

Preparing People for Change
AIEx™ 101

A PDS Mini-Seminar

Hosted by the
Wyoming-Kentwood Area
Chamber of Commerce

Session Preparation

July 28th, 2010



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Questions to help you prepare

1. Consider the answer to these questions

- a. **What concerns you most about the next 12 months when it comes to getting and keeping people on the same page?**
Consider employees, contractors, vendors, customers and other stakeholders)
 - b. **Six Questions**
 1. What is working?
 2. What is not working?
 3. What is missing?
 4. What is next?
 5. By what method will we accomplish or improve it?
 6. What stands in the way of progress?
 - c. **What is your biggest competitive challenge in 2011?**
 - d. **Who has got to take more off me so I can do.....?**
 - e. **Who's going to take over when X leaves?**
 - f. **Who has to delegate more?**
 - g. **Who's not performing?**
 - h. **Who's not hooking up?**
2. **Select and register those people to bring with you on the 28th? (make sure you bring an even number so you can pair people up, including yourself)**
3. **Select and list alignment areas to focus on (Key Components)**
Consider and list those areas or key components where you need to get people better aligned. (See examples taken from two projects at the end of these instructions to get you started)
4. **Select 1 or 2 areas to work on at the session**
5. **Write expectations for the most critical area in your business:**
- a. **My Expectations of Other**
 - What I expect John Doe (JD) to *keep* doing
 - What I want JD to *start* doing
 - What I want you to *stop* doing
 - b. **Others' Expectations of Me**
 - What things I think others want me to *keep* doing . . .
 - What new things I think others want me to *start* doing . . .
 - What things I think others want me to *stop* doing . . .

Expectation Examples

My Expectations of You

1. Work with Finance Manager to perform cost analysis of big jobs after securing the business.
2. Ensure your team members are given credit where credit is due for the contributions they make.

What I Think You Expect of Me

1. Train you and other budget holders in the current Great Plains Software modules by 02/28/11
2. Meet with Matt G to agree the process for managing outsourcing by Oct 31st

Appendices – Sample Components

KeywordID	KeywordText
Project Finances	Managing all those issues that affect cost over-runs, including schedules, approvals change orders and materials acquisition.
Project Leadership	Constantly modeling, sharing and translating LEAN concepts into day to day activities so as to motivate associates and colleagues to effective action. Influence others to build collaborative solutions and decisions by gaining their promises.
Respectful Communications	Using all available resources to accurately and effectively relate ideas and positions to associates and colleagues. Manage the tensions created by the conditions, people and conflicting objectives. Respectfully listen to others' contributions, allowing them to engage and own their contributions. Respond with thoughtfulness, taking into consideration the contributions of others.
Team Integration	This is the effective working between one of more teams so that a team's effort adds to the impact of another teams effort. So optimizing resources and maximizing outcomes is a natural outcome. It is based on every one recognizing that "we are all in this together." Welcome the talents and contributions of all members into the team environment. Manage communication, decisions and actions so all are committed to agreements. - Raise the bar by consistently sharing knowledge, advising, mentoring and developing associates and colleagues.
Value Innovation	Be prepared to articulate the value of others' contributions and ideas for the teams. Be prepared to quantify the value of your contribution as your colleagues and associates see it. Recognize that shared value is an important part of project completion.

Key Component	Definition
<p>Business Development</p>	<p>Delivering the best solutions to Customers profitably so building stronger Customer relationships and our reputation in the Market. Including:</p> <p><i>All</i></p> <ul style="list-style-type: none"> • Being aware of potential development opportunities • Leveraging internal resources to deliver “best solutions” • Helping Customers solve Technical problems, • Actively networking • Representing the “Best of The Firm” at all times with Customers representatives, subs, engineers and architects <p><i>Level 4 & Above</i></p> <ul style="list-style-type: none"> • Taking-on the competition and differentiating your value • Appropriately referring opportunities • Developing new owner relationships • Identifying implied and explicit needs in new and current owner projects • Identifying emerging owner business needs and innovating appropriate solutions • Identifying powerbases and budget by assessing owner structure and construction history • Engaging senior management with high level Customers • Entrenching solutions in Customers’ business processes • Negotiating and closing the business
<p>Phased Competency Development</p>	<p>Developing graduated development plans for direct reports based on the Level Competencies including:</p> <ul style="list-style-type: none"> • Selecting Training • Delegating progressively • Coaching consistently • Developing stretch work experiences • Agreeing SMART Objectives with delivery evidences and • Seeking development opportunities daily <p>Progressive delegation and stretch work experience develops staff to the next level by:</p> <ul style="list-style-type: none"> • Accepting what’s effective not perfect • Being patient and supportive to ensure that the task is done well and not doing it yourself.

Key Component	Definition
	<ul style="list-style-type: none"> • Establishing boundaries around their decisions that you can live with the outcome • Monitoring delegated tasks for evidence of progress • Helping them exercise their authority well • Creating individual ownership in self development • Driving for clarity of expectations in both directions <p>“Raising the Bar” through consistent coaching including:</p> <ul style="list-style-type: none"> • Sharing learning/experiences • Challenging traditional thinking to see if it applies • Encourage learning from mistakes and successes • Modeling the required skill levels when needed • Using evidence and observation as the foundation for improvement • Focusing people on “doing the right things, not doing things right”
<p>Performance Assessment</p>	<p>Setting agreed performance expectations and evidences of effective performance that are Specific, Measurable, Achievable, Realistic and Time bound. (SMART).</p> <p>Ensuring that performance goals are directly aligned with the Level Competencies</p> <p>Developing measurable performance criteria for each aspect of the person’s last performance review</p> <p>Agreeing a schedule of progress reviews at least quarterly, more frequently for new team members. At each of these reviews,</p> <ul style="list-style-type: none"> • Ensuring that the coaching, training and work experience schedule is updated in terms of frequency, focus and delivery expectations. • Agreeing what and how the person needs to practice between each coaching session • Reviewing and developing your assessment rating
<p>Delegation</p>	<p>Enabling others to do a job for you while ensuring that:</p> <ul style="list-style-type: none"> • They know what you want • They have the authority to achieve it • They know how to do it. <p>By communicating clearly:</p> <ul style="list-style-type: none"> • The nature of the task • The extent of their discretion • The sources of relevant information and knowledge.

Key Component	Definition
<p>Delegation</p>	<p>Each task delegated should have enough complexity to stretch - but only a little by including:</p> <ul style="list-style-type: none"> • Agreeing criteria and standards by which the outcome will be judged. • Agreeing first how often and when information is needed to monitor progress • Avoiding making decisions for the delegate when they are capable • Not making a decision unless provided with clear alternatives, their pros and cons, and the individual's recommendation. • Not judging the outcome by what you would do, but rather by its fitness for purpose. • Delegating the task and its ownership so that it can be changed or upgraded, if needed.
<p>Team Working</p>	<p>Building and growing teams that delivers owner and stakeholder value by:</p> <ul style="list-style-type: none"> • Identifying key stakeholders to lead partnering activities • Sharing common strategies and building solutions with Customers and other functions within the spirit of “we are in this together” • Focusing team effort on delivering value for both Customers and other stakeholders • Balancing different functions' objectives and needs • Making and delivering on commitments • Supporting and implementing team decisions • Resolving conflicting positions inside the team • Engaging others to improve solutions and decisions. • Developing external alliances to develop new and innovative solutions