

# Coaching For Impact: Generational Diversity & Building Winning Teams!®

Dr. Jeffrey Magee, PDM, CSP, CMC

(Designed from the books,

THE MANAGERIAL-LEADERSHIP BIBLE©,

COACHING FOR IMPACT: Leadership And the Art Of Generational Coaching©)



# General Introduction/BIO For Dr. Jeffrey Magee PDM, CSP, CMC

"Leadership & Marketing Strategists." He started his first business at age 15 and sold it before going to college. By age 24, he was recognized by a Fortune 500 company as its top salesman in the nation, while at the same time becoming the youngest certified sales instructor for the Dale Carnegie Sales Course. After experiencing downsizing in 1987, he went on to work as a sales associate for the nation's largest educational and youth advertising/marketing firm, Target Marketing, and was promoted to Vice President of Sales and Chief

Our speaker today has been called one of today's leading

Operating Officer within two years.

Magee's credentials are significant. He is a Certified Speaking Professional, a Certified Management Consultant, and a Certified Professional Direct Marketer. He has been recognized as one of the "Ten Outstanding Young Americans" (TOYA) by the U.S. Junior Chamber of Commerce. A three-term President of the Oklahoma Speakers Association and twice awarded their Professional Speaker Member of the Year, today, the Chapter's outstanding member of the year is awarded the "Jeff Magee Member of the Year Award."

Today, Magee is the author of the nationally syndicated "Leadership" column that you may have seen in your local business newspaper; serves as the publisher of *Professional Performance Magazine*; and is the author of more than 20 books that have been transcribed into multiple languages, including four best-sellers. In fact, his text, *Yield Management* (also known as *The Managerial-Leadership Bible*) was the #1 selling graduate management school textbook in 2000, and his newest book *it!* is currently a best-selling sales book.

Many of the Fortune 100 firms today use Jeff for **Performance Execution®** in the areas of managerial-leadership effectiveness and sales training and coaching. He also been invited to keynote at many major associations in America and speak at **West Point Military Academy** on leadership.

Magee was commissioned to design, train, and present a new series of national leadership and sales recruitment programs for more than the 5,000 professional sales recruiters and sales managers with the **U.S. Army National Guard.** For this he has subsequently received the prestigious **Commander's Coin of Excellence**.

The *London Business Gazette* has hailed Jeff as "An American Business Guru." Former President George Bush and the U.S. Army National Guard recognized him with the high honor of the "**Total Team Victory & Freedom Award.**" However, more important than Magee's credentials and accomplishments, he is here today to deliver ideas you can use immediately to improve your own personal performance.

### **Managing The Different Generations For Success**©

By: Dr. Jeffrey L. Magee, PDM, CSP, CMC www.JeffreyMagee.com

"Success is in the JOURNEY more so than in the destination ...
the seasoned, learned leader knows this, learns from this,
and grows outward because of this!"
- Jeffrey Magee

Old Leadership/Man-ag-er, n. One who manages a business or enterprise; the act, practice, or process of managing; executive skills.

Evolving Leader/**Leader-ship**, v.n. To direct the performance or activity of; to be ahead or at the head of.

Generational Leader/Coach, v.n. The fluid ability to move between states of manager and leaderbased upon situations for maximum performance and effectiveness

Organizations for decades have been legislated, mandated, educated, acclimated, cultured, conditioned, and evolved into understanding the world of human resource management on all levels of (1) gender and (2) ethnicity – and so we operate not be sexist or racist in our actions. We have even parked these endeavors within organizational institutions of "diversity" to ensure we are legal. The volume of white papers, books, articles, and consultants on these two matters is endless; just do a Google search and see for yourself.

Now imagine the added variable of *generational diversity* today and examine how you draw upon this as a strategic asset internally and externally as you move forward—very few do and very few are as we speak. In fact, of all of the Fortune 500 Organizations, only one has recognized the power of generational segmentation as a strategic asset and made it part of its diversity organization to ensure that everyone gets it!

So who are we?

Adages are great benchmarks for human behavior and as goes the adages so to does our ability to celebrate the diversity of individuals based upon their respective generational place in time. *Our age can serve as an asset or a liability; you choose.* 

Many times in our personal and professional lives we "rush to a judgment" and have tendencies of "judging the book by the cover," and in these instances, the possibilities of what could have been may be lost. This is a powerful reality in the workplace today when we look at the generational perspectives, differences, and mode-of-operation when it comes to just the simplest of actions.

MANAGER

### **COACH**

**LEADER** 

Imagine you gathered all of your colleagues together, placed all of your driver's licenses in a bag, and shook them up. Upon pouring them out upon a table face-down, you were to grab one, and now that is you – that age, that mailing address, that perspective on life.

Here are the explosive questions you would be confronted with in determining if you can even grasp how your colleagues operate:

- 1. Could you understand that age's vantage point?
- 2. Could you see how that age print would differ from how you think and feel (and thus operate)?
- 3. What have been some of that age points defining life experiences to date? Do those differ than your experiences? Consider that no one in the workplace today has WWII, The Great Depression, or even the Korean War as a defining life point, most likely .... In fact, most senior employees in the workplace today may have the Assassination of JFK, man's first step on the moon, or the resignation of Nixon as a defining global moment. More than 50 million workers today have as their first and most defining life moment the World Trade Center attack, and a better question would be, "what does the Kennedy tragedy mean?"
- 4. Is it the Yellow Pages or YP.com? MySpace, FaceBook, YouTube, Twitter, Texting, or ?
- 5. Could you relate to that age print's favorite music and television shows? Can you even list a few of either?
- 6. What are some of the favorite words or phrases that age print uses, as opposed to the favorite sayings of your generation? Does each have their own language?

Your ability to make a quiet connection with the other person in your circle, whether they are of a similar age or significantly different, will afford you the ability to:

- 1. Learn from them,
- 2. Enhance and add perspective you may otherwise not have had to your present operational knowledge set,
- 3. Determine how and when to best engage the other person and find ways to make communication connections with them,
- 4. Make them feel welcomed and valued.
- 5. Put the other person at ease and allow you to focus on your engagement agenda without being continually mentally distracted by the age-related variances in actions, dress, appearance, etc.

As you work to understand the other person's operational level or awareness, start by recognizing the similarities you may have and just the differences you may have with the other person. Significant levels of success await all of us, when we can get beyond the differences of generational segmentations and recognize that generational differences can be our diversity strengths!

The *United States Census Bureau* groups American's into five broad generational segmentations (from birth-to-death) and we can use these same segmentation labels when observing the landscape of the American workplace. If the norm is that our workforce enters the market place around ages 17-to-21 and that people begin exiting between 55-and-65, we will use these same segmentation labels and just modify the age ranges for presentation herein this text.

Notice that there are similar behavior characteristics from society that we can use as an over-lay to the traditional workplace for coaching engagement clues.

SEGMENTATION NAME	AGE/Birth Date	Population		
1. Centurion =	(1922-1945)			
2. Baby Boomer =	(1946-1964)			
3. Generation X =	(1965-1975)			
4. Generation Y =	(1975-1985)			
5. Millennial (MTV) =	(1985-2001)			

The five basic different generational segmentations in the workplace today have similar situational operational behaviors and beliefs, but, in many instances, radically different ways of processing and doing things. Your ability to make instantaneous, real-time readings can mean the difference between success and outright disaster.

Here is a matrix (**template**) that individuals and organizations can use to determine individual clues as to how each different generational segmentation works and, thus, find ways to better interact with one another or even ways to ingrate differing segmentation together.

The intent is for you to individually (or with a group of colleagues/clients back home) complete the matrix and compare observations and recognize similarities and vast differences among individuals—many you think you knew very well but, as you will learn, do not.

Use the trigger descriptors on the left hand-side of the inverted L-grid as prompts to the words that could be associated under each generational-segmentation that is detailed across the top. The more words that you can determine for each segmentation across the top of the L-grid for each *ABC MAPS* descriptor, the greater your ability will be to understanding each and thus interaction each.

Discussion:

Consider the ABC MAPS Model for intervention clues:

**Reference, Discuss Shaping Of Generations** – Great Depression-to-Civil Rights-to-MTV-to-Internet; Hollywood; Toyota; Telephone; Dress

Centurion	/ Baby-Boomers	s / Generation "X"	' / Gen. "Y" / M	lillennial
55+	38-55	28-38	21-28	17-21
<b>;</b>				
fs				
	fs	55+ 38-55	55+ 38-55 28-38	

Given the descriptors for each generational-segmentation that you come up with, imagine how you may engage each more efficiently, given your own age reference point, if you needed to. Imagine how you may delegate, communicate, motivate, discipline, counsel, coach, educate, manage, lead, or interact with another person differently—wow!

Here are some additional unique distinguishing descriptors for each as generalizations ...

	Centurion / B	Raby-Boomers /	Generation "?	K" / Generation "	Y" / MTV
	55+	38-55	28-38	21-28	17-21
Attributes	Loyal	Competitive	Independent	Collaboration	Loyal
Behaviors	Dedicated	Materialistic	Self-time	Individuality	Dedicated
Characteristic	s Conservative	Driven	Open	Liberal	Conservative
Morals	Formal	Situational	Free Wheeling	Informal Very I	npressionable
Attitudes	Respectful	Optimistic	Me-ism	Entitlement	Respectful
Personalities	Guarded	Independent	Outgoing	Attention-getting	Guarded
Spiritual Belie	efs Structured	New Age	Trendy	Interactive	Structured

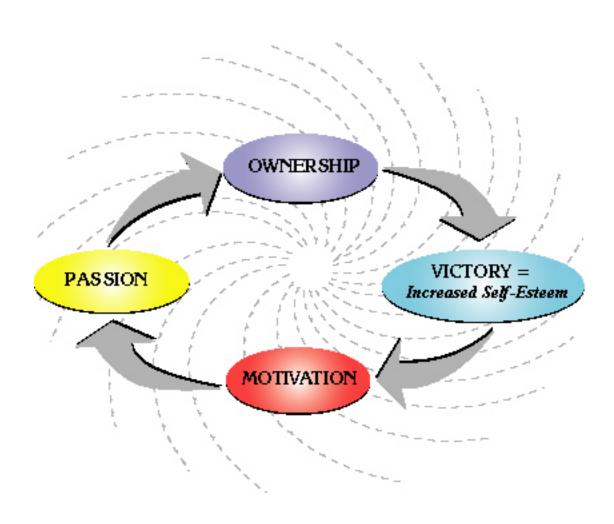
The more descriptors you have, the greater your ability to understand the differences and similarities that there will be among the generational-segmentations.

Effective leaders maintain influence through quiet interaction, as opposed to loud stands of last call. Understanding how to engage individuals from their Generational imprint allows you to more effectively and engage in the "Talent Management" of your Human Capital for immediate, intermediate, and long term needs (of both the individual, the positions and organizational needs)!

# **MODEL ONE:**

# **Building OWNERSHIP Today -**

The goal of building an integrated team (department, business unit, committee, task force, organization), whereby buy-in or attaining higher levels of ownership by individuals, groups, across departments or business units, and with external constituents today is even a greater challenge than ever before – add the generational segmentation uniqueness and it may seem impossible. But, it can be accomplished. Consider the following four forces and what can be built from it:



Building ownership among employees (or what name your organization affixes to the labor force – associates, team members, colleagues, etc.) used to be a non-issue. For decades, it was assumed that all employees would be loyal to their employer and that their employer would take care of them—we had a cradle-to-grave mentality.

For reasons not worth belaboring, the reality of the business world today is that all employees do not operate the same way. Consider that playing to the operational styles of each would serve as a good road map for gaining ownership from the differing generational segmentations:

1.	(over the age of 55), being the senior-most
	employees are motivated by their desire to be given a reason to be loyal, prefer structure, are more comfortable in conservative situations, and were raised to live to work.
2.	those between the ages of 39 and 55), being the larger workforce population, prefer status opportunities and materialistic gains and have me-ism perspectives and a what's-in-it-for-me approach to the business unit, more often than not.
3.	those between the ages of 28 and 39), being the up-and-comers for leadership consideration, were raised in environments where they were conditioned that it is acceptable to question anyone at anytime about anything that does not play to their comfort zone. They are more socially driven and less work-focused; they work to live.
4.	(those between the ages of 21 and 28), as the labor agents in most situations, have reasons for assuming ownership that are distinctly different than those that have come before them. This group is entitlement driven, needs immediate gratification for their labor, and likes multiple stimulation. They become bored quickly and easily and are very self indulgent and self centered.
5.	(the entry level workers of the ages of 17 to 21), are members of the new generation, which actually find themselves frustrated with their immediate elders. This group is very high-tech, are looking at big picture relevance, seek something to be committed and loyal to, and see their colleagues as an extension of their family.

The leader within you must recognize that today how one communicates and motivates those around them may have to dramatically differ from one generational segmentation to another to gain universal ownership.

## **MODEL TWO:**

# Player Capability Index<sup>TM</sup> -

Another very effective technique for quickly and objectively analyzing whether **you** or **others** who need to address a task will be able to and regain stability, calm, and success or simply add to the turbulence would be to understand and use the "**Player Capability Index**<sup>TM</sup>" formula (*sample document in the text of fundamentals of management effectiveness* <u>THE MANAGERIAL-LEADERSHIP BIBLE</u>©, ISBN: 0-9718010-5-3 / US \$39.95/Copyright 1995 and 2005).

Now reflect on each variable below and how it has been imprinted on each generation, what your reference and comfort zone is, and what the reality is for the other generation. For example how did you receive your formal "T" and how did/do other generational segmentations receive their formal "T"? Explore this for each variable in the "Player capability Index" formula.

The "Player Capability Results" Index<sup>TM</sup>

$$C = (T2+A+P+E+C)E2xR = R$$

## **MODEL THREE:**

# **Building Alliances before you act – Consider Model 80-10-10**®

Another way of looking at a situation, initiative, or impending need and how those around you may play a part in contributing forward or working to pull you backwards can be seen by evaluating groups against Rule 80-10-10. This model from sociology suggests (and is situational based) that people tend to migrate into groups, which will effect and affect outcomes, especially when under fire!

Your ability to build coalitions and alliances when times are good, does not always imply that people will be with you when you come under fire. Because of the Maslow's Hierarchy of Needs, people will change based upon many factors, one of which is based upon who speaks up first, so consider:

1.	$80\% = _{}$							
	a						-	
	b						-	
	c							
2.	10% =							 
3.	10% =							 
							nct or end	
thus be	etter positio	oning y	ourself to	address v	what com	es next:		
1.								
2.								 

Discuss how the differing generational segmentations might respond to this model.

## **MODEL FOUR:**

# **Coaching Communication Requires Five Sequential Steps or Phases!**

Most communication interactions start at step four (very "Centurion-esque") and thus immediate mental, if not physical, resistance (very Generation "X/Y-esque") is a natural state. To break this wall down and engage individuals from their perspective, follow the five step model:

### STEP ONE

Buy-in or Enrollment Phase

### STEP TWO

Identity-Purpose Statement Relevance/Connection Phase

STEP THREE

Choice Phase

STEP FOUR

**Commitment Phase** 

STEP FIVE

**Accountability Phase** 

As you deploy this model to the five different generational segmentations, keep in mind the MAPS that guide each generation's operational DNA and make suitable adjustments with each. By doing so you will have healthy communication cycles, and if you do not, you will have continual communication breakdowns. For example:

- 1. Centurions tend to be more linear, literal, like things written out.
- 2. Baby Boomers are more bottom-line, self-centered, and want less written and more verbal communication.
- 3. Generation X is more interactive and may prefer you to tell them and show them.
- 4. Generation Y members challenge the norms, do not play by tradition or structure, and see nothing wrong with their actions. The may want some of the communication exchange written out, others given verbally, and some degree of interactivity.
- 5. Generation Millennial/MTV (17-21) like instant "me" gratification and all delivery methods—visual, verbal, and interactive (kinesthetic)—to be used simultaneously

How you communicate based upon generational differences will become your diversity advantage and afford you (both personally and professionally) significant strategic leverage and advantage in your relationships!

# **MODEL FIVE:**

# Management Effectiveness through 6-Intervention Styles (Hats) for Success & Micro Management Avoidance!

The fundamentals of managerial-leadership effectiveness, and especially when under fire, demands that the correct intervention style be the norm, not the exception. There are six strategic core management styles that can be deployed, depending upon your tactical needs. *Now recognize the subtle adjustments one should consider given the generational diversity as an overlay to managerial-leadership-coaching effectiveness.* Consider:

### **Six Alternative Management Styles**

Management Style (hat)	Responsibilities/Traits
MANAGER	
TEACHER	
	1
MENTOR	
COUNSELOR	
DISCIPLINARIAN	
СОАСН	

www.JeffreyMagee.com and www.westernCPE.com

Using the "Managerial-Leade	ership I	Engag	ement	<sup>1</sup> M (	<i>Grid"</i> can g	give	you	instant	clue	s as
to which of the six manageria	al-leade	rship	styles i	is g	oing to be	mos	st ef	fective,	so a	s to
avoid micromanaging a situati	on and	creati	ng add	itio	nal problen	ns—	botl	n now a	nd in	the
long term. Consider the follow	wing L	-Grid	as you	r ir	stant guide	e to	be 1	used in	both	the
	need	and	after	a	situation	as	a	guide	for	the
					of your tea	m fo	r fu	ture nee	ds.	

## **MODEL SIX:**

# **Speed Reading Personality/Social Styles!**

Building winning teams and forging better interactions among individuals of differing generational segmentation can also be influenced by understanding Personality/Social styles. You can make this exercise very academic and deploy measurement instruments that can be driven by situational factors, EQ and IQ factors, vision and motivation factors, character versus personality factors, and on-and-on ...

As effective managers, leaders, and coaches of human performance a simple understanding of how to understand your dominant drivers and what may be at any given point-in-time the other persons' drivers is what is most useful. Consider this helpful grid for navigating your behavior to greater performance and how to integrate others for maximum human capital utilization.

# **NOTES**

## **MODEL SEVEN:**

# Understanding Others, why Generations may Scare you, and how we can Blend Better!

The unknown always scares the uninformed mind. Once maps are revealed for how to address the unknown, you have a route of engagement to a calculated end, and the interaction becomes less scary and intimidating and more welcoming.

Based upon past interactions with differing generational segmentations, you will gauge future interactions accordingly. Some of the generational reasons we think we cannot connect with others may range from:

1. The person of an older segmentation being too scripted, traditional, structured, and conservative and will not appreciate or respect the younger demographic

To:

2. The younger segmentation being too impulsive, sporadic, liberal, and not dedicated enough to be solely empowered, placed in charge, or counted upon to make great things happen.

These separate observations of the extreme generational segmentations in the professional workplace today are more examples of gross generational-izations and stereotypes than they are accurate descriptors. It is the phantom types of categorizations that lead to failure in connecting the generations together today.

#### Consider:

- 1. With older generations, less explanation and reasoning was offered or allowed when directing someone to do a task or do a job. With younger generations that have grown up in a more quiz-itive world, asking for explanation to practically everything has become their norm, a sense of operational DNA, if you will.
- 2. Middle generations, due to experiences with organizational implosions and regular acts of deceit by major political leaders/people of power (who have a sense of being beyond reproach and are rarely held accountable), have become more jaded.
- 3. The antidote to both scenarios is to slow down and provide more "why" in our conversations to gain connectedness. Don't just address what is expected or what one needs, or dictate how something is to be done or not done; add into that conversation the reasoning, rationalization, and motivation behind each. This is accomplished by adding "why" conversation into our actual dialogue!

In making the connections, recognize that our sense of vested interest is driven by many needs: some may be lifestyle, some life choices, and some still may be based upon the generational segmentation we come from. While there are times we may act outside our generational segmentation, this is typically situational and temporary; a more accurate barometer of how we usually act is the age on our driver's license. So, for example, some guideposts of what motivates different generational segmentations and ways to speak to each in order to connect would be:

- 1. Centurions frame decisions based upon security, safety, and tend to be more cautions in their actions....
- 2. Baby Boomers are driven more by accumulation, net worth, titles and position....
- 3. Generation X is driven by entitlement, friendships, need for immediate gain, growth, brand identity, census building among others, etc....
- 4. Generation Y is driven by self interest, protection, social interactions, collaborations, and having fun; life is not just about work and profession....
- 5. Generation Millennial (MTV) is driven by a concern for the future and security—while wanting to make statements of individuality, they also have a level of awareness to others needs and work to accommodate them....

You will find that many of the initial reasons we think we have no connection with someone of a different generational segmentation are phantom at best once you get to know the other person based on his or her generation and we stop attempting to squeeze everyone else into the generational box we live in and operate out of!

### Power Thought -

"The problem with the youth today, is that they are disrespectful of others, not motivated, and want everything given to them ...."

\*

# Push-Point/Idea:

Invest a few minutes now, whether you are participating in this self-study course solo or with others, to <u>review your #1 Push-Point Idea today to commit and push yourself to apply</u> (and/or do the same drill for each model and make an application note explaining what you are doing now or what you can start doing to ensure each idea is utilized fully within your team, organization, or life for greater success)!



# The Fundamentals Of Managerial-Leadership Effectiveness: Interviewing, Hiring & Terminating Employees in the New Economy and How to Organize and Rebuild Winning Teams!©

Dr. Jeffrey Magee, PDM, CSP, CMC

(Designed for from the books, YIELD MANAGEMENT©, THE MANAGERIAL-LEADERSHIP BIBLE©, TRANSFORMATIONAL LEADERSHIP: What Quiet Leaders Do That Matters©, PERFORMANCE EXECUTION©)

### **Interviewing, Hiring & Terminating Employees ...** ©

By: Dr. Jeffrey L. Magee, PDM, CSP, CMC

"Given the opportunity to come, people will come to you. Given the opportunity to leave, people will leave you. Given the opportunity to stay, people will stay! What opportunity do you provide to people?"

- Jeffrey Magee

Organizations can approach how they attract and retain employees from a myriad of perspectives and ensure that they are in accordance with all local, regional, industry, and federal mandates; this session will not address any of those areas. Here, participants will explore the business management and creative marketing aspects of this need!

What this program will not explore:

- 1. The law,
- 2. Industry templates,
- 3. Psychological (or like) assessment instruments,
- 4. Mainstream HR SOPs,
- 5. Union v. management posturing,
- 6. Academic models, or
- 7. Any systems designed by individuals that have never signed a payroll check!

To provide you an enhanced approach to how you position your organization (firm, department, position, project, etc.) and assist you in increasing your effectiveness in you're A.I.M. toward attracting and retaining employees, what we will attempt to focus on will be:

- 1. Practitioner-based business models,
- 2. Immediately applicable strategies and tactics,
- 3. Back-of-the-room ideas, and
- 4. Synergistic ideas.

To do this, research indicates that human buying patterns are influenced by one of or a combination of four variables ONLY. Your ability to look at any micro measure you would initiate and determine if it would have any significant yield can be benchmarked against:

USF/1:		
USF/2:		

ATTRACT or RETAIN not just employees, but to attract or retain STAR Players® (this will be developed later in the session), consider these four core differentiators:
1.
2.
3.
4.
In evaluating your present behaviors towards <u>Attracting</u> , <u>Interviewing</u> , <u>and Merging-Managing-Motivating-Maintaining</u> employees in a tight labor market, consider the <u>AIMx4 Model</u> ®. Let's start by establishing your baseline (past-to-present tense realities), and then identify ways to enhance your position for greater success and profitability.
Robert Half & Associates (California-based) and Express Personnel Services (Oklahoma-based), the largest two national employment search and consulting firms in America, agree on why people leave an employer and what drives people away from even considering you as a viable long term employer. These industry leaders estimate the raw financial costs associated with a white-collar position turnover is \$!
If you were to survey your newest hires, veterans, or explore true exit interviews of actual employees, consider what they would say to <u>Reason's People Leave You:</u>
1. 2. 3. 4. 5. 6. 7. 8. 9.
Industry data says here is why they leave:
1. 2. 3. 4. 5.

So given the marketing world USF concept, once applied to how to look at ways to

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.
Industry data says here is why they come or stay with you:
1.
2.
3.
4.
5.

Reason's They Come or Stay With You:

**ADDITIONAL NOTES:** 

So *WHAT* do we collectively know that does work in **attracting** and **retaining** winners and workers today?

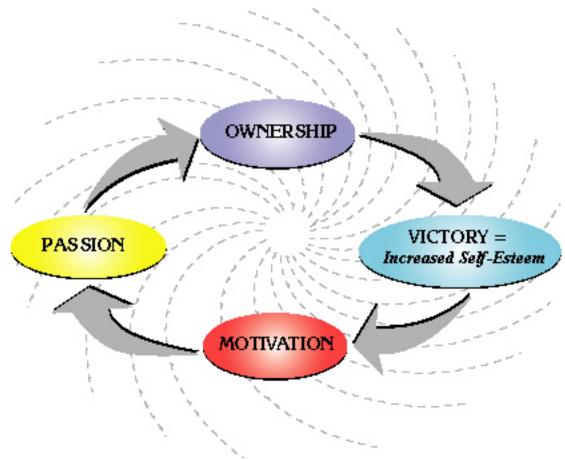
<b>ATTRACTING</b>	<b>RETAINING</b>
1	1
2	
3	3
4	4
5	5
6	6
7	
8	8
9	9
Now apply the	to each to determine if it is a,
1.	
2	
3.	
4	

You could assign a different color highlighter marker to each of these four categories, and use each color as you go through any present marketing, advertising, position announcements, or collateral materials that you would send to market to see just how much you speak to each, if any. This will assist in seeing either why people do come or ignore you!

# **MODEL ONE:**

# **Building OWNERSHIP Today -**

In attracting people and building a sense and desire for individuals to assume ownership, which builds a sense of community that people will want to associate with and begrudgingly ever leave, consider this model and the ways to make each component come to life.



The critical point here is that by addressing each of these four core and essential components, what you need to be doing to **attract** and **retain** STAR Performers becomes a clear road map to success.

How can we do VICTORY?

- 1.
- 2.
- 3.
- 4.
- 5.

How can we do MOTIVATION?
1.
2.
3.
4.
5.
How can we do PASSION?
1.
2.
3.
4.
5.
How can we do OWNERSHIP?
1.
2.
3.
4.
5.

### **ADDITIONAL NOTES:**

# **MODEL TWO:**

# All STAR® Player Index -

To attract winners, it helps to have winners. Let's presume that you have a winner, in essence, an all star person, and you wish you could attract and keep more people like him or her. Here is a model to use:

Now let's evaluate what you just said you really want and what you really value (which you can then weigh against how your organization rewards, awards, and compensates to determine f you are really in alignment). Each entry on the proceeding model is either an:
1. A-entry or

2. S-entry or \_\_\_\_\_

Lessons learned thus far?

# **MODEL THREE:**

# Player Capability® Index -

Another very effective technique for quickly and objectively analyzing whether YOU or OTHERS that need to address a task will be able to do so to regain stability, calm, and success or add to the turbulence would be to understand and use the "Player Capability Index<sup>TM</sup>" formula (sample document in the text of fundamentals of management effectiveness <u>THE MANAGERIAL-LEADERSHIP BIBLE</u>©, ISBN: 0-9718010-5-3 / US \$39.95/Copyright 2005).

The "Player Capability Results" Index<sup>TM</sup>

$$C = (T2+A+P+E+C)E2 \times R = R$$

### Lesson's Learned:

- 1. Use this formula in ensuring the DNA of any POSITION/JOB DESCRIPTION?
- 2. Use this formula in ensuring the PERSON hired or in a position has the DNA?

# **MODEL FOUR:**

# **Position Competency Analysis Grid -**

<u>Do not hire someone that fits into your team, hire someone you need for your team!</u> This is a classic mistake organizations make. To make sure we continually set people up for VICTORIES (remember the OWNERSHIP Model from page seven), consider the following grid, the *three categories* of data needed within it, and how to use them throughout the employee life cycle for greater OWNERSHIP possibilities:

# Position/Project/Task Name

Candidate	Organization	n
1-3-5	1-3-5	
1-3-5	1-3-5	
1-3-5	1-3-5	
1-3-5	1-3-5	
1-3-5	1-3-5	
1-3-5	1-3-5	
1-3-5	1-3-5	
1-3-5	1-3-5	
1-3-5	1-3-5	
1-3-5	1-3-5	
1-3-5	1-3-5	
1-3-5	1-3-5	
1-3-5	1-3-5	
1-3-5	1-3-5	
1-3-5	1-3-5	
1-3-5	1-3-5	
1-3-5	1-3-5	
1-3-5	1-3-5	
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1-3-5	1-3-5	
1-3-5	1-3-5	

### KEY:

1 = Does Not Meet Expectations 3 = Meets Expectations 5 = Exceeds Expectations

# **MODEL FIVE:**

# Plant TREs® to Attract STAR Employees -

Use the Target-Rich Environment (TRE) Model as a brainstorming matrix to identify *WHERE* you have been attracting people from and *WHERE* you could attract people from. Use the following matrix to brainstorm solutions:

4. Gender TRE 3. Industry TRE

1. Generational TRE

5. Ethnic TRE

2. Specialty TRE

6. Other TRE

## **MODEL SIX:**

Creative Recruiting Techniques Help Employers Attract Workers 3 Ways to Find and Keep the Best Employees By: Robert Funk, CEO ExpressPersonnel Services

With unemployment rates declining and wages increasing, employers now need to recruit creatively to attract workers. It is no longer enough to merely place a classified ad in the newspaper and wait for the résumés to arrive by the hundreds. To find talented workers, organizations must understand what drives and attracts their best.

As many Baby Boomers retire, the competition for employees will heighten, and the demand for workers may require employers to improve salaries, benefits and signing bonuses. In addition to keeping benefits packages competitive, employers must ensure that prospective and current employees are aware of those benefits.

### Discover what employees want

To attract employees, businesses must know who their prospective employees are – what interests and motivates them – and then tailor their recruiting efforts accordingly. An example of an effective recruiting message is the current ads for the U.S. Navy touting that recruits will have the opportunity to work with the most sophisticated technology in the world. This message works because much of the Navy's target audience is in the 20-something age bracket that treasures access to the latest gadgets.

### Drill down for greater understanding

The first step in discovering what potential workers want is for employers to ask their current workforce what influenced them to accept their position with the organization. The answers to this simple question can help a business revolutionize the way it recruits. For example, say a growing accounting firm needs to hire several data entry clerks but is having difficulty attracting enough qualified applicants. One way the firm could address this issue is to ask their best data entry clerks where they looked when they were searching for employment. This simple survey would help the company find out what made them stand out from the competition. Then, they could advertise in the places that reached their best clerks and communicate the benefits that were most appealing to those individuals.

### Respond to employees' needs

To lure the most sought-after workers, businesses must be responsive and willing to add or change programs based on the interests of their target workforce. For example, if an organization is losing many of its top candidates to a competitor, it needs to find out what that business is doing differently and adjust its methods to compete. Often, an employee's decision to go to another company is not based solely on offers of more money – incentives like flexible work schedules, a company fitness center or tuition reimbursement can make a big difference in employees' opinions of an organization.

Employees are an organization's greatest asset and likely its greatest financial expense. That's why it's essential for employers to analyze their recruiting situation and devise a plan that allows them to recruit and retain the most qualified candidates. Most importantly, employers must remember to think like their prospective employees. By recruiting with employees' interests in mind, businesses will develop a positive reputation with job seekers, which will in turn make finding qualified workers much easier.

### **ADDITIONAL NOTES:**

## **MODEL SEVEN:**

## FastTrack Recruitment Ideas -

Consider best practices from your past, other businesses you have encountered, and ideas you wished you had implemented:

1.	Be the Employer of Choice (American Society of Training and Development/ASTD, Malcomb-Baldridge, Training Magazine, Other benchmarks):
2.	Determine from Candidate <i>Intent-to-Stay</i> Perspective (i.e. Big 8/4/? Accounting Firm Accounting/finance major to CPA track model) –
3.	Internal bounty system (employees and family members/i.e. G-RAP) –
4.	Referral program for clients-
5.	Enlist service bureaus –
6.	Generational engagement team -
7.	Regular press release to media/industry/society on colleagues, notables –

8.	Brand your name within your community (local, regional, nationally, internationally, industry, etc.) –
9.	eZines to clients, CIOs, media, prospects, etc. –
10.	Viral marketing –
11.	Craigslist, local newspapers, online walls, etc
12.	ePlacement options like Monster.com, CareerBuilder.com, Theladders.com, etc. –
13.	Crate a "hit list" of where your top present talent came from and work that list routinely –
14.	Identify competitors/peers "hit list" and work that as well –
15.	Aggressive internship/co-op partnerships -
16.	
17.	
18.	
19.	
22.	

### **MODEL EIGHT:**

## **Integrating and On-Boarding Successful New Hires -**

Based upon your personal experiences and those collectively in your head from other reference points professionally, what are those best practices we should consider for onboarding and integrating people to our **team**, **culture**, and **organization** effectively?

- 2.
   3.
   4.
   5.
   6. Use the *JOB DESCRIPTION* in the interview, and as a daily/weekly/monthly reference tool in the on-boarding immersion process to ensure greater success from the
- beginning.
- 7. Another instrument at our disposal that could be multi-purposed and used more effectively is the *Performance Review Assessment* instrument in the *interview and on-boarding process*.

An effective Performance Review/Assessment instrument should among your specific unique needs, also include three core sections. Consider this template:

Part I: Goal Setting – What you need to achieve

Part II: Review of Employee Job Description – What you do

Part III: Behavioral Traits and Performance Factors -

How you behave



### Performance and Development Assessment

Employee Name:

Job Title:

Evaluation Period: to

Supervisor:
Peer Reviewer:

Grid for management use

#### Part I: Goal Setting – What you need to achieve

List the 3-5 target goals, objectives, projects, or special assignments to be achieved or worked on in the next assessment period.

#### Part II: Review of Employee Job Description – What you do

Review the employee's job description and make comments based on defined areas of responsibility. What does the employee excel at? What area(s) is more training or better performance needed? Be sure the entire job description has been accounted for.

# <u>Part III: Behavioral Traits and Performance Factors – How you behave</u>

Listed below are behavioral traits and performance factors that are key to the success of the employee in his or her position. The following rating system will be used. Any line item marked "Needs Improvement" must have a plan of action toward improving the skill attached to this assessment. Line items marked "Exceeds Expectations" must include some examples of how expectations were exceeded. Please type 'plans of action' and 'exceeding expectation' examples in a different colored font immediately following the specific trait or performance factor.

- **1 Needs Improvement** Consistently or occasionally fails to meet job requirements due to performance, behavior, or lack of knowledge in the case of the job or duty being new to the employee. Immediate improvement required to maintain employment.
- **2 Meets Expectations** Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- **3 Exceeds Expectations** Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas.

#### **General Performance**

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**Rating** PUNCTUALITY – Employee observes assigned work hours and adheres to them.

**Rating** ATTENDANCE – Employee can be depended on to report to work regularly with few unplanned absences. Provides proper notification when absent.

**Rating** POLICIES & PROCEDURES – Employee understands and complies with company policies and procedures.

**Rating** JUDGMENT & DECISION MAKING – Employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically.

**Rating** DEPENDABILITY – Employee can be depended upon to apply him/herself to tasks, use time efficiently, follow instructions and carry out assignments to completion.

**Rating** PROFESSIONALISM & WORK HABITS – Employee demonstrates pride in the job and conducts self in a professional manner; identifies with the mission of the company.

**Rating INITIATIVE** – Employee accepts and/or volunteers for extra responsibilities beyond normal job duties in order to improve self. Employee monitors projects independently and follows through appropriately.

**Rating** DRESS – Employee's workplace attire is professional (business casual as

a minimum). When on-site at a WCPE event or on-site at a company, employee's dress is professional and matches the expectations of the

client.

Rating WORK SPACE – Employee maintains a professional, neat, and

operational work space.

#### Job Performance & Knowledge

Rating

Rating QUALITY OF WORK – Employee demonstrates accuracy, neatness, and

thoroughness in performing job duties.

**Rating** QUANTITY OF WORK – Employee demonstrates ability to meet

required work output without sacrificing quality; ability to manage

several responsibilities simultaneously.

Rating SENSE OF URGENCY – Employee demonstrates a sense of professional

urgency in meeting their job responsibilities and interacting with others.

Rating JOB KNOWLEDGE – Employee possesses and demonstrates necessary

knowledge and skills to accomplish job duties. Uses experience

effectively to enhance work performance.

Rating TIME MANAGEMENT & ORGANIZATIONAL SKILLS – Employee

demonstrates ability to effectively plan, organize, and prioritize work; demonstrates effective use of time management practices; completes tasks

in a timely manner and meets deadlines without sacrificing quality.

**Rating** TRAINING & SELF IMPROVEMENT – Employee utilizes what is

learned in training; makes an effort to obtain on-the-job training and to

improve skills and knowledge for advancement and improved

performance.

Rating ON-GOING TRAINING & SELF IMPROVEMENT – Employee seeks

continued opportunities for additional learning and training; makes an effort to obtain on-the-job training and to improve skills and knowledge

for advancement and improved performance.

Interviewing, Hiring & Terminating Employees By – Dr. Jeffrey Magee, PDM/CSP/CMC **Rating** ADAPTABILITY – Employee adjusts with ease to changes in duties,

procedures, supervisors, or work environment. Employee accepts new ideas and approaches to work; responds appropriately to constructive

criticism and suggestion for work improvement.

**Rating** CREATIVITY/INNOVATION – Employee demonstrates new and

creative ideas in carrying out job duties and makes constructive

suggestions for seeking new and improved procedures.

**Rating** SELF MANAGEMENT – Demonstrates good self discipline. Has the

ability to forecast needs and opportunities and proactively exercises abilities to capitalize on those opportunities. Has the ability to be productive (not just busy) to attain continued profitability and

productivity.

#### Interpersonal Relationships & Communication

Rating

**Rating** ATTITUDE– Employee demonstrates cooperative attitude with fellow

employees and a willingness to share responsibilities as part of the team;

displays a positive attitude toward work and fellow employees.

Rating RELATIONSHIP W/ SUPERVISOR – Employee responds positively to

supervision, direction, and constructive criticism.

Rating DEALING W/ THE PUBLIC – Employee demonstrates tact and patience

in dealing with others. Relationship with clients is firm but fair, positive, decent, and respectful. Promotes good public relations and works

effectively with teammates, clients and vendors alike.

Rating WRITTEN COMMUNICATION – Employee demonstrates a high level

of competency in written expression, including reports and

correspondence; uses grammar and syntax correctly and expresses ideas

clearly and succinctly.

Rating VERBAL COMMUNICATION – Employee demonstrates competency in

oral expression and listening; expresses thoughts clearly; listens and understands oral instructions and information and actions reflect that

understanding.

Rating

**OPEN COMMUNICATION** – Employee interacts with peers and supervisors in such a manner that good rapport is maintained with the company; follows established chain-of-command.

The following section is for employees in a <u>Customer Service & Sales</u> role.

Rating Rating

**RELATIONSHIP BUILDING** – Employee has made routine contact with Centers-of-Influence (also known as advocates, allies, and champions) to make sure our company's name is top of their mind and to ensure the Manager has a pulse on market trends and issues that sales reps are facing.

Rating

**LEAD GENERATION** – Employee has worked to grow his/her market share through additional market contacts since last assessment period.

Rating

**SELLING PROCESS** – Employee understands the selling process and has worked to ensure effective selling is taking place and that the skills of themselves and others have been elevated since the last assessment period.

Rating

MAINTAINS A CHAMPION SELLING ATTITUDE – Employee demonstrates, promotes and exudes a positive selling attitude and motivational beliefs.

Rating

**PHONE MANAGEMENT** – Employee manages calls efficiently and meets expected inbound and outbound call volumes.

Rating

**DATABASE MANAGEMENT** – Employee keeps their contact files updated and current and documents thoroughly what they have done with each contact. Call back dates are maintained and current.

#### Supervisory Skills

This section to be completed only for those who perform supervisory functions within the company (in addition to the previous sections).

Rating Rating

**UNDERSTANDING OF DUTIES** – Supervisor understands the duties, functions, and responsibilities of their management position and the role

Interviewing, Hiring & Terminating Employees By – Dr. Jeffrey Magee, PDM/CSP/CMC

they play on the team; understands the mission of the company and adequately represents position of management.

Rating

**LEADERSHIP SKILLS** – Supervisor demonstrates leadership qualities by setting an example of excellence and dedication for subordinates to follow; motivates subordinates to perform duties to optimum level of abilities.

Rating

**EFFECTIVE SUPERVISION** – Supervisor manages subordinates effectively in order to maximize their performance and produce the desired quantity and quality of work; exerts authority when necessary.

Rating

**ORGANIZATIONAL SKILLS** – Supervisor demonstrates effective use of organizational skills in order to keep department and subordinates working in a cohesive and organized manner; good knowledge of all aspects of work of department.

Rating

**RELATIONSHIP W/ SUBORDINATES** – Supervisor encourages an open door policy with subordinates; deals with all in a fair and impartial manner.

Rating

**INTERPERSONAL SUPERVISORY SKILLS** – Supervisor demonstrates effective interpersonal relationship practices with peers, subordinates, and management, so as to foster good communication within the department and company; effectively and properly uses the chain-of-command.

Rating

STAFF – Supervisor is accessible to his/her staff and others during work hours and beyond (when emergencies arise). He/she has regular team briefings, meetings, and communication as appropriate. Supervisor effectively promotes the improvement and development of staff and subordinates through formal training sessions, coaching, and other activities.

Rating

**SELF DEVELOPMENT** – Employee demonstrates a proactive behavior in searching out job appropriate skills training (books, articles, audio, video, live classes, etc.) in the past assessment period to elevate his/her competency level to share and guide their team to greater successes.

<u>Signatures</u>
Supervisor:
Date:
I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional).
Employee Signature:
Date:

profitability of his/her division.

**BUDGET RESPONSIBILITIES** – Supervisor has a firm grasp of the budgeting process and how to analyze and use the data to impact the

Rating

## **MODEL NINE:**

## FastTrack Retention Ideas -

Consider best practices from your past, other businesses you have encountered, and ideas you wished you had implemented:

1.	Be the Employer of Choice (American Society of Training and Development/ASTD, Malcomb-Baldridge, Training Magazine, Other benchmarks):
2.	Onboarding Immersion Pulse-Interviews (30/60/90/120-day assessments) –
3.	Holiday celebrations -
4.	Anniversary celebrations –
5.	Make day one a whirlwind event, max out that day –
6.	Victory parties -
7.	Birthday celebrations –

8.	Decompression areas –
9.	Party rooms –
10.	Generational engagement teams –
11.	Generational outings –
12.	Off-campus opportunities –
13.	BONUS liberally –
14.	Performance pay –
15.	Flex schedules –
16.	Project/job rotation (ConocoPhillips example) –
17.	Reputation for <b>fair</b> and <b>honorable</b> behavior –
18.	Environmental allowances (dress code, etc.) –
19.	
20.	
23.	

### **ADDITIONAL NOTES:**

# **MODEL TEN: Termination ideas** –



# Disciplinary Notice

Employee Name:			
Supervisor Name:			
Documentation ofWritten Warning orVerbal Warning			
Statement of problem (fact data driven):	_		
	_		
Has the employee received prior warnings on this subject? Yes No			
Was the employee's activity in violation of Company policy? Yes No			
If yes, describe how:	_		
Describe the corrective action to be taken by the Company and/or the employee:			
Consequences of failure to improve performance or correct behavior:			
Employee Statement:	_		
Employee Signature: Date:			
Supervisor Signature: Date:			
Director of Operations: Date:			

## END OF EMPLOYMENT AGREEMENT for **Employee**

This Agreement (the "Agreement") is made as of the 10<sup>th</sup> day of March, 2011, by and between Western CPE, LLC, (the "Company") and Mr./Ms.XXXXXXXXXXXXXXX (the "Employee," and collectively, the "Parties").

WHEREAS, Company has determined that Employee's employment relationship with Company is concluded;

NOW, THEREFORE, for and in consideration of the mutual covenants herein contained and other good and valuable consideration, the Parties hereby agree as follows:

- 1. Ending Date of Employment. The Parties agree that as of March 10th, 2011 (the "Ending Date"), the employment relationship between Employee and Company will be concluded.
- 2. Agreements. Parties agree to the following terms:

Company will pay Employee for *X-hours* of accumulated PTO at the end of the current payroll period.

Company will continue to pay Employee existing bi-weekly salary thru April 30, 2011.

No bonus will be paid during the period of this agreement.

3. Release. Employee hereby releases Company, its officers, employees, directors, independent contractors, agents, representatives, consultants, affiliates, subsidiaries, permitted assigns, and all other associated persons or entities from all claims, causes of action, suits, damages, or other complaints now and at any time in the future arising out of or relating to in any way, whether directly or indirectly, Employee's employment with, resignation from, or termination by Company.

NOTE THAT BY AGREEING TO THIS PROVISION, EMPLOYEE WILL NOT BE ABLE TO SUE COMPANY FOR CAUSES ARISING OUT OF HIS/HER EMPLOYMENT RELATIONSHIP.

- 4. Mutual Non-Disparagement. Employee shall not make any false, disparaging or derogatory statements to anyone, including but not limited to any media outlet, industry group, financial institution, current or former employee, consultant, client or customer of Company, regarding Company or any of its directors, officers, employees, agents, affiliates, consultants or representatives or about Company's business affairs and financial condition, any statements that disparage any person, product, service, finances, financial condition, capability or any other aspect of Company's business, and will not engage in any conduct which is intended to harm professionally or personally the reputation of Company (including its officers, directors, and employees). Company agrees to instruct its officers, directors and employees that have knowledge of this Agreement not to make any false, disparaging or derogatory statements to anyone, including but not limited to any media outlet, industry group, or current or future employee about Employee; about Employee's employment with Company; or about Employee's separation from Company.
- 6. Confidentiality. Except as required by law, neither Employee nor Company will disclose any term or condition set forth in this Agreement to any other person, except that Parties may discuss said terms and conditions with an attorney.
- 7. Governing Law. This Agreement shall be construed in accordance with, and governed in all respects by, the laws of the State of *XXXXXXXXX*, without regard to conflicts of law principles.
- 8. Assignment. Neither Company nor Employee may assign its respective rights or obligations under this Agreement without prior written consent from Company and Employee, except that such rights and obligations may be assigned without such prior written consent if the assignment is in connection with a sale or transfer of control of Company.
- 9. Severability. If any part or parts of this Agreement shall be held unenforceable for any reason, the remainder of this Agreement shall continue in full force and effect. If any provision of this Agreement is deemed invalid or unenforceable by any court of competent jurisdiction, and if limiting such provision would make the provision valid, then such provision shall be deemed to be construed as so limited.
- 10. Notice. Any notice required or otherwise given pursuant to this Agreement shall be in writing and mailed certified return receipt requested, or delivered by overnight delivery service, addressed as follows:

If to the Company:	Organization	
	Attn: Manager	
	Address	
	City, State, Zip	
If to the Employee:	First Last Name	
1 7	Address	
	City, State, Zip	
16. Headings. The headings for sec affect the meaning of the provision	ction herein are for convenience only and shall not ns of this Agreement.	
Company and Employee, and supe any kind preceding the date of this	ent constitutes the entire agreement between ersedes any prior understanding or representation of a Agreement. There are no other promises, or agreements, whether oral or written, relating to ent.	
Employee	Employem	
Employee: First Last Name	Employer: First Last Name	
First Last Name	Pilst Last Name	
Signature:	Signature:	
	Position/Title:	
Date:	Date:	

### **ADDITIONAL NOTES:**

### Exercise:

Invest a few minutes <u>now</u> if you are participating in this self - study course solo or with others and review each <u>Model</u> and make an <u>Application</u> note as to what you are doing now or can start doing now to ensure each idea is being utilized fully within your team, organization, or life for greater success ...

## Homework Assignment ...

Watch The Company Men, this movie puts us down on the ground after having been up in the air. The movie powerfully revisits a theme touched on in the bitter comic drama "Up in the Air": the devastating impact of sudden downsizing on corporate executives who have lived by the treacherous adage "You are what you do." Instead of regarding these unfortunate men from the lofty perspective of a charming, cynical hatchet men, "The Company Men" looks them straight in the eye from inside the trenches.

## Push-Point/Idea:

Invest a few minutes now, whether you are participating in this self-study course solo or with others, to <u>review your #1 Push-Point Idea today to commit and push yourself to apply</u> (and/or do the same drill for each model and make an application note explaining what you are doing now or what you can start doing to ensure each idea is utilized fully within your team, organization, or life for greater success)!