gives a professional, structured and very practical approach to change, dealing with human behaviour, feelings and emotions. The insights are helpful in learning when and how to convince people.

The Adaptive Decision Maker, by John W. Payne, James R. Bettman & Eric J. Johnson (Cambridge University Press, 1993).

This book argues that people use a variety of strategies to make judgements and choices. The authors introduce a model that shows decisions makers which strategy a person will use in a given situation. A series of experiments testing the model are presented, and the authors analyze how the model can lead to improved decisions and opportunities for further research.

Changing the Essence: The Art of Creating and Leading Fundamental Change in Organizations, by Richard Beckhard and Wendy Pritchard (Jossey-Bass, 1991).

Essential reading in organizational change and the leadership behaviours required for success.

Managing Transitions: Making the Most of Change, by William Bridges (William Bridges and Associates, Inc., 1991).

This is a practical book that begins with a short self-diagnosis of change management skills. It provides tactical, useable ideas and checklists for every stage of change. It also provides advice on how to “take care of yourself” during change.

When Giants Learn to Dance, by Rosabeth Moss Kanter (Simon & Schuster, 1989).

A collection of case stories that illustrate how organizations learn to rapidly shift their strategies to adapt to the changing needs of the internal and external environment.

Organizational Transitions: Managing Complex Change (2nd ed.), by Richard Beckhard and Reuben Harris (Addison-Wesley, 1987).

This book provides an excellent introduction to managing organizational change.

Transforming Leadership: From Vision to Results, by John Adams (Miles River, 1986).

A collection of works intended to emphasize the role and thinking processes of leaders in various types of organizations faced with complex and turbulent environments.

The video “Change: Making It Work For You” (Performance Resources Inc., 1-800-263-3399).

This film examines some common emotional responses to change, and how people deal with those responses. It also illustrates three fundamental guidelines to use with any type of change.

The video “Managing Change” (Performance Resources Inc., 1-800-263-3399).

This video provides a discussion on how to achieve change in an organization with minimum resistance and disruption.

The video “Managing at the Speed of Change” (International Tele-Film, 1-800-561-4300, www.itf.ca).

The pace and pressure of rapid change is constantly escalating. Why do some people seem to thrive on change, when others become dysfunctional and ineffective? According to Conner, the answer is resilience. While some people see change as danger, others see it as opportunity. (27 min).

The video, “Taking Charge of Change (Healthcare Version)”, (Enterprise Media, 1-800-423-6021, www.enterprisemedia.com).

This film is a critically needed tool for teaching everyone in the organization how to understand change, embrace it and make it work to maximum advantage. The morale-building, confidence-building strategies shown in this film will dramatically raise productivity and speed the organization's progress in meeting its highest objectives. This emotionally involving film shows how to understand change as opportunity.

The video “The Doughnut Organization” (International Tele-Film, 1-800-561-4300, www.itf.ca).

This video examines the dilemmas people face in organizations that are struggling to adapt to a changing world.

The video “The Psychology of Resistance” (Marlin Westwood Training).

This video details the five main reasons why people tend to resist change. It gives staff and supervisors an understanding of why so few of us welcome change. (11 min).

The video “The Power of Vision” (International Tele-Film, 1-800-561-4300, www.itf.ca).

This video shows how meaningful visions of the future empower organizations and individuals to solve problems and accomplish goals.

The video “Thriving on Chaos” (Visual Education Centre, 416-252-5907).

This video program provides a comprehensive approach to the subject of change - how to cope with it, run with it, love it and thrive on it.

The movie “Dances with Wolves”.

In the film, pay attention to how Kevin Costner adapts to the ways of native people. The lesson for business is to recognize that there is something to be learned from the different viewpoints of other people and other areas/units.

The movie, “In America”.

This movie illustrates how an Irish family move to New York and create a new life for themselves as they struggle to come to terms with a family tragedy. The two young sisters are particularly resourceful kin adapting to their new life style.

The movie “Local Hero”.

This wonderful film is about an executive sent to a small town in the British Isles as part of a big oil project. Notice how the lead character comes to understand and adapt to the point of view of the locals.

Relationship/Network Building (RNB)

Definition:

Relationship/Network Building is about building and maintaining effective and constructive working relationships, partnerships or networks of contacts with people who are, or might someday be, instrumental in achieving work-related goals. It is the desire to work co-operatively with all stakeholders to meet mutual goals. It includes demonstrating strong interpersonal relations where one interacts with others in ways that advance the work of the agency/sector by developing respect, trust and mutual understanding, and productive working relationships. It involves awareness that a relationship based on trust is the foundation for success in delivering results.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ cultivating useful contacts with a broad range of people in a variety of positions 	<ul style="list-style-type: none"> ▪ networking without a purpose
<ul style="list-style-type: none"> ▪ making a conscious effort to understand differences and establish common interests with your colleagues in other areas of the agency and across the sector 	<ul style="list-style-type: none"> ▪ making contact with other colleagues only when you need to solve a problem or get information
<ul style="list-style-type: none"> ▪ using networks to help achieve sector/organization/department goals 	<ul style="list-style-type: none"> ▪ keeping things "strictly business" when talking to clients and stakeholders
<ul style="list-style-type: none"> ▪ developing trusting and productive relationships with partners to secure and build on future opportunities for the agency 	<ul style="list-style-type: none"> ▪ limiting your involvement to updates and receipt of additional work assignments relative to your business area's mandate
<ul style="list-style-type: none"> ▪ seeking the ideas, concerns and needs of your multiple stakeholders for mutual benefit on an ongoing basis 	<ul style="list-style-type: none"> ▪ ignoring the ideas of your multiple stakeholders and showing little flexibility to changing needs
<ul style="list-style-type: none"> ▪ establishing a long-term relationship with a variety of internal and external stakeholders 	<ul style="list-style-type: none"> ▪ focusing on the short-term with a stakeholder to build immediate project support without considering the long-term impact
<ul style="list-style-type: none"> ▪ serving on community committees whose membership includes influential people within your industry 	<ul style="list-style-type: none"> ▪ turning down invitations or not being involved in community groups

Developmental Activities

Level 1-2 Activities

Spend time talking with your co-workers/colleagues about individuals who are good at networking and building relationships.

- Focus on real life examples of excellence, describing the skills and behaviours the person demonstrated.
- Talk about the value Relationship/Network building brings to the agency.
- Ask others how an established network has made a difference to their success.
- Identify and discuss the consequences of NOT having relationship building skills.

Reflection Tip:

* The key to this exercise is to figure out what motivates individuals to initiate and develop their relationships and partnerships.

Use “free information” when talking with others (e.g. information others volunteer about their interests, personal values, preferences, personal life).

- Actively listen to conversations and identify information that could be used as an entree to “small talk”.
- Look around their workspace to identify items of interest or indicators of a particular hobby. Use these to build rapport.
- Use this “free information” to prepare questions that will get the other person to expand on their interests, etc., (e.g., What was it like going to school in another country? How long have you been a runner?).
- Review your formal (work-related) and informal (non-work related) networks on a regular basis, and apply this technique to consciously solidify and expand your network.

Reflection Tip:

* Be sure to note how this changes the dynamic of the interaction.

Reflect on your interactions with others.

- Take the time to reflect on your interactions with others. Pay attention to both your reaction and theirs'. What was the final outcome? Were both parties happy with the outcome?
- At the close of an interaction, make it a practice to imagine what the other person is thinking as he/she walks away. Reflect on how your interpersonal style contributed to the interaction.
- Recognize patterns in others' behaviour. After each interaction make a note about what transpired. Also make note of comments made by the individual. Use this information to remind yourself about the individual before your next meeting to enable you to proactively work on the relationship.

Ask others for feedback on how you build relationships and network.

- Share what you've done with key individuals, how it's worked, and how you felt about it.
- Ask for their input, and ongoing feedback.

Reflection Tip:

** Choose co-workers/peers that you feel are particularly well connected, and politically astute.*

Maintain regular contacts.

- Make sure you keep up with contacts and other people you have met through community conferences, client meetings, and other events.
- Meet regularly to find out what is going on within your area of expertise, as well as any social, economic or political forces that will impact your agency.
- Discuss new opportunities, initiatives, and approaches to the sector.
- Review your achievements and challenges.
- Nurture both old and new relationships. Don't pay attention to one at the expense of the other.
- Find ways to keep in regular contact with stakeholders, even when you are not having to work with them directly (i.e., your deliverable may have been met but you've come across some information that you would like to share with them).

**Improve the quality and depth of the relationships you have with your stakeholders
(i.e., clients, colleagues, community partners etc.)**

- List all clients, community partners and stakeholders who you have regular contact.
- Use the scale below to evaluate the quality of your relationship with each client, community partner and stakeholder on the list:
 - ⇒ **1** Poor relationship (i.e., there is a current serious problem which has not been resolved)
 - ⇒ **2** Adequate relationship (i.e., strictly business/transaction oriented)
 - ⇒ **3** Reasonably good relationship (some successes but room for improvement)
 - ⇒ **4** Extremely good relationship (many successes, some social contact).
- Identify any barriers that get in the way of these relationships and identify specific actions you can take to remove the barriers.
- Set a date for improving the relationship with each individual on your list.
- Monitor your progress against your goals; re-evaluate each of your at a later time.
- The skills you will gain in this exercise will also help to build effective relationships and networks:
 - ⇒ Learn as much as you can about your clients, community partners and stakeholders. This knowledge will help you be seen as a partner instead of just a provider.
 - ⇒ Get to know key decision makers and the people who influence them.
 - ⇒ Keep up-to-date with what's happening in the broader public sector by talking to your stakeholders regularly, reading business magazines and publications, meeting with other colleagues, and talking to your stakeholders about the critical short and long-term issues facing them.
 - ⇒ Bring colleagues (internal or external to your agency) together to generate ideas aimed at supporting strategic alliances, (e.g., funding for a new project.).
 - ⇒ Every time you read an article or book, or come into contact with information you find interesting or useful, ask yourself if any of your clients, community partners and stakeholders might be interested in the same information.
 - ⇒ Make copies of the information and pass it along with a short note to those who might be interested.
 - ⇒ Use following up on the information as an excuse to chat with these individuals and get information about what's going on with them.

Take an inventory of your multiple stakeholders, groups, associations and any other partners that you have, and consider how frequently you contact them to keep informed about issues of mutual interest.

- Have you not contacted the individual before?
- Set up a schedule to maintain regular contact with those who are key influencers. Remember that your relationships with these individuals will probably vary, depending on their role. Use your understanding of this as a springboard to constantly add value.
- Regularly attend networking events, seminars, discussion forums, etc., at which these people will be present.
- Regularly ask yourself “who did I see today that gave me some useful information about what is going on in the organization?” Stay in touch with that person on a regular basis.
- Share your learnings and information with your colleagues in your department.

Represent your clients, community partners and stakeholders and position yourself as a resource for them.

- Become the voice of these individuals across the agency. Represent their issues, concerns, and needs within your own area, and take rapid action to resolve them.
- Be a resource by providing them with useful information and recommendations that help them understand what it all means for them.
- Advocate for these individuals both inside and outside the agency and ensure they know you are available and listening when they may need you most.

Level 3-4 Activities

Expand your networks beyond your agency using existing contacts.

- Ask someone you know in the community to identify and introduce you to other influential people within their (internal/external) network.
- Plan to meet with these new people.
- Use these new relationships to further expand your networks.

Take your time and have a plan when building your network

- Identify specific individuals whose expertise you can leverage to develop your own department or that of the agency as a whole.
- Including these individuals, build a network to develop your expertise and the visibility of your agency or department.
- Exchange ideas and expertise on a regular basis to keep up to date on sector trends, patterns and changes related to your service area.

Reflection Tip:

** Proceed with caution when commencing a partnership where committing to funding is involved.*

Ensure the benefits of the working relationship are clearly understood from the outset

- Communicate the goals and objectives of the relationship and how you see the partnership developing over time.
- Ask for input and listen to the other party to clarify their expectations and address any concerns.
- When listing the benefits of the relationship, make sure they are clearly stated and mutually understood.
- Develop a plan to do what is necessary to ensure the support you need from each key person.

List all the individuals who currently exist in your work related network who you interact with on a regular basis. Use these contacts to broaden your perspective.

- Identify the kind of role each person occupies in your network. For example, information sources, coach or mentor, expert advisor and supporter.
- Are there any roles you would like to see expanded or added to your network?
- Make a conscious effort to identify and get to know people who can fill those roles.
- Try to reach out to these people in a social or non-threatening situation.
- Ask their opinion about the kind of work you do and if they could help you achieve some of your job-related objectives.
- Try to return the favour by offering your assistance or identifying areas where you may help the individual achieve some of his/her goals.

Reflection Tip:

** Speak with your colleagues about their networks. Do they have any advice about who else should be in your network? Do they have any specific recommendations for expanding your network?*

Target Relationship/Network Building based on stakeholder insight.

- Build a plan for long-term relationship building. Consider your long-term strategic aims and your own role in realizing those aims. What support will you need from others and from whom?
- Identify the key people who will be important to you in the future. Plan to initiate and strengthen your relationship with them over time. Focus initially on building rapport with them.
- Think about your department and agency. Identify the individuals who are most important for you to have relationships with. Make a concerted effort to get to know them better.
- Speak with colleagues with whom you already have established relationships to identify key influencers in your department/agency that you may be unaware of. Create a list of these key influencers and then make it a priority to get to know them.

Reflection Tip:

** Keep track of the people you are meeting and information you are gathering. Reflect on what you bring to each relationship, as well as the reasons you might be interested in building a stronger relationship with this person.*

Work to become a trusted advisor to your stakeholders when they are faced with a tough decision

- Conduct an independent analysis of the situation. For example, identify what is happening versus what should be happening.
- Discuss the options you've identified for these individuals.
- Weigh the value of each (for example, potential outcomes, cost of implementation, resources required, time to implement, etc.).
- Identify the pros and cons of each option and identify potential contingency plans to address potential obstacles in implementation. Determine whether it is better to do this analysis independently or in partnership.
- Offer the perspective of your thinking and share your experiences around situations you have faced in the past.
- Offer to coach the stakeholder in how to implement the chosen solution successfully.
- Maintain the relationship by conducting ongoing coaching and serving as a sounding board to test out new ideas.

Identify your community partners' and stakeholders' critical issues and assumptions about the future.

- Talk to these individuals on a regular basis about issues facing them, trends affecting them, and concerns they have about the future.
- Ask them to share their strategic plans, and the assumptions their plans are based upon.
- Summarize common themes you hear and report these back to your colleagues and supervisor.
- Discuss your findings with your colleagues and supervisor/manager to incorporate their impressions into the critical issues these individuals are faced with.
- Work with your colleagues and supervisor/manager to discuss what, if anything, you can do to help them continue to provide excellent service and maintain a strong reputation in the sector.
- Communicate your ideas back to your community partners and stakeholders for their feedback.

Books and Videos

The Art of Mingling, by Jeanne Martinet (New Edition: VHPS Trade, 2006; Griffin, 1992) – also available on audio CD.

This book shows how to start a conversation, how to become part of a group, or how to respond if you're approached. Using recognized situations, this book will teach you how to overcome fears, meet new people confidently and with charm, and achieve success in every kind of gathering.

Bravo Principal: Building Relationships With Actions That Value Others, by Sandra Harris (Eye on Education, 2004).

In this book, the author offers their perspective from that of the school environment to help explain how relationship building is based on how you treat others.

The Frog Prince: Secrets of Positive Networking, by Darcy Rezac (Frog & Prince Network Corp., 2003).

This book lays out the new reality of networking. In this age of business and personal uncertainty, never have you needed your network more. Equally as important are the revolutionary new scientific discoveries that prove that networks, including social networks, form and act in a certain manner. In this book you learn how to tap into this new knowledge, and how to build your own powerful positive social networks - for both business and life.

Lessons Learned: Shaping Relationships and the Culture of the Workplace, by Roland Barth (Corwin Press, 2003).

An informal discussion of interpersonal behaviour on the job. A loose autobiographical essay on the author's lessons learned about relationships at work.

Leading Beyond the Walls: Wisdom to Action Series (The Peter F. Drucker Foundation for Nonprofit Management), by Frances Hesselbein, Marshall Goldsmith & Iain Somerville (John Wiley & Sons, 2001).

In this book, twenty-nine great thinkers examine leaders adept at establishing partnerships, alliances, and networks both within and outside their organizations. They address the challenge of leading in an age when the old rules and conventional boundaries no longer exist.

Managing Strategic Relationships: The Key to Business Success, by Leonard Greenhalgh (The Free Press, 2001).

In this book, the author asserts that the primary job of the manager is no longer to plan, organize, direct, or control. Instead, he argues, today's successful managers are primarily negotiators who are judged on their ability to foster, coach, protect, and support collaborative relationships, as well as manage conflict, with peers, workers, bosses, suppliers, customers, regulators, competitors, and stakeholders.

The Handbook of Interpersonal Skills Training: 16 Complete Training Modules for Building Working Relationships, by Bob Wall (McGraw-Hill Trade, 2000).

Bad communication, lack of trust, and poor interpersonal skills are often the key cause of weakness and inefficiency in an organization. This book contains twenty complete training modules or lesson plans to help trainers teach managers and employees how to improve productivity through better working relationships.

Networking: Building Relationships and Opportunities for Success, by Melissa Giovagnoli & Jocelyn Carter-Miller (Jossey-Bass Publishers, 2000).

In this book, the authors explain their practice as a "purposeful process of collaboration" among individuals who "share similar intent, values, goals, and interests." They then lay out a seven-step system for developing such mutually beneficial personal relationships, ranging from the establishment of "a values-rich foundation" through the formation and cultivation of a circle of "connections" with whom you "co-create opportunities" that move everyone ahead.

Networking Smart: How to Build Relationships for Personal and Organizational Success, by Wayne E. Baker (New Edition: Backinprint.com, 2000; Original: McGraw-Hill, 1993).

The ability to manage networks of people can make or break a career or a whole company. This book teaches managers the techniques they need to successfully develop, maintain, and use people networks to full advantage.

PowerSkills: Building Top-Level Relationships for Bottom-Line Results, by James P. Masciarelli (Nimbus Press, 2000).

In this book you'll learn practical tips and techniques -- a sustainable process for becoming more savvy and successful in managing relationships for results, whether you're at the top of your company or determined to get there.

Building Trust at the Speed of Change: The Power of the Relationship-Based Corporation, by Edward M. Marshall (AMACOM, 1999).

This book offers a breakthrough model for building organizations that can swiftly and effectively respond to rapidly changing business needs. It's a model that values principle over power and people over processes--and that focuses on integrity, trust, and collaboration. His approach treats the workforce not as a cost or liability, but as an intellectual asset and irreplaceable resource.

Conversationally Speaking: Tested New Ways to Increase Your Personal and Social Effectiveness, by Alan Garner (New Edition: McGraw-Hill, 1997; Original: Lowell House, 1991).

The author provides a set of techniques for initiating contact with others, how to ask conversation-promoting questions, and how to achieve more rewarding relationships with others.

Neanderthals at Work, by Albert Bernstein (New Edition: Ballantine Publishing Group: 1996; Original: John Wiley & Sons, 1992).

This book develops an understanding of groups, behaviours and relationships between people. It explains that people need to understand what others are thinking and make adjustments to fit the culture.

The video, "Another Look: Defining Respect in Healthcare", by VisionPoint Productions Inc. (Owen Stewart Performance Resources Inc., 1-800-263-3399, www.owenstewart.com).

Discover how to create an inclusive work environment that enables the delivery of respectful and culturally-appropriate healthcare. Using powerful video scenarios, this high-impact program will create a deep awareness about our own mindsets and biases toward others and demonstrate how to resolve situations caused by hidden differences.

The video "Constructive Communication: How to Give It and How to Take It", by American Media (International Tele-Film, 1-800-561-4300, www.itf.ca).

Constructive criticism can strengthen relationships, increase productivity and solve problems. This video introduces three techniques for successfully giving and receiving criticism — communicate, clarify, and commit.

The video "People Skills" (Core Career Strategies Inc.).

This highly entertaining program reveals innovative techniques for interacting with others more successfully by getting on their wavelength.

The video, “How to Connect in Healthcare in 90 Seconds or Less”, by Media Partners (International Tele-Film, 1-800-561-4300, www.itf.ca).

In healthcare as well as life, the failure to build trust and rapport can be insurmountable, while the rewards of a good first impression are almost immeasurable. This training video will teach employees how to make a genuine connection with those who matter most. By simply putting the power of this training to work for them, employees will learn how to improve relationships, raise productivity and have more fun at work.

The video “Relationship Strategies Course”, by American Media (International Tele-Film, 1-800-561-4300, www.itf.ca).

With Dr. Tony Alessandra. This two-video course utilizes dramatic vignettes to illustrate how to build successful working relationships through effective communication.

The video “You’re Not Communicating (2nd Edition)”, by Barr Films (International Tele-Film, 1-800-561-4300, www.itf.ca).

This is a comprehensive guide to the keys to effective communication. Revitalize professional and personal relationships with practical skills that can be put into effect today. Five humorous vignettes demonstrate how and why the "message sender" unconsciously creates barriers to getting his messages across to the "receiver".

The movie, “Dangerous Minds”.

In the film, look for instances where the characters act with the “customers” best interests at heart.

The movie, “It Could Happen to You”.

In the film, how do the Bridget Fonda and Nicholas Cage characters display Building Partnerships?

Resilience (RES)

Definition:

Resilience involves maintaining stamina and performance under continuing stress, and to act effectively under pressure. It includes bouncing back from disappointments or confrontations, not letting them negatively influence ongoing performance. Resilient people consistently display determination, self-discipline and commitment in spite of setbacks or lack of support, and a willingness to take a stand when appropriate.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ Assuming responsibility for routine or mundane tasks because of the greater good they present to the agency 	<ul style="list-style-type: none"> ▪ Refusing to take on tasks that are not challenging or exciting
<ul style="list-style-type: none"> ▪ Delivering high quality work efforts even in the face of mounting pressures 	<ul style="list-style-type: none"> ▪ Sacrificing the quality of work effort because of increasing pressures
<ul style="list-style-type: none"> ▪ Keeping a positive outlook and remaining focused during challenging or stressful times. 	<ul style="list-style-type: none"> ▪ Letting the “tides” drive your attitude and decision making abilities when faced with increased pressure to perform
<ul style="list-style-type: none"> ▪ Staying motivated and dealing productively with normal pressure; helping others do the same 	<ul style="list-style-type: none"> ▪ Letting the situation take control of your thoughts and actions
<ul style="list-style-type: none"> ▪ Recognizing the appropriate times to let yourself experience strong emotions and when to avoid emotions that may interfere with task accomplishment 	<ul style="list-style-type: none"> ▪ Displaying strong emotions to clients, colleagues or partners without considering the impact they may have on the relationship
<ul style="list-style-type: none"> ▪ Knowing when to step forward to take action and when to take a step back to rest and re-fuel 	<ul style="list-style-type: none"> ▪ Jumping in head first to take action without first considering the barriers to a successful outcome
<ul style="list-style-type: none"> ▪ Having the capacity to manage your feelings, emotions and impulses to maintain high levels of motivation and self-confidence 	<ul style="list-style-type: none"> ▪ Displaying a negative demeanour and lack of motivation for on-going task when stress levels are high
<ul style="list-style-type: none"> ▪ Maintaining a positive/optimistic view of yourself and confidence in your strengths and abilities at all times 	<ul style="list-style-type: none"> ▪ Second guessing your strengths and abilities when confronted with a continued stressful or frustrating situation

Developmental Activities

Level 1-2 Activities

Make connections to lean on during difficult times.

- Develop a supportive network of colleagues, family and friends who know you well and whom you can trust.
- Accept help from your network graciously when pressures mount.
- Become involved in the community and do something that matters to reclaim hope and obtain a different perspective to your unfavourable circumstances.

Reflection Tip:

** Supportive connections are strengthened when you experience both sides of caring.*

Accept the fact that doing things we don't want to do is a part of the job.

- When faced with a routine or mundane task that needs your attention, take a step back and alter the way in which you have achieved the task in the past to break-up monotony.
- Re-group and re-evaluate the plans you held before, identifying those procedures that can be altered and those procedures which cannot change.
- Recognize that change is inevitable within the agency and altering workflow processes can be a positive experience and will help you focus on new plans.

Nurture a positive view of yourself.

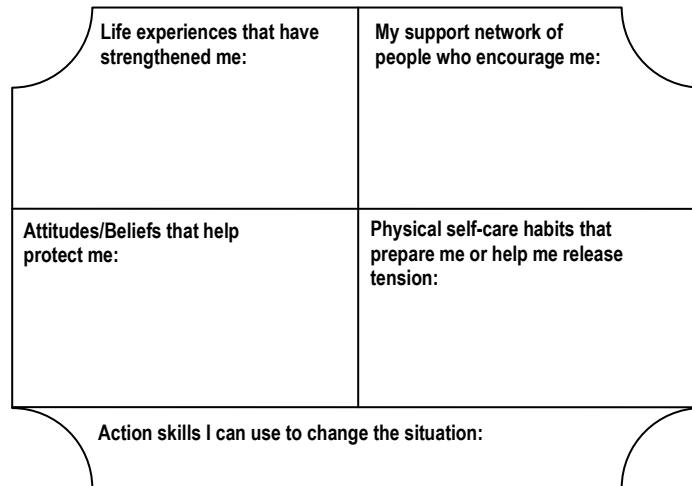
- Use positive affirmations to help build confidence in your ability to overcome challenging and frustrating obstacles and/or situations.
- Recognize that each step toward achieving a goal (no matter how small the accomplishment) can reinforce trust in your instincts and abilities.

Maintain a hopeful outlook when the pressure to deliver is increasing.

- Adopt an optimistic view of the situation despite how difficult it may be during hard times.
- Plan the seeds of possibilities rather than focus on a loss or disappointment.
- Try visualizing what you want to achieve to help guide your outlook.

Draw a stress buffer shield to think about resilience and establish strategies for dealing with stress

- Using the diagram below as an example, draw your own stress buffer shield to identify your own personal store of constructive coping skills.



- Record your own stress buffers in the appropriate sections of the shield:
 - ⇒ Life experiences that have strengthened me
 - ⇒ My support network of people who encourage and help me
 - ⇒ Attitudes/Beliefs that help protect me
 - ⇒ Physical self-care habits that prepare me or help me release tension
 - ⇒ Action skills I can use to change the situation

Reflection Tip:

** While completing your stress buffer shield, think about how you define stress. Ask a colleague or a manager for their definition of stress. Where are there similarities? differences?*

Monitor your exposure to media coverage of violence.

- Limit the amount of media you consume to 1-2 sources per day.
- Stay informed of current events but try your best not to overindulge on a news story from multiple outlets (i.e., TV, radio, newspaper, on-line)
- Keep track of the amount and type of media you consume on a weekly basis and take breaks if you start to feel overwhelmed.

Complete a self-reflection resilience checklist

- For the items below, place a checkmark next to the items that demonstrate current strengths and a plus sign next to the items for which you would like to improve or strengthen:
 - I demonstrate caring and support for my clients and colleagues by:
 - ⇒ Keeping on task when presented with repeated rejection/frustration
 - ⇒ Taking time to manage stress levels effectively
 - ⇒ Staying motivated and keeping a positive disposition under trying conditions
 - ⇒ Showing respect even during challenging times
 - ⇒ Being non-judgemental
 - ⇒ Looking beneath “problem” behaviours
 - ⇒ Using humour/smiling/laughing when faced with a difficult situation

Avoid “catastrophizing”.

- When faced with a very sad or painful situation, always try and view it within a broader context.
- Reflect on previous difficult situations with a client or a colleague and check to see if you blew things out of proportion. How many times did you “catastrophize” the situation?
- When faced with a difficult situation in the future, avoid predicting the future negatively without first considering other, more likely outcomes (i.e., the client will be so upset, he/she won’t ever come to a meeting again).

Assessing implications and possibilities.

- After an adversity strikes, many people become preoccupied with beliefs about what will happen next.
- Consider a recent or current adversity when you began to catastrophize.
- Review the adversity and list the:
 - ⇒ Worst case implications (your most catastrophic beliefs)
 - ⇒ Most likely implications (between worst and best)
 - ⇒ Best case possibilities (the most wildly positive outcomes you can dream of)

Reflection Tip:

** Dwelling on a current adversity and imagining a chain of disastrous events into the future produced anxiety and prevents us from responding a resilient manner?*

Identify and purge toxic thoughts.

- First, identify an adversity you are currently experiencing:
- Think about the toxic thoughts you are having regarding that adversity, and write them down on a piece of paper.
- Review each toxic thought one at a time and reframe your thinking by identifying alternative resilient thoughts to compensate.
- Example:

⇒ “I’m the worst manager in the world. I can never get my staff to listen to me.”

VS

⇒ “I’m not managing effectively, because I have not truly made an effort to get to know them as individuals. I will try to meet with everyone separately before the end of the month to get better results.”

Level 3-4 Activities

Avoid seeing a crisis as insurmountable.

- When faced with a crisis, break down the problem into parts to identify the underlying obstacles and constraints.
- From the list, classify which obstacles and constraints are within your control versus those that are not.
- Recognize that you cannot prevent all bad things from happening, but you can alter the way you interpret and respond to them.
- Revisit the crisis again, this time with a clear focus on what needs to be done to successfully address a challenge.

Reflection Tip:

** Always take a step back when faced with a crisis before throwing in the “white towel”. What may initially look insurmountable, may in fact be achievable when looking at what individual components are contributing to the crisis.*

Develop realistic goals focused on meeting a challenge rather than obstacles or constraints.

- When faced with a challenging situation within your department or agency, remember to set realistic and attainable goals.
- During “road blocks”, look for something familiar to tackle – something part of a usual routine in order to boost your morale and self-confidence.
- After you have successfully completed something, build off of the accomplishment to address other small obstacles or constraints contributing to the larger problem.

Reflection Tips:

** Don't focus on things that seem out of reach*

** Remember that even a small accomplishment is forward movement*

Keep things in perspective.

- Always view painful or difficult times in a broader context.
- Consider the long-term perspective; know that the present is fleeting and that emotions like anger, frustration or despair will not last forever.

Continually seek out opportunities for self-discovery over the long-term.

- After weathering a difficult time or challenging situation, it can be very beneficial to reflect back on the valuable lessons learned about ourselves.
- Reflect on the following:
 - ⇒ How have you grown as an individual because of the struggles you have experienced?
 - ⇒ Have any of your personal relationships been deepened?
 - ⇒ Do you have a greater sense of personal strength? An increased sense of self-worth?
 - ⇒ Are you more in touch with your spirituality and do you have a greater appreciation for life?

Take care of yourself in order to deliver consistent results for your department/agency into the future.

- Remember that taking care of yourself helps keep your mind and body primed for dealing with situations that require resilience.
- Do not neglect paying attention to your personal needs and feelings.
- Engage in activities that you enjoy and find relaxing.
- Exercise regularly and pay attention to your diet.

Books and Videos

Resilience: Reflections on the Burdens and Gifts of Facing Life's Adversities by Elizabeth Edwards (Broadway, 2009)

While on the campaign trail, Elizabeth met many others who have had to contend with serious adversity in their lives, and in Resilience, she draws on their experiences as well as her own, crafting an unsentimental and ultimately inspirational meditation on the gifts we can find among life's biggest challenges. This short, powerful, pocket-sized inspirational book is ideal for anyone dealing with difficulties in their life, who can find peace in knowing they are not alone, and promise that things can get better.

Resilience, by Boris Cyrulnik (Penguin UK, 2009)

Boris Cyrulnik, internationally renowned psychologist, takes us on a journey towards understanding the incredible mechanism we use: resilience. More than just the ability to resist, it is the means through which every one of us overcomes trauma time and time again. He tells the story of resilience through the stories of children who, living in conflict and war zones, exhibit the human ability to triumph over misfortune in all its guises, focusing on those who lived through the Holocaust and experienced a multitude of inhumanity, abuse and suffering.

The Resilience Factor: 7 Keys to Finding Your Inner Strength and Overcoming Life's Hurdles (Paperback), by Karen Reivich & Andrew Shatte (Broadway, 2003)

In the capable hands of psychologists Karen Reivich and Andrew Shatté, resilience is not a Band-Aid or a buzzword. It is a habit of mind. The Resilience Factor is a practical roadmap for navigating unexpected challenges, surprises, and setbacks at work and home. Their premise--that your thinking style determines your resilience--underlies the book's promise: you can boost resilience by changing the way you think about adversity.

Researching Resilience (Paperback), by Linda Liebenberg & Michael Ungar (University of Toronto Press, 2009)

This collection assembles qualitative and quantitative studies from a diverse group of scholars and disciplines, stressing the importance of studying the strength and resilience of youth who are faced with adversity. Working with youth in a variety of cultures and contexts, the contributors provide critically astute analyses of existing scholarship as well as rigorous methods for conducting resilience research in less Eurocentric and more culturally sensitive ways. Researching Resilience is unique in approaching interventions with youth specifically from the point of view of research methods and challenges.

Handbook of Adult Resilience, by John W. Reich PhD, Alex J. Zautra PhD, and John Stuart Hall PhD (The Guilford Press, 2010)

The first book to move beyond childhood and adolescence to explore processes of resilience across the lifespan, this cutting-edge volume synthesizes the best current research in the field. Contributors offer a comprehensive examination of resilience at multiple levels of analysis, from genetic and physiological factors through individual, family, and community processes.

Mental Resilience the Power Of Clarity: How to Develop the Focus Of a Warrior and the Peace Of a Monk, by Kamal Sharma (New World Library, 2008)

We all face challenges — complex decisions, difficult personalities, constant demands on our time — but we don't have to be at their mercy. By developing the skills outlined in this book, which create what author Kamal Sharma calls mental resilience, we become able to meet these challenges with clarity. Both warriors and monks have for centuries made training their minds, developing mental resilience, a key priority. Through this training, they are able to silence incessant mental chatter and live a life of awareness, peace, and focus. Kamal draws upon his roles as a former student of Eastern spiritual practices and a successful Western corporate advisor to present a step-by-step guide to developing mental resilience.

Building Personal and Organizational Resilience, by HARVARD BUSINESS REVIEW (Mc-Graw Hill Europe, 2003)

The series is designed to bring today's managers and professionals the fundamental information they need to stay competitive in a fast-moving world. From the preeminent thinkers whose work has defined an entire field to the rising stars who will redefine the way we think about business, here are the leading minds and landmark ideas that have established the Harvard Business Review as required reading for ambitious businesspeople in organizations around the globe.

Chicken Soup for the Recovering Soul: Your Personal, Portable Support Group with Stories of Healing, Hope, Love and Resilience, by Jack Canfield, Theresa Peluso, Peter Vegso, and Robert Ackerman (HCI, 2004)

Your personal portable support group - Chicken Soup for the Recovering Soul - underscores the tenacity of the human spirit. Find inspiration for change and personal growth in each story within its pages as people in this dynamic community share their experiences of transformation, of lives reclaimed, of relationships renewed and futures full of promise. Whether you are just embracing a commitment to recovery, or have already experienced deep healing, hope and renewed love in recovery, Chicken Soup for the Recovering Soul will be a source of inspiration and renewal every step of the way. Remember, you are not alone.

Adversity Quotient: Turning Obstacles into Opportunities, by Paul G. Stoltz (New Edition: John Wiley & Sons, 1999; Original: John Wiley & Sons, 1997) – also available on audio cassette.

Adversity Quotient (AQ) is defined as the measure of one's resilience and ability to persevere in the face of constant change, stress, and difficulty. The author says individual AQs explain why some people, no matter what their intelligence or educational or social background, succeed where others fail.

The movie “Harlem Diary: Nine Voices of Resilience” (Discovery Channel Productions).

Inspired by professor, author and sociologist Terry Williams' widely acclaimed book, "The Uptown Kids: Struggle and Hope in the Projects," this film tells the poignant story of nine young people, aged 12-26, who live in New York City's Harlem. Each uses a video camera to record his or her own struggles and successes over several months.

The movie “The Blind Side” (Alcon Entertainment, 2009).

"The Blind Side" depicts the story of Michael Oher, a homeless African-American youngster from a broken home, taken in by the Touhy's, a well-to-do white family who help him fulfill his potential. At the same time, Oher's presence in the Touhy's lives leads them to some insightful self-discoveries of their own. Living in his new environment, the teen faces a completely different set of challenges to overcome. As a football player and student, Oher works hard and, with the help of his coaches and adopted family, becomes an All-American offensive left tackle.

Resource Management (RM)

Definition:

Resource Management is understanding and effectively managing resources (e.g., people, materials, funds). This is demonstrated through measurement, planning and control of resources to maximize results. People who demonstrate this competency treat the agency's/sector's financial resources as if they were their own. It requires a balance of qualitative (e.g., human resources) and quantitative (e.g., financial resources) measures.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ understanding what the key resources are in your department and how the allocation of these resources impact the agency and the sector 	<ul style="list-style-type: none"> ▪ ignoring the fact that all resources are valuable
<ul style="list-style-type: none"> ▪ ensuring that projects/initiatives are completed in an effective and efficient manner while maintaining or improving current quality standards 	<ul style="list-style-type: none"> ▪ using resources without regard to the costs associated with waste, i.e., inefficient use of time, supplies, personnel
<ul style="list-style-type: none"> ▪ acting in a responsible manner when using the agency's resources 	<ul style="list-style-type: none"> ▪ using the same combination of resources to achieve business goals without investigating more effective alternatives
<ul style="list-style-type: none"> ▪ trading resources with other agencies in the sector so as to achieve greater efficiency 	<ul style="list-style-type: none"> ▪ exclusively keeping your resources within your department and not sharing them with other areas
<ul style="list-style-type: none"> ▪ utilizing resources to meet current and future business goals, with a view and tie-in to the tactical and strategic aspects of the agency and sector 	<ul style="list-style-type: none"> ▪ using resources to attain present goals without thinking of future implications

Developmental Activities

Level 1-2 Activities

Consider the following general tips to improve your Resource Management capabilities.

- Plan how you can effectively use resources to accomplish your goals, assignments or projects.
- Monitor your progress against milestones.
- Take the time to get a detailed understanding of the systems, programs and resources needed to complete your projects.
- Clear away bureaucratic barriers or other problems that make it difficult for you or your colleagues to get the project done.

Analyze organizational charts to familiarize yourself with resources across the agency.

- Identify the various functions in the organization and familiarize yourself with their business needs and roles.
- Take action to learn more about functions closer to your business needs. Review the organizational chart and contact colleagues in your service area to learn more about what they do and the resources they have at their disposal.

Identify one or two colleagues who are resourceful and work to improve your relationship with them.

- Set a goal to have at least one conversation each week.
- Focus on learning about these individuals: What do they do? What are they good at? What are their interests?
- Discuss how they have handled similar situations to yours. Listen carefully and evaluate which approaches would work best for you.
- Keep in touch with them on a regular basis.

Identify the resources needed to accomplish a current goal.

- Make a list and prioritize these resources according to their level of importance within the department.

Organize and execute priorities with others.

- Talk to people about relevant issues, concerns, approaches or ideas.
- Use a matrix to decide what activities need to be done and then determine who should do them. For example, Steven Covey makes reference in his book “The Seven Habits of Highly Effective People,” to a time management matrix that lists activities as urgent and not urgent, important and not important.

	URGENT	NOT URGENT
IMPORTANT	I Activities Crises Pressing Problems Deadline Driven Projects	II Activities Prevention Relationship Building Recognizing new opportunities Planning Recreation
NOT IMPORTANT	III Activities Interruptions, Service Calls Service Mail, Source Reports Some meetings Proximate, pressing matters Popular Activities	IV Activities Trivia, busy work Some mail Some phone calls Time wasters Pleasant Activities

- ⇒ **Quadrant I** activities are crises and emergencies which require immediate attention. Involve others to help with project deadline or tasks.
- ⇒ **Quadrant II** activities are priorities that need to be scheduled. Organize your work week and then delegate to others who have time and experience in handling the tasks.
- ⇒ **Quadrant III and IV** activities include phone calls, answering mail, attending some meetings. These activities should be done but are not urgent or as important. Ask someone to help you out. Have someone attend a meeting in your place.

Ensure that you use your agency's resources in an efficient manner. Devise a “recipe” for effective resource allocation.

- Create a plan for your next project and list the resources needed to follow through on this plan.
- Calculate how much of each resource (e.g., people, materials, funds) is needed at each stage and incorporate this into the project plan.
- When implementing the project steps, try to stay at or below your calculated resource need while maintaining a high level of service quality.

Level 3-4 Activities

Clarify expectations and develop a plan.

- When accepting a new project or activity, clarify your immediate manager's/supervisor's expectations, your role and if any resources can be shared across other areas of agency to be more efficient. Define key deliverables and accountabilities.
- Write a plan which lists:
 - ⇒ Key activities to be performed,
 - ⇒ Who will perform the activity,
 - ⇒ Who will provide assistance,
 - ⇒ Expected outcome of each activity,
 - ⇒ When it will be completed,
 - ⇒ Required resources, and
 - ⇒ How you will measure whether the activity is completed to the standards established.
- Share this plan with your manager/supervisor and clarify any concerns or issues he or she may raise as they relate to effective resource utilization.
- Regularly track your performance using this plan. Identify when activities are completed and/or milestones are met.
- If there is any "slippage" in your plan, identify the cause and problem-solve using whatever resources necessary to overcome the obstacle(s) and place this project back on line. This may involve other departments making "sacrifices" for the greater good of the agency.

Act as a role model to your colleagues in the organization.

- Think of an initiative/project you worked on that achieved top results at a minimum expense (in terms of human and financial resources)
- Discuss this initiative/project at your next departmental meeting and obtain feedback. Do they agree that it was an example of superior resource management? Do they see any areas to improve upon?

Look at a series of income statements for a description of your department's revenues and expenses over the past three years.

- Examine the expense column and determine where most of your department's expenses lie.
- Use this information to assess what areas require the greatest degree of financial resource allocation.
- Think of measures you can take to cut costs in these areas (e.g., reduced staffing, time saving measures, etc.).
- When making costs reductions, ensure that the integrity of the agency's future goals and strategic objectives are not weakened.

Books

The Balanced Scorecard: Translating Strategy into Action, by Robert S. Kaplan and David P. Norton (Harvard Business School, 1996).

The authors explain a management system which uses measurements in four categories - financial, client, internal, and innovation and learning - to align individual, organizational, and cross-departmental initiatives.

Human Resources Management Systems, by Glenn M. Ramton and associates (Nelson, 1997).

This book outlines the process of planning for, acquiring, implementing, and operating a Human Resources Management System (HRMS). Includes case studies, current Canadian Legislation and the impact on HRMS.

The Human Side of Management, by Dr. George S. Odiorne. [Also available on audiocassette.]

How to manage employees as a human resource.

Managing in a Flexible Workplace, by Barney Olmstead and Suzanne Smith.

Written especially for managers/supervisors, this guide explains the many benefits of workplace flexibility, including allocating people and resources more effectively, and attracting quality people who can't (or won't) work in a traditional structure.

Managing Internal Client Service (Owen-Stewart Performance Resources Inc.).

Learn how to make a proper assessment of internal needs, establish and document service standards and involve all employees in a continuous improvement process.

Self-Development (SDV)

Definition:

Self-Development involves proactively taking actions to improve personal capability. It also involves being willing to assess one's own level of development or expertise relative to one's current job, or as part of focused career planning.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ actively seeking feedback and suggestions as a significant source of learning and improvement. 	<ul style="list-style-type: none"> ▪ waiting for clients, families or colleagues to provide you with feedback and advice.
<ul style="list-style-type: none"> ▪ working to improve your skills and seeking developmental projects and tasks 	<ul style="list-style-type: none"> ▪ being content with what you already know and sticking to projects and tasks similar to ones you have done before
<ul style="list-style-type: none"> ▪ regarding upgrading one's professional skills as a continuous process 	<ul style="list-style-type: none"> ▪ Upgrading skills only when the topic comes up during a performance planning discussion
<ul style="list-style-type: none"> ▪ exploring personal strengths and weaknesses and learning from mistakes 	<ul style="list-style-type: none"> ▪ generalizing personal shortcomings and viewing them as unchangeable
<ul style="list-style-type: none"> ▪ seeking out new information/knowledge to strengthen skills and competencies for further career development 	<ul style="list-style-type: none"> ▪ relying on a manager/supervisor to provide you with the information/knowledge you need to advance your career
<ul style="list-style-type: none"> ▪ displaying a willingness to accept novel assignments and responsibilities that may be a stretch, but will add to your professional development 	<ul style="list-style-type: none"> ▪ accepting new projects or tasks only when they fall within your comfort zone and current area of responsibility

Developmental Activities

Level 1-2 Activities

Use brainstorming and other techniques.

- Avoid the temptation to go with the first ideas or solution for an issue or opportunity that comes to mind.
- Spend some time brainstorming with others to generate a number of ideas or solutions.
- Generate a long list of ideas or solutions first. Don't evaluate their merit until you've generated multiple ideas.

Take an external course to improve your performance on the job.

- If possible, arrange to take a community college or university course either in your own or related area of expertise.
- Include your learnings into your work.

Join a Professional Association.

- Join an association outside of your agency that consists of participants from all areas in your field of expertise.
- Try to "learn" one new approach or idea from each session that you attend.
- Consider how that new approach or idea could impact the work that you already do.

Attend forums and seminars.

- Attend forums and seminars to exchange ideas and enhance learning opportunities.
- Select forums, seminars and training sessions from various areas of the business or even different industries where skills are transferrable.

Keep your Manager informed of any new creative ideas you are pursuing.

- Be proactive in making sure your Manager is fully aware of new concepts and initiatives you are learning.
- Solicit his/her support and advice in getting things done, removing roadblocks and contacting others.

Meet with colleagues whose area of expertise differs from yours.

- Think of a colleague who you consider to be a “leading edge” expert in their field of expertise.
- Arrange a meeting with this colleague.
- Prepare a list of questions that you would like your colleague to address.
- Ask them for suggestions on how to increase your own ability in this field.

Purposely seek out opportunities to strengthen your own abilities.

- Read the latest pertinent journals, books and articles which will extend your knowledge.
- Collect information about best practices and key success factors in your industry/service area.
- Try to share these benchmarks with your Manager once a month or during department meetings.

Keep a New Idea file

- File any new ideas and key learning points you come across in readings, meetings, presentations, courses, conversations etc. and review this file periodically.
- Choose ideas on which you will take action and develop a plan for executing the idea.
- Try to “learn” one new approach or idea from each meeting you attend.

Apply new techniques and technologies into your work.

- Choose a topic area that is outside your profession and is of personal interest to you. For example, walk through a bookstore or library and browse through the different sections (e.g., politics, psychology, etc.).
- Develop an understanding of the key ideas or approaches in the area. Write down, in bullet point form, a summary of the main concepts to consolidate your learning.
- Use the theory you summarized and apply it to first time problems. Share your findings with your colleagues.

Level 3-4 Activities

Get feedback from your Manager and peers on your commitment to Self-Development.

- Solicit feedback on your ability to recognize new and emerging ideas and apply them to your department/work.
- Determine how you are perceived in this area (e.g., are you perceived as a leader or champion in applying new tools and methods?)
- Observe others whom you consider outstanding in their commitment to Self-Development and identify what they do to learn and apply new areas of expertise.

Find a mentor and/or a person who holds a job similar to the one to which you aspire and identify key learning experiences in his or her career.

- Discuss the formal and on-the-job experiences that led to new knowledge, skills, or insights.
- Relate these experiences to your own areas of interest.
- With their input, identify similar opportunities to develop your own expertise.

Call or meet with current potential stakeholders on a regular basis to stay abreast of their issues and challenges.

- Talk to stakeholders (colleagues, individuals and families) on a regular basis about issues they face, trends affecting them, and concerns they have about the future.
- Ask stakeholders to share their issues and assumptions on which you will have to navigate in order to deliver excellent service.

Look for opportunities in your community to network and develop your expertise.

- Take advantage of any opportunities for networking to gain insight to relevant industry-related issues. For example:
 - ⇒ Volunteer to serve on the board of an external agency to get a better sense of how other agencies run and expand your contacts within the community.
 - ⇒ Volunteer to be an advisor to a smaller agency which may benefit from your area of expertise.

Develop a personal learning agenda.

- Refer to your long-term (e.g. 3-5 years) career goal(s).
- Keeping your career goal(s) in mind, prepare a list of all the knowledge and skill areas you will need to acquire. Be as specific and detailed as you can for each area.
- For each development area you identify, write the steps you will need to take to acquire the necessary knowledge and skill (e.g. formal educational programs, job experiences, etc.).
- Assign target completion dates for each step. Commit to taking the first step.

Test a new idea or concept with others that would be unique/different in your service area relative to the industry.

- Determine its application within your department by following the steps below:
 - ⇒ Develop a plan for its implementation, even if you believe the idea may not be supported.
 - ⇒ Test the plan with your manager and trusted colleagues and get their feedback.
 - ⇒ Identify key learnings from the exercise.
 - ⇒ What changes are necessary to your plan to make it viable?
 - ⇒ Assess the feasibility of the plan and determine if there is merit to proceeding further.

Facilitate a meeting with colleagues to improve upon your presentation skills and share information relevant to your department goals.

- Select an unfamiliar topic that both benefits you and the agency.
- Develop a presentation to explain and promote your ideas to the stakeholders in attendance.
- Take note of the discussion that ensues from your presentation. Was the audience engaged? What topics did they respond well to?
- Ask for feedback following your presentation and make revisions to apply to future presentations.

Volunteer for projects and new initiatives that involve topics that are new and different from your normal mandate, or represent “ground-breaking” areas for your area of responsibility, where existing policies and practices do not apply.

- Take advantage of this opportunity to experiment with doing things in a new way and exploring opportunities from a broad perspective.
- Integrate new trends to first time work issues. Make a conscious effort not to impose the old, comfortable way of doing things on this new initiative.

Do something dramatically different to improve your ability to think about learning from a broad perspective.

- Make a conscious effort to broaden your perspective or thinking.
- Three or four times a year read something that is dramatically different from the material you normally read or participate in an activity that you normally don't do.
- Think of ideas, approaches or contacts that might be useful to you or your department, to help develop new opportunities.

Seek out creative thinkers.

- Identify people that are considered highly creative within your department and agency and beyond.
- Arrange a meeting (s) to discuss how they approach issues and identify new ideas. Incorporate some of their ideas into your business plans.
- Read about creative thinkers from the past and present, e.g. Einstein, Galileo, Steven Spielberg, George Lucas, etc.

Books and Videos

Competing for the Future, by Hamel & Prahalad (Harvard Business School Press, 1994).

This book advises companies to be constantly thinking ahead to the future and sets out a plan for how to accomplish this objective.

The Age of Paradox, by Charles Handy. (McGraw-Hill, 1995).

This book explores the changes confronting modern businesses and employees. It is an educational tool for understanding the context surrounding current business decisions and strategies.

The Organization of the Future, by The Druker Foundation (Jossey-Bass, 1997).

This book has a number of top - notch contributors reflecting on the healthy competitive organization of the 21st century.

Whack on the Side of the Head, by Roger Von Olech (Warner Books, 1989).

This book is a practical reference tool which will act as a personal guide to improving your business sense.

Seven Habits of Highly Effective People, by Steven R. Covey (Distican, 1990).

This book provides thought provoking ideas on clarifying your personal values and how to translate them into your daily and weekly activities. An excellent read.

Emotional Intelligence, by Daniel Goleman (1995).

This is a fascinating and persuasive book that shows precisely how emotional intelligence can be nurtured and strengthened by all of us.

Experiential Learning, by David A. Kolb (Prentice Hall, 1984).

This book is a somewhat technical discussion of learning styles, how they play out in practice, and how to maximize one's own learning through their application.

Future Edge, by Joel Arthur Barker (William Marrow & Company, Inc., 1992).

The author discusses spotting trends, adapting to change and dealing with problems to improve results.

The Circle of Innovation, by Tom Peters (Knopf, 1998).

A collection of solid ideas and inspiring thinking intended to awaken you to the need for innovation in your company to prosper.

Lateral Thinking, by Edward de Bono (Penguin UK, 1991).

'Thinking is a skill; it can be developed and improved if one knows how.' This book, now an internationally known bestseller, is a textbook of creativity. It shows how the habit of lateral thinking can be encouraged and new ideas generated. The author has worked out special techniques for doing this, in groups or alone, and the result is a triumph of entertaining education.

Use Both Sides of Your Brain, by Tony Buzan (New York, NY: Dutton, 1983).

This book contains practical ideas on how to learn more effectively and efficiently, solve problems and improve your memory.

PDI's Successful Manager's Handbook (1992):

- ⇒ Understanding the Learning Process (pp. 622-625)
- ⇒ Pursuing Learning and Self-Development (pp. 626-629)
- ⇒ Putting Learning Into Action (pp. 629-633)

The PBS television series, Connections and Connections.

These entertaining shows trace various seemingly unrelated technological developments over time and show how they interconnect. They also discuss the creativity and ingenuity of great thinkers.

The movie "Ideas into Action" (International Tele-Film).

This program looks at the barriers to fresh thinking and suggests some simple but powerful ways to overcome them.

Strategic Thinking (ST)

Definition:

Strategic Thinking is linking long-range visions and concepts to daily work, ranging from a simple understanding to a sophisticated awareness of the impact of the world at large on strategies and on choices.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ continually assessing how day-to-day tasks support broader agency objectives 	<ul style="list-style-type: none"> ▪ planning your work based on short-term commitments and deadlines
<ul style="list-style-type: none"> ▪ understanding tactical business fundamentals and incorporating them into decision making 	<ul style="list-style-type: none"> ▪ ignoring the business issues and how they will impact decisions
<ul style="list-style-type: none"> ▪ aligning your department's goals with the agency's strategic goals 	<ul style="list-style-type: none"> ▪ setting goals that are independent of agency priorities
<ul style="list-style-type: none"> ▪ using area resources effectively to accomplish work-related goals 	<ul style="list-style-type: none"> ▪ assuming "the way it has always been" is the best way to get things done despite changes in the environment
<ul style="list-style-type: none"> ▪ understanding how business issues, processes and outcomes affect the agency's strategic direction 	<ul style="list-style-type: none"> ▪ meeting short-term job objectives without considering long-term opportunities or impact for the agency or the department
<ul style="list-style-type: none"> ▪ understanding how the department's performance and outcomes are used to monitor the agency's progress towards its strategic goals 	<ul style="list-style-type: none"> ▪ focusing only on the measures relating to your department's success
<ul style="list-style-type: none"> ▪ preparing and reviewing contingency plans for future problems and opportunities 	<ul style="list-style-type: none"> ▪ reacting and taking a day-to-day approach to handling issues and challenges
<ul style="list-style-type: none"> ▪ assessing trends and calculating any potential implications these may have on your department's future direction 	<ul style="list-style-type: none"> ▪ constantly revising your department's business plan based on new information

Developmental Activities

Level 1-2 Activities

Gather information from your colleagues about the agency's strategy and focus.

- Spend time with a colleague discussing their knowledge of departmental objectives and how they align to the agency's strategic goals.
- Ask them how they address the agency's underlying strategy in their own planning.

Reflection Tip:

** Make notes on each conversation, and spend some time comparing the different approaches of your colleagues.*

Research the Strategic Thinking competency in your agency.

- Find out how others learn about organizational strategy and factor it into work prioritization.
- Research how your department's strategy is created. Ask others about what sources they consider in their analysis.
- Share your own ideas for implementation of your department's strategy into individual work processes with colleagues. Listen carefully to their comments.
- Integrate your findings with the comments of your colleagues to create an implementation plan. Follow through on it.

Reflection Tip:

** Create a working journal or process that will help you to keep on top of the changes that occur with respect to agency goals and priorities (i.e., collecting agency newsletters)*

Assess your department's contribution to the agency's strategic plan.

- Identify your department's specific expertise. Ask yourself, "What outputs, services would be lost, now and in the future, if our department did not exist?"
- Test whether the major mission for your department is aligned with and adding value to the overall direction of the agency. Review your department's overall strategic plan.
- Once you have identified your department's contributions, consider how its expertise should evolve and adapt over time to continuously add value on the broader level, and to support the agency's strategic plan.
- Produce a written record of your conclusions and the action steps required.

Reflection Tip:

** What challenges/opportunities will impact your department's strategic plan?*

Select a key task or function within your department that would significantly improve results if it were better aligned with strategic imperatives.

- Investigate and develop different approaches for performing the function.
- Develop a business case that supports a change including such things as strategic repositioning and leverage, resource utilization, cost/benefit and impact analysis, and so on.
- Examine the pros and cons from the perspective of each stakeholder group/client group.
- Create a draft implementation plan. Include a transition plan for migration/conversion to the new approach and a communication plan for repositioning the project and updates to stakeholder groups.
- Present your ideas and case to the appropriate groups.

Reflection Tip:

** What short-term goals will meet your long-term objectives? What necessary adjustments are needed to achieve success at the department/team level?*

Keep current with trends and issues affecting business in general as well as your sector/industry.

- Review local and national events and trends affecting your sector/industry and business in general by reading relevant publications (i.e., local newspapers, relevant magazines, journals, etc.). Consider what implications, if any, these developments have for your agency.
- Look at what your colleagues are doing across the province. What assumptions are they making about the future that is driving their current strategy?
- Attend industry conferences/seminars.
- Collect information about best practices and key success factors in the developmental services sector or in other organizations that you believe could be transferable to your agency.
- Anticipate changes in legislation and/or accepted sector standards and determine any adjustments your unit will have to make in order to keep on track with accomplishing its objectives.

Identify obstacles.

- Look ahead over the next three months. Considering each of the projects you are working on or plan to work on, with which project do you anticipate encountering the most difficulties?
- Make a list of the major obstacles that you believe you will encounter that will deter you from achieving your goal.
- Analyze what is the root cause of each obstacle and identify what actions you can take to lessen or overcome the problem before you encounter it.
- Bounce your ideas off your manager and colleagues, and ask for their feedback. Have contingency plans in place.
- Write out these actions in a plan, delegating responsibilities where appropriate, with targeted completion dates for each step. Put the plan into action and keep a note of your progress.

Reflection Tips:

**Discuss with your colleagues how they identify obstacles. Remember to keep a proactive approach rather than a reactive one.*

Level 3-4 Activities

Document and align your /department with the agency's strategic objectives

- On an index card, document your agency's overall strategy and objectives.
- Use the following matrix:

Strategic Objective #1	Activities That Align
Strategic Objective #2	Activities That Align
Strategic Objective #3	Activities That Align

- Reflect on the work the department has been focused on for the last few weeks.
- Which activities that your team focuses on do not align with any objective?
- Which objectives have no activities against them?
- Adjust your work plans accordingly.

Reflection Tip:

** If you are not familiar with the agency's strategic objectives, ask your manager to brief you before beginning this activity.*

Align priorities with strategy

- With your manager, list all the initiatives underway in your department.
- Prioritize these initiatives in terms of strategic impact.
- Identify where you are currently spending the most time and resources.
- Does the rank ordering, based on strategic impact, correlate with where you are spending your time and resources?
- Work with your manager to refocus your effort and achieve alignment

Create a strategy learning group of colleagues from other departments

- Share your strategic objectives with colleagues from other departments to help achieve overall objectives.
- Ask each member to present their departmental strategy and how it links into the overall agency strategy and the specific initiatives/methods/practices they use to deliver on their strategy. Use this forum to ask questions.
- Determine what elements might be applicable to solving problems within your own department and what you can do to work together where appropriate.
- Share this information with your team.

Assess a current departmental process or policy against the agency's long-term strategic priorities

- Select any one of your department's current processes or policies which you consider to be less than effective.
- Analyze the process/policy against each long-term strategic priority and determine if it supports or hinders the strategic priority. List the long-term strategic priorities that are supported and those that are hindered.
- Taking one of the long-term strategic priorities that are hindered, brainstorm what changes could be made to the process or policy that would align it with the agency in the future. Repeat the brainstorming exercise for the remaining long-term strategic priorities that are hindered.
- Redraft or modify the process or policy using the results of the brainstorming exercise, which in your view is more likely to lead to the desirable results.
- Test the revised policy on some of the key stakeholders that you will need to champion it as well as those that will be impacted by the changes.
- Produce a written report summarizing what you have learned from this exercise.
- Using a similar procedure as outlined above, create an entirely new process or policy to meet additional future needs of the agency which you anticipate will become a reality.

Develop a decision making framework

- For all major decisions, begin with a stakeholder analysis.

Who is Impacted?	How are They Impacted?	What is Their Likely Reaction?	What Level of Commitment is Required of Them?	Do They need to be Involved in the Decision?

- For all decisions that are strategic (i.e., linked to strategy plan, has legal implications, impacts public, reputation, poses a risk), describe the issue and decision required, document input from other groups, include background of issue, risks/benefits of various options, implications, recommendations and rationale. Also include next steps, timelines and a communication plan.
- Present this summary to your manager and encourage others to use the framework.

Create an actionable position paper

- Identify sector/industry gurus.
- Read what they are saying with respect to changes in the sector/industry.
- Consider the impact these changes have for your agency.
- Write a position paper to clarify your thoughts.
- Turn your position paper into an actionable plan.

Level 5 Activities

Practice using the FIST model to develop a vision and strategy in the context of wider agency/sector priorities.

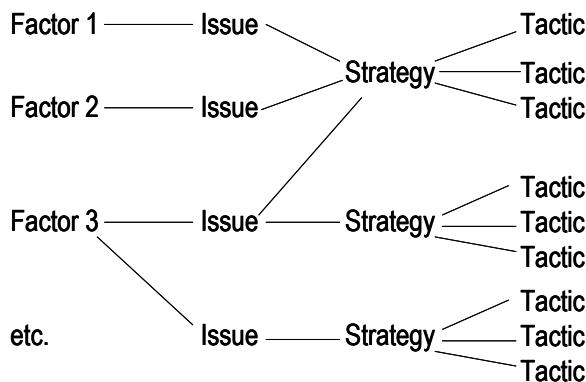
F = Factors – Identify client needs, behaviours, and trends within the sector. Document your agency's position vis-à-vis external agencies, and related advantages.

I = Implication - Identify how the factors impact the work that you do.

S = Strategies – Document the major initiatives that will impact growth, direction, etc. Think longer term.

T = Tactics – Identify the actions that will fit the agency strategy.

Factors	Issues	Strategies	Tactics
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- Create a model and draw the lines.

Anticipate the impact of the changing external environment on your agency

- List the possible changes that may occur in the community/province over the next 3-5 years and how those changes could affect the agency.
- List the possible changes to the sector/industry as a result and how those changes could affect the agency.
- Assess the probability of each event (low, medium or high), the impact it will have on agency (low, medium or high) and the time frame.
- Use this information to prioritize strategies, focusing on events that will have the most significant impact on the agency and have a high probability of occurrence.
- Determine those factors that cannot be predicted, and assess their potential risk or impact on the future of the agency.
- What factors, if realized, could impact the agency's future/direction. What can be done to mitigate that risk? How can those factors be continuously monitored and continually assessed?
- Once you have recorded the information, look for trends across other developmental services agencies within the province. How have they typically responded to changes in the sector/industry?
- Take action - include team members in your action plan. Teach your team members your approach to conducting market reviews.

Use external trends to enhance strategic objectives

- Review local and provincial events and trends affecting the sector by regularly reading leading newspapers and industry journals. Make a point of talking to knowledgeable individuals in the field (e.g., social workers, psychologists and other thought leaders).
- Try to access trend information from research organizations.
- Identify an opportunity based on your analysis and discuss it with your colleagues. What change to the strategy would be required to capitalize on this opportunity?
- Identify who will be impacted by the changes and bring them together for a discussion forum.
- Determine a strategy for engaging the support required to initiate the opportunity.
- Use the following matrix to help you with your analysis.

Trends/assumptions made by others	Implications to agency/ Changes required to strategy	Opportunities	Key stakeholders impacted

- Communicate your plan to your team and other key stakeholders.

Books and Videos

Becoming a Strategic Leader: Your role in Your Organization's Enduring Success, by Richard L. Hughes and Katherine M. Beatty (Jossey-Bass, 2005).

Today's organizations face difficult challenges in order to remain competitive – the quickening pace of change, increasing uncertainty, growing ambiguity, and complexity. To meet these challenges, organizations must broaden the scope of leadership responsibility for strategic leadership and engage more people in the process of leadership. This book outlines the framework of strategic leadership and contains practical suggestions on how to develop the individual, team, and organizational skills needed for organizations to become more adaptable, flexible, and resilient. The authors also show how individual managers can exercise effective strategic leadership through their distinctive and systemic approach – thinking, acting, and influencing.

Making Strategy Work: Leading Effective Execution and Change, by Lawrence G. Hrebiniak (Wharton School Publishing, 2005).

In this book, the author offers a comprehensive, disciplined process model for making strategy work in the real world. The author shows why execution is even more important than many senior executives realize, and sheds powerful new light on why businesses fail to deliver on even their most promising strategies. He offers a systematic roadmap for execution that encompasses every key success factor: organizational structure, coordination, information sharing, incentives, controls, change management, culture, and the role of power and influence in the execution process.

Scenarios: The Art of Strategic Conversation, by Kees van der Heijden (Wiley, 2004).

In this book, the author shows you how to move your organization to meet the future by turning it ongoing “strategic conversation” to its own advantage. Linking your organization’s unique (but often tacit) business idea with scenario thinking, and building on the principles of organizational learning, the author describes practical ways to develop those skills that will enhance the continuous scenario-based strategy process.

Strategic Thinking: A Four Piece Puzzle, by Bill Birnbaum (Douglas Mountain Publishing, 2004).

In this book, the author shares his lessons learned during years helping management teams develop their business strategy. He offers techniques for achieving and maintaining focus, understanding and responding to markets and customers.

Fundamentals of Management, Stephen P. Robbins and David DeCenzo (Prentice Hall, 2003).

This book provides an informative and practical introduction to management, including the latest concepts and practices. Organized with useful learning tools, the book discusses issues of small and large companies, e-business, and other important issues to managers in the 21st century.

Re-imagine, by Tom Peters (DK Publishing, 2003).

By focusing on how the business climate has changed, this book outlines how the new world of business works, explores radical ways of overcoming outdated, traditional company values, and embraces an aggressive strategy that empowers talent and brand-driven organizations where everyone has a voice.

Business Strategy: A Guide to Effective Decision-Making, by Jeremy Kourdi (W.W. Norton & Company, 2003).

Tools, tactics and techniques for making effective strategic decisions in business today.

Execution: The Discipline of Getting Things Done, by Ram Charan, Charles Burck, Larry Bossidy (Crown Business, 2002).

While failure in today's business environment is often attributed to other causes, Bossidy and Charan argue that the biggest obstacle to success is the absence of execution, and they describe the building blocks--leaders with the right behaviours, a culture that rewards execution, and a reliable system for having the right people in the right jobs--that need to be in place to manage the three core business processes of people, strategy, and operations.

Good to Great: Why Some Companies Make the Leap, by Jim Collins (HarperCollins, 2001).

Making the transition from good to great doesn't require a high-profile CEO, the latest technology, innovative change management, or even a fine-tuned business strategy. At the heart of those rare and truly great companies was a corporate culture that rigorously found and promoted disciplined people to think and act in a disciplined manner. Peppered with dozens of stories and examples from the great and not so great, the book offers a well-reasoned road map to excellence that any organization would do well to consider.

Strategy Safari: A Guided Tour Through the Wilds of Strategic Management, by Henry Mintzberg, Joseph Lampel and Bruce W. Ahlstrand (Simon & Schuster, 1998).

This book provides a thorough critique of the contributions and limitations of 10 dominant schools of strategic thought.

Making Strategy Work: Building Sustainable Growth Capability, by Timothy J. Galpin (Jossey-Bass, 1997).

This hands-on book outlines the steps managers need to take so they can confidently implement corporate strategy within their departments and divisions and throughout their organizations. The author bridges the gap that so often exists between strategy and action, and offers the tools managers need to translate plans into results-oriented strategic change.

Fundamental Issues in Strategy, by Richard P. Rumelt, Dan E. Schendel and David J. Teece Eds. (Harvard Business School Press, 1995).

Twenty-two of the most influential strategy thinkers take a comprehensive look at the “intellectual backbone” of the field of strategy.

Applied Strategic Planning: A comprehensive guide, by Leonard D. Goodstein, Timothy M. Nolan, J. William Pfeiffer (McGraw-Hill Companies, The, 1992).

This provides a complete understanding of the strategic planning process, along with views on the most effective ways to plan strategically. It presents the model that Pfeiffer & Company uses for its own strategic planning, with complete chapters devoted to each phase of the model.

Strategy: Seeking and Securing Competitive Advantage, by Cynthia A. Montgomery and Michael E. Porter Ed. (Harvard Business School Press, 1991).

The foremost strategy thinkers offer insights and advice on how to make the critical decisions for business success.

When Giants Learn to Dance, by Rosabeth Moss Kanter (Simon & Schuster, 1989).

A collection of case stories that illustrate how organizations learn to rapidly shift their strategies to adapt to the changing needs of the internal and external environment.

Periodicals such as Harvard Business Review and Fortune.

These periodicals often contain articles that offer insight into Business Insight concepts and approaches.

The video, “Football and the Art of Strategic Planning” (Vision Films Associated).

This video illustrates the effectiveness and importance of the strategic planning process by using a professional football club as an example.

The video, “Applied Strategic Planning: Executive Briefing”, by William J. Pfeiffer.

This videocassette presents an overview of the applied strategic planning process by J. William Pfeiffer, Ph.D. J.D. president of University Associates, Inc. Dr. Pfeiffer uses the Applied Strategic Planning Model to illustrate and to explain chronologically the steps necessary for effective strategic planning. He also shares insights and examples from his work in numerous organizations.

The video, “What is Strategic Planning”, (Performance Resources Inc.).

This video demonstrates the five important steps in developing a strategic plan. It is designed to assist you with the first stage in creating an organizational culture which relates strongly to the concepts of strategic planning.

Flexibility (FLX)

Definition:

Flexibility is adapting to and working effectively within a variety of situations, and with various individuals or groups. Flexibility entails understanding and appreciating different and opposing perspectives on an issue or situation, adapting one's approach as the requirements of a situation change, and changing or easily accepting changes in one's own organization or job requirements.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ having an open mind to new and different ways of thinking 	<ul style="list-style-type: none"> ▪ rejecting new ideas or approaches
<ul style="list-style-type: none"> ▪ accepting others' points of view as valid and incorporating them into your approach 	<ul style="list-style-type: none"> ▪ believing that your opinion is the only correct one
<ul style="list-style-type: none"> ▪ deciding what to do based on the situation and adapting to fit it 	<ul style="list-style-type: none"> ▪ acting in ways that may have worked before, but not adapting for possible differences in situations
<ul style="list-style-type: none"> ▪ enthusiastically adopting new systems or procedures 	<ul style="list-style-type: none"> ▪ wanting to do things the way you have always done them
<ul style="list-style-type: none"> ▪ flexibly applying guidelines or procedures to get the job done and meet agency objectives 	<ul style="list-style-type: none"> ▪ rigorously adhering to agency procedures
<ul style="list-style-type: none"> ▪ finding alternatives that will meet the client's/ stakeholder's underlying needs 	<ul style="list-style-type: none"> ▪ believing your view is the only one
<ul style="list-style-type: none"> ▪ maintaining an open perspective on a stakeholder's concern or problem; exploring different alternatives; displaying empathy 	<ul style="list-style-type: none"> ▪ refusing to look for alternatives to resolve a stakeholder's concern or problem; "digging in your heals"
<ul style="list-style-type: none"> ▪ changing your strategy when the situation changes 	<ul style="list-style-type: none"> ▪ shifting the plan when the environment has changed
<ul style="list-style-type: none"> ▪ changing your priorities and work plan as new issues arise even though changes may involve extra work 	<ul style="list-style-type: none"> ▪ ignoring problems and sticking to your original work plan by telling the client/customer it can't be done
<ul style="list-style-type: none"> ▪ willing to operate in a dynamic and changing environment 	<ul style="list-style-type: none"> ▪ resisting any change that will impact your work

Developmental Activities

Level 1-2 Activities

Practice being flexible.

- The next time you disagree with someone on how something should be done; consider doing it the other person's way.
- Make a point of identifying the positive aspects of others' way of doing things.

Respond to change enthusiastically.

- Suppress any desire to complain the next time you are asked to change your work plan.
- Practice adopting a positive attitude and you will find that the new demands on you will be less stressful.
- Use this as an opportunity to loosen the ideas stuck in your mind about how things "should be" or "used to be", by:
 - ⇒ Physically changing your frame of reference. For example, sit in a different seat in your next department meeting.
 - ⇒ Daring to be positive. Instead of listing all the reasons that something won't work, look at the situation "through a different pair of glasses".
- Take personal responsibility for the choices you have amongst alternatives by:
 - ⇒ Daring to be different and open-minded. Ask a colleague to exchange responsibilities for a day or shift from your normal work routine.

Reflection Tip:

* Ask yourself questions like: *How does this situation look from your new viewpoint? What else do you see? What insight have you gained into your own sense of personal responsibility to this change?*

Discuss difficult situations to learn what alternatives are possible.

- Make a point of discussing difficult situations with your manager to learn what could have been done differently.
- By developing an understanding of the alternatives you will be better able to respond flexibly in the future.

Think about your own preferences.

- Think about the style of work you prefer, for example:
 - ⇒ A manager who leaves me alone vs. a manager who works closely with me
 - ⇒ Colleagues who work with me / colleagues who complete their work on their own
 - ⇒ A formal business-like office / An informal office
 - ⇒ People who say what they mean / people who are very polite
 - ⇒ Working in a team / Working on my own
- After thinking about your preferences, consider why some people might prefer the opposite.
- What are the possible advantages of each option?
- This exercise will help you recognize the difference between “This is the best way” and “This is the way that I personally prefer”.

Reflection Tips:

- * *What are the possible advantages of each perspective?*
- * *In what types of situations would each of your preferences be more or less appropriate?*

Practice reaching a compromise.

- Think of any disagreements you have had with your manager.
- Rather than trying to win the argument, develop your Flexibility by thinking of a compromise or win-win scenario. Have a discussion with your manager with the explicit goal of finding a satisfactory compromise.
- If you do not have any disagreements now, think back to an earlier one. See if you can think of a compromise that might have worked in that situation.

Talk to people with different viewpoints.

- Go out of your way to find people who have points of view different from your own.
- Encourage them to express their opinions and resist expressing your point of view immediately.
- Ask them more questions to understand what they are thinking and why.
- Try to see the world through their eyes.

Get feedback from your colleagues on your flexibility.

- Tell your colleagues that you are trying to improve your Flexibility. Ask them to give you immediate feedback when you are or are not being flexible.
- Resist the temptation to defend your point of view if your colleagues say you are not being flexible enough. Thank them for their feedback and consider the possibility that they may be right.

Reflection Tip:

** Reflect on the situations where colleagues have indicated you've been less flexible. Do you understand why they feel that way?*

When a problem situation arises that the normal policies or practices will not solve, develop a plan of action that applies the “rules” more flexibly.

- Think of a situation where you and a colleague or a manager approached a situation in different ways.
- Ask yourself what did he/she do differently from you and what were the outcomes? Is there something you can learn from their approach?
- Find out why they approached that situation in that manner. Think of some of your reasoning behind your approach. Are there opportunities for you to adapt your approach and tactics based on what you heard?
- Try to “piggy-back”, i.e., improve upon the tactics and suggestions. Try to see their approach as a new and different set of tools which can be applied and adapted for you to achieve your goals.

Build islands of stability.

- Try and keep some things constant. This is sometimes called building islands of stability in a sea of change.
- Build little routines about how you start and end your work day and keep these up in the face of change.
 - ⇒ Keep your desk organized a certain way
 - ⇒ Pack your lunch the night before
 - ⇒ Head to the gym every Wednesday to release stress

When you find yourself faced with many competing demands on your time, seek input from a manager for ideas.

- Ask your manager for input and advice on the priorities and the implications of any trade-off decisions you might make.
- Seek to understand how your manager makes decisions and what information they use when faced with similar situations.
- The intent is not to ask the manager for direction, simply to “pick their brains” so that you know how best to adapt to the situation.

Discuss the underlying reasons behind rules and procedures with your manager.

- Ask your colleagues about times they have had to bend the rules to solve a problem for a client and find out what occurred as a result.
- Do not bend rules unless you understand the implications of bending them. Learn more about the existing rules and talk to your manager about what would happen if certain procedures were changed.

Reflection Tip:

**Based on the information you've gathered, can you think of any current procedures that could improve efficiency if it was altered?*

Avoid telling others something cannot be done because of a rule.

- Whenever a rule or procedure gets in the way of what you or others need to achieve, do not say, “That’s the rule - end of discussion.” Instead, think of alternatives that will achieve the desired result.

Understand the background of the people you are working with.

- Spend some time talking to your peers about their backgrounds, their work preferences and concerns, their interests.
- Try to understand values so that you can adapt your behaviour to match. Observe the effects this change has on your group dynamics.

Learn from someone who is flexible.

- Identify a person(s) who adapts to changing situations with ease. This could be a colleague with whom you work, or someone in another department of the agency with whom you interact.
- Observe them at work and model your behaviour based on what you learn from them.

Level 3-4 Activities

Question your own role within the department.

- Review the methods by which you perform your more routine activities to identify new or better ways of performing them.
- Learn to play devil's advocate with yourself, particularly when you find yourself with a fixed commitment to a certain position.

Reflection Tip:

** Ask yourself why you are so attached to this particular position. Are there emotional reasons why you are sticking to one position?*

Use 'imaging' techniques to generate ideas and new solutions.

- Think of impossible scenarios, then ask yourself questions like:
 - ⇒ "What if we could do this in one-tenth the time?"
 - ⇒ "What if we could do this five times faster than we do now?"
 - ⇒ "How do we implement the new program with no formal training?"
 - ⇒ "How do we reduce review time by a factor of x?"
- Ask yourself other questions like:
 - ⇒ "What would it look like?"
 - ⇒ "What would people be doing?"
 - ⇒ "What could our service partners achieve?"
 - ⇒ "What would our clients be doing?"
 - ⇒ "How would our community partners be supporting us?"...
- Be creative in approaching current procedures and technologies.
- By freeing up your mind to think of potentially impossible solutions, some very possible and creative solutions may emerge while maintaining the same overall plan/strategy.

Set a tough personal goal to regularly consider two or more reasonable alternative courses of action for every major decision.

- Are the alternatives simply “straw persons” or are they realistic? That is, would you ever implement them?
- How creative are your alternatives?
- Keep a record of your thinking by noting the decision and the alternatives and by meeting with your manager to review your progress.
- Recognize that there is rarely only one solution to a problem or only one approach to solving that problem.
- Review this record occasionally and set milestones with your manager to assess how flexible you are being.

Volunteer to work with your manager on a project/task where you know your viewpoints will be openly challenged.

- Conduct a rough analysis of your manager’s approach to the project/task making note of their techniques and insights.
- Find areas where your thinking differs and areas where there is congruency.
- Determine if any of your manager’s techniques or approaches that you presently do not practice could be applied to other areas of your work.
- Set a goal of testing out one new technique/approach a month.
- Use any opportunity to work with your manager to practice demonstrating more flexibility and openness to alternatives.

Work with others who have strong opinions.

- Participate in assignments or projects in which you will be working with others who have strong opinions, styles that are different from yours, or who have more expertise in the project area than you have.
- Use these opportunities to practice being more flexible and to manage yourself in a way that fits the person whom you are working with.

Volunteer for projects and assignments that involve topics that are new and different from your normal work load or represent “ground-breaking” areas for your department/agency.

- Ask for projects or assignments where existing policies and practices do not apply.
- Discuss with others under what circumstances it would be appropriate to “bend the rules”.
- Note the issues and implications of bending the “rules” and how these areas affect the overall plan or goal within the department/agency.
- Think of the rules or standard operating procedures that at times have got in the way of achieving results.

Reflection Tip:

** Reflect on your comfort level while working on a project where policies and procedures don't apply.*

Consider if your priorities need to be revised.

- Review your to-do list or plan of action to see if anything you previously had decided should change based on new information.
- Try to find at least two things to change. The goal is to improve your comfort level with changing priorities, goals and methods.

Comfortably navigate through ambiguity.

- In a situation where you are required to “shift gears”, develop a plan for how you may go about reacting to that change. Think through the resources you may need, obstacles that may impede your ability to adapt to change, and potential solutions and plans of action for your change effort.
- When current strategies are not working, stop what you are doing, acknowledge that it is not working, and make the necessary adjustments to your plans, activities, objectives, or behaviour. Be willing to make midstream adjustments when things are not going well or when situations change.
- Imagine that a deadline for something you are working on has been brought forward. Review the impact this would have on your responsibilities and tailor your plans and goals as necessary.

Identify an opportunity to improve or change a current function, process or procedure within your department.

- Assess the scope and impact of the intervention.
- Identify the individuals or groups (both internal and external to your own department) who will be affected by it.
- Think about how this change will benefit them and what reasons they may have for dismissing the change.
- Work on anticipating different problems that may arise and the approaches you could take to address potential problems. Identify the individuals who need to be involved in the solution and solicit their input and buy-in.
- Build your business case for the change by preparing a proposal that includes the benefits and obstacles to overcome, a list of required resources, timelines, and return on investment, for review with the key stakeholders involved.

Reflection Tip:

** Talk to colleagues who have been involved in past improvement initiatives – what made them successful? What stood in the way or undermined their efforts before or during implementation? Consider these factors as you move forward.*

Use the technique of scenario planning to identify and explore alternative future environments for your own department or the agency as a whole.

- For a difficult, strategic decision, create scenarios or stories about the future, each one modeling a distinct, plausible possibility for the future
- Bring together a group of key stakeholders who will contribute a wide range of perspectives to agree on the issue to be addressed.
- Identify the driving and constraining forces related to four key areas associated with the issue: social, economic, political and technological
- Use these scenarios to illuminate the short- and long-term risks and opportunities associated with specific decisions and investments as well as to explore emerging opportunities for services and new markets.

Reflection Tip:

** The technique of scenario planning will help you strike a balance between thinking you can predict the future and letting the uncertainties freeze you into inactivity?*

Invest time in developing knowledge transfer in the procedures or systems used in your department.

- Maintain a list or file on knowledge transfer so you will have access to multiple ways of doing things in order to quickly adapt should the situation arise.
- Take time to read manuals and question your manager on best practice, so that you develop knowledge transfer in your department and are comfortable when engrained routines change without notice.

Books and Videos

Understanding Adaptability: A Prerequisite for Effective Performance within Complex Environments, by C. Shawn Burke (Jai Press Inc., 2006).

This book takes a multi-disciplinary approach to increasing our understanding of adaptability within complex environments by integrating cutting-edge work done by experts in the field and compiling it in one volume. Specifically, the volume takes a systems approach in that chapters describe the manifestation and antecedents of adaptability at individual, team, and organizational levels.

Ping: A Frog in Search of a New Pond, by Stuart Avery Gold (Georgetown, 2005).

In the tradition of "Who Moved My Cheese?" here is a parable about change, overcoming obstacles, and making a leap of faith. A frog named Ping represents everybody who has encountered a setback, needs to take a risk, or is struggling with the challenges of change—that is to say, he is all of us. The Owl Ping meets in his journey is the mentor who helps him find meaning and leap to new heights. The adventure they embark on together is both engaging and revealing.

Developing Cultural Adaptability: How to Work Across Differences, by Jennifer J. Deal and Don W. Prince (Center for Creative Leadership, 2003).

Being able to communicate effectively across cultural differences, understanding how to negotiate complex social situations, and being familiar with the customs and norms of many cultures are important skills in organizations today. Perhaps even more important than possessing those essential pieces of cultural knowledge is the skill of cultural adaptability – the willingness and ability to recognize, understand and work effectively across cultural differences. Proficiency in this area helps managers to build the relationships needed to achieve results in today's global organizations, especially when those relationships are forged across borders and cultures.

A Peacock in the Land of Penguins: A Tale of Diversity and Discovery, by Barbara J. Hately & Warren Schmidt (New Edition: Berrett-Koehler Publishers, 2001; Original: Berrett-Koehler, 1997).

A short and rather light fable, this book celebrates the value of diversity. Openness to diverse styles and cultures is one important side of the Flexibility competency. This delightful fable humorously and memorably illuminates the importance of understanding and embracing the full range of perspectives that people bring to bear on their work. This expanded edition is enhanced with practical new tips, tools, quizzes, strategies, checklists, and resources.

Leadership and the One Minute Manager: Increasing Effectiveness Through Situational Leadership, by Kenneth Blanchard, Patricia Zigarmi & Drea Zigarmi (New Edition: William Morrow, 1999; Original: 1990)

This book illustrates why you must fit your style to the needs of the individual; how to diagnose a situation correctly so you know when to delegate, support, or direct; how to contract with your people for the leadership style that suits them best; and more.

Who Moved my Cheese? An Amazing Way to Deal with Change in Your Work and in Your Life, by Spencer Johnson, Kenneth H. Blanchard (New Edition: Vermilion, 1999; Original: Putnam Publishing Group, 1998).

Change affects everyone, and Who Moved My Cheese? Shows readers how to deal with change and “win”. Written in a parable form, this “quick read” makes the point that we have to be alert to changes in our lives and to be prepared to search new ways of doing things, and that there’s no single way to deal with change.

The Situational Leader, by Dr. Paul Hersey (New Edition: Center for Leadership Studies: 1997; Original: Warner Books, 1985).

This is the classic book on the theory of Situational Leadership. It proposes that there is no one best leadership style for all occasions and hence a key to leadership is flexibility. The book provides practical insights on how to vary your management style to meet the needs of people you want to lead, how to diagnose readiness, how to develop people, and what to do when performance slips.

The Art of the Long View – Planning for the Future in an Uncertain World, by Peter Schwartz (New Edition: Doubleday Canada Ltd., 1996; Original: Doubleday, 1991) – also available on audio cassette.

This is an excellent starting book describing the fundamentals of scenario planning. Peter Schwartz offers scenarios from the oil industry that can be applied to all aspects of life. His first-hand accounts, originally developed for Royal Dutch/Shell are invaluable tools for creative thinking in one's personal life and in business.

The Adaptive Decision Maker, by John W. Payne, James R. Bettman & Eric J. Johnson (Cambridge University Press, 1993).

This book argues that people use a variety of strategies to make judgements and choices. The authors introduce a model that shows decisions makers which strategy a person will use in a given situation. A series of experiments testing the model are presented, and the authors analyze how the model can lead to improved decisions and opportunities for further research.

Future Edge: Discovering the New Paradigms of Success, by Joel Arthur Barker (William Marrow & Company, Inc., 1992).

The author discusses spotting trends, adapting to change and dealing with problems to improve results.

The Hidden Dimensions, by Edward T. Hall (New Edition: Peter Smith Publisher Inc., 1992; Original: Doubleday & Company, 1987)

This is an older but still popular sociology book. It explores some of the subtle but important differences between cultures. This is a good book to spark your awareness of how diversity can affect interpersonal relations. If you like this author you might enjoy his other books such as: *Hidden Differences*, *The Silent Language*, *Understanding Cultural Differences: Germans. French and Americans*.

Learning Adaptability and Change, by John Heywood (Paul Chapman Publishing, 1989).

This book provides a unique overview of the vital importance that education has for business, industry and government, and for society in general. It advocates that unless our educational system can teach individuals to adapt, their contribution to society, and thus society itself will be weakened.

Thriving on Chaos, by Tom Peters (New Edition: Harper Collins, 1989; Original: Random House, 1987) – also available on audio cassette.

A popular business management book showing how we can (and must) respond flexibly to an ever-changing world.

The movie “Dances with Wolves”.

In the film, pay attention to how Kevin Costner adapts to the ways of native people. The lesson for business is to recognize that there is something to be learned from the different viewpoints of other people and other areas/units.

The movie, “In America”.

This movie illustrates how an Irish family move to New York and create a new life for themselves as they struggle to come to terms with a family tragedy. The two young sisters are particularly resourceful in adapting to their new life style.

The movie “Local Hero”.

This wonderful film is about an executive sent to a small town in the British Isles as part of a big oil project. Notice how the lead character comes to understand and adapt to the point of view of the locals.

Self-Control (SCT)

Definition:

Self-Control involves keeping one's emotions under control and restraining negative responses when provoked or when faced with opposition or hostility from others, or when working under conditions of stress. While anger and frustration may, at times, be justified, this competency is concerned with expressing or resolving it in an appropriate way that doesn't harm self or others, emotionally or physically.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ continuing to perform effectively in stressful and difficult circumstances (i.e., a difficult case) 	<ul style="list-style-type: none"> ▪ giving up and letting fear take over; letting stressful times get the best of you
<ul style="list-style-type: none"> ▪ keeping things in perspective despite fatigue and frustration 	<ul style="list-style-type: none"> ▪ letting events "take control" of you
<ul style="list-style-type: none"> ▪ coping effectively with ambiguity 	<ul style="list-style-type: none"> ▪ wanting everything to be black and white
<ul style="list-style-type: none"> ▪ maintaining a professional approach when unduly annoyed, disturbed, or disrupted by others; remaining calm 	<ul style="list-style-type: none"> ▪ being rude and impolite by "lashing out" and over-reacting
<ul style="list-style-type: none"> ▪ responding calmly with a sense of empathy and perspective when something happens that makes more work for you 	<ul style="list-style-type: none"> ▪ blaming others and getting angry when something happens that makes work for you
<ul style="list-style-type: none"> ▪ remaining polite and in control when speaking with clients or colleagues and dealing with offensive provocations 	<ul style="list-style-type: none"> ▪ getting angry or flustered when a client or colleague becomes unruly and directs personal attacks your way
<ul style="list-style-type: none"> ▪ holding your tongue and taking a deep breath to relax when something annoys you 	<ul style="list-style-type: none"> ▪ sharply complaining to someone who is getting on your nerves
<ul style="list-style-type: none"> ▪ taking steps to calm someone (e.g. a co-worker or client) who is noticeably upset 	<ul style="list-style-type: none"> ▪ refusing to get involved in emotionally charged situations, or saying or doing things that make the situation worse

Developmental Activities

Level 1-2 Activities

Think before you react.

- Take a deep breath, count to three in your head and then re-evaluate the situation.
- If you feel what you want to say or do may be inappropriate then don't do it, wait until you can revisit the situation with a clear head.

Remove yourself from the situation.

- If it's a phone call, put the person on hold temporarily or tell them you'll call back.
- If in a meeting, excuse yourself.
- This will allow your emotions to subside before you act.

Think twice before placing blame.

- The next time you are angry with someone or some department pause a moment before placing blame.
- Think about what could be done to prevent these problems and discuss with your colleagues or manager.
- Self Control becomes easier when you direct your thoughts and energy towards solving the problem rather than assigning blame.

Keep situations in perspective by leading a balanced life.

- Don't focus all your energy in one area of your life.
- Make a conscious effort to take mental breaks from work. Join a community recreational sports league or a book club.

Maintain a healthy lifestyle in order to keep your stress level in check.

- Eat right, exercise regularly, get plenty of sleep and drink at least 8 glasses of water a day.
- When experiencing strong emotions, such a lifestyle should facilitate maintaining your composure and continuing your conversation or task.

Next time you find yourself in a stressful situation involving interpersonal conflict try practicing one or two of the suggestions below:

- Recognize that others will not always be willing or capable of understanding or accepting your point of view.
- Present your point of view clearly but diplomatically.
- Refer to the “Books and Videos” section of this guide. The references in this section contain many helpful techniques for dealing with interpersonal conflict situations.
 - ⇒ Evaluate the outcomes of interpersonal conflict situations once you have applied some of these suggestions. Do you feel differently? How are others affected by your new behaviour?

Demonstrate active listening to reduce conflict and stress.

- Summarize the main points being expressed by others.
- Be sure to communicate the content of what was said as well as the feeling behind the content. This demonstrates to others that you are actively listening.

Use quick stress relievers.

- Implement, with the approval of a physician, a regular (i.e. at least three times a week) exercise program, including cardiovascular training, muscular conditioning and stretching exercises.
- Reduce your intake of caffeine, alcohol and, if you smoke, nicotine. All these drugs can significantly decrease your ability to cope with strong emotions such as stress.
- Use a support group of friends, colleagues and family members. Follow these suggestions:
 - ⇒ list all the people who can support you in work-related and personal stressful situations
 - ⇒ review your list and determine if you are lacking support in any area
- Identify any gaps in your support network. Take specific actions to strengthen your support network (e.g. ask your colleagues and friends where they have found helpful support).
- If personally criticized, calmly explore reasons for the criticism.

Use humour.

- The appropriate use of humour can lighten your load and make it easier to maintain diplomacy.
- If you find work is making you angry or you are getting frustrated, remove yourself from the situation and chat with your colleagues to laugh it off.
- Recognize the right and wrong times to use humour. Do not use humour with someone who is angry with you or your department -- be serious in helping them.

**When faced with a crisis, identify those people required to handle the problem.
Have them meet and explain the problem.**

- Assign responsibilities and set up procedures for keeping you informed.
- Work with the group/individual to ensure that a resolution is delivered that meets the needs of the agency and/or client.
- At the conclusion of the crisis ask the group/individual what was learned? How can this type of situation be avoided in the future? Who will take responsibility to ensure that this does not happen again?
- Analyze the results of your discussions.
 - ⇒ Review your initial starting position and that of the other person. How much closer were both of you at the end of the discussion?
 - ⇒ Review what you thought and felt at the time. Did you experience strong emotions? Think about what you did to control your feelings.
- Plan a strategy for incorporating what you have learned to successfully resolve your next difficult negotiating situation.

Role play a difficult client situation with a colleague.

- Watch for your own emotional responses and practice responding calmly.

Level 3-4 Activities

Develop a win-win strategy for resolving conflict and minimizing stress.

- Identify a difficult situation where you have a significant disagreement with a client/colleague.
- Categorize your typical negotiating style into one of the categories below (be honest with yourself).
 - ⇒ **Win-Lose** -- where you typically see yourself as winning and the other party losing in the process
 - ⇒ **Lose-Lose** -- where you typically see both yourself and the other party losing
 - ⇒ **Lose-Win** -- where you typically see yourself losing or giving in during the process
 - ⇒ **Win-Win** -- where you see both you and the other party being satisfied with the outcome
- Meet with your manager, review the situation and ask for suggestions on how you and the individual can move closer to a win-win agreement.
- Apply your win-win strategies to resolve the conflict.
 - ⇒ find a goal which both you and the individual can agree and focus on.
 - ⇒ maintain a focus on your common objectives.
 - ⇒ monitor your thoughts and feelings throughout the discussion. Note the reactions you are having to what the individual says. How does the individual respond to your actions?
- Discuss the results of the meeting with your manager.

Practice calming others.

- Be on the lookout for situations where you can help others calm down. When there is an opportunity, seize the chance to practice calming others.
- Try a variety of techniques such as:
 - ⇒ calmly listening to the person who is upset.
 - ⇒ speaking in a calming tone of voice.
 - ⇒ holding yourself in a relaxed, non-threatening way (body language).
- After each incident reflect on what worked and what didn't.
- You can be confident that with practice you will become increasingly skillful at calming others.

Identify one or two situations in the recent past (home or work) where you demonstrated high levels of self control and one or two situations where you had difficulty maintaining self control.

- Make notes about the techniques you used in the situations where you demonstrated high levels of self control.
- Think about whether your previously successful techniques would have helped in the situations where you had difficulty maintaining self control. Plan to use them the next time a similar situation arises.
- If you feel that the techniques would not have helped, or you tried them and were not successful, identify what it was about the situation that made it different and jot down some ideas or techniques that you might try next time. Keep a record of what happens to further evaluate.

Keep a log, over the next month, of situations that are particularly stressful and involve interpersonal conflict and stress.

- Write down the key points describing the situation.
⇒ When did it occur, who was involved, what was the outcome?
- Note how you reacted to the situation. What did you think, feel and do at the time? What was the outcome? Were you satisfied with the result of your behaviour?
- Review the situations and try to identify any common themes.
- Recognize if there are specific types of situations that cause you to react badly.
- Work on improving your reaction to stress.
- Use the chart below to keep track of these situations.

Stressful Situation	Reaction	Outcome

Build awareness of what you are feeling in stressful situations.

- Stop and ask yourself the following questions next time you are in a stressful situation:
 - What is happening right now? What am I:
 - ⇒ doing? (pause)
 - ⇒ thinking? (pause)
 - ⇒ feeling? (pause)
 - What do I want to do right now? Think about your objectives in the current situation. What do you want to achieve?
 - What am I doing that is getting in the way of achieving my objectives? Think about what you want to do next. Say to yourself "I choose to . . ."
 - Be clear about your choice of action, then do it.

Investigate the barriers that prevent agreement in conflict situations.

- Determine the root cause for disagreement. Consider the following categories:
 - ⇒ Facts -- what are the issues? what actually happened? what is the data or information?
 - ⇒ Methods -- how should the situation be resolved? what are the steps?
 - ⇒ Goals -- what needs to be accomplished? What outcome would best satisfy everyone involved?
 - ⇒ Values -- what is important to each individual or group involved in the situation?
- Use the above categories to help establish the source of the disagreement or conflict. Discuss these sources with those involved to help clarify assumptions and, in doing so, reduce tension and clear the way for removing barriers to resolution.
- Listen to the viewpoints of others as if you are hearing them for the first time. Be open to new ideas and perspectives.
- Consider how the other person views the situation. Seeing the situation from the other person's perspective may provide new insights to resolving the conflict.

Identify someone in your agency (e.g. a colleague or employee) who shows excellent Self-Control.

- Ask your colleagues for their opinion on the person you have identified. Are there any other people whom your colleagues might also recommend as good role models?
- Observe how the person you have identified handles situations where Self-Control is especially important.
 - ⇒ Ask the person you have identified to describe the kinds of situations he or she faces that require self control.
 - ⇒ Observe the person during an actual situation. Note what the person actually says or does.
 - ⇒ Afterwards, ask the person to describe the thoughts and feelings he or she had during the interaction.
- Review your findings with your colleagues. Apply two or three techniques you learned at your next opportunity.

Ask for your colleagues to give you feedback on how to handle stressful or difficult situations.

- Identify the different types of situations where you have had difficulty controlling your emotions (e.g. interacting with a difficult or demanding customer).
- Ask your colleagues to describe what they have observed you doing or saying (probe your colleagues for specific examples).
- Ask your colleagues for suggestions on how you might handle these situations more effectively in the future. Note their suggestions and apply them to the next time you face a stressful situation with a client or co-worker.
- Meet with your colleagues periodically to review your progress.

Ask your manager to involve you in resolving difficult or stressful client situations.

- Use these situations as opportunities to practice diplomacy.
- Ask your manager to give you feedback on how you managed the situation.
- Take notes on how you thought you did and discuss it with your manager.

Books and Videos

Quantum Healing: Exploring the Frontiers of Mind/Body Medicine, by D. Chopra (Bantam Books, New York, 1989).

This book shines with the mystery, wonder and hope of "miraculous" recoveries from cancer and other serious illnesses. Dr. Chopra brings together the most recent research on this topic from Western medicine and the Ayurvedic medical tradition.

Body, Mind and Sport: The mind-body guide to lifelong fitness and your personal best, by J. Douillard (Crown Harmony Books, 1994).

This book discusses the attainment of peak performance through ayurveda and exercise. Dr. Douillard describes ayurvedic fitness as a tailor-made lifestyle and fitness routine to individual body type, and a precursor to more enjoyable living. "It's not just exercise, but a lifestyle" claims Douillard.

Behaviour patterns, stress, and coronary disease, by D. C. Glass (Wiley-Erlbaum, NY, 1977).

Coronary-prone behaviour, by T. M. Dembroski, S. M. Weiss, J. L. Shields, S. G. Haynes, M. Feinleib (Springer, NY, 1978).

Power: The Inner Experience, by D. C. McClelland (Irvington, NY, 1976). [pp. 173-192 on protest masculinity].

McClelland attempts a deeper motivational explanation for male impulsive aggressive "macho" behaviour in a study of Mexican culture. A good source of information on impulsive aggressive behaviour.

Attitude: Your Most Priceless Possession, by Elwood N. Chapman (Crip Publications Inc., Calif., 1995)

A practical, workable guide to better human relations. Chapman's famous for attitude development seminars teaches how you can maintain and transmit a positive attitude by anticipating successful encounters.

Stress for Success, by Peter Hanson, M.D. (Collins Publishers, 1989).

Focuses on the major problems and pressures of today's workplace and explains how to deal with its most stressful challenges: handling corporate mergers and acquisitions, managing techno-stress and the problems of the computerized workplace. How to affirm leadership but avoid the bad-boss syndrome.

Seven Habits of Highly Effective People, by Stephen R. Covey (Distican, 1990).

This book presents a holistic, integrated principle-centered approach for solving personal and professional problems. Covey reveals a step-by-step pathway for living with fairness, integrity, honesty, and human dignity. Topics include: being proactive; and principles of cooperation and leadership.

Perfect Health: The Complete Mind/Body Guide, by D. Chopra (NY: Harmony Books, 1989).

This book presents to its readers easy steps on how to relax the mind and body in stressful situations.

Type A Behaviour and Your Heart, by Meyer Friedman (Fawcett, 1982).

This book contains good descriptions of Type A behaviour and readers can easily identify with some of the characteristics described. The Type A pattern is probably the best researched personality syndrome in psychology.

Let's Talk: An Introduction to Interpersonal Communication, by Freda Sathre-Eldon, Ray Olson and Clarris Whitney (Simon & Schuster, 1981).

An easy to read handbook covering topics on listening skills, self-awareness, non-verbal communication and conflict reduction.

Feeling Good, by David Burns (Penguin, 1981).

This book, written by a renowned cognitive psychologist, outlines simple step by step techniques to control the negative thought patterns that lead to lack of self-confidence and low self-esteem. Highly recommended.

The movie “A House of Your Own”.

This movie vividly presents what happens to an otherwise sympathetic character who keeps expressing her anger and self-centeredness with physical aggression.

Service Orientation (SO)

Definition:

Service Orientation is about identifying and serving clients, the public, colleagues, partners, co-workers and peers to best meet their needs. It is the ability to understand those underlying needs of others and to use this information to benefit those they serve/support - both clients and others within the developmental services sector. Individuals demonstrating this competency are able to put himself/herself into the mind of the client and understand needs from the client's/individual's point of view. It includes focusing one's efforts on discovering and meeting the needs of the client, including unexpressed and/or future needs, in order to develop a broad understanding of those they support.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ asking clients, partners and co-workers questions in order to better understand their needs 	<ul style="list-style-type: none"> ▪ just following the usual process or procedures
<ul style="list-style-type: none"> ▪ being "obsessed" with client satisfaction and loyalty 	<ul style="list-style-type: none"> ▪ always feeling burdened by "yet another client issue"
<ul style="list-style-type: none"> ▪ creatively identifying the right solution to client needs 	<ul style="list-style-type: none"> ▪ limiting solutions to existing services
<ul style="list-style-type: none"> ▪ demonstrating a concern for the needs of clients, partners and co-workers while providing efficient service 	<ul style="list-style-type: none"> ▪ providing efficient but impersonal service
<ul style="list-style-type: none"> ▪ discussing with clients, partners and co-workers their needs and satisfaction with service delivered 	<ul style="list-style-type: none"> ▪ assuming clients, partners and co-workers will let you know if there is a problem
<ul style="list-style-type: none"> ▪ ensuring tough decisions are made in alignment with the client's vision 	<ul style="list-style-type: none"> ▪ placing other priorities ahead of the need to demonstrate active support to the client's vision
<ul style="list-style-type: none"> ▪ following up to ensure that commitments made to the client are kept 	<ul style="list-style-type: none"> ▪ assuming everything has been taken care of because you asked someone else to do something
<ul style="list-style-type: none"> ▪ integrating specific client knowledge with general market knowledge to create effective retention strategies 	<ul style="list-style-type: none"> ▪ assuming the client will always return to you

Continued on next page

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ knowing when to take a long-term perspective in addressing a client issue and when to focus on short term issues 	<ul style="list-style-type: none"> ▪ always taking the same approach regardless of client needs
<ul style="list-style-type: none"> ▪ maintaining communication with clients, partners and co-workers to better understand their needs and their concerns; seeking to build trust 	<ul style="list-style-type: none"> ▪ saying as little as possible so that you can move on to the next priority/issue
<ul style="list-style-type: none"> ▪ operating with a strong sense of urgency and taking responsibility to solving client problems quickly, without having to ask for permission 	<ul style="list-style-type: none"> ▪ delegating client, partner and co-worker problems to someone else
<ul style="list-style-type: none"> ▪ recognizing what is blocking your agency's focus on client service 	<ul style="list-style-type: none"> ▪ insisting on client service without being clear about what you mean
<ul style="list-style-type: none"> ▪ regularly reviewing client files to identify services that would add value 	<ul style="list-style-type: none"> ▪ waiting for the client to ask you about a service they are not currently using
<ul style="list-style-type: none"> ▪ sharing client issues or problems with management in order to address them 	<ul style="list-style-type: none"> ▪ hoping the client issue will disappear
<ul style="list-style-type: none"> ▪ understanding the viewpoint and objectives of different clients, community partners and co-workers and why these can, at times, conflict with the interest of the agency 	<ul style="list-style-type: none"> ▪ steering clear of trying to deal with the sometimes conflicting needs and viewpoints of different people
<ul style="list-style-type: none"> ▪ working hard to build and maintain long-term relationships with clients, community partners and co-workers 	<ul style="list-style-type: none"> ▪ focusing on short-term interactions with clients, partners and co-workers without considering the long-term implications

Developmental Activities

Level 1-2 Activities

Establish a detailed call plan for clients, community partners and co-workers.

- Create a weekly and monthly call plan to ensure that you are meeting with your clients, partners and co-workers on a regular basis and providing them with adequate information.
- Make regular calls to clients, partners and co-workers to maintain adequate service levels.
- Personally follow-up on any unanswered questions or requests in a particular client call by doing necessary research. Respond to the client within the week.
- A useful way to respond to client needs is to ask them to help you write these lists:
 - ⇒ things you should start to do;
 - ⇒ things you should stop doing;
 - ⇒ things you should continue to do.

Reflection Tips:

* Keep track of client reactions in order to track which response was most effective.

Ask your manager for feedback on your service orientation skills.

- Ask for specific, behavioural feedback on your client, community partner and co-worker responsiveness.
- When you are given feedback, do not respond defensively. View this as an opportunity to learn to become more responsive to clients, community partners and co-workers.
- Work with your manager to identify tactics to change/improve behaviours that were identified as lacking, deficient, or inappropriate.

Reflection Tip:

* Are there patterns that emerge from the feedback – these may help you to identify areas for improvement?

Practice open communication.

- On a day-to-day level, work at responding to people in a helpful, supportive manner.
- Take the time to understand their real needs and what it would take from you to assist them effectively.
- Reflect on how you can apply this understanding to clients, community partners and co-workers.

Respond to client, community partner and co-worker needs in a timely, responsive manner.

- Listen carefully to requests or complaints and probe for all relevant information.
- Test your understanding by summarizing what you heard.
- Address their needs in a responsive manner. Inform them of the specific actions that you will take, and make clear when you will be back in touch to report your progress.
- Work together to identify alternatives that might suit their needs.
- If you need to make special arrangements to satisfy the needs of those involved, do so quickly. Solicit support if you need help to break down barriers.

Clarify expectations of the client.

- When servicing clients, clarify their expectations. Identify all key deliverables and their expected delivery date.
- Write down what has been agreed upon, including some of the following, if applicable:
 - ⇒ instructions or guidelines needed in order to execute the work;
 - ⇒ any interim progress reports and final reports required;
 - ⇒ the priorities of each activity;
 - ⇒ who will perform each activity or provide assistance;
 - ⇒ completion dates.

Learn how your work affects your clients, partners and co-workers.

- Find out more about how your work fits into the bigger picture.
- Understand the flow of work from others to you and from you to others. This knowledge will help you better understand their needs.
- Use a specific example of a client interaction to trace through what parts of the agency were involved in meeting the client's needs.
- Consider your role in how the agency addresses client needs.

Reflection Tips:

- * Use this information to reflect on how your work addresses your client's needs.
- * Consider how this understanding can assist you in retaining clients by meeting their needs.

Ask your manager how client and partner decisions are made within your department.

- When a new client/partner initiative is made in your department, ask your manager to review the event with you in order to understand the reasons behind the decision.
- Probe for informal decision making processes or agency constraints or norms which led to the decision.
- Ask for advice on ways in which you can frame your ideas and recommendations on client/partner service to make them attractive to the others.

Think of something extra you can do for a client or partner. Do it.

- This could be making a special effort to help someone overcome a problem, such as taking some extra time to explain the reasons for a certain procedure or resolution.
- Follow through on commitments in a timely manner and take the time to explain “why” certain procedures, policies or forms exist.
- It may be just sending them information on another program/service, or suggesting how they can contact you directly in the future.

Look at both positive and negative examples of client service.

- Communicate your ideas to others.
- Identify those behaviours you could incorporate into your own service delivery.
- Keep a log of client related actions/service-related actions or behaviours that you come across in your everyday dealings that you feel demonstrate the kind of service the agency should be providing.
- Watch for examples of how “not to” service the client as well.
- What did you like about the service you received? What specific behaviours led to good service?
- Write down the behaviours you observed. Identify any patterns.

Reflection Tip:

* Look for examples, such as how they respond to your personal needs and expectations, respond to complaints, and make the relationship effective and memorable.

Identify someone who demonstrates exemplary client service. Learn from them.

- For example, observe how a colleague explains a service to a client.
- Ask questions. You want to understand what the thinking behind what he or she did and said in their client interactions (e.g., ask him or her to identify the clients' needs as they see them).
- Do this with a number of colleagues and draw out the effective behaviours they have in common.
- Try to incorporate these behaviours in your own ways of dealing and interacting with clients.

Reflection Tip:

** Try to identify these behaviours in others. The first step in learning a new behaviour is being able to accurately identify it.*

Level 3-4 Activities

Demonstrate commitment to the client.

- Takes personal responsibility for ensuring that client service issues are addressed promptly; follows through until the client's issue is resolved.
- Start a reading file of articles about your clients and their needs. Share this with colleagues who have similar clients.
- Shares information with others to ensure that the client's concerns are appropriately understood and addressed on a timely basis.

Improve your service orientation by trying some of the following activities.

- Take responsibility to resolve a client's problem if it goes beyond the normal demands of the job.
- Use your knowledge to think through what would be best for a client, partner and co-worker – and act accordingly.
- Conduct an interview with a client to determine his or her needs and satisfaction with current services.
- Immediately inform a client if problems in your department will impact on them.
- Take personal ownership for a client's concerns by acting to address them in a timely fashion.

Reflection Tip:

** Be sure to focus on both clients and community partners, as appropriate to your role.*

Ask your manager about a particularly challenging or difficult client problem he or she is currently involved with. Ask to work with them to resolve the issue.

- Prepare yourself by really learning about general and specific client issues.
- Get ideas from your colleagues, read about client issues, and test ideas with others.
- Apply your expertise to consider what will be best from the client's point of view for the particular situation that your manager is facing.
- Working with your manager, act to ensure the client gets what he/she needs.

Reflection Tip:

** Make note of the specific actions that your manager takes. If you're not sure why a particular action was taken, make sure you ask your manager.*

Compare successful and difficult client interactions.

- Review your activities for the past week and identify one successful and one difficult client interaction.
- Discuss your observations with your manager and then make note of any advice he or she provides you with to improve the client interaction next time.
- Take action to improve on your activities in future similar situations.
- In a similar situation with that client make a point of testing your improvement tactics. Ask the client for feedback as appropriate.

Reflection Tip:

**Also be aware of similar interactions that might be happening between your colleagues and their clients. Discuss with them their methods for handling this particular situation, and the reasons behind their actions.*

Be aware of your ability to respond to client or partner needs in a proactive, responsive manner.

- Continuously monitor for possible requests or complaints and probe for all relevant information.
- Test your understanding of the client or partner by summarizing what you heard.
- Address client/partner needs in a proactive manner. Inform the client or partner of the specific actions that you will take, and make clear when you will be back in touch with the client to report your progress.
- Make a note of how they reacted.
- Reminder: A useful way to respond to their needs is to ask them questions that will help you compile three lists:
 - ⇒ things you should start to do;
 - ⇒ things you should stop doing;
 - ⇒ things you should continue to do.

Develop alternative ways of looking at client service problems.

- Describe the client service problem in a brief statement.
- Identify the key factors in the problem from your perspective. Pretend you are going to tell someone a story about the problem. What are the three or four key characteristics or details you would want to convey?
- Identify the key factors in the problem from the perspective of others. Ask yourself the following questions:
 - ⇒ How would management view this problem? What factors would they see at their level?
 - ⇒ How would your colleagues in other departments view this problem? What factors would they see from their perspective?
 - ⇒ How does the client view this problem? What are their most important issues?
- Prepare and present a summary of your findings to a colleague whose level of service orientation you respect.
- Identify any immediate steps you could take on your own to help resolve the problem. Take the first steps.

Reflection Tip:

** A key step in ensuring that this problem is prevented in the future, is sharing your experience and your suggestions with management.*

Keep a list of any compliments you receive from clients or partners on your desk.

- Keep track of how many work-related compliments you get each month.
- Strive to provide such good service that you receive an increasing number of compliments.
- This list will remind you of the rewards of going above and beyond expectations to provide good service. It will also keep track of how well you are doing.

Create your own systems to keep track of work.

- Set up simple systems to keep track of your and others activities with clients and partners.
 - ⇒ For example, you could create a form to track problems.

Improve your relationship with one or two community partners.

- Set a goal to have at least one conversation each week with a community partner you have identified.
- Gather information about the partner's role, function, and responsibilities before initiating conversation.
- During the conversation, focus on uncovering the unstated needs of each partner. Ask about:
 - ⇒ objectives;
 - ⇒ key measures of success;
 - ⇒ issues impacting them or their work.
- Resist telling them what you could do or offering a solution before listening to them.

Volunteer to work with difficult clients.

- Tell your manager that you would like to gain experience dealing with difficult clients.
- Tell them that if they are having a client problem, then you would like to be part of the solution.
- Do some research to better understand their needs:
 - ⇒ How were past issues resolved?
 - ⇒ Are there unique client requirements that make it more challenging to meet their needs?
 - ⇒ Make a point of clearly introducing yourself to the client and pointing out that you are interested in exploring their needs further to provide the level of service they require.

Spend time talking with your colleagues about what Service Orientation means to them.

- Share real life examples of excellence, describing the skills and behaviours that would need to be demonstrated.
- Talk about the value of strong Service Orientation to the client.
- Describe how Service Orientation makes a difference to your success.
- Identify and discuss the consequences of NOT making oneself fully available and taking action beyond normal expectations during critical periods.

Identify opportunities to meet and exceed expectations.

- Think about all of the different groups of clients and partners you currently have (i.e., the groups of individuals who receive a service from you). Be sure to include both internal and external stakeholders in your list.
 - ⇒ For example, you may identify segments of the population/community that are not as well represented. Among your internal stakeholders you may identify your colleagues or co-workers in other departments.
- List the expectations each group of stakeholders has of you. In other words, what criteria do they use to determine if the service you provide is acceptable to them?
- Verify your list of expectations by asking people in each group what they expect. How accurate was your original assessment?
- Think about how to best meet the needs of each group. Share your ideas with your peers.

Reinforce your “passion” for client centricity and encourage others to develop commitment, by trying some of these.

- In discussions with your workgroup, emphasize how the current work effort or current work issues are related to key clients or community partners.
- Engage people in conversations about the relationships they have with these individuals.
- When goal setting with your team ensure that they are focusing on the client as one of the goals to which their specific efforts will deliver.

Level 5-6 Activities

Solicit feedback from clients.

- Identify the information you want to collect. For example:
 - ⇒ Which services do client's use most often and why?
 - ⇒ Are the services offered exactly what they need? What needs are not being met?
 - ⇒ What services will they need in the future?
 - ⇒ What are the advantages and disadvantages of services offered by other agencies?
- Determine how you will collect the information (e.g., questionnaires, focus groups, one-on-one interviews).
- Determine how frequently you will collect the information. It is important to collect the information on a regular basis to address current or emerging issues or needs.
- Prepare a report of your findings.

Establish a climate within your department that consistently demands service excellence from all team members.

- Take the point of view of the client when making decisions.
- Create opportunities to empower front line employees to resolve client complaints on the spot rather than escalating them.
- Monitor the implementation of service solutions to ensure similar problems do not recur.
- Consider the impact of the data obtained from surveys, focus groups and other feedback mechanisms and identify strategic opportunities to improve the client's experiences and perceptions.

Enlist the support of your manager to make a change that will improve client service.

- Identify the hidden resources you need to implement a new idea, project or plan, aimed at improving client service.
- Develop a plan to do what is necessary to ensure the support you need.
- Take specific steps to learn more about individuals throughout the agency who provide important client support, or who can help you accomplish your goals.
- Monitor the success of your plan and modify it with your manager as you go along.

Identify opportunities for collaboration with people from other departments on client initiatives or programs.

- Work with your manager to establish a task force which would be able to focus on these programs.
- As a group, explore potential opportunities that could benefit all areas. When discussing possible plans of action, try to come to a consensus on the following issues:
 - ⇒ Who are your clients?
 - ⇒ What do your clients expect from you in the immediate and long-term?
 - ⇒ What would be the biggest complaint clients have?
 - ⇒ How well are we currently meeting client expectations?
 - ⇒ What gets in the way of effective client service?
 - ⇒ What suggestions do we have to improve service?
- Generate solutions to improve Service Orientation.
- Transfer these solutions into an action plan.

Reflection Tip:

** Use these ideas to begin to formulate a longer term plan that focuses on satisfied clients.*

Act as a trusted advisor.

- Become intimately involved in the decision making processes of clients and community partners.
- Get asked to consult on a wide range of issues, even those outside of one's own area of formal expertise.
- Demonstrate ability to provide counsel without abdicating or compromising one's obligations with mutual accountability.
- Conduct research (e.g., formal research in industry/sector journals and informal conversations with subject matter experts) to better understand the changes that will likely have an impact on your clients needs and interests over the next few years. Map out the changes that are likely to occur and develop plans for how your agency may need to alter its services to continuously meet demands into the future.
- Ensure that anyone providing client service has the required resources (e.g. the necessary skills, tools, and support) to deliver excellent service.
- Challenge your management team to deliver excellent client satisfaction, advocating for exceptional service, innovative client service approaches, and attention to and resolution of client issues and problems.

Conceptualize and articulate your vision of Service Orientation into the future.

- Review all the key events and initiatives linked to your vision of Service Orientation.
- Anticipate the reasons behind potential resistance to some initiatives and think about what actions you can take to alleviate that resistance.
- Build a persuasive case for these initiatives that is personally meaningful to people and develop a communication plan to articulate these initiatives. Present the message to a select group for feedback on the content. Make any necessary changes.
- Implement the communication plan to your department as well as others within the agency that will be impacted. Ensure the vision is visible to all employees.

Reflection Tips:

- * Make notes of your thoughts on each of these. Refer back to those notes periodically, to look for trends.
- * Develop multiple two-way communication channels so that you can effectively monitor the agency's reaction to the message and make yourself available to answer any questions and clarify your vision.

Consider role mapping the players involved in creating a culture of client centrality with your manager.

- Use a role map to help you identify:
 - ⇒ The key individuals/departments necessary to sponsor client focus;
 - ⇒ The political terrain of the change environment that must be addressed;
 - ⇒ The dynamics of influence that may affect the outcome of the change effort.
- When do I create a role map?
 - ⇒ Early in the process when you have a clear understanding of how you will achieve your vision.
- What is the process for creating a role map?
 - ⇒ Begin the process by dividing your project into key components or phases. For example, if you are implementing your vision in phases, you will want to create a role map for each phase;
 - ⇒ Ask the questions outlined below. Note that not all questions are relevant in every situation.
- Gather information to answer the following questions:
 - ⇒ Who are the main individuals/groups affected?
 - ⇒ Is the vision going to be implemented in phases?
 - ⇒ Based on the responses to the questions, begin drafting your role map(s).

Books and Videos

Customer Service: A Practical Approach, by Elaine K. Harris (New Edition: Prentice Hall, 2006; Original: Prentice Hall, 2002).

Customer Service: A Practical Approach was created in response to the need for increased customer service and for qualified customer service professionals. It tackles the important issues facing customer service providers and customer service managers today. Individual success is contingent on how effectively fundamental skills are mastered and carried out. In addition to important content, special emphasis is placed on self-assessment and the mastery of those skills and abilities that are missing from the average employee's resume.

The Relationship Edge in Business: Connecting with Customers and Colleagues when It Counts, by Jerry Acuff & Wally Wood (John Wiley & Sons, 2004).

With real case studies and step-by-step guidance, The Relationship Edge in Business shows you how to: Develop the right mindset—understand that personal relationships are vital to business success; Ask the right questions—discover the common ground you share with others; Do the right thing—be truthful and straightforward or you'll undermine the goodwill you've worked so hard to build.

Customer Experience Management: A Revolutionary Approach to Connecting With Your Customers, by Bernd H. Schmitt (John Wiley & Sons, 2003).

In this book, the author introduces the five-step CEM process, a comprehensive tool for connecting with customers at every touch-point. A must-read for senior executives, marketing managers, and anyone charged to drive growth and spur change.

Service Magic: The Art of Amazing Your Customers, by Ron Zemke and Chip Bell (Dearborn Publishing, 2003).

According to a recent study, one of the top five challenges facing CEOs today is improving customer service. "Service Magic presents inventive, fun, and unexpected ways to surprise and delight your customers and maintain their loyalty.

Customer Care Excellence: How to Create an Effective Customer Focus, by Sarah Cook (Kogan Page Ltd, 2002).

This book demonstrates, in a clear and practical way, how to develop and sustain a customer-service focus. Customer Care also explains how to deliver an excellent service at the front line, covering personal service, speed of delivery and service recovery.

The Trusted Advisor, by David H Maister, Charles H. Green & Robert M. Galford (Simon & Schuster, 2001).

This is an excellent book for anyone who wants to attain a relationship of trusted advisor. It is full of examples and practical advice. As you read, decide if this role is where you want to move. If so, try putting the ideas to work in your current role.

180 Ways to Walk the Customer Service Talk, by Eric Harvey (Performance Publishing Company, 1999).

This book is packed with powerful strategies and tips to cultivate world-class customer service and promises to be the answer to getting everyone "Walking the Customer Service Talk" and building a reputation of service integrity

Satisfying Internal Customers First, by Richard Chang & P.K. Kelly (New Edition: John Wiley & Sons, 1999; Original: Jossey-Bass Publishers Inc., 1994).

This book demonstrates how the principles useful for satisfying external customers can be applied to internal customers as well.

Customer Intimacy: Pick Your Partners, Shape Your Culture, Win Together, by Fred Wiersema (New Edition: Wedding Solutions, 1998; Original: Time Warner, 1996) – also available on audio cassette.

This book reveals why the most successful businesses are those that build close win-win relationships with their customers - not just strong working relationships and good business relationships, but "customer-intimate" relationships. Customer intimacy is more than being customer-driven and sensitive to the customer's every demand. These companies seek solutions that exceed immediate needs and demands. They push the traditional boundaries until they find and deliver the best total solution for each client.

Customer Satisfaction is Worthless, Customer Loyalty is Priceless: How to Make Customers Love You, Keep Them Coming Back and Tell Everyone They Know, by Jeffrey Gitomer (Bard Press, 1998).

A nationally syndicated columnist and sales trainer shows how to convert "satisfied" customers into "loyal" customers. Includes real-world techniques, helpful checklists, inspiring stories, and thought-provoking self-tests.

Customers as Partners: Building Relationships That Last, by C. R. Bell, (Berrett-Koehler Publishers, 1995).

This book goes beyond Customer Service, to explore the real personal relationships that sustain every successful enterprise. It examines the qualities that form the core of all lasting relationships and describes a way of business where personal interactions, not sales take center stage. When you put the relationship first, customers and clients will respond in kind and will feel themselves to have a personal stake in your success. They will act as benefactors and partners supplying feedback; recommending you to others, and forgiving mistakes because they feel a reciprocal long term commitment.

The video, “An Invisible Man Meets the Mummy” (Owen Stewart Performance Resources Inc., 1-800-263-3399, www.owenstewart.com).

Participants will learn that flexibility, policies and procedures are no good if they alienate your customer and their needs. They will learn about planning and attitude. Finally, they will learn about measurement-tracking progress to provide effective tools for change.

The video, “A Passion For Customers”, by Enterprise Media Inc. (International Tele-Film, 1-800-561-4300, www.itf.ca).

Tom Peters takes viewers on location to five leading organizations that provide superior customer service and details the essential characteristics that have given them their competitive edge.

“BBC Training videos”, by Phil Crosby.

In this program, Phil Crosby provides the information to help managers tackle quality issues. The core message is that success in quality revolves around everyone in the organization having the same approach to quality. The program consists of training notes and 2 videos.

The video, “But I Don’t Have Customers”, by American Media (International Tele-Film, 1-800-561-4300, www.itf.ca).

This program teaches employees the steps and techniques for defining their internal customers and how to serve them appropriately. By asking questions, listening and keeping their word, employees can create a productive working environment which will reflect on external customers as well. As employees learn to value each other, it will result in increased performance throughout the organization.

The video, "Customer Service: The Film", by Barr Films (International Tele-Film, 1-800-561-4300, www.itf.ca).

This video focuses on specific customer service practices, as well as the need for every person in the company to maintain a customer service attitude. It also delivers its most important message — customers who receive bad service are likely to tell at least ten other people of their bad experiences.

The video, "Exceptional Customer Service", (CareerTrack Publications, 1-800-780-8476, www.pryor.com).

This video will teach you about the vital role every member of your organization plays in dealing with customers, and the results of poor teamwork. It will also help you use 11 creative techniques to improve your listening skills and how to diffuse irate customers and turn a potential disaster into something positive. (3 volume Video Set).

The video, "How to Deliver Exceptional Customer Service" (CareerTrack Publications, 1-800-780-8476, www.pryor.com).

This four volume video set is designed to train anyone who ever has contact with customers. Training includes how to build rapport with customers quickly, how to gracefully handle angry or difficult customers; the secrets to staying motivated and projecting an attitude of genuine caring, and how today's service leaders win customers' devotion, loyalty and repeat business.

The video, "In The Customer's Shoes", by Melrose (International Tele-Film, 1-800-561-4300, www.itf.ca).

Most organizations teach their people how to deal with customers, whether face to face or on the phone. But it's no good going through the process unless they have the right attitude to go with it. This program is designed to change attitudes and offers a five step model for getting it right.

The video, "Quality Customer Service" by William Martin (Crisp Learning, 1-800-446-4797, www.crisplearning.ca).

This 20-minute training film is based on a book written by William Martin, Ph.D and focuses on the personal side of making customers happy. It describes the numerous factors—operational and personal—that all combine to create a winning environment.

Values & Ethics (VE)

Definition:

Values & Ethics refers to depicting conduct, dispositions and viewpoints consistent with personal integrity, as well as concern for, and sensitivity to, the fundamental values and ethics of the agency/organization/sector and the profession. It includes the capacity for sound ethical judgement in an ethically complex work environment and in the face of pressures and constraints.

<i>This Means...</i>	<i>This Doesn't Mean...</i>
<ul style="list-style-type: none"> ▪ dealing with people in a direct and candid manner that fosters trust 	<ul style="list-style-type: none"> ▪ “beating around the bush” to avoid confrontation
<ul style="list-style-type: none"> ▪ being receptive to new ideas and open to talking without judgement 	<ul style="list-style-type: none"> ▪ being rigid and not thinking about others’ points of view
<ul style="list-style-type: none"> ▪ taking action which is consistent with own values and beliefs 	<ul style="list-style-type: none"> ▪ taking actions that may be associated with unethical practices
<ul style="list-style-type: none"> ▪ being honest with others about potential implications of change 	<ul style="list-style-type: none"> ▪ neglecting others’ feelings and concerns to get your point across
<ul style="list-style-type: none"> ▪ being honest with the client about all available options 	<ul style="list-style-type: none"> ▪ being rigid and not thinking about the client’s point of view
<ul style="list-style-type: none"> ▪ recognizing own mistakes and publicly admitting them 	<ul style="list-style-type: none"> ▪ hiding behind the truth in fear of being reprimanded
<ul style="list-style-type: none"> ▪ having the confidence to stand up for your opinions and beliefs, even in difficult situations 	<ul style="list-style-type: none"> ▪ letting others convince you of a course of action that is against what you stand for
<ul style="list-style-type: none"> ▪ challenging unprofessional behaviour, unsafe or unfair working practices 	<ul style="list-style-type: none"> ▪ keeping quiet when others with more positional power act unethically or for personal gain
<ul style="list-style-type: none"> ▪ conveying compassion and honesty even in the hardest times 	<ul style="list-style-type: none"> ▪ letting unethical behaviour/directives continue because of strict deadlines or rigid deliverable timelines
<ul style="list-style-type: none"> ▪ develops others within the agency and sector to value ethics, standards and fair conduct to ensure the profession remains strong into the future 	<ul style="list-style-type: none"> ▪ failing to use your authority and experience to set a good example around ethical practice for employees.

Developmental Activities

Level 1-2 Activities

Ask for Support.

- Ask your manager for support or ideas on how you can handle difficult situations.
- Ask your manager to provide examples of when he/she was in a difficult situation either with a client, an employee or community partner.

Practice how to make agreements and commitments to others. Consider some of the following guidelines:

- Choose your commitments carefully. Figure out how you will follow-through on the agreement before making commitments to others.
- Resist the tendency to make commitments in order to buy more time or keep others from bothering you.
- Keep a running list of the commitments or indirect promises you have made to others.
- Think about the reasons behind making the commitments in the first place (to avoid harsh feelings, to escape pressure, to buy time, etc.).
- What do you begin to notice about your motives and reasoning when accepting commitments that you are unable or unwilling to fulfill later?
- Use this information to build strategies to guard against making empty promises and for managing your calendar.
- Check off those you have followed through on, and decide to what extent you were able to deliver on the promises you made to others.

Reflection Tip:

* Become familiar with the patterns that emerge from this exercise.

Solicit input from your manager on situations that tested your values and ethics.

- Follow-up with your manager when you are faced with a difficult situation with a client.
- Communicate your intentions to your manager, openly and honestly.
- Ask for input and ideas on how to approach the situation with the client and guide the client towards an appropriate solution.

Reflection Tip:

* Based on the feedback, what might you do differently in future?

If a deliverable is falling short, make sure that impacted groups and individuals are notified right away.

- Be proactive, not reactive when you know a commitment to a client or community partner will not be met.
- Talk to the appropriate individuals to find out the impact of non-delivery and agree on mutually beneficial next steps to get things back on-track.

Focus on building trust and credibility with your clients, colleagues and community partners.

- Ask others to give you feedback on their perceptions of your honesty and ethical behaviour with those individuals that you deal with regularly.
- Be honest with your constituents about what you can and cannot commit to.
- Periodically ask yourself if you are providing everyone with all the necessary information.

Reflection Tip:

** What level of value and ethics do you expect in return from your clients or team members?*

Use clear statements of your personal values and code of ethics.

- Try some of the following behaviours:
 - ⇒ State the behaviours that violate the department's values.
 - ⇒ Be willing to honestly admit when you have made a mistake.
 - ⇒ Periodically ask yourself if you are withholding necessary information from others.
 - ⇒ Ask others to give you feedback on their perceptions of your honesty and ethical behaviour.
 - ⇒ Allow others to anonymously submit their impressions of your fairness.
 - ⇒ Assess whether your behaviour towards others is in line with your personal values and ethics.

Reflection Tip:

** Post your personal code of ethics in your calendar to keep you on track.*

Develop a personal set of ethical guidelines for handling sensitive or confidential information.

- With your manager, review agency guidelines for ethical conduct.
- Reflect on these guidelines, and the implications for your role.
- Make suggestions on how to handle sensitive or confidential information in the agency while still ensuring important issues are dealt with promptly.

Spend some time exploring the values and principles that you feel most strongly about.

- Write down the most important ones. Next to each one, examine whether your behaviour is consistent with these values.
- Ask colleagues to monitor your interactions and determine how consistent you are with your expectation, interactions, principles and performance. Be sure they provide you with specific examples to help you in your development.
- Ask yourself what you would need to do differently in order to live more genuinely and be true to your beliefs.

Reflection Tip:

** How similar are your own personal values and beliefs to those held by others in the agency?*

Clearly, and firmly express your opinion.

- Rather than being indirect or backing off during conversation in which various views are discussed, communicate simply and clearly how you feel about the issue.
- If you feel some hesitancy regarding your opinion about a work-related issue, take some time to list the strengths and weaknesses of alternative points of views.
- Carefully review the list, and critically analyze your views in light of all of the pros and cons. After you have resolved and solidified your opinion, discuss your views with others.
- State your views in a manner that conveys your confidence but does not attack people with different ideas. Disagree tactfully and politely. Have confidence in your ideas and opinions, even though they may be unpopular.

Reflection Tip:

** Be sure to let new information further inform your point of view.*

Improve the level of genuine and honest feedback you provide to others by practicing giving feedback in positive and constructive ways.

- Focus on the behaviour and not the person so that you can provide genuine feedback and avoid harsh feelings and the perception by the other person of being personally attacked.
- Provide specific examples of when the person is particularly effective and when they are less effective.
- Ask others to reciprocate. Be open to their feedback and thank them for their honesty.

Level 3-4 Activities

Act on an issue you feel strongly about.

- Communicate your opinions strongly and with conviction to employees, colleagues or clients.
- Increase your credibility by describing the rationale behind your beliefs and decisions, citing the underlying logic and any supporting data when appropriate.
- Listen attentively and sincerely to feedback, whether it involves a mistake or some other opportunity for improvement.

Reflection Tips:

- * *Explicitly state your confidence in your own judgement. At the same time, ensure that you listen to others so that your confidence does not “shut others down”.*
- * *Be careful that your self-confidence does not come across as arrogance. Be willing to recognize mistakes that you make.*

Champion a commitment to values and ethical behaviour throughout.

- Develop a personal set of ethical guidelines. Encourage others to do so as well.
- Get involved in committees that monitor ethical issues in the agency or across the sector.
- Review the guidelines for conduct.
- Start a discussion group or task force to identify ethical issues of consequence.
- Treat others with the fairness and honesty with which you would like to be treated.

Be authentic and broaden your own self-awareness.

- Seek opportunities to strengthen your self-insight, and then share who you are and what you believe in.
- Think carefully about your personal strengths and weaknesses. Consider the impact these have on the contribution you make to the agency.
- State openly and sincerely your personal position or opinions. Avoid giving evasive or tentative responses to questions.

Reflection Tip:

- * *Do you feel proud of who you are and how others perceive you across the agency and sector?*

Strengthen your confidence in taking a clear stand on difficult or unpopular issues.

- In conversations with others, express your opinion when it differs from someone else's.
 - ⇒ Make sure you think about your opinion before you state it.
 - ⇒ Maintain the other person's self-esteem - don't tell them that you think they are wrong, just state that your point of view is different, then express it, and seek feedback to ensure your opinion was expressed clearly.
- Talk with a colleague who has made a good decision that was initially unpopular.
 - ⇒ Ask him or her how they dealt with other people's opposition and how he or she presented arguments in favour of the decision.
 - ⇒ Incorporate some of the strategies in presenting your own arguments.
 - ⇒ Make a practice of acknowledging that your stand on an issue may be unpopular with others.
 - ⇒ Be sure to explain why your point of view should be considered.

Reflection Tip:

* Pay attention to what you are thinking and feeling during these discussions. What techniques can you use to get through the times you are not feeling so self-confident?

Develop a strategy to face challenging situations with management or others in power.

- Develop a methodology for discussing controversial issues with management or others in such a way that your point of view is clearly but appropriately communicated (in a way that is not construed as disrespectful, hot-headed or belligerent), and apply this methodology to all opinionated workplace discussions, regardless of the rank or status of the other participants.
- Your methodology should include:
 - ⇒ Reviewing items of agreement with the other party before dealing with the disagreements.
 - ⇒ Considering the reasons for opposing points of views.
 - ⇒ Asking the other party for feedback and input about your point of view.

Reflection Tip:

* Learn to debate issues without feeling personally attacked. A constructive debate (one in which all participants maintain a professional, rational attitude and show respect for their opponents) can be an extremely productive problem-solving method, as well as an efficient means for sharing information.

Consider the issues on which you are willing to act against all opposition.

- Clarify for yourself what is and is not worth fighting for.
- If a rare opportunity comes up to act on principle, take it. But be sure you are certain of your ground.
- Plan opportunities to systematically reinforce actions in alignment with these key principles.

Reflection Tip:

* What was most difficult about standing up for your values?

Work on gaining trust with others relative to your programs and the agency's overall image.

- Listen to understand stakeholder positions and use a mediation/conciliation approach to working through issues with people so they feel they have had an opportunity to be heard.
- Present information in a non-technical manner; make an effort to view a problem from their perspective and show sensitivity to their concerns. (i.e., don't preach policy when it does not make sense)
- Admit when you're unsure of a situation. Address sensitive information while keeping the agency's image intact. Speak only to what you have control over. Avoid bringing up sensitive information and stay clear of laying blame to higher authority figures.
- Admit when you don't know something related to a stakeholder issue and offer to find out - don't bluff your way through. Similarly, admit when a mistake has been made. Ensure your responses are in line with your agency's agenda.

Volunteer to work with difficult constituents or on controversial issues.

- Tell your colleagues that you will support them in dealing with difficult clients or controversial issues. Tell them that if they are having a problem you would like to be part of the solution.
- Use these situations as opportunities for modeling desired ethical behaviours for others and act as an ambassador for the agency's image and your own values.

Books and Videos

The Power of Ethical Persuasion, by Tom Rusk (Penguin Books, 1993).

The author applies the ethical principals of respect, understanding, caring and fairness - which together create the foundation for quality in personal life and business - to high-stake conversations.

Credibility: How Leaders Gain and Lose It, Why People Demand It, by James M. Kouzes and Barry Posner (Jossey-Bass, 1993).

This is a guide to help Managers understand the fundamental importance of credibility for building personal and organizational success and for fostering trust within work, family, and the community.

The Seven Habits of Highly Effective People, by Steven R. Covey (Distican, 1990).

This book provides thought provoking ideas on clarifying your personal values and how to translate them into your daily and weekly activities. An excellent read.

Power and Influence: Beyond Formal Authority, by John Kotter (Free Press, 1986).

This book describes the need to develop relationships and effectively Manager those relationships as a complicated but important leadership task. One key element is overcoming resistance and gaining cooperation without formal authority. Kotter explains that lateral relationships are necessary for work to get done and that maintaining good relationships takes effort.

The Cultures of Work Organizations, by Trice and Beyer (Prentice-Hall, 1993).

This comprehensive book illustrates the relevance of organizational culture sin a variety of work contexts, provides concrete examples from actual Fortune 500 organizations, and offers advice on managing cultures in organizations.

The Book of Virtues, by W. Bennett (1993).

This remarkable collection of stories will help children develop that most important quality--character--and includes stories from the Bible, and from sources as diverse as well-known fairy tales, the philosophy of Plato, the poetry of Robert Frost and Maya Angelou and Aesop's fables. Line drawings throughout

PDI's Successful Manager's Handbook (1992):

- ⇒ Establishing Trust and Integrity (pp. 585-587)
- ⇒ Working to Increase Your Integrity (pp. 588-590)
- ⇒ Developing Organization-Wide Ethics (pp. 590-591)