REPRODUCIBLE TRAINING LIBRARY
Customizable Soft-Skills Courseware

Developing Your Direct Reports

Instructor Guide

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Instructional Design and Learning Philosophy

We are committed to providing the best core-skills content possible for instructor-led training (ILT). The following principles are applied in the development of programs:

Sound Instructional Design

All course content is developed using a variety of research techniques. These include:

- *Brainstorming sessions with target audience*
- *Library research*
- *Online research*
- *Customer research (focus groups, surveys, etc.)*
- *Subject matter experts (SMEs)*
- *Interviews with trainers*

Expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:

- *Learning objectives provide effective tools for managing, monitoring, and evaluating training.*
- *Meaningful connections between the topic and students' past, present, and future.*
- *Appropriate organization of essential ideas helps students focus on what they need to know in order to learn.*
- *Modeling techniques demonstrate useful behaviors and problem-solving skills.*
- *Active application, the cornerstone to learning, helps students immediately apply what they have learned to a real-life situation.*
- *Consistent instructions and design help students learn and retain new information.*
- *Accelerated learning techniques create interactive, hands-on involvement to accommodate different learning styles.*

Application of Adult Learning Styles

Adults learn best by incorporating their personal experiences with training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions, and lectures within each course to appeal to all learning styles and ensure that the ideas and information will be retained.

Instructional Design and Learning Philosophy (cont.)

Customizing Your Program

There are two ways you can customize this program: 1) Customize the content and 2) customize the format.

Customizing the content is easy. The Instructor Guide and Participant Guide are created in Word, so you can simply modify the content just as you would any Word document. Some common reasons for customizing content include:

- *Changing examples to fit your industry or work environment*

- *Modifying content to match work rules and procedures*

- *Adding, deleting, or rearranging content to meet training time constraints*

The other way to customize the program is to change the formatting. Typically, organizations will do this to add their corporate logo and/or colors, or it may just be an issue of personal preference. Again, treat the Instructor Guide and/or Participant Guide as you would any Word document. The styles used in this document are labeled HRDQ in the Quick Styles tab. For additional help using Word, consult the Microsoft website.

Preparing for the Training

As you know, preparation is the key to conducting an effective training session. Here are some issues to consider:

Logistics

- *Advertise the training with enough advance notice that participants can block it out on their calendars. Consider contacting potential participants' managers to encourage their attendance.*

- *Send a confirmation notice before the training session reminding participants of the date, time, and location.*

- *Room setup: Ideally, use round tables to facilitate partner and small-group interaction.*

Equipment and Supplies

In order for the training to go smoothly, have these supplies and equipment on hand:

- *Name tags*
- *Flip chart and markers, tape*
- *Laptop with projector (for the PowerPoint)*
- *Timer or watch*

- *Pads of sticky notes*
- *Beverages and snacks (optional)*
- *Water for yourself and the participants*

Contents

Please note: Only the pages highlighted in yellow below are those featured in this preview.

Module One

Understanding Development

Course Objectives

Successful completion of this course will increase your knowledge and ability to:

◊ *Recognize the difference between performance management and development coaching.*

◊ *Implement a strengths-based approach to development.*

◊ *Provide employees with the tools to assess their strengths and development needs.*

◊ *Conduct a positive development discussion.*

◊ *Identify a variety of paths to development.*

◊ *Create an effective individual development plan.*

Developing Your Direct Reports

Course Objectives

- Recognize the difference between performance management and development coaching.
- Implement a strengths-based approach to development.
- Provide employees with the tools to assess their strengths and development needs.
- Conduct a positive development discussion.
- Identify a variety of paths to development.
- Create an effective individual development plan.

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Strengths-Based Focus

Traditional development plans often focus on an employee's weaknesses and trying to improve them. Recent studies have found that capitalizing on strengths while managing weaknesses leads to better performance and happier employees.

Why focus on strengths?

◊ *Leveraging strengths is more efficient and takes less effort than trying to change a weakness.*

◊ *Strengths-based work is stimulating and not tedious.*

◊ *Allowing an employee to use his or her unique strengths to achieve specified outcomes provides him or her the greatest amount of autonomy, which contributes to job satisfaction.*

◊ *High performance can be achieved in a number of different ways. You don't have to make all high-performing employees identical in terms of their skill sets. In fact, the diversity of talents will enhance the overall performance of the organization.*

Manage weaknesses

◊ *An underperformer probably has strengths that don't match his or her current role or isn't being allowed to use his or her talents. Finding this person's unique talents could make him or her a valuable contributor in another position.*

◊ *You can often use your talent to overcome a weakness. Example: If time management is a weakness and influencing others is a strength, then you could persuade others to hold you accountable when you're late or risk missing a deadline.*

> *"Strength is achieved by developing our strengths, not by eliminating our weaknesses."*
>
> *Marilyn vos Savant,*
> *American journalist*

Strengths Assessment

Instructions: Use the following scale to assess an employee's strengths. Choose the number that most closely reflects the frequency with which you observe the behavior or characteristic. This assessment can also be used as a self-assessment.

1=Seldom 2=Occasionally 3=Usually 4=Frequently

Self-Management

Strength	Description	Rating
Self-confidence	*Faith in his or her own ideas and abilities*	1 2 3 4
Flexibility	*Willingness to adapt to changing circumstances; open to different and new ways of doing things*	1 2 3 4
Credibility	*Reliable and responsible; follows through on commitments*	1 2 3 4
Initiative	*Identifies what needs to be done and does it before being asked*	1 2 3 4
Time management	*Uses time effectively, spends time on most important activities, keeps to schedule*	1 2 3 4
Stress management	*Functions effectively under pressure and maintains composure in the face of stressful situations*	1 2 3 4

Relating to Others

Strength	Description	Rating
Interpersonal skills	*Notices and interprets others' concerns and feelings and communicates that awareness empathetically*	1 2 3 4
Conflict resolution	*Resolves conflict productively*	1 2 3 4
Influencing others	*Gains others' support for ideas, proposals, solutions*	1 2 3 4

Trainer Notes

15 minutes

This strengths assessment serves as an example for what participants may want to include in their own assessments. The technical section has been left blank since individual positions will require specific functional or technical skills.

The strengths assessment serves two functions: one as a snapshot of an employee's current skills and abilities, and additionally as a prompt for identifying an employee's strengths or talents that you can help the employee capitalize on.

Activity: Ask participants to complete the strengths assessment for one of their direct reports.

Note: If participants would prefer, they can complete it as a self-assessment.

Strengths Assessment

The strengths assessment serves two functions:
- A snapshot of an *employee's current* skills and abilities
- A prompt for identifying *an employee's* strengths that you can help the employee capitalize on.

Where Are You Now?

Identify strengths

◊ *"What do you do exceptionally well? Or, "In what specific situations do you show outstanding performance?"*

◊ *"What do you learn quickly and easily?"*

◊ *"What tasks or activities do you really enjoy?"*

◊ *"What tasks or activities give you the greatest sense of fulfillment or satisfaction?"*

◊ *"What accomplishments are you most proud of?"*

Apply strengths

◊ *Make the employee's strengths productive.*

◊ *Take it to the next level.*

◊ *Find new applications/avenues.*

Manage weaknesses

◊ *Make incremental improvements.*

◊ *Find resources.*

◊ *Use strength to compensate.*

◊ *Find a partner.*

◊ *Eliminate the need for it.*

Find resources: Anything that supports the employee, for example, a job aid.

Find a partner: Help employees find colleagues that complement them. Their weaknesses can be compensated by the strengths of another, and vice versa. Bonus: The diversity and combination of strengths will improve the overall performance of the organization. Also, it's kind of like shadowing and may help them see how others handle their weakness.

Eliminate the need for it: This means finding a way for the employee to stop doing the task or having the responsibility that calls on the employee's weakness. It may be possible to switch tasks with another person, or perhaps review the outcome or expectation and see if there is a different way to achieve it that allows the employee to use his or her natural strengths.

Where Do You Want to Be?

Review employee self-reflection, Part 2

◊ *Description of career success*

◊ *Personal and professional goals*

- *Short-term (1–2 years)*
- *Long-term (3–5 years)*

◊ *Ideal role*

Encourage "blue-sky thinking"

◊ *"If money were no object, what would you like to do?"*

_____

◊ *"If you knew you could not fail, what would you do?"*

_____

◊ *"If there were no obstacles in the way, what would you like to do?*

_____

Shift to realistic perspective

◊ *Don't give up the dream; break it down into smaller pieces.*

◊ *Create realistic, manageable stages.*

Practice

Instructions: Read the following scenario and brainstorm in your small group.

An employee's blue-sky goal is to develop a best-selling app. What could that employee do to create stepping-stones to achieve that goal?

_____

_____

_____

_____

_____

Trainer Notes

15 minutes

Part 2 of the employee's self-reflection will play a key role in this part of the discussion.

Blue-sky thinking: Encourage the employee to not put any limits on his or her career and then work back from that, creating realistic, manageable steps. Blue-sky thinking doesn't always involve a promotion or managing others. For the employee, it may mean better work-life balance or engaging in a specific activity, etc. Your role is to help the employee look into the future and visualize new approaches and opportunities.

Activity: If time permits, have participants answer the blue-sky thinking questions for themselves and share their answers with a partner or in small groups.

Practice: Have participants work in small groups, read the scenario, and brainstorm ways to move from blue-sky thinking to manageable stages. This doesn't have to include every specific development step, merely stepping-stones along the way.

Where Do You Want to Be?

How Will You Get There?

Identify and Analyze Options

Expansion

◊ *Increases employee's tasks or responsibilities within current position*

◊ *Answers the question: "What else can I do or learn in this job?"*

Lateral

◊ *Shifts to different position but not necessarily more responsibility*

◊ *Answers the question: "Is there another way I can contribute to the organization that is more fulfilling to me?"*

Vertical

◊ *Moves up in position and responsibility*

◊ *Answers the question: "How can I use my strengths to contribute more to the organization?"*

Practice

Instructions: Read each scenario and decide which option (expansion, lateral, or vertical) is most appropriate. Circle the language that led to your decision.

1. *"I love my job and I enjoy working here. I especially enjoy the challenge of researching new software options or coming up with a new way of doing things. I like to be the first to find out something new."*

    _____

2. *"I really enjoy helping people. When I trained the new team members, they all said I did a good job. And it was a great feeling when our department productivity increased."*

    _____

3. *"I'm bored with my current responsibilities. I was talking to my friend and she was so excited about her job. I want to feel that way again."*

    _____

> *Certainly, you want to ask open-ended questions. An example for Scenario 3 might be, "Tell me more about what parts of your job bore you and what parts you still find enjoyable."*

Trainer Notes

10 minutes

Once you have established the employee's goals and/or ideal role, you need to map out options to get there. In general, there are three options to consider: expanding the employee's current responsibilities, shifting to a different position, or moving up in position and responsibility.

How Will You Get There?

- Expansion: Expand current tasks and responsibilities
- Lateral: Shift to different tasks and responsibilities
- Vertical: Move up in position and responsibility

Practice, Scenario 1: Expansion is probably the most appropriate career development choice. This associate loves his/her current position and is interested in learning new things.

Scenario 2: Vertical is probably the most appropriate career development choice. This person likes being involved with people (critical for management) and has an eye toward business results as well.

Scenario 3: Lateral is probably the most appropriate career development choice. This associate is bored and a big change might be just right.

If it's not immediately clear which option is most appropriate, follow up with some additional questions. Ask participants what kinds of questions would be helpful to further clarify.

Practice

Instructions: Using the following information, prepare for a coaching development discussion.

Worksheet 1

Name: Kelly McMahon   *Position:* Financial Analyst

Development priorities:

My definition of career success: What do I want in my career and why is it important to me? What are my personal and professional goals, needs, and interests?

I want to feel fulfilled in my job, that I'm being challenged and always learning something new. I never want to feel bored!

My career goals: What additional work experience and steps are required for me to achieve my career goals?

I want to get my MBA in the next five years and become a manager. Constraint: I'm reluctant to relocate permanently, but I enjoy traveling for work.

Long-term goals (3–5 years): Finish MBA

Short-term goals (1–3 years): Begin MBA, become more knowledgeable about the various departments in the organization

What skills, knowledge, abilities, and experience do I have now?

I have four years of experience as a financial analyst, two here and two elsewhere.

1. How would you open the discussion? What would you say?
   _____
   _____
   _____
   _____

2. What skills and interests will you focus on in the discussion?
   _____
   _____
   _____
   _____

Training

Benefits

◊ *Increased job satisfaction and motivation and reduced turnover*

◊ *Increased efficiencies in processes and procedures, resulting in increased productivity and performance and higher-quality outcomes*

◊ *Can spark innovation and increase capacity to adopt new methods and technologies*

◊ *Prepares employees for new positions and challenges*

◊ *Allows employees to practice new skills in a no-risk situation*

◊ *Creates opportunities to build new relationships and create support network*

◊ *Increases autonomy*

Characteristics of effective instructor-led training

◊ *Clearly states objectives and key content*

◊ *Encourages participation*

◊ *Allows time for reflection and application*

◊ *Incorporates a variety of learning styles*

◊ *Incorporates fun and humor*

◊ *Stays focused/sticks to schedule*

Learning styles: There are different approaches to learning. The most common is probably auditory (hearing and listening, i.e., lecture), followed by visual (watching) and kinesthetic (hands-on).

Trainer Notes

5 minutes

When employees take on new challenges to meet their career goals, they will need to be supported with specific development activities. These activities can take many shapes and forms. Which path or combination of paths depends on the employee's goals and needs. We'll look at the most common paths to development in this module.

Paths to Development

- Training
- OTJ or shadowing
- Job rotation or cross-training
- Job enrichment
- Self-directed learning
- Mentoring
- Delegation

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We're talking about traditional instructor-led training here. It's especially useful for topics and issues that require interactions with other people such as communication skills, negotiating, influencing, managing, teamwork, customer service, etc.

Characteristics: The most effective training is memorable and easy to retain and apply on the job. For example, humor and fun usually make learning more memorable. So do stories.

Training

- Memorable
- Encourages participation
- Relevant

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Job Enrichment

Job design

◊ *Skill variety: Increasing the number of skills an employee uses while performing the job*

◊ *Task identity: Enabling an employee to perform a job from start to finish*

◊ *Task significance: Providing work that has a direct impact on the organization*

◊ *Autonomy: Increasing the degree of decision making and the freedom to choose how the work is completed*

◊ *Feedback: Increasing the amount of recognition for doing a job well and communicating the results of employees' work*

Strategies for job enrichment

◊ *Combine tasks: Create a more complex work assignment by combining tasks that are currently handled separately.*

◊ *Make small changes.*

◊ *Involve the employee.*

Activity

Instructions: Examine one employee you supervise and identify ways to provide job enrichment for that person.

_____

_____

_____

_____

_____

_____

_____

Trainer Notes

10 minutes

Job enrichment is one of the most useful tools for development because it allows employees to actually tackle new challenges and opportunities.

The five factors of job design that contribute to an employee's enjoyment and satisfaction were developed by J.R. Hackman and G.R. Oldham (source: mindtools.com).

Strategies:

Combine tasks: Increases task identity because employees see the task from start to finish. Also allows an employee to use a wide variety of skills, increasing skill variety, and will likely increase task significance and autonomy as well.

Make small changes: They can have big results. You don't have to completely redesign every employee's job.

Involve the employee: This probably goes without saying, but ask the employee what would make his or her job more meaningful.

Activity: Examine one employee you supervise and identify ways to provide job enrichment for that person. Debrief by having participants share their examples.

Self-Directed Learning

Definition

◊ *A process in which individuals take the initiative, with or without the help of others, to diagnose their learning needs, formulate learning goals, identify resources for learning, select and implement learning strategies, and evaluate learning outcomes*

How to help

◊ *Negotiate a learning contract with the employee: goals, strategies and evaluation criteria.*

◊ *Teach inquiry skills, decision making, and self-evaluation.*

◊ *Help employees develop positive attitudes and feelings of independence relative to learning.*

◊ *Help employees find resources.*

Create a learning contract

◊ *Specify the company's business goals and how your individual work contributes to their achievement.*

◊ *Specify how the employee must change his or her work to help the company achieve its goals.*

◊ *Specify what the employee needs to learn in order to make those changes.*

◊ *Develop a learning plan, including:*

  ▪ *What the employee needs to learn*

  ▪ *What learning resources he or she will use*

  ▪ *A schedule of learning activities*

◊ *Specify measures of learning achievement.*

◊ *Develop a plan for how the employee will apply the learning on the job.*

◊ *Specify what changes in business results are expected from the application of this learning to the job.*

Self-Directed Learning

- Negotiate a learning contract
- Teach inquiry skills, decision-making and self-evaluation
- Foster independence
- Help employees find resources

Components of an Individual Development Plan

Definition

An individual development plan (IDP) is a document that describes an employee's career objectives and the plans to achieve them. It should contain specific, measurable activities that will stretch the employee's strengths and foster growth.

Components

◊ *Overall career goal*

◊ *Short-term development goals*

◊ *Strengths needed to achieve goals*

◊ *Specific development activities*

◊ *The manager's role in the development activities*

◊ *Target milestone dates*

◊ *Measurable results and outcome*

Reviewing the IDP

◊ *Are the employee's goals realistic based on your assessment of his or her capabilities and strengths?*

◊ *Are the employee's goals consistent with the organization's vision, values, and purpose?*

◊ *Do the proposed development activities support the employee's goals?*

◊ *Is the level of proposed development activities reasonable given the employee's workload?*

Reviewing the IDP

- *Are the employee's goals realistic?*
- Are the goals consistent with the vision, values and purpose?
- Do the development activities support the goals?

IDP Practice

Instructions: Review the IPD

Individual Development Plan	
Name: Marisa Sanchez	*Position: Sales Rep*
Date: 06/12/11	*Length in current position: 18 months*
Overall career goal: To become a district manager	
Development goal 1: Attend online executive development program	
Strengths needed to achieve: Initiative, time management, decision making	
Specific development activities: Commit to the course timeline, which covers four months.	
Manager's role: No direct role	
Measurable result: Complete the course and receive certificate	
Target date: End of 2011	
Development goal 2: Change my style so I'm not perceived as bossy	
Strengths needed to achieve: Oral communication, collaboration, interpersonal skills, influencing others	
Specific development activities: Take training on increasing my interpersonal skills, shadow a manager who is known for excellent interpersonal skills	
Manager's role: Approve proposed training, suggest a manager for Marisa to shadow, provide feedback on Marisa's interpersonal skills	
Measurable result: Receive 360° evaluation from a variety of coworkers and clients to assess increase in interpersonal skills and flexibility	
Target date: End of 2011	

Trainer Notes

10 minutes

Activity: Have participants work with a partner or in small groups. Tell them to review the IDP, decide if the goals are appropriate, and consider what modifications or recommendations they would make to improve the IDP. Debrief by sharing answers. Here are some suggestions:

Development goal 1 really isn't a goal; it's a development activity. A more appropriate goal would be to increase her credibility as a potential manager, and taking the online program would be one specific development activity. Once the development goal is rewritten, the strengths to achieve will probably change. And the measurable result should be more relevant; for example, she could list a way she will use the information from the course in the workplace.

Development goal 2 is framed as eliminating a weakness. It could easily be reframed as increasing a strength. For example: "Increase my decision-making skills by incorporating more input from others." Measurable results could be adjusted by adding more work-related items, such as allowing others to run brainstorming sessions or making sure she includes one option other than her own when making a decision.

Course Review

1. *What is the difference between performance management and development coaching?*

    _____

    _____

    _____

2. *Which strategy leads to better overall performance?*
    a. Eliminating an employee's weaknesses
    b. Building on an employee's strengths

3. *The most successful development occurs when*
    a. The employee initiates and drives the development.
    b. The manager initiates and drives the development.

4. *List three clues that an employee would benefit from a development conversation.*

    _____

    _____

    _____

5. *How often should a manager meet with an employee to discuss the employee's development?*
    a. Once a year
    b. Once a month
    c. Quarterly
    d. Weekly

Trainer Notes

1. Performance management focuses on correcting performance issues and looks at past and present performance. Development coaching focuses on future performance and career goals.

2. b.

3. b.

4. Employee asks for feedback, employee shows frustration with current project or job, employee mentions a new interest or a new skill, employee seeks out personal or professional development opportunities.

5. c.

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