CORE RESPONSIBILITIES

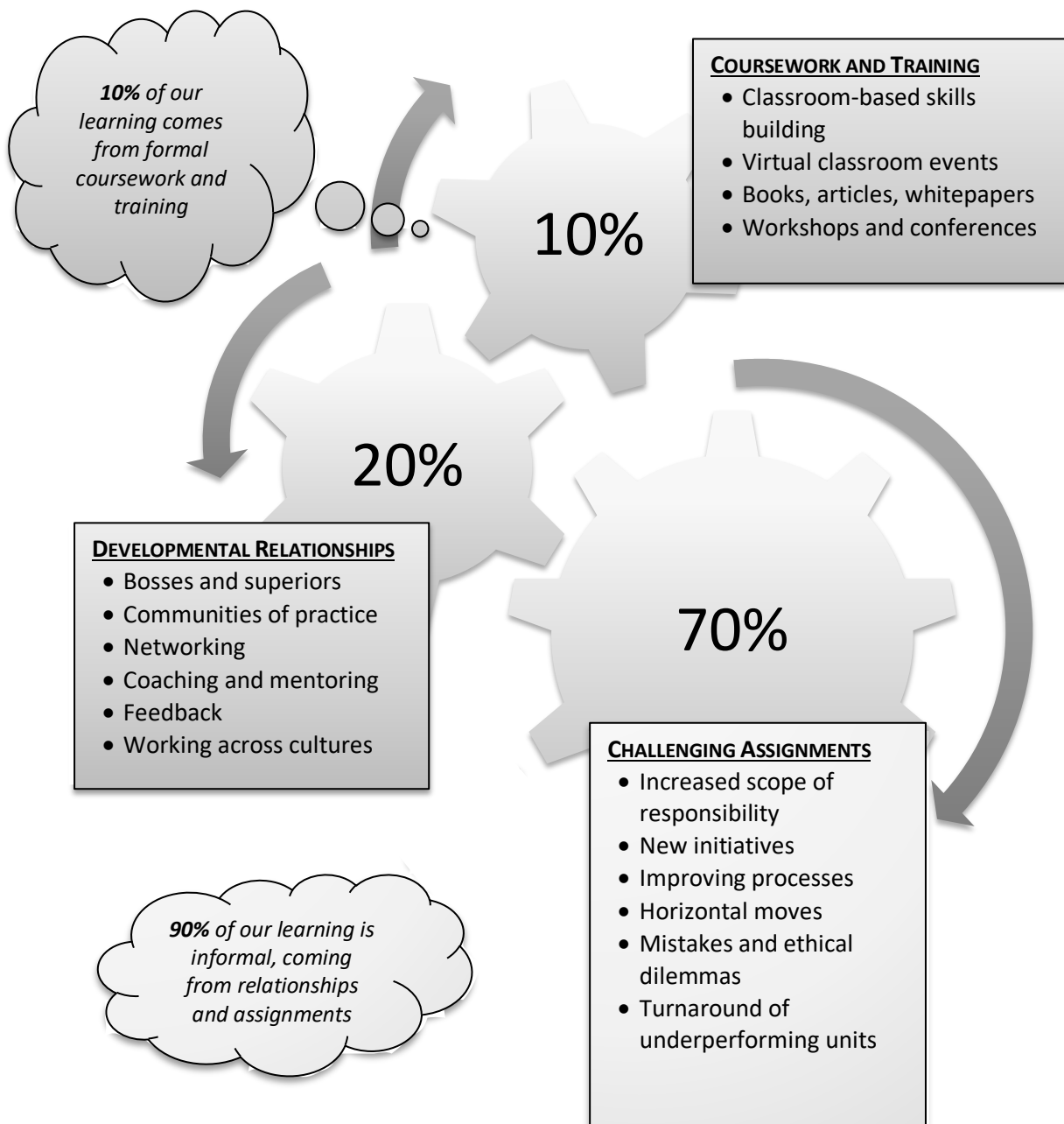## Chapter 7

HELPING STAFF GROW

Leadership and learning are indispensable to each other.

John F. Kennedy

7.1 The 70:20:10 Rule

ABOUT THIS TOOL—Effective managers learn roughly 70% from tough jobs, 20% from people (mostly the boss), 10% from courses and reading. Though coursework and training are seen as contributing just 10 percent to a manager's development, when done well they have an amplifying effect—clarifying, supporting and boosting the other 90 percent of a manager's learning.

APPLICATION—Study the image, below, and then evaluate where the opportunities are to leverage learning for your team.

10% of our learning comes from formal coursework and training

COURSEWORK AND TRAINING
- Classroom-based skills building
- Virtual classroom events
- Books, articles, whitepapers
- Workshops and conferences

10%

20%

DEVELOPMENTAL RELATIONSHIPS
- Bosses and superiors
- Communities of practice
- Networking
- Coaching and mentoring
- Feedback
- Working across cultures

70%

CHALLENGING ASSIGNMENTS
- Increased scope of responsibility
- New initiatives
- Improving processes
- Horizontal moves
- Mistakes and ethical dilemmas
- Turnaround of underperforming units

90% of our learning is informal, coming from relationships and assignments

Source: "The 70-20-10 Rule for Leadership Development," Center for Creative Leadership, accessed 2018, https://www.ccl.org/articles/leading-effectively-articles/70-20-10-rule/

7.2 Menu of Professional Development Options

ABOUT THIS TOOL—Many of our most powerful learning experiences occur outside of classrooms, workshops, and conferences. This chart is meant to spark creative thinking in deciding how best to foster employee development. There are many low- or no-cost options that can lead to lasting learning.

APPLICATION—Study the chart and review with your employees to identify promising professional development opportunities.

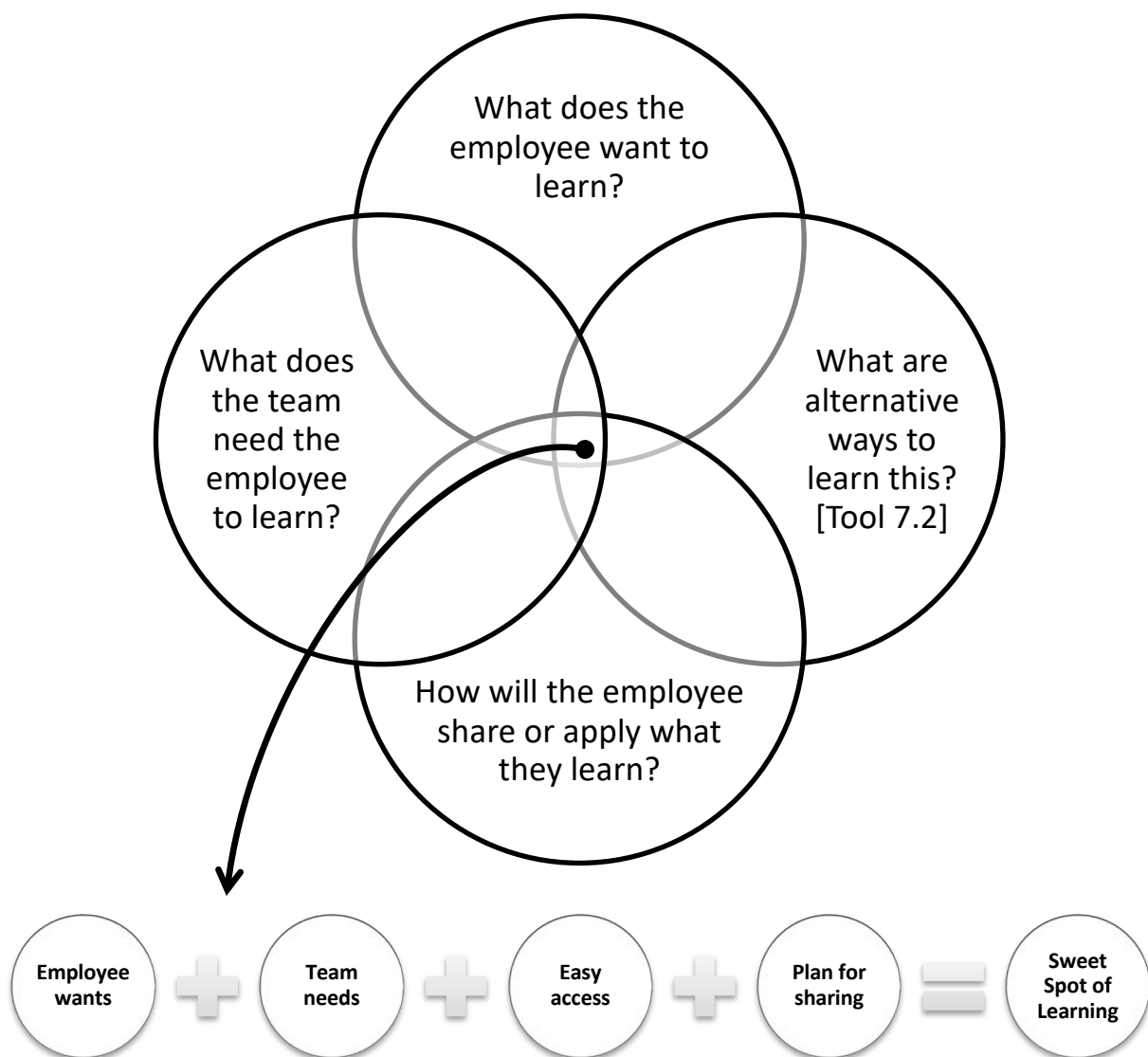| Learn from the Work Itself	Learn from Colleagues	Learn through Teaching	Reflective Learning	Learn with Others
1. Take on stretch assignments *(assignments at a higher level of complexity and skill)* 2. Participate in a cross-division or office working group 3. Develop or improve a process, procedure, or practice 4. Learn and apply a new method or technique 5. Take on temporary assignments 6. Help design and lead team retreats 7. Work across cultures	8. Join or start a study group, journal club, or community of practice 9. Find a mentor for yourself 10. Join a LinkedIn group 11. Network *(meet periodically with other professionals to learn about their experiences and challenges)* 12. Learn from the "Digital Network" (Google, YouTube, TED, Wikis, Websites…) 13. Shadow a colleague for a day (or so)	14. Mentor others 15. Read and report to your team on what you read 16. Teach a workshop or course 17. Present at a conference 18. Share what you learn with your team	19. Write case studies and articles 20. Solicit feedback 21. Keep a journal 22. Read a book 23. Create your personal vision and mission statement 24. Clarify your values	25. Join online discussion groups 26. Take an online course or workshop 27. Attend workshops, seminars, and conferences 28. Volunteer in your community 29. Participate in professional associations 30. Take field trips with teammates to see how others do business 31. Go back to school for a graduate certificate or degree

Source: Developed by the author

7.3   How to Plan for Employee Development

ABOUT THIS TOOL—The continuing opportunity to deepen and broaden one's professional repertoire is one of three factors that motivate knowledge workers [Tool 1.2]. While professional development is ultimately the responsibility of the employee, the support and encouragement of their manager is indispensable.

This simple framework will give you the basis for a productive conversation with the employee about their learning. It balances employee interests with those of the team. It also reinforces the learning by challenging the employee to synthesize and share with others what they learned, even if it's only the manager.

APPLICATION—Use these questions when meeting with your employees about their professional development or in responding to their learning requests.

What does the employee want to learn?

What does the team need the employee to learn?

What are alternative ways to learn this? [Tool 7.2]

How will the employee share or apply what they learn?

Employee wants ➕ Team needs ➕ Easy access ➕ Plan for sharing ➕ = Sweet Spot of Learning

7.4   How to Evaluate Workshop and Conference Requests

ABOUT THIS TOOL—Learning occurs in many forms. A common one necessitating a manager's authorization is whether or not to spend the organization's money for an employee to attend a workshop or conference. These questions will help you fairly evaluate such requests.

APPLICATION—Use these questions in deciding whether to fund workshop or conference requests.

1. **How strongly does the workshop or conference relate to the employee's job?**
   a. How does it relate to current responsibilities?
   b. How does it relate to probable future responsibilities?
   c. To what extent will this build on the employee's strengths, deepen their understanding or add skills?
   d. How strongly does this relate to the needs of the team and organization?
   e. What is the employee's track record for using or sharing learning from past workshops or conferences they've attended?

2. **How much does it cost in terms of both money and time away from work?**
   a. Is there sufficient budget to cover the full costs--fees, travel, lodging, and food?
   b. Can the employee's absence be managed with minimal disruption?
   c. Is it allowable and reasonable under applicable policies and regulations?
   d. Are there no- or low-cost options? [Tool 7.2]
   e. Does this employee's performance merit this level of investment?

3. **How will this be viewed by others?**

4. **Has this employee already had this kind of opportunity?**

5. **How easily can the learning be shared or applied?**

Source: Developed by the author

7.5   Summary: It's Challenging to Learn from Experience[8]

Learning from experience is not as easy as it sounds. According to the scholars Emre Soyer and Robin Hogarth, our doing so is flawed. Here's why:

1. We focus on outcomes instead of the processes that led to them.

2. We are insufficiently critical of our successes and overly critical of our stumbles, often overlooking the role of systemic issues and just plain luck in both.

3. Self-censorship by staff and colleagues distorts the feedback we receive. This is exacerbated by the level of the manager receiving the feedback: The higher the level, the greater the distortion and staff self-censorship.

4. We gravitate towards explanations that reinforce our biases and beliefs.

5. Our memories are flawed and incomplete.

6. Our own experience is limited.

7. We tend to imagine a future much like the present.

The antidote?

1. Actively seek diverse perspectives and disconfirming evidence.

2. Interrogate your wins as well as your setbacks.

3. Fail forward, that is, use a structured process to debrief decisions. That US Army's after-action review (AAR) process is a good example. Sample AAR questions:

    a. What was supposed to happen?

    b. What actually happened?

    c. What can we learn from what went well?

    d. What can we improve for the future?

    You can find many more AAR questions online.

4. Widen your lens to consider factors in the environment surrounding the immediate decision.

5. Embrace the ethic of continuous improvement.

Source: Developed by the author

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[8] Emre Soyer and Robin M. Hogarth, "Fooled by Experience," *Harvard Business Review*, (May 2015)

7.6 Stay Interview Questions

ABOUT THIS TOOL—What can you do to help keep a good employee working for you? Conducting a *stay interview* will help you find out and learn what might make a valued employee want to leave. Here is a sample format for inviting an employee to such an interview that includes the *stay questions* themselves.

APPLICATION—Edit the invitation to fit your interests, then give it a try. It's rewarding and insightful in its own right, plus you'll be able to adapt your delegation, communication, and feedback routines to better match the motivations of your employees.

You are invited to attend…

The next step in your continued development.

You make a difference and I value your contributions.

Let's discuss some things that are important to you and me:

What will keep you here?

What might entice you away?

*What is most energizing to you about your work?*

Are we fully utilizing your talents?

What is inhibiting your success?

What can I do differently to best assist you?

Please schedule a meeting with me within the next two weeks to discuss this and anything else you'd like to talk about.

Source: Beverly Kaye and Sharon Jordan-Evans, *Hello Stay Interviews, Goodbye Talent Loss,* (Oakland, CA: Berrett-Koehler, 2015), Ch. 2

Find listening tips in Chapter 3 "How to Listen"
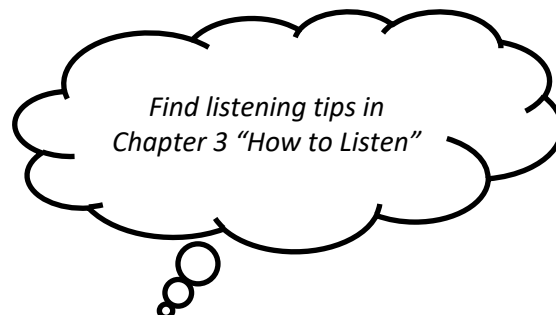
7.7   ORBIT Your Opportunities [repeated as Tool 11.6]

ABOUT THIS TOOL—The ORBIT coaching sequence begins by envisioning the future you want, rather than the obstacles you're facing. Doing so enables you to coach others both deliberately *and* optimistically. This is my go-to tool for professional development conversations and decision-making.

APPLICATION—Follow this sequence when coaching others.

<u>O</u>utcome What outcome do you hope to see in this situation? What does the problem look like solved or the aspiration realized? What do you hope to achieve?

<u>R</u>eflection What are the current circumstances in relation to your desired outcome? Consider both facts and feelings. This would be the ideal time to use Force Field Analysis [Tool 11.3]

<u>B</u>rainstorming Generate at least seven unique ideas to achieve your objective in light of your reflections. Why seven? Your initial ideas will be the obvious solutions; by the time you get to seven you need to get creative, to think beyond the obvious.

<u>I</u>ntention Which of the ideas you brainstormed hold the most promise for achieving your objective? Which ones energize you? Just pick two or three. One is all you need to get started.

<u>T</u>asks What are the initial tasks and timing to implement your intention? You don't have to create an entire plan; you just need to identify the first steps you'll take and when you will take them.

For an even more complete problem-solving session, consider adding an E and R to your ORBIT…ORBITER

<u>E</u>ncouragement What encouragement or support do you need to assure you'll follow-through on the tasks you've identified? It may be as simple as putting a couple of notes on your calendar or committing to a colleague to check in periodically.

<u>R</u>efinement Did your steps achieve their intended objective? If so, what can you learn from your success? If not, how can you refine your actions to better achieve your objectives?

Source: Developed by the author

Step	Manager	Employee
7.8	**Sample ORBIT Coaching Conversation [repeated as Tool 11.7]**	
O		I'd like to be the lead on the next project…a real project manager
R	Say more. Why does this appeal to you?	
		I feel like I'm ready—I've been a member of three project teams. I really enjoy the work. The details and discussion of what to do and when have been a real education on how to tackle complicated projects. I've learned a lot. Plus, I completed an online workshop.
B	Let's put together a list of ideas on how you could step up to a project manager role.	
	Both Manager and Employee participate in the brainstorming 1. Take a more formal project management course 2. Become a Certified Project Manager 3. Learn about how to design and facilitate project meetings 4. Interview a few project managers to learn more about their work and training 5. Find a project manager who could be a mentor for me 6. Shadow a project manager 7. Review a project manager's job description to understand the work and requirements better 8. Study a few projects more deliberately to identify common practices 9. Join a professional association of project managers	
I	Those are a lot of good ideas. Where do you want to start?	
		I'd like to begin by interviewing a few project managers. [Idea #4 from above.]
T	How and when will you start?	
		I'll reach out next week to the project managers I've worked with and ask them for an appointment.

Source: Developed by the author

7.9   Mentoring Agreement

ABOUT THIS TOOL—Mentoring is a powerful, deliberate learning strategy. A manager plays an instrumental role in helping focus an employee's mentoring goal and connecting them with a potential mentor.

Mentors are colleagues whose experience and expertise can accelerate an employee's learning. Mentors can come either from within or outside the organization.

APPLICATION—This Mentoring Agreement supports successful mentoring relationships by assuring the mentor and mentee are clear about what they expect of one another.

Mentoring Agreement

Employee_____   Mentor_____

We voluntarily enter into this mentoring relationship to benefit both us and the organization. We want this to be a rich and rewarding experience, with most of our time together spent on substantive development activities. To minimize administrative details, we have noted these features of our relationship:

A.   Learning Objectives
What the employee hopes to learn from the mentor.

B.   Confidentiality
All information shared by the employee relevant to the learning objectives will be held in confidence by the mentor unless mutually agreed otherwise.

C.   Duration

From _____   To _____

Mentoring agreements are typically for a year or less.

D.   Frequency of Meetings
Depending on the nature of the learning objectives, meeting at least every three to four weeks is best for maintaining the momentum for learning.

E.   Approximate amount of time to be invested by the Mentor
Other than meeting with the mentee, what else will the Mentor be expected to do to contribute the mentoring relationship.

F.   Describe the specific role of the Mentor and Mentee
MENTOR—Describe the specific ways in which the Mentor is expected to contribute to the mentee's development.
MENTEE—The Mentee is expected to engage fully in the mentoring relationship, complete any assignments, and arrive on time prepared for meetings.

G.   Termination
Either party may terminate the mentoring relationship at any time for any reason.

H.   Signatures
Of the mentor and mentee only.

7.10   Tips for Giving Positive, Powerful Feedback

ABOUT THIS TOOL—When you deliver positive feedback, you help people recognize what they are doing well, feel good about their performance, and develop their trust in you as a person who cares about their success. Positive feedback builds performance and relationships.

APPLICATION—Apply these tips so your feedback is positive and powerful.

1.   Be specific
It is acceptable to write a general comment such as "Great work!" but add why the work was great. The details make the message stick. Here are two examples:

> **Subject:** Thanks, Larry!
>
> Hey, Larry. Your coming in early last night meant we could get the trucks loaded and out before the weather got too bad. As usual, your flexibility helped a lot. Much appreciated.
>
> Mike
- -
> **Subject:** I liked "Vacationing at Home"
>
> Tye, nice job on this month's newsletter! I liked your tips on staycations, which covered both simple and elaborate things to do. You gave me several ideas I am going to suggest to Ellen and the kids.
>
> I always enjoy reading the newsletter. I am sure our clients appreciate it too. Thanks for all you do!
>
> Dana

2.   Avoid using the word *but* right after a compliment
But is guaranteed to erase any positive feeling in the reader's mind. Compare these statements:

> I liked your rapid turnaround, but the mistakes were disappointing.

> I liked your rapid turnaround. It was wonderful to get the document back so fast.

When you do need to communicate both positive and constructive feedback, include the constructive part in a separate paragraph, or at least in a separate sentence. The previous "rapid turnaround" compliment might be followed with this statement: "A few mistakes need to be corrected."

3.   Use the pronouns *you* and *your* when making positive comments
The pronouns give credit clearly to your reader. Compare these two sets of paired examples:

> The event-planning ideas were very creative and expertly carried out.

> Your event-planning ideas were very creative, and you carried them out expertly.
- -
> This is the best proposal for cleanup services I have read.

> You wrote the best proposal for cleanup services I have read.

4.   Include why the person's performance or traits are valuable
Perhaps the individual's contribution:

- Made your life easier.
- Made the department look good.

- Helped a student.
- Enhanced the organization's reputation.
- Taught you a helpful lesson.
- Built goodwill.
- Increased efficiency.
- Created positive buzz.
- Saved time and money.
- Created beauty for everyone to share.
- Reduced accidents.
- Made everyone feel good.
- Ensured customer satisfaction.

5. When appropriate, share positive feedback with others beyond the recipient

If you communicate positive feedback in an email, for example, copy the person's supervisor on the message. If you write positive feedback for a peer on your team, copy the team on the message.

Normally copying others makes everyone feel good. However, in a potentially sensitive situation, ask yourself whether the copies could cause hard feelings. Imagine, for instance, that Joseph was named project leader, a role that Amy was disappointed not to get. Copying Amy on positive feedback to Joseph might make her feel worse.

6. If you find yourself saying "I have no time for this!"

Recognize that positive feedback takes just a moment. The secret to making time for feedback is to write it (or to make a note to yourself to write it) as soon as you notice the excellent work. You don't have to go into great detail. These two examples involve brief but powerful feedback:

Walking through the lunchroom, you speak to a new employee, who praises several aspects of the day's orientation program. On your smartphone, you send a text to the training designer: "Marty, I got a huge compliment on your onboarding program from a new employee. He loved the map challenge and pop quizzes. Nice work creating new evangelists!"

A couple of students tell you what a great class Dr. Smith, a new faculty member, is delivering—they tell you how energetic, well-organized and open Dr. Smith is. You grab your iPad and send Dr. Smith a message: "Dr. Smith: You've really impressed your students with your enthusiasm and openness. Your energy and expertise are making a difference!"

7. Help yourself remember to give positive feedback

Add "Give positive, powerful feedback" to your planner or calendar as a daily activity.

Whether you are a CEO, supervisor, manager, individual contributor, an entrepreneur, or consultant, share positive feedback every day. Look for opportunities to recognize people's contributions to your success and contentment. Your positive feedback will strengthen your business relationships, making them more supportive, rewarding, and enjoyable. And it will strengthen performance!