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PNHRS Core Competencies Project: Executive Director 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 competencies that have been identified for superior performance in the Executive Director role.

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 a 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 managers, 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.
Building & Leveraging Collaborative Networks (BLCNET)

Definition:

Building and Leveraging Collaborative Networks is about making connections and maintaining, nurturing and utilizing the relationships for the present and future benefit of the agency, e.g., politicians, other agency executive directors, lobbyists, educators, businesses enterprises, etc.

<table>
<thead>
<tr>
<th>This Means...</th>
<th>This Doesn't Mean...</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ cultivating useful contacts with a broad range</td>
<td>▪ networking without a purpose</td>
</tr>
<tr>
<td>of people in a variety of strategic positions</td>
<td></td>
</tr>
<tr>
<td>▪ making a conscious effort to understand differences</td>
<td>▪ Connecting with others only when you need to solve a</td>
</tr>
<tr>
<td>and establish common interests with your contacts</td>
<td>problem or get information</td>
</tr>
<tr>
<td>▪ using networks to help achieve business goals</td>
<td>▪ keeping things “strictly business” when talking to</td>
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<tr>
<td></td>
<td>community partners colleagues, politicians etc.</td>
</tr>
<tr>
<td>▪ developing trusting and productive relationships</td>
<td>▪ limiting your relationships with stakeholders to basic</td>
</tr>
<tr>
<td>to secure and build on future opportunities for</td>
<td>transactions</td>
</tr>
<tr>
<td>the agency</td>
<td></td>
</tr>
<tr>
<td>▪ seeking the ideas, concerns and needs of your</td>
<td>▪ ignoring the ideas of your multiple stakeholders and</td>
</tr>
<tr>
<td>multiple stakeholders for mutual benefit on an</td>
<td>showing little flexibility to changing needs</td>
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<tr>
<td>ongoing basis</td>
<td></td>
</tr>
<tr>
<td>▪ establishing long-term relationships with a</td>
<td>▪ focusing on the short-term with a stakeholder to build</td>
</tr>
<tr>
<td>variety of internal and external stakeholders</td>
<td>immediate support without considering the long-term</td>
</tr>
<tr>
<td></td>
<td>impact</td>
</tr>
<tr>
<td>▪ building and nurturing relationships internally</td>
<td>▪ keeping only internally focused</td>
</tr>
<tr>
<td>and externally that may have a direct impact on</td>
<td></td>
</tr>
<tr>
<td>your agency</td>
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</tbody>
</table>
Developmental Activities

Level 1-2 Activities

Spend time talking with your colleagues about individuals who are good at Building & Leveraging Collaborative Networks.

- Use real life examples of excellence, describing the skills and behaviours the person demonstrated.
- Talk about the value Building & Leveraging Collaborative Networks brings to the agency.
- Describe how Building & Leveraging Collaborative Networks makes a difference to your success, personally.
- Identify and discuss the consequences of NOT having good Building & Leveraging Collaborative Networks skills.

Reflection Tip:

- The key to this exercise is to figure out what motivates individuals to initiate and develop their relationships and partnerships.

Keep regular contacts.

- Make sure you keep up with the people you have met through conferences, meetings, and community visits.
- Meet regularly to find out what is going on within your area/region, as well as any social, economic or political forces that will impact the organization.
- Lean on this network to discuss new opportunities, initiatives, and approaches within the sector.
- Review your achievements and challenges.

Reflection Tip:

- Keep your network “live”.

Learn as much as you can about your stakeholders’ needs.

- Research prior mandates that are related to your current mandate and uncover the similarities/differences.
- Share your findings with your network in an effort to build meaningful information exchanges and to grow and enhance the partnership.
- Learn as much as you can about your network and encourage your team/colleagues to interact with their networks professionally and socially as appropriate.
Be visible, accessible and stay in contact with the individuals and groups within your network.

- Find ways to keep in regular contact with individuals and groups who may be of future value to the agency and/or the sector.
- Maintain contact even when you are not directly working with these individuals on a current mandate. (i.e., you may have come across some information that may be of use and value to them).

Keep track of issues and concerns affecting your stakeholders

- Always know your stakeholders’ broader issues.
- Talk to them about their business, not just the services or projects you currently have a mandate to deliver against.
- Keep up-to-date with what’s happening in the broader 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 you are facing.
- Act as a sounding board for them.

Identify important relationships and make an effort to serve as an ongoing resource to these individuals and/or groups.

- Every time you read an article or book, or come into contact with information you find interesting or useful, ask yourself if anyone in your network 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.
- Follow up on the information as an excuse to chat and strengthen the relationship for when you need to draw upon it in the future.

Leverage an existing relationship to develop further collaborative connections.

- Ask this individual to identify and introduce you to other influential people within his or her network.
- Plan a meeting with your contact to be introduced to these new people.
- Find common ground and topics to discuss with the individuals.
- Look for opportunities during the course of the conversation to demonstrate how you can be of help to one another moving forward.
- To expand your network, try and add one new connection to your network a month over the next 6 months.
Level 3 - 4 Activities

Proactively develop a network to support the needs and objectives of the agency.

- Build a large network to develop your expertise and the visibility of your agency.
- Identify individuals internal or external to your agency whose expertise you can use to develop your own agency or that of the sector as a whole.
- Exchange ideas and expertise on a regular basis to keep up to date on sector trends, patterns and changes related to your service area.

Target relationship and 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.
  - Identify the support you will 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 agency and the community it serves:
  - Identify the individuals who are most important for you to have strong relationships with
  - Create a plan for getting to know these individuals
  - Speak with colleagues who have experience in establishing relationships key influencers in the community.
- Create a list of these key influencers and then make it a priority to first get to know them and then integrate them into your network.

Understand your stakeholder’s point of view and share this knowledge with your network.

- After an interaction with a stakeholder, put yourself in their shoes and try to imagine what they were feeling or thinking during your interaction with them.
- Think about how what you did influenced that person in either a positive or negative fashion.
- Write down what you would do differently next time to make the interaction more positive.
- Pass along this information to anyone within your network who would benefit from the new knowledge before the next time they interact with the same stakeholder.
Represent your network in an ethical and professional manner.

- Be your network’s voice back in the agency. Advocate for their issues, concerns, and needs within your own area, and take rapid action to resolve them.
- See yourself as someone who can help both your network and your agency achieve its service mandates in a collaborative fashion. Looking at your job this way will change your interactions from transactions to partnerships.
- Transfer useful information and recommendations from both the network to the agency and from the agency to the network.

Reflection Tip:
- Consider all parties within your network, including, the Ministry of Community & Social Services, community partners, local businesses and other agencies

Actively build and form new partnerships/networks to benefit the agency and achieve its goals.

- Don’t hesitate to establish a new network of associates to gain support for new initiatives within the agency based on stakeholders’ needs.
- Use your expertise and contacts to approach others and help in the delivery of the services your agency provides.
- Take the time to form new partnerships/networks where you feel there will be the biggest payback. Both parties need to gain so that the overall mandate is best served and mutual goals achieved.

Reflection Tip:
- Go beyond “traditional” boundaries.

Capitalize on your trusted advisor status within your networks to meet the emerging and future needs of people who receive support.

- Leverage your reputation within your collaborative networks to champion long-term strategies for all stakeholders.
- Offer the perspective of your thinking and share your experiences around situations you have faced in the past to prepare for the future.
- Offer to coach members of your network in how to adequately plan, prepare and implement possible solutions to long-term problems.
Books and Videos


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.


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.


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.


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.


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.

This is the classic book on developing relationships with others. It explains the fundamental techniques of handling people, ways to make folks like you, 12 tricks of persuasion, methods to change people without resentment and dozens of other tips for successful interpersonal relations.


This book charts a clear, compelling new course for navigating turbulent competitive waters. Examples and specific “how-to” advice show how to build a new kind of partnership with customers, creating competitive advantages you can sustain long-term.


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


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.


With Dr. Tony Alessandra. This two–video course utilizes dramatic vignettes to illustrate how to build successful & working relationships through effective communication.
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.

<table>
<thead>
<tr>
<th>This Means...</th>
<th>This Doesn’t Mean...</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ thinking through a problem before offering a solution</td>
<td>▪ jumping to a conclusion without thinking through the facts</td>
</tr>
<tr>
<td>▪ breaking down complex problems to identify root cause(s)</td>
<td>▪ addressing only the surface issue, ignoring other possible deeper causes</td>
</tr>
<tr>
<td>▪ prioritizing required information to help determine when you can make a sufficiently informed decision</td>
<td>▪ waiting for all the information to be clear before evaluating options</td>
</tr>
<tr>
<td>▪ thinking about the chain of events that led to a problem</td>
<td>▪ explaining problems in a vague, general way, e.g., “that procedure always goes wrong”</td>
</tr>
<tr>
<td>▪ waiting for all the information before evaluating options</td>
<td>▪ evaluating options before getting all relevant information</td>
</tr>
<tr>
<td>▪ reflecting on past successes and failures to identify recurring trends</td>
<td>▪ missing the larger picture by focusing too much on case-by-case details</td>
</tr>
<tr>
<td>▪ thinking ahead about the outcome of an action (“If I do A, then B and C will also happen”)</td>
<td>▪ solving the immediate problem without thinking about other problems that may follow - the longer term impact</td>
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<thead>
<tr>
<th><strong>This Means...</strong></th>
<th><strong>This Doesn’t Mean...</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ looking for the common factors in different situations and using/modifying previously successful approaches to meet the unique needs of the situation.</td>
<td>▪ “re-inventing the wheel” with every situation and overlooking common sources of difficulty, to focus on the peculiarities of each situation.</td>
</tr>
<tr>
<td>▪ responding to changes or constraints by formulating new concepts or approaches.</td>
<td>▪ assuming that changes or constraints are inevitable and that you just have to adapt</td>
</tr>
<tr>
<td>▪ 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.</td>
<td>▪ getting stuck on a single line of reasoning by focusing in on the detailed components of a problem.</td>
</tr>
</tbody>
</table>
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 person who receives support. 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 direct reports to identify specific times where you either showed or did not show good Creative Problem Solving & Decision Making
- Ask them to specify what it was about your behaviour which made a particular impression on them.
- Get them to talk through how they 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 people who receive support 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 estimate costs minus the total estimated benefits).
- Use this methodology to perform comparative analyses of alternative solutions.

Conduct a problem prevention analysis.

- Talk to your direct reports to identify problems which may arise in the agency over the next few months. Only ask for a brief description, not the potential causes or solutions.
- List the possible causes for each problem that has been identified with your direct reports. 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 direct reports. 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.

- Identify a problem within 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 team to implement the solution in a feasible manner.
- Advise others 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 with a person who receives support 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 viewpoint 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.
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, peers 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 peers/immediate 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 agency have dealt with similar problems or situations.
- Document your findings and share them with the appropriate 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?

<table>
<thead>
<tr>
<th>CRITERIA</th>
<th>ALTERNATIVE 1 St. Albert House</th>
<th>ALTERNATIVE 2 Edmonton South House</th>
<th>ALTERNATIVE 3 Downtown Condo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost</td>
<td>4</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Location</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Resale Value</td>
<td>4</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Distance From Work</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Etc....</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Total</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>

**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 directors 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?

<table>
<thead>
<tr>
<th>Consequence</th>
<th>Importance</th>
<th>Likelihood</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve service</td>
<td>+4</td>
<td>100</td>
<td>400</td>
</tr>
<tr>
<td>Positive response by customers</td>
<td>+3</td>
<td>50</td>
<td>150</td>
</tr>
<tr>
<td>Increased stress level</td>
<td>-5</td>
<td>100</td>
<td>-500</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
<td></td>
<td>+50</td>
</tr>
</tbody>
</table>

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 a trusted peer 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 others use 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 problems or issues when dealing with people who receive support 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


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 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.


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.


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.

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.


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.


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.


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


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.

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.


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 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.


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.


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.

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.


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.


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


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.


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.


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.

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.


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 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.


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.


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.

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


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?”


In this video, experts show a manager (played by John Cleese) how he has ignored or neglected the basis 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 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.


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.


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.

<table>
<thead>
<tr>
<th>This Means...</th>
<th>This Doesn’t Mean...</th>
</tr>
</thead>
<tbody>
<tr>
<td>making positive comments regarding staff’s /employee’s current and expected abilities and potential to learn and develop</td>
<td>giving only negative feedback and/or criticizing personal traits</td>
</tr>
<tr>
<td>actively tracking direct reports’ performance and progress on development plans</td>
<td>conducting only annual performance reviews</td>
</tr>
<tr>
<td>ensuring that there is a clear understanding of roles, accountabilities and specific expectations</td>
<td>assuming direct reports know what is expected of them</td>
</tr>
<tr>
<td>actively monitoring the quality of others’ work, giving on-the-job instructions and training, or other practical support, as a means of enhancing performance</td>
<td>taking a “no news is good news” approach</td>
</tr>
<tr>
<td>taking the time to work with staff on developmental strategies</td>
<td>putting off dealing with developmental planning</td>
</tr>
<tr>
<td>acting as a mentor by spending time with staff who are trying to develop their competencies</td>
<td>simply reviewing employee progress through their written work or what others say</td>
</tr>
<tr>
<td>providing behavioural feedback and support to someone after a setback</td>
<td>telling other people what an individual should have done differently but not telling the individual directly</td>
</tr>
</tbody>
</table>

Continued on next page
<table>
<thead>
<tr>
<th>This Means…</th>
<th>This Doesn’t Mean…</th>
</tr>
</thead>
<tbody>
<tr>
<td>• assigning appropriate and helpful work experiences and training to foster the learning and development of direct reports</td>
<td>• 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</td>
</tr>
<tr>
<td>• designing significantly new processes for teaching traditional materials</td>
<td>• waiting for someone else to design new or innovative training processes</td>
</tr>
<tr>
<td>• 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</td>
<td>• 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</td>
</tr>
</tbody>
</table>
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 correspondence with people who receive support that all employees can access.

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.

- 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 by a trusted peer on your coaching capabilities.
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 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

<table>
<thead>
<tr>
<th>Hi Knowledge and Ability</th>
<th>Lo Knowledge and Ability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Encourage expression of feelings</td>
<td>Encourage sharing of ideas, suggestions, options</td>
</tr>
<tr>
<td>Ask for ideas and suggestions</td>
<td>Ask group to decide frequency of meetings</td>
</tr>
<tr>
<td>Provide moderate feedback</td>
<td>Delegate important responsibilities</td>
</tr>
<tr>
<td>Be direct in conveying consequences</td>
<td>Hold frequent group meetings</td>
</tr>
<tr>
<td>Hold frequent group meetings</td>
<td>Encourage discussion and sharing</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Hi Knowledge and Ability</th>
<th>Lo Knowledge and Ability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Give information and direction</td>
<td>Provide detailed instruction and high levels of feedback</td>
</tr>
<tr>
<td>Provide detailed instructions and moderate feedback</td>
<td>Hold frequent meetings</td>
</tr>
<tr>
<td>Monitor closely</td>
<td>Involve in brainstorming, idea generation on specific issues</td>
</tr>
<tr>
<td>Be direct in conveying consequences</td>
<td>Delegate “safe” responsibilities</td>
</tr>
<tr>
<td>Hold frequent group meetings</td>
<td></td>
</tr>
</tbody>
</table>

**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. 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 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


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.


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.


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.


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.


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


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.

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.


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.


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.


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.


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.


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.


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.


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.


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.

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.


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.


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.


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.


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.


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

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.


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.


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.


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.

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.


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.


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


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


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.


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 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.


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


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.


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.


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


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.


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

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.


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


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.


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.


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.
Integrity (ING)

Definition:
This competency involves acting with integrity, ensuring one's actions are consistent with what one says is important (i.e., walking the talk). It is also about sharing information candidly, accurately and openly with employees, peers and managers.

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<thead>
<tr>
<th>This Means...</th>
<th>This Doesn't Mean...</th>
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<tbody>
<tr>
<td>questioning established procedures and policies</td>
<td>feeling that things should be done differently, but keeping</td>
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<tr>
<td>which no longer are effective in achieving</td>
<td>those feelings to yourself</td>
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<td>objectives</td>
<td>“beating around the bush” to avoid confrontation/conflict</td>
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<td>complete opposite</td>
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<td>hedging the truth to avoid potential conflict</td>
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<td>being honest with others about potential implications of</td>
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<td>bringing problems into the open so that they can</td>
<td>turning a “blind eye” to others who exhibit unethical behaviour,</td>
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<td>be addressed</td>
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Developmental Activities

Level 1-2 Activities

Focus on building trust and credibility with people who receive support and peers.

- Be honest with people who receive support and peers about what you can and cannot commit to.
- Periodically ask yourself if you are providing people who receive support and peers with all the necessary information.
- Ask others to give you feedback on their perceptions of your honesty and ethical behaviour with those individuals that you deal with regularly.

Reflection Tip:
* What level of integrity do you expect in return from people who receive your support (internal or external), team members, and peers?

Develop a personal set of ethical guidelines for handling sensitive or confidential information.

- Review agency guidelines for ethical conduct.
- Reflect on these guidelines and the implications for your role.
- Decide how to handle sensitive or confidential information in the agency and still ensure important issues are dealt with.
- Share these guidelines with your direct reports.

Get feedback on your straight-talk.

- Follow-up with peers after you have been involved in a crisis or difficult assignment where you had to communicate your intentions, openly and honestly.
- Explain your thinking, what you said and did.
- Ask for feedback on how you approached the situation.

Reflection Tip:
* Based on that feedback, what might you do differently in the future?
Develop a system to keep track of your commitments and follow-through.

- Fulfilling promises/commitments helps to build trust, so choose your commitments carefully. Evaluate your ability to follow through before making commitments to others.

- Resist the tendency to make commitments in order to buy more time or keep others from harassing you – failure to follow through on promises and commitments can lead to a loss of credibility and conflict.

- Keep a running list of the commitments or promises you have made to others. Remember to include the ones that may seem insignificant to you but may be extremely important to the other individual/group (e.g., forward an article, initiate a phone call, bring a book from home).

- Set a date by which you will follow through on the commitment or accomplish the task.

- Check off those with which you have followed through, and assess the extent to which you deliver on these commitments/promises.

**Reflection Tip:**

*Log your ability to follow through on commitments over time. Are you over-committing yourself?*

Reflect on a couple of situations when you failed to follow through on your commitments.

- Examine the nature of the commitment and the reasons why you were unable to fulfill that particular commitment (e.g., low priority, poor planning, forgot).

- Ask yourself what you could have done differently to prevent it and incorporate this new information into your planning and scheduling to avoid future conflicts.

  - What are the reasons that you made the commitments in the first place (to avoid harsh feelings, to escape pressure, to buy time, etc.).

  - Do you notice any trends about your motives and reasoning when accepting commitments that you do not fulfill?

- Use this information to build strategies to guard against failing to deliver on your commitments.

**Reflection Tip:**

*Become familiar with the patterns that emerge from this exercise.*
Use clear statements of your personal values and code of ethics.

- Try some of the following behaviours:
  - State the behaviours that violate the agency’s/department’s values.
  - Be willing to admit when you have made a mistake.
  - Periodically ask yourself if you are withholding necessary information.
  - Ask others to give you feedback on their perceptions of your honesty and ethical behaviour.
  - Allow your employees to anonymously submit their impressions of your fairness.
  - Assess whether your behaviour is in line with your personal values and ethics.

Explore the values and principles you feel most strongly about.

- Write down those values and principles that are most important to you. Next to each, examine whether your behaviour is consistent with these values.
- Ask yourself what you would need to do differently in order to live more genuinely and authentically.

Solicit feedback on how consistent your actions are with your values and beliefs.

- Solicit input from your co-workers/peers on how consistent you “walk the talk”.
- Ask them to monitor your interactions and determine how consistent you are with your expectations, interactions, principles and performance. Be sure they provide you with specific examples to help you in your development.

Practice giving honest performance feedback to your team

- Think through all the members on your team. Identify their strengths and performance gaps.
- For each gap, have you actually given feedback around the gap.
- Develop a specific plan to provide constructive feedback. Remember to:
  - Give feedback as close in time as possible to the event
  - Base your feedback on observations
  - Balance constructive feedback with positive feedback
- Focus on the behaviour, not the person, so that you can provide genuine feedback and avoid harsh feelings or perceptions by the other person that they are being “attacked”.

Level 3-4 Activities

Admit your mistakes.
- If you have made a mistake or not delivered on a promise, take ownership of the outcome.
- Indicate that it was your responsibility to ensure delivery.
- State how you will rectify the situation and when the person can expect delivery.

Reflection Tip:
* How did you feel after having admitted a mistake?*

Be authentic and increase own self-awareness.
- Seek opportunities to strengthen your self-insight, and then share who you are and what you believe in (360° assessments are invaluable).
- State openly and sincerely your personal position or opinions. Avoid giving evasive or tentative responses to questions.

Champion a commitment to values and ethical behaviour.
- Treat others with the fairness and honesty with which you would like to be treated.
- Get involved in committees that monitor ethical issues in the sector.
- Start a discussion group or task force to identify ethical issues of consequence.
- Develop a personal set of ethical guidelines for handling sensitive or confidential information.
- Review the guidelines for conduct.

Work on gaining trust with others relative to your programs and your 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.
- When dealing with the public admit when you’re unsure of a situation. Address sensitive information when it is brought up while keeping the government’s image intact. Speak only to what you have control over. Avoid bringing up sensitive information yourself and stay clear of laying blame to higher authority figures.
- Admit it 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 the agency’s agenda.
Level 5 Activities

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.
- Ensure that your decisions are supportive of the agency’s values and do not diminish those values for the sake of short term gain.

Reflection Tip:

What was most difficult about standing up for your values?

Consciously apply ethical standards and values in your daily decision-making. Consider the following guidelines:

- Ask yourself the following questions to consciously apply ethical standards and values in your daily decision-making:
  - What are the consequences for the issue both in the short and long-term for the team, agency or sector?
  - Does the situation present a potential risk or danger to employees or people who receive support?
  - Is the reputation of the agency or sector in jeopardy?
  - What advice would you provide if someone else came to you with the same issue?
- Consider the perspective of different stakeholders (e.g., people who receive support, peers, direct reports, community partners, or, as a whole, the media). Would they be comfortable with the decision you are making?

Reflection Tip:

* Think about the decisions that you have made and assess whether they meet or exceed your ethical standards.

Volunteer to work with difficult constituents or on controversial issues.

- Tell your direct reports that you will support them in dealing with difficult people who receive support or controversial issues. Inform them that if they are having a problem you would like to be part of the solution.
- Use these situations as opportunities for modelling desired behaviours with subordinates and acting as an ambassador for the agency’s image and your own values.
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.

Compare successful and difficult interactions where you feel your role within the agency impacted the outcome.

- Review your recent activities and identify one successful and one difficult interaction.
- Reflect on what you did differently in each situation in an effort to determine the successful and unsuccessful behaviours associated with the outcomes. Use this information to modify your approach on future difficult interactions.
- Contact the constituent(s) involved to find out/confirm what they liked or how the interaction could have been improved.

Work through “ethical dilemmas”

- Brainstorm with your team the kinds of “ethical dilemmas” you find yourselves in or might find yourselves in.
- Work through the “correct” answers to these dilemmas, and the criteria used to determine the ethical route.
- Use these as your moral compass and hold your team accountable for doing the same.

Discuss ethical issues with others

- As an article appears in the media regarding ethical issues, engage in a discussion with your team regarding how it applies to your agency and/or department.
- Together, determine the best course of action.
Books and Videos

The Transparent Leader: How to Build a Great Company Through Straight Talk, Openness and Accountability by Herb Baum and Tammy King (Harper, 2005).

Baum, CEO of Dial Corporation, teaches corporate executives how to be transparent leaders and in turn create transparent companies. Using examples from Dial, Campbell Soup Company, and Quaker State, he shows readers the power of transparency.


This book offers a framework for understanding the issues and competencies that contribute to effective leadership during times of change. Its purpose is to help leaders determine how to choose and move among a variety of managerial approaches–to help them see what's working, what's not working, and what's missing.


The collection of practical, hard-hitting articles in Finding Our Way draws on renowned author and business speaker Margaret Wheatley's work around the world and applies the revolutionary ideas in her ground-breaking books Leadership and the New Science, A Simpler Way and Turning to One Another. The articles support the practices of people and leaders in many different types of organizations, communities and cultures, with topics ranging from leadership to parenting to specific organizational techniques.

Integrity: The Courage To Meet The Demands Of Reality by Henry Cloud (Harper, 2009).

For Cloud, an author, clinical psychologist and corporate consultant, integrity is more than just a person's ethics and morals. The French and Latin meanings of the word hint at its origins, "that the whole thing is working well, undivided, integrated, intact and uncorrupted." Achieving this "wholeness" requires the development of six character traits (creates trust, unafraid of reality, results-oriented, solves "negative realities," causes growth and finds meaning in life) which Cloud examines in great detail, using business stories like Proctor and Gamble's success in China and the experiences of his CEO friends and clients.

In this guide to doing the right thing, Lee presents a self-help approach to solving hard-edged problems. The key to effective leadership, he argues, is "principled conduct under pressure"—in short, courage. While courage is hardly the one-size-fits-all magic bullet that Lee envisions, much of his advice is valuable, particularly that dealing with communication, the thorniest management issue of all. The book is built around extended anecdotes about executives facing tough personnel decisions and having to confront their habits of "avoidant communication," and Lee's reconstructed dialogue is engaging, realistic and instructive.


In this engaging and hard-hitting guide to leadership, Joe Healey reveals a simple, yet powerful method for teaching the four competencies necessary to build performance-enhancing trust. Using inspiring case studies and stories of real leaders, Healey shows how these four competencies form the foundation of financial success in this age of global competition.


This easy-to-understand book presents insightful discussion of practical business issues in today's workplace. It contains numerous examples, and real-world case studies and questions that illustrate dilemmas learners can practice resolving. For any and all professionals focused on ethics in business.


Goffee and Jones reviewed the most influential theories on leadership – as well as workshops with thousands of leaders and aspiring leaders – and concluded that great leaders also share four unexpected qualities: 1) They selectively reveal their weaknesses; 2) They rely heavily on intuition to gauge the appropriate timing and course of their actions; 3) They manage employees with “tough empathy,” and 4) They capitalize on their differences. The authors argue that all four qualities are necessary for inspirational leadership, but they cannot be used mechanically; they must be mixed and matched to meet the demands of particular situations. Most important, however, is that the qualities encourage authenticity among leaders.

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.

The Integrity Advantage: Creating and Sustaining a Competitive Advantage in Business, by Adrian Gostick and Dana Telford (Gibbs Smith, 2003).

Pocket-size text identifies ten characteristics that are consistently displayed by people with integrity. Outlines a four-step process to help readers determine their integrity level and enhance one’s reputation for ethical behavior.


Covering the subject of HR in a rigorous and comprehensive way using ethical frameworks, this book looks at areas of ethical concern in current trends and practice, as well as examples and methods for promoting good practice.


Whether you’re dealing with an underperforming employee, disagreeing with your spouse about money or child-rearing, negotiating with a difficult client, or simply saying “no,” or “I’m sorry,” or “I love you,” we attempt or avoid difficult conversations every day. Based on fifteen years of research at the Harvard Negotiation Project, Difficult Conversations walks you through a step-by-step proven approach to having your toughest conversations with less stress and more success.


This book lays the framework for a supportive, trusting environment where each person is valued and respected. The Keys provide a meaningful way to gain alignment and build a strong sense of community. Stories and comments by youth and adults about each of the 8 Keys are provided to guide and inspire.

In this book, the author states that many people today feel that something is missing in their lives, and one of the reasons for this dissatisfaction is because of conflicts between our actions and our deeply held personal values. Through compelling examples from others and drawing from his own extensive experience, Smith outlines a simple but powerful formula to help you identify your own deeply held values -- what matters most in your life -- and how to live them to the fullest.


In this book, the author states that excellence in business depends on "integrity, values and virtues" as much as profits. Solomon says that business leaders shouldn’t be torn between doing what is right and doing what is necessary to make money, and that a good corporation fosters an environment that encourages people to develop their skills and their values.

Winning with Integrity: Getting What You’re Worth Without Selling Your Soul, by Leigh Steinberg (Random House, 1999).

In this book the author states that too many people would rather simply give up what they want. They would rather avoid the discomfort of possible conflict by accepting a situation or terms without discussion, even when it means accepting less than they rightfully deserve or desire. Steinberg candidly explains how he realizes his goals without violating his principles.

Trust in the Balance: Building Successful Organizations on Results, Integrity, and Concern, by Robert Bruce Shaw (Jossey-Bass Publishers, 1997)

Drawing on a variety of examples from real business situations, Robert Shaw explains the increasing importance of trust in business at four key levels: individual credibility, one-to-one collaboration, team effectiveness, and organizational vitality.


This book provides leaders with practical and inspiring advice on how to discover and appeal to people as human equals. You'll discover: how to build trust in the workplace, how to lift people to newer heights and reach inspiration levels never before achieved in the workplace, how to be a "real" leader not a cardboard cutout, and what your workers might want to tell you if they had the opportunity.

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.


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.


This book is a practical guide to the tough ethical questions faced by today’s managers. It offers tools for building a caring, ethical environment inside any organization.
Leading Change (LC)

Definition:

Leading Change involves initiating, implementing, and managing the implementation of new approaches, practices and processes, energizing and alerting relevant groups, stakeholders and professionals to the need for specific changes in the way things are done. At higher levels, it involves not only understanding the concept of change management (a structured approach to transitions in individuals, teams, organizations and societies that moves the target from a current state to a desired state), but also involves managing change, from communicating and implementing the change to taking action to reinforce new ways of thinking.

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<tr>
<th>This Means...</th>
<th>This Doesn’t Mean...</th>
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<tr>
<td>defining and expressing a vision for change</td>
<td>complaining about the way things are</td>
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<td>publicly describing a need for change</td>
<td>getting frustrated because one thinks change should happen</td>
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<tr>
<td>recognizing “where” change needs to happen</td>
<td>changing for the “sake of change” with no focus</td>
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<tr>
<td>challenging the status quo</td>
<td>believing things will never change</td>
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<td>proactively searching out opportunities to talk about the new vision in both formal and informal settings at all levels of the agency and across the sector.</td>
<td>engaging the agency in a one-time-only communication and expecting everyone to accept the vision</td>
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<td>supporting/reinforcing actions of team members and others that represent or contribute to the new vision</td>
<td>inadvertently encouraging behaviors that are counter to the new vision</td>
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<td>taking personal action to reinforce or support the new vision in tangible ways (e.g., budgeting for agency changes)</td>
<td>expecting others to change their behaviour to support the new vision without demonstrating any commitment through personal actions</td>
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<td>being an advocate for changes that will help the agency or sector accomplish it’s objectives</td>
<td>keeping ideas about changes you think will benefit the agency or sector to yourself and getting frustrated</td>
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Developmental Activities

Level 1-2 Activities

Learn from someone who excels in leading change.

- Identify a person who is perceived as a strong change leader.
- Observe them in their environment and model your behaviour on what you learn from them, or arrange a meeting to discuss how they approach different situations.
- What does he or she do that you can do?

Reflection Tip:
- Ensure that you understand why the individual is taking each of the steps that he/she takes.

Identify an opportunity to improve or change a current function, process or procedure within your area.

- 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.

Reinforce your “passion” for a change initiative and encourage others to develop commitment.

- In communication with your group, emphasize how the current work effort is related to the change.
- When goal setting with your direct reports ensure that they are referencing the change as one of the goals to which their specific efforts will deliver.
Enlist the support you need for a new idea, project or plan.

- Identify the people whose support you need.
- Determine what each of these people thinks about your proposal before you present your ideas.
- Develop a plan to do what is necessary to ensure the support you need from each key person.
Level 3-4 Activities

Diagnose the impact of change on your department/agency.

- Determine the impact of change on the team and on individuals in the team.
  - Outline the specific changes that will occur.
  - Determine how significant each of those changes will be in terms of how individuals work now in your department.
  - Think of how each change will affect the working relationships existing in your team.
  - Understand who will be likely to feel the most stress from these changes.
- Determine what new capabilities will be required to meet the change vision for your department/agency.
  - Outline the skills and competencies that will be required to meet the vision.
  - Consider what skills and competencies currently exist.
  - Plan to develop or acquire these skills and competencies.
  - Think about which staff need development and plan that development.

Reflection Tips:

- As you are doing this analysis, note the responses that you are having, both professionally and personally, to the potential impacts of the change.
- When individuals are faced with multiple changes, they often respond cynically when they are told that the change will create opportunities for them. You need to think carefully about the members of your team, how much change they have faced in the recent past, and which opportunities are the most realistic - do not set yourself up for failure by exaggerating the possibilities.

Help your team move forward.

- Explain to your team that the change is here to stay, and is non-negotiable, if that is the case.
- Help your team look at the change from a more positive perspective, while not downplaying the challenges they may face. Speak clearly about the specific benefits your team members will see from the change; not just the “party line”. If there are no specific benefits you can outline, then work to neutralize the areas which are seen to be the most troubling.

Reflection Tip:

- Recognize that the changes required will be more or less difficult for various individuals on your team. Do not expect everyone to respond in the same way. Also, recognize that other environmental facts (stress, workload, deadlines, etc.) will have an impact on individuals’ reactions to the change.
Convey and reinforce accurate information about the change.

- Hold regular meetings to communicate information about the change:
  - 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 others in what you are discussing.

- Establish multiple communication methods.
  - Create bulletin boards to show progress.
  - Route memos_emails regarding the change when the information would be of interest to others.
  - Consider the use of a communication team for your department/agency 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 across the agency.
  - Reinforce to staff that they aren’t alone with respect to the pending changes.

Translate the vision for change into a plan for the agency.

- Determine the sequence of changes that will occur in your 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 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.
Encourage people to express their feelings relative to the change vision.

- Allow time for emotions.
  - Let employees express how they are feeling as they begin to deal with the impact of the change. Don't cut off this kind of communication too soon.
  - Explore employee's concerns and take their feelings seriously.
  - Express appreciation for the level of extra work the change initiative may have on them as applicable.

- Anticipate the reactions of the group.
  - Prepare yourself to deal with employee’s issues and concerns on a one-to-one basis and in group settings. Remember that resistance to change is normal; prepare to manage the issues rather than treating resistance as an obstacle to be overcome.

- Don't take it personally.
  - Remember that emotional responses and sarcasm are ways that individuals deal with difficult information. Refer employees back to the objectives of the change initiative.
  - Point out how critical it is that everyone works together to make the change work effectively. Don't apologize for the change or place blame.

- Don't assume you “know how they feel”.
  - Listen carefully to each individual without judging or assigning your own beliefs to what they are saying.
  - Ask questions that demonstrate your interest in that individual’s point of view.

- Act on the needs identified.
  - Let people know that you are committed to providing them with candid information about their personal situation as soon as you know.
  - Coach staff on what they need to do to make the changes work for them.
  - Recognize the need for training or support.

**Reflection Tips:**
- Clear communication is a critical component for ensuring the success of any change initiative.
- Ask others about how they effectively communicate their change messages.
Consider role mapping the players involved in the change effort.

- **Purpose** - Role mapping helps us to identify:
  - the key people necessary to sponsor the change
  - the key individuals/departments affected by the change
  - the political terrain of the change environment that must be addressed when developing implementation plans
  - the dynamics of influence that may affect the outcome of the change effort

- **When do I create a role map?**
  - early in the project when you have a clear understanding of your project plan
  - who - the project sponsor and the project implementation team or key people responsible for managing the change
  - how - usually a 2-hour facilitated session depending on the size and scope of the change

- **Process**
  - Begin the process by dividing your project into key components or constituencies. For example, if you are implementing the project of change effort in phases, you will want to create a role map for each phase

- **Ask the questions**
  - Who are the main constituencies affected by the change?
  - Is the change going to be implemented in phases?
  - Based on the responses to the questions, begin drafting your role map(s). Continue to facilitate the process by asking the following questions:
    1. Who are the primary targets?
    2. Who are the key Sponsors and Advocates who will influence the targets?
    3. Who are the other key Initiating/ Sustaining Sponsors who will legitimize the change?
    4. Who are the key advocates to these sponsors?
    5. Who are the key change agents?
    6. Who plays more than one primary role?
    7. Where is sponsor commitment strong/weak?
    8. Which targets are supportive/resistant to change?
    9. How prepared are key agents to fulfilling their role in helping:
       - Sponsors? Targets? Advocates?

Continue on next page
10. Are the key Advocates prepared to appropriately influence their Sponsors and Targets?

**Note:** Not all the questions are relevant in every change situation.

- **Key changing roles:**
  - **Initiating Sponsor (I.S.):** individual/group who has the power to initiate and legitimize the change for all affect targets.
  - **Sustaining Sponsor (S.S.):** individual/group who ensures that the Initiating Sponsor(s) directives are implemented on time and within budget in his or her respective area.
  - **Change Agent (C.A.):** individual/group who is responsible for implementing the change.
  - **Change Target (C.T.):** individual/group who must actually change.
  - **Advocate (A):** individual/group who wants to achieve change but does not have sufficient sponsorship to make the change happen.

**Reflection Tip:**
- Include all players who are involved in key roles regardless of their current commitment or predisposition to the change.

**Develop a change plan.**

- Review the resources in the “Books and Videos” section of this Development Resource Guide and gather ideas for a change model.
- Select a model of organizational change that fits with your team’s current situation.
- Develop a draft strategy for implementing change that includes a clear statement of why change is necessary, a vision of the future state, and an implementation plan that uses the model of change identified in your readings.
- Review your draft change plan with others for input.
- Identify next steps for implementing your plan.
Level 5 Activities

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 forces you have underlined, brainstorm 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.
- 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 step you have listed, and underline those which seem promising.
- List the steps you have underlined. Them for each action step list the materials, people, and other resources which are available to your 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.
Create a clear and effective vision.

- When creating a vision for the future make sure it has the following characteristics:
  - it conveys an imaginable picture of what the future will be 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 your team periodically to see how they are doing with the changes required. Ask them what they feel the next logical steps should be and encourage them to share their thoughts.

Translate your change vision into key behaviours that need to be demonstrated in your new environment. Model these behaviours.

- Think through the new behaviours that are needed to support your change vision.
- Consider how these behaviours might be demonstrated by your peers and direct reports – how will they be similar to or different from the behaviours you have had to adopt?
- Communicate these new behaviours to your team, and provide them with a rationale, not only for the overall change, but also for the need to change behaviours. This is a vital step in obtaining buy-in.
- Build commitment to the demonstration of the new behaviours needed to drive your change vision.
  - Ask individuals to help you and each other to demonstrate them.
  - Encourage people to let you and each other know when you or they are demonstrating them and are “falling into old habits”. Make sure that members who take you up on this request are not censured for it.
  - Make sure you reward individuals for demonstrating the new behaviours – this can be as simple as saying, “that’s exactly what I need you to be doing to be successful”, or asking the individual to share his/her experience and approach at a meeting or informal session.

Reflection Tip:

 Don’t expect every member of your team to have to, or want to, behave exactly the same as you do. Keep in mind that individuals may well have different opportunities to demonstrate the required behaviours.
Use the technique of scenario planning to identify and explore alternative future environments for your own area or the organization 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 products, services, technology, 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.
Books and Videos


Building the Bridge As You Walk On It tells the personal stories of people who have embraced deep change and inspired author Robert Quinn to take his concept one step further and develop a new model of leadership—“the fundamental state of leadership.” Quinn shows how anyone can enter the fundamental state of leadership by engaging in the eight practices that center on the theme of ever-increasing integrity—reflective action, authentic engagement, appreciative inquiry, grounded vision, adaptive confidence, detached interdependence, responsible freedom, and tough love.


This action-oriented book presents the revolutionary J Curve model, which tracks people’s performance, thoughts, and emotions at each of the five stages of the change process, from resistance through positive acceptance-key knowledge you need to lead your team and speed implementation. Used by leading companies such as IBM, Chevron, Toyota-Lexus, and 3M, the J Curve gives you proven tactics and tools for quickly getting employees to a positive stage on the curve.


The power to influence others is probably the most important skill in management and leadership. Unfortunately, its development is nowhere near as advanced as it should be. In this commanding work, the authors provide an essential toolbox for all of us. Learn how some of the world’s most powerful influence masters have risen to the top by employing a relatively simple set of practices and attitudes.


Kotter presents his framework for an effective corporate change initiative through the tale of a colony of Antarctic penguins facing danger-inspired, perhaps, by today’s real-life global warming crisis (or, perhaps, by March of the Penguins’ box office). Under the leadership of one particularly astute bird, a small team of penguins with varied personalities and leadership skills implement a thoughtful plan for coaxing the other birds in their colony through a time of necessary but wrenching change.
Managing Transitions: Making the Most of Change by William Bridges and Susan Bridges (Da Capo Lifelong Books, 2009).

The business world is transforming. Stories of layoffs, bankruptcy, mergers, and restructuring appear in the news every day. When these changes hit the workplace, the actual situational shifts are often not as difficult for employees and managers to work through as the psychological components that accompany them. Directed at managers on all rungs of the proverbial corporate ladder, this expanded edition of the classic bestseller provides practical, step-by-step strategies for minimizing the disruptions caused by workplace change. It is an invaluable managerial tool for navigating these tumultuous, uncertain times.

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 behavior, feelings and emotions. The insights are helpful in learning when and how to convince people.


Essential reading in organizational change and the leadership behaviors required for success.

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.

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.


Despite the best efforts of management, change programs are more likely to fail than to succeed, because, according to Kotter, most organizations are overmanaged 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.
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.


Nanus gives practical examples to show how to perform a “vision audit” to determine your organization’s current direction, anticipate changes in the economy/society/technology that suggest new directions, formulate alternate visions and choose one best suited to you, turn vision into action by overcoming resistance to change and winning employee support.


The authors present a complete tool kit for identifying and diagnosing the causes of performance gaps and developing action plans to attain, and maintain industry leadership.


The author details his proven change program - the most sophisticated and highly developed large-scale change approach in use today.

The Northbound Train, by Karl Albrecht (Amacom, 1994).

This book helps the reader to find the purpose, set the direction and shape the destiny of their organizations. Topics covered include creating an inspiring vision that can be discussed, understood and shared.

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.


This highly acclaimed author presents strategies and techniques for anticipating and preparing for changes in the industry.
**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.


Despite the best efforts of management, change programs are more likely to fail than to succeed, because, according to Kotter, most organizations are overmanaged 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.


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.

**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 unmeasurable) and proposes ways to turn these obstacles into sources of improvement.


A step-by-step action plan for the change process including setting goals for change, establishing measurement criteria and providing feedback, rewards, and recognition.


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.

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.

The video “The Power of Vision” (International Tele-Film).

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 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 ”The Doughnut Organization” (International Tele-Film, 1-800-561-4300).

This video examines the dilemmas people face in organizations that are struggling to adapt to a changing world.

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 “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.

The video “Managing at the Speed of Change” (International Tele-Film).

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).
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.

<table>
<thead>
<tr>
<th>This Means...</th>
<th>This Doesn’t Mean...</th>
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<tbody>
<tr>
<td>▪ soliciting and utilizing the skills, ideas and opinions of team members</td>
<td>▪ going through the motions of soliciting input but never synthesizing or utilizing the gathered information</td>
</tr>
<tr>
<td>▪ supporting and encouraging team members</td>
<td>▪ placing blame on or making judgements about other team members</td>
</tr>
<tr>
<td>▪ bringing group issues out in the open which may be personally threatening or difficult to deal with</td>
<td>▪ only offering opinions on other group members’ behaviour without being willing to examine your own shortcomings</td>
</tr>
<tr>
<td>▪ keeping team members informed about decisions and explaining the rationale behind them</td>
<td>▪ dictating orders and giving incomplete information</td>
</tr>
<tr>
<td>▪ clearing away bureaucratic barriers or other problems that are making it difficult for your team to get things done</td>
<td>▪ getting stuck in these barriers yourself or not believing you can do anything about them</td>
</tr>
<tr>
<td>▪ actively promoting the mission and goals of the department as it relates to the strategic direction of the agency</td>
<td>▪ delegating tasks to others without providing them with an understanding of the ultimate goal</td>
</tr>
<tr>
<td>▪ “walking the talk” by demonstrating the actions you expect from other team members</td>
<td>▪ creating rules or policies for the team which you do not follow (i.e., “do what I say, not what I do” mentality)</td>
</tr>
<tr>
<td>▪ actively working to make sure your team is well regarded by other departments and agencies</td>
<td>▪ missing opportunities to showcase your team members’ unique strengths and accomplishments</td>
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<th>This Means...</th>
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<tr>
<td>▪ communicating a team vision and working with the team to develop shared goals to achieve the vision</td>
<td>▪ believing that if you want it done right you need to do it yourself</td>
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<tr>
<td>▪ painting an exciting picture for the team of its mandate and doing things that create some enthusiasm to achieve it</td>
<td>▪ focusing on strictly task-based activities to reach your goal</td>
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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 peers and direct reports to ensure you are enabling others 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 people who receive support.
- 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
  - Focus on People who Receive Support
  - 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 agency.
Celebrate team successes to increase future performance

- List all of the reward strategies you have seen others use with their team over the past year.
- Rank these strategies in order of their effectiveness in motivating and engaging the team.
- 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?

Identify a mentor who has strong leadership skills

- Identify someone inside or outside the agency 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.
- 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.

Increase your exposure to colleagues and other directors/executives 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 a department and/or agency.
- Include feedback, where appropriate, from people who receive support in the discussion to ensure that your mission meets their expectations as well.
- Post the final product prominently and refer to it regularly in meetings when agreement has been reached.
Instill into others your passion for an agency initiative and encourage others to develop commitment.

- Identify opportunities within departments 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 agency from another perspective.
- Get a sense of how others (peers, people who receive support and similar organizations) see your agency by asking how they view your operations and deliverables.
- Examine your 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.
- 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


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.


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.


A definitive study of executive failures—why they happen and how to prevent them.


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.


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.


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.


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.


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.

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.


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.

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.


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.


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.

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.


Take a journey with Frodo Baggins and the entire ensemble cast of the movies in this trilogy as they work there 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 I3”.

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 of 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.
**Organizational Sensitivity (OS)**

**Definition:**

*Organizational Sensitivity* involves focusing on the public face of the agency and the need to maintain support for the agency by ensuring that it is represented in a manner that is above reproach and supportive of its purpose and values at all times.

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<thead>
<tr>
<th><strong>This Means...</strong></th>
<th><strong>This Doesn’t Mean...</strong></th>
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<tbody>
<tr>
<td>▪ considering the agency’s reputation when working with external stakeholders</td>
<td>▪ carrying out work in the community without stopping to think about the impact your actions may have on the agency</td>
</tr>
<tr>
<td>▪ presenting a positive image of the agency to the community and various stakeholders</td>
<td>▪ sharing negative views or opinions of the agency or sector in public (“airing dirty laundry”)</td>
</tr>
<tr>
<td>▪ positioning agency services to the public as stories</td>
<td>▪ trying to “sell” services to the public without connecting emotionally</td>
</tr>
<tr>
<td>▪ holding others accountable when acting in an unprofessional manner that reflects badly on the agency</td>
<td>▪ not confronting colleagues, direct reports or community partners who behave toward the agency and/or department in a slanderous or libelous fashion</td>
</tr>
<tr>
<td>▪ routinely working to create strategic marketing plans that put the agency in the best light</td>
<td>▪ drawing attention to the negatives of the agency because of outdated marketing collateral</td>
</tr>
<tr>
<td>▪ proactively working stakeholders to ensure that the agency’s public image is reflective of its underlying direction and objectives</td>
<td>▪ waiting for a negative event to take place before reacting to outcries from external stakeholders and the public</td>
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Developmental Activities

Level 1-2 Activities

Only engage in activities that present the agency in a positive manner.

- Consider the following tips when unsure of the impact your actions may have on how the public perceives the agency:
  - Consult others before taking action or making a decision by balancing the pros and cons.
  - Consider the impact of the action on the community as if you were to pick up the paper tomorrow morning and read a breaking “news story”.
  - When speaking with external stakeholders, always present a positive image of agency employees.
  - Act appropriately outside the agency and after work hours since you never know who could be observing you. Be a positive role model and ambassador for the agency.

Learn to work with – not against local reporters, writers and editors.

- Respect the “rules of the game” when it comes to media placements.
- Ensure market facing literature is legible and easy to understand to increase the likelihood of adoption.
- Leverage your established relationships with the media when you need to convey an important message to external stakeholders and the public.

Use a current news event to frame a release.

- If your agency caters to a specific population, use the news about a recent research study involving that population to inform the rest of the sector about the services you offer.
- Take every opportunity to let the sector know exactly what your agency is doing.

**Reflection Tip:**

확 인 any industry, there can be multiple focuses and sub-categories. Ensure your agency’s unique services and offerings don’t get lost in the fray when an opportunity for more exposure emerges.
Create and promote a special event to raise awareness of the agency.

- Champion a yearly charity drive to raise monies and awareness for the agency and all the people who receive support.
- In planning the event, ask yourself the following questions to keep you on task:
  - How will community involvement take place?
  - What agency staff will be involved and what will be their responsibilities?
  - How much will the event cost?
  - How will you determine if the event was effective?
- Ensure that people who receive support are invited to the event and participate (where possible).
- Produce a post-event press release summarizing the event, showcasing the agency and clearly stating how proceeds raised will be distributed back to the community.
Level 3-4 Activities

Encourage peers and direct reports to share a success story with the community that will reflect positively on the agency.

- Ask peers and direct reports to review their letters, emails or service files that are not confidential and identify one or more positive instances of an agency service being used in a new and different way.
- Encourage them to establish a good narrative that clearly outlines the challenge that was overcome. People love a good story.

Reflection Tip:
- Remember that when an agency service is framed as the answer to a challenge that may affect others within the community, goodwill and interest will be generated toward the agency.

Advocate for the promotion of agency accomplishments.

- Keep up to date with your understanding of Ministry governance issues affecting the sector and use this knowledge to your advantage when trying to push forward with a newsworthy accomplishment.
- Think of yourself as a key influencer and decision maker when pitching the story.
- Challenge the conventional thinking of these individuals, allowing new perspectives to be brought to bear.
- Highlight the positives to be expected after sharing the accomplishment with the public.

Reflection Tip:
- Long-term relationships with the public require individuals who are trustworthy and who establish relationships built on honesty and integrity.
Level 5 Activities

Following are some general guidelines to ensure the agency is respected by external stakeholders and the public.

- Avoid “selling” agency services to the public.
  - Pitch a unique story instead to your sector’s particular journals or websites. The media knows a sales job when they see one and resents the treatment.
  - Come up with an idea (or three) about how your agency or service aligns with a current topic of local or national interest.

- Acquire help promoting the agency to the public if you need it.
  - Spelling mistakes, poor grammar and total lack of formatting and presentation cause an immediate negative response on the part of the reader and destroys credibility immediately.
  - If you are not able to write a quality press release, seek out help, even if you have to pay for it.

- Business plan first, marketing plan second, public relations plan third.
  - Before a public relations plan can be implemented for your agency, strategic direction and objectives must first be in place.
  - Following that, your marketing plan needs to ensure an effective and consistent public image for the agency (i.e., logo or agency image).
  - Seeking out any press coverage before these two plans are in place is a recipe for disaster.

- Draw upon established relationships with local media.
  - Use your relationships with the media to your advantage.
  - By doing so, you will increase the likelihood of having a worthy news item for the agency included in their publication.

- Act professionally at all times.
  - Stay abreast of new technologies and practices in the media.
  - Be a professional in your own area of expertise and extend that professionalism to the way you interact with members of the media.
  - Expect to earn more credibility which always helps when pitching future press worthy stories.
Develop an integrated public relations plan for the next 4-6 months.

- Define and write down your objectives for your publicity or media plan. Think about the objectives of the plan. Will it be designed to:
  - Establish the expertise of the agency?
  - Build goodwill among the people who receive support and the community?
  - Inform and create good perceptions regarding your company and services?
  - Mitigate the impact of negative publicity and/or corporate crisis?

- Define your goals in achieving the above objective. It is important that your goals be specific, measurable, results-oriented and time-bound.

- Determine who the target audience consists of. Who is it that you want to reach with this campaign? What do you want your key messages to be?

- Develop a schedule for your public relations campaigns. Create synergy by coinciding your public relations plans with other departments marketing efforts.

- Develop your “plan of attack”. What communication vehicles will you use to get the message to the public? Examples may include:
  - Press releases
  - Articles
  - Success stories from people who receive support
  - Letters to the editor
  - Conference interviews
  - Radio or television interviews
  - Seminars or speaking engagements

- Select three approaches from the above list and begin researching and developing your integrated approach.

- Identify both internal and external staff resources to assist you in the implementation of your selected approach.

- Finally, ensure that measures are in place to track the results of each campaign.
  - After each campaign, sit down with those involved to review the results.
  - Did you achieve the defined objectives and goals?
  - Should you consider modifying the original plan? If so, how and why?

Consider how changing attitudes and behaviours of publics will contribute to both short-term and long-term agency goals.

- Conduct quarterly focus groups to…
- Involve the ministry, other agencies and respected individuals within the sector
Books

**Community Action and Organizational Change: Image, Narrative, Identity** by Associate Professor Brenton D Faber PhD (Southern Illinois University Press, 2002)

Faber argues that an organization’s identity is created through internal stories. When the organization’s internal stories are consistent with its external stories, the organization's identity is consistent and productive. When internal stories contradict the external stories, however, the organization's identity becomes discordant. Change is the process of realigning an organization’s discordant narratives.

**Ama Handbook Of Public Relations** by Robert L. Dilenschneider (Amacom, 2010)

Public relations was among the first industries to harness the power of the Internet. As a medium for corporate communications, branding, product information, and more, the Web's value was readily apparent. But the Internet is a double-edged sword whose perils are every bit as important to control. The AMA Handbook of Public Relations is written to help professionals merge their traditional and Web-based campaigns while protecting their clients, companies, and themselves against harmful attention.

**Public Relations: Strategies and Tactics** by Dennis L. Wilcox and Glen T. Cameron (Allyn & Bacon, 2008)

Comprehensive and current, Public Relations: Strategies and Tactics, Ninth Edition helps better understand the basic concepts, strategies, and tactics practiced in public relations today. Public Relations: Strategies and Tactics combines numerous real-life case studies with core theoretical to help relate theory to the actual practice of public relations.


When it comes to communicating corporate information, the skills of the messenger can make or break a company’s reputation in the eyes of shareholders, employees, and the media. Filled with practices, principles, and case studies, this essential guide helps HR professionals hone their skills at delivering information, managing crises, responding to queries, and more.

**Strategic Planning for Public Relations** by Ronald D. Smith (Routledge, 2009)

This innovative and popular text provides a clear pathway to understanding public relations campaigns and other types of strategic communication. Implementing the pragmatic, in-depth approach of the previous editions, author Ronald D. Smith presents a step-by-step unfolding of the strategic campaign process used in public relations practice.
**Public Relations: Creating an Image** by Moi Ali (Heinemann, 2005)

This book explains what public relations is, who undertakes it, what methods it uses and to what effect. Using real life case studies it shows how PR can be used to benefit society.

**Effective Writing Skills for Public Relations (Paperback)** by John Foster (Koran Page, 2008)

Effective Writing Skills for Public Relations is a reference source on style and presentation with tips on making the best use of written communication. It gives advice on how to write concisely using jargon-free language while avoiding overused words and phrases. It includes advice on policing house style with attention to punctuation, headlines, captions, and overall consistency. Readers will also find help on public speaking, pronunciation and the standard writing skills needed in the office.
Planning, Coordination & Execution (PCE)

Definition:

This competency is about planning and coordinating work and executing individual and team activities in a way that ensures the achievement of a set of objectives. At the highest levels, individuals are able to achieve desired results on a consistent basis despite having to deal with unpredictable or unexpected circumstances.

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<tr>
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<tr>
<td>▪ coming up with a detailed plan for projects</td>
<td>▪ having a general idea about how the work is to be done without being clear about the specifics</td>
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<tr>
<td>▪ developing contingency plans</td>
<td>▪ understanding the “big picture” and letting someone else figure out the details</td>
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<tr>
<td>▪ helping the agency or the department prioritize competing projects</td>
<td>▪ only concerning yourself with completing your own projects and obligations</td>
</tr>
<tr>
<td>▪ identifying specific action steps, accountabilities and timelines for completion</td>
<td>▪ throwing yourself blindly into the details of work, because it appears exciting and challenging</td>
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<tr>
<td>▪ preparing realistic estimates of resource requirements</td>
<td>▪ assuming resources will be available when needed</td>
</tr>
<tr>
<td>▪ communicating your expectations to others of their role within the project</td>
<td>▪ becoming distracted by other people or projects</td>
</tr>
<tr>
<td>▪ effectively managing competing demands by quickly synthesizing information from multiple sources</td>
<td>▪ being able to focus single-handedly on one task at a time</td>
</tr>
<tr>
<td>▪ involving other groups, departments or agencies, as appropriate in the planning process for complex or difficult initiatives.</td>
<td>▪ operating in a silo and failing to consider the impact an initiative may have on other groups, departments or agencies.</td>
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Developmental Activities

Level 1-2 Activities

Develop your time management skills/

- Use time management techniques to improve your personal efficiency. For example, spend 10 to 20 minutes at the end of each day planning how you will spend the following day.
- Prepare “to-do” lists and list the tasks according to priority and determine the amount of time you expect to spend on each. Be realistic knowing that you will need to spend some time answering any phone calls or fielding questions from colleagues.
- Prioritize your list in terms of urgency - A’s, B’s and C’s.
- Check off items as you complete them. Make sure that you do all the top priority items first and then move down the list.
- Review your list at the end of the day and determine how much you accomplished and how long it took. Look for reasons which explain any large discrepancies between what you planned and what you actually accomplished.
- Problem-solve around dealing with these reasons or change your future time plans accordingly.

Ask for regular feedback regarding your Planning, Coordination and Execution.

- Ask others if you are showing a high level of Planning, Coordination and Execution.
- For example, you could ask:
  
  ⇒ “Do I develop realistic project timelines?”
  ⇒ “Do I allocate sufficient time for task completion?”
  ⇒ “Am I crystal clear when I communicate about the work we are doing?”
  ⇒ “Can you think of any times I have made errors that could have been avoided?”
  ⇒ “Am I well organized in my work?”

- If the feedback is good, take a moment to enjoy your success. If the feedback is poor, you know you must focus on improving.

Reflection Tip:

ัก is there any feedback that surprised you? If so, be sure you fully understand the message.
Consider the following general tips to improve your 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 staff to get the project done.

**Reflection Tip:**
Ask your peers what additional recommendations they have for managing resources.

Ensure that you use the 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 (people, materials, assets) 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 quality.

Determine priorities.

- To manage your time effectively, you must have a clear understanding of your short- and long-term priorities. Without this understanding it is easy to fall into the trap of reacting to the crisis of the day rather than focusing on what is most critical to you and your organization.
- List your primary accountabilities.
- Rank each accountability according to importance (A = Most Critical; B = Important and C = Least Critical). To help decide the rank, ask the following questions:
  - Which of these tasks will be of most benefit to the team/agency?
  - Which tasks do agency/departmental priorities suggest are most important?
  - Which of these tasks does my manager consider most important?
- Adjust your schedule and priorities as necessary to ensure that your daily work aligns with your most critical job accountabilities.
- Periodically repeat this exercise so that the allocation of your time and energy remains in line with your strategy and objectives.
Create your own methods of ensuring that you can work on multiple tasks simultaneously and meet targets.

- Find out what methods work and do not work for your team.
- Gather input on the current processes and mechanisms in place and ask what works and does not work.
- Develop new processes and mechanisms based on your team's input and your expertise in the area.
- Ensure that projects stay on track by consistently monitoring progress.
- Review the new processes and mechanisms with your team regularly.

Negotiate priorities to get the job done on time.

- When faced with multiple demands on your time, take a few moments to discuss each new task with the “owner” to help you prioritize your time. Ask how time-critical the deliverable is. You may find that the task you assumed was urgent can actually wait a few days to be completed.
Level 3-4 Activities

Clarify expectations.

- When accepting a new project or activity, clarify the expectations placed on you, and the role you are expected to perform.
- Identify all key deliverables and their expected delivery date.
- Write a project plan that lists the key activities to be performed, who will perform the activity, who will provide assistance, the expected outcome of each activity, when it will be completed, the required resources, and how you will measure whether the activity is completed to the standards established.
- Regularly track your performance on this project using the project plan. Identify when activities are completed and/or milestones are met. If there is any "slippage" in your project plan, identify the cause of the delay and problem solve using whatever resources necessary to overcome the obstacle(s) and put the project back on track.
- When delegating tasks or projects to members of your team, clarify your expectations and monitor their progress regularly, keeping notes to assist you in reviewing their performance.

**Reflection Tips:**
- Are there any other details that need to be defined at the beginning of a project?
- Are there any agency guidelines that might assist you in determining which detail should be established at the beginning of each project?

Take specific steps to keep yourself and 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.
- Remember that the team must work cohesively to accomplish its goals.
- Help the group to stay focused on its common goal.

**Reflection Tip:**
- What specific activities were most helpful in keeping yourself focused?
Evaluate and prioritize the team’s initiatives within your work environment.

- People often become caught up in urgent day-to-day activities and crises, losing sight of the importance of developing strategy and planning. Use the following suggestions to ensure that your team spends time on planning and prioritizing:
  - Evaluate their priorities by identifying the important, the urgent and the less important or less urgent. Ensure they do those items that are both important and urgent, then handle the important ones. Ensure they are delegating to someone else to handle the urgent but less important tasks.
  - When an urgent matter arises, make sure they step back and determine how it fits into their daily, weekly or monthly plan before they act accordingly.
  - Suggest using the 80/20 rule (80% of the value of a group of items is generally concentrated in only 20% of the items). The 80/20 rule means that you can be 80% effective by achieving 20% of your objectives. Thus, if the team’s daily “To-Do List” has ten items, under this rule, they can expect to be generally 80% effective by successfully completing only the two most important items.
  - Ask the team to keep a log to determine how they are spending their time. Evaluate their time allocations to ensure they are giving proper time and attention to the more strategic and important priorities.

Proactively seek out ways to improve work plans on complex projects.

- Identify a specific project or routine in your daily activities that involves multiple groups of individuals and develop a more systematic way of achieving the required results.
- Investigate opportunities to expedite any time consuming activities and improve upon the work plan. Are tasks assigned to the right group based on knowledge and skill.
- Talk to others who have redesigned a complex work plan to be more efficient. What was their strategy?

When assigning tasks and projects, develop mechanisms that allow you and your team to monitor progress against goals.

- For example, have the team members prepare interim progress reports or schedule regular update meetings to provide feedback regarding their progress against goals.
- Communicate to team members that they should inform the appropriate individual of problems early before they become more serious.

Reflection Tip:

성을 다른 방식으로 progress monitoring에 대해 고려해 보시기 바랍니다. 이 작업의 성과에 대한 피드백을 받기 위해 팀 멤버들이 인터미널 리포트를 준비하거나 정기 업데이트 회의를 주최할 수 있습니다. 문제를 조기에 대처할 수 있도록 적절한 개인에게 문제를 신고하도록 지시해 주시기 바랍니다.
Monitor initiatives/assignments against milestones, deadlines or quality standards that have been set.

- Set milestones or goal deadlines and regularly assess yourself and/or the group against those deadlines. Keep in mind that there is a tendency to be overly optimistic about how long each step will take.
- Meet regularly with other team members throughout an initiative/assignment to discuss how you are doing with respect to deliverables.
- Regularly update the relevant people on the status of your work. If a deliverable is falling short of its targets, make sure that impacted groups/individuals are notified right away.
- Talk to the appropriate individuals to find out the impact of non-delivery and agree on next steps.
- Seek feedback on your performance from whoever assigned the work.

Anticipate problems, identify risks and plan for contingencies.

- Anticipating potential problems is an important part of the planning process. If you identify risk areas in the initial stages of planning, you can prepare for problems and mitigate them early. In addition, no matter how well you plan, unanticipated events and consequences will arise. To develop your ability to anticipate and plan for problems, consider the following suggestions:
  - Review the discrepancies between plans and actual performance from the previous three to six months. Which of these problems could and should have been anticipated? What patterns exist in regard to risks for which you did not plan? What can you do differently to anticipate problems?
  - As a part of your regular planning process, identify risk areas and develop risk-management plans for them. Do not assume that risks will not occur.
  - Use data to anticipate and plan for risks. For example, if the plan relies on a stable team, anticipate what you will do if the team loses a member.
  - Use scenario planning to identify three or four different ways in which a situation may evolve. Determine how you and your team will handle each of these scenarios.
  - After a plan is drafted, brainstorm with the team what might go wrong. Identify the most likely problems and generate ideas for handling them if they do occur.
Level 5 Activities

Creating planning consciousness.

- Each time you begin work on a project over the next three to six months, use the following process:
- Prepare a breakdown of all tasks and critical decision points and then determine the critical path of the project.
- Analyze each component to detect areas of risk. Be a negative thinker for a moment – try to think of everything that could go wrong. For example:
  - Information required for effective planning may be unavailable.
  - A technical procedure new to employees might be required.
  - A service group that you use might experience staff problems.
  - You might lose a key resource at a critical time.
- Categorize potential problems into high- and low-risk areas. When doing this, consider both how likely it is that the problem will occur and how damaging it would be if it did occur.
- Prepare several possible approaches for dealing with such problems should they occur.
- Introduce safety factors into your planning for high-risk areas:
  - Consider allocating more time, resources and/or funds to these phases.
  - Introduce tough control methods in high-risk areas.
  - Ensure that you are kept fully informed of all developments by those involved.

Link planning to the agency’s strategic vision.

- Effective planning requires a deep understanding of the strategic intent and the underlying processes necessary to achieve these goals. To better understand and link your agency’s strategic vision to your team’s work, consider the following steps:
  - Be able to articulate your agency’s vision, strategic direction and goals?
  - What industry are we in? What is our sustainable competitive advantage?
  - What processes are critical to our success?
  - What role does my team play in the success of the agency?
- If you can’t answer these questions, discuss these with your manager.
- Communicate this information to those you supervise/lead so that they understand the agency’s direction. They will need this information to set their own goals and/or guide their teams.
Streamlining and/or improving efficiency for future work.

- Inefficient work processes often result in duplication of effort and frustration among employees. Analyze the flow of work in your own team and across departments within your agency. Identify where your current work process is ineffective or can be done in a smarter way. Look for where you can eliminate or modify inefficient procedures and systems by creating new approaches.

- Identify procedures that you and your team find outdated, overly time-consuming or difficult to complete.

- Find out the purpose of the procedure.

- Evaluate the procedure in detail, critiquing each step. Identify what is working and what isn’t working.
  - Identify bottlenecks and recurring problems.
  - Identify duplication in effort.
  - Note places where the formal process is often circumvented.
  - Highlight internal and external service problems
  - Examine the level at which decisions are made?
  - Identify what information is collected, why and how?
  - Include what is working well. Examine why.
  - Determine if any steps can be eliminated/combined to save time.

- Generate as many alternate procedures as possible that would meet the same objective.

- Review your potential alternatives. It may be possible to combine the best elements of several alternatives to obtain one superior solution.

- Define and document process and role changes.

- Plan for change. Include internal and external communication, resource needs and required training.

- Set up a system to evaluate how well your solution really works. Continue to evaluate and adjust, where appropriate, for improvement over the long-term.
Books and Videos

**Conquering Chronic Disorganization**, by Judith Kolberg (Squall Press, 2003).

This book contains all the simple and easy innovative methods you will ever need to know to end recurring, chronic disorganization forever. This book challenges 60 years of conventional organizing wisdom and makes it possible for anyone to achieve long-lasting organizing results, reach high productivity, lower stress, and have fun doing it!


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 behaviors, 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.


This book is the organizing book for disorganized people. In six easy steps, the author offers a system that will help you clean up your act. At the end of the day, your desk will be clear and your mind will be free to relax.


Almost everyone procrastinates. For most people, procrastination is a frustrating, troublesome habit they know they should be able to overcome. This book will inspire them to get started, with the author drawing advice from her own experience as a “recovering procrastinator” and that of people she has met at her seminars.


This book is designed to be a guide to personal productivity through organization. The book discusses the benefits of being organized, how paper backlogs develop and how to avoid them, how to manage your desk and papers, and keeping clutter away, permanently.

This book contains strategies to deal with many demands. Learn how to act assertively, delegate, manage difficult personalities and say no without actually using the word.


Written especially for Managers and 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.


This book, packed full of quick and simple tips, is a great resource for getting organized. Being organized in your work is one of the essential elements of Planning, Organization and Coordinating.


This book stresses the importance of planning out activities in today’s organizations.

If You Haven’t Got the Time to Do it Right, When Will You Find the Time to Do it Over?, by J Mayer (Simon & Schuster, 1990).

This book provides practical ideas on how to get things right the first time, and focuses the reader on the importance of order and quality, as well as the cost of being low on this competency.

If You Haven’t Got Time To Do It Right, When Will You Find Time to Do it Over? by J. Mayer (Simon & Schuster Trade, 1990).

This book provides practical ideas on how to get things right the first time.


- Developing General Planning Skills (pp. 24-28)
- Improving Your Planning Skills (pp. 28-31)
- Engaging in Proactive Planning (pp. 31-32)
- Coordinating Work with Other Groups (pp. 85-86)
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.

<table>
<thead>
<tr>
<th>This Means...</th>
<th>This Doesn’t Mean...</th>
</tr>
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<tbody>
<tr>
<td>continually assessing how day-to-day tasks support broader agency objectives</td>
<td>planning your work based on short-term commitments and deadlines</td>
</tr>
<tr>
<td>understanding tactical business fundamentals and incorporating them into decision making</td>
<td>ignoring the business issues and how they will impact decisions</td>
</tr>
<tr>
<td>aligning your department’s goals with the agency’s strategic goals</td>
<td>setting goals that are independent of agency priorities</td>
</tr>
<tr>
<td>using area resources effectively to accomplish work-related goals</td>
<td>assuming “the way it has always been” is the best way to get things done despite changes in the environment</td>
</tr>
<tr>
<td>understanding how business issues, processes and outcomes affect the agency’s strategic direction</td>
<td>meeting short-term job objectives without considering long-term opportunities or impact for the agency or the department</td>
</tr>
<tr>
<td>understanding how the department’s performance and outcomes are used to monitor the agency’s progress towards its strategic goals</td>
<td>focusing only on the measures relating to your department’s success</td>
</tr>
<tr>
<td>preparing and reviewing contingency plans for future problems and opportunities</td>
<td>reacting and taking a day-to-day approach to handling issues and challenges</td>
</tr>
<tr>
<td>assessing trends and calculating any potential implications these may have on your department’s future direction</td>
<td>constantly revising your department’s business plan based on new information</td>
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</table>
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.
- 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 departmental contribution to the agency’s strategic plan.
- Identify the specific expertise of each department. Ask yourself, “What outputs, services would be lost, now and in the future, if the department did not exist?”
- Test whether the major mission for each department is aligned with and adding value to the overall direction of the agency. Review the department’s overall strategic plan.
- Once you have identified departmental 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 a 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 or people who receive support.
- 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:**

ﻴWhat 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 of 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 departmental objectives with the agency’s strategic objectives
 On an index card, document your agency’s overall strategy and objectives.
 Use the following matrix:

<table>
<thead>
<tr>
<th>Strategic Objective #1</th>
<th>Activities That Align</th>
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<tbody>
<tr>
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<tr>
<td>Strategic Objective #2</td>
<td>Activities That Align</td>
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<tr>
<td>Strategic Objective #3</td>
<td>Activities That Align</td>
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</table>

 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.

Align priorities with strategy
 Consult with each department and list all initiatives underway.
 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 each department manager to refocus effort and achieve alignment
Create a strategy learning group of colleagues from other departments

- Share your strategic objectives with colleagues from different 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 a current process or policy 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.

<table>
<thead>
<tr>
<th>Who is Impacted?</th>
<th>How are They Impacted?</th>
<th>What is Their Likely Reaction?</th>
<th>What Level of Commitment is Required of Them?</th>
<th>Do They need to be Involved in the Decision?</th>
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- 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.

- 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 the needs of people who receive support, 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.

- 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.

<table>
<thead>
<tr>
<th>Trends/assumptions made by others</th>
<th>Implications to agency/ Changes required to strategy</th>
<th>Opportunities</th>
<th>Key stakeholders impacted</th>
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- Communicate your plan to your team and other key stakeholders.
Books and Videos


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.


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.

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.


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.


Tools, tactics and techniques for making effective strategic decisions in business today.


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.


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.

This book provides a thorough critique of the contributions and limitations of 10 dominant schools of strategic thought.


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.


Twenty-two of the most influential strategy thinkers take a comprehensive look at the “intellectual backbone” of the field of strategy.


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.


The foremost strategy thinkers offer insights and advice on how to make the critical decisions for business success.


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.


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.