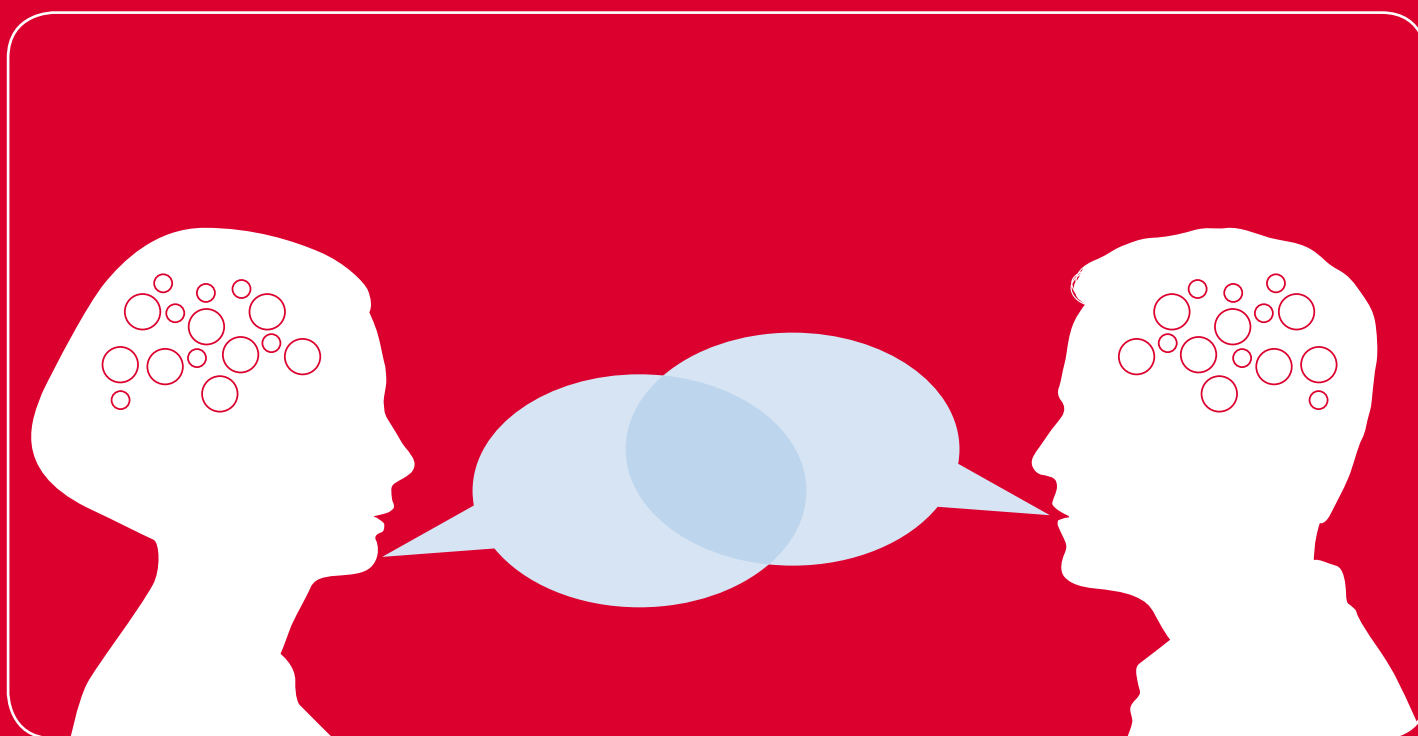


# Talking Performance

[Second edition]



The Victorian Government has vested the State Services Authority with functions designed to foster the development of an efficient, integrated and responsive public sector which is highly ethical, accountable and professional in the ways it delivers services to the Victorian community.

The key functions of the Authority are to:

- identify opportunities to improve the delivery and integration of government services and report on service delivery outcomes and standards;
- promote high standards of integrity and conduct in the public sector;
- strengthen the professionalism and adaptability of the public sector; and
- promote high standards of governance, accountability and performance for public entities.

The Authority seeks to achieve its charter by working closely and collaboratively with public sector departments and agencies.

# All about this guide

## Background

This guide complements the SSA's online e-Learning resource '*Talking Performance*' which can be found on the SSA's website ([www.ssa.vic.gov.au](http://www.ssa.vic.gov.au)). It is intended for users who prefer to read and work from paper, rather than online. It also provides some activities and resources additional to those contained in the online version.

## Who should use this guide?

This guide is primarily designed for anyone who leads or manages others, but it is a valuable resource for everyone. It can be used by individuals, a team or by a facilitator conducting a training session.

## Why use this guide?

Get the best performance from everyone in your team, through understanding how to apply a well-rounded approach to managing performance.

## When to use this guide?

- If you've recently assumed people management responsibilities and want to learn how to get the best from your team – work through the entire guide.
- To help with particular challenges you may be facing with your team's performance – go to the relevant section of the guide.
- If you're feeling a bit rusty and want a refresher in managing performance.

## What's in this guide?

While there is never a single right answer to the challenges of managing performance, this guide explores key considerations that should inform your choices around:

- effective goal setting;
- showing appreciation and building rapport;
- coaching on an informal and formal basis; and
- adapting your approach to the person and the situation.

This guide also offers practical tools and aids:

- Video scenes of well executed performance conversations contrasted with poorly executed performance conversations.
- "How to" tips, checklists, conversation starters and templates for use on a daily basis.

## What's not covered?

While formal 'performance management' systems have their place in your organisation, they are not what this resource is about. *Talking Performance* emphasises a much bigger mindset and a much broader range of approaches you can use at any time, within or beyond the scope of your organisation's formal systems.

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## Glossary of terms

The following terms are used throughout this guide.

Term/Phrase	Definition
5Ps	A checklist for preparing and delivering feedback – based on the acronym for <b>Purpose, Product, People, Process and Preparation</b> .
360° feedback	Self assessment and feedback provided by colleagues, peers and supervisors and, in some cases, external clients and customers.
Appreciation	Encouraging and motivating people through praise, recognition and acknowledgement of their achievements and the challenges they face.
Building rapport	Connecting with people at a personal level.
Coaching	Working with people to help them achieve their goals and reach their full potential.
Development	Has two meanings: <ol style="list-style-type: none"><li>1. Assisting people to identify their own needs for additional knowledge and skills, identify development activities that meet these needs and then focusing their attention on transferring their new knowledge and skills to on-the-job behaviours.</li><li>2. Passing on your skills and knowledge to people.</li></ol>
Key objectives	The outputs for which a role is responsible, whether it is people, processes or resources.
Ladder of inference	A feedback tool that focuses on presenting data and explaining thinking/assumptions that underpin your conclusions. It also assists in understanding another person's perspective.
Monitoring	Ongoing observation and review.
Performance	Tangible results <i>and</i> interpersonal behaviours.
SMART goals	A framework used to create comprehensive goals, based on the acronym for <b>S</b> pecific, <b>M</b> easurable, <b>A</b> chievable, <b>R</b> elevant and <b>T</b> ime-bound.
Talking Performance	A range of approaches and activities undertaken to get the best performance from people to achieve organisational, team and individual goals and objectives.
Working Well/ Do Differently (WW/DD)	A framework for providing coaching feedback on each person's goals/targets.

## Talking Performance tools

The following tools and templates are available throughout this guide.

Tool	Explanation	Page
What's your 'talking performance' approach?	Quick survey to determine your 'talking performance' approach.	11
Ways to show appreciation and build rapport	Simple, practical examples of how you can demonstrate appreciation and build rapport.	26
Conversation starters	Example statements that help you to show appreciation and to build rapport.	27 & 80
5Ps framework	Framework to help you plan and conduct coaching conversations.	33
Working well/do differently	Structured process to help you provide balanced feedback to your staff, including an associated template.	35 & 83
Ladder of inference	Powerful tool to help you discuss and understand other people's perspectives in coaching conversations.	38
Communication styles scale	A quick assessment tool to help you identify yours (and other's) preferred communication style.	50 & 96
Goal-setting template	Template to help you assist each team member to set SMART goals, and help them to identify how to achieve them.	78
Helping people develop	Four page document to help you assist your staff to undertake effective development, including identifying an appropriate type of development activity.	89
What motivates people	Two page document to help you identify what motivates your staff to perform well.	93

## Talking Performance activities

The following activities are included within this guide, to help you build your 'talking performance' skills.

Activity	Explanation	Page
Smarten up activity	Rewrite goal statements to make them SMART goals.	20
The rapport challenge	List three practical actions you can take to learn more about a team member you know little about or you feel less comfortable with.	28
The ripple effect	List three practical actions you can take to encourage people to show appreciation to each other and to build rapport.	29
Think of your own conversation starters using the 5Ps	List statements you can use to start conversations about the purpose, outcome (product), people, process and preparation for a coaching conversation.	34
Coaching activity	Use Talking Performance tools to help you prepare for, conduct and then reflect on a coaching meeting with a staff member.	43
High performers – high stakes activity	Questions to stimulate your thinking around coaching the high performers in your team.	45
Style check activity	Consider how your communication style is perceived by others, and how it impacts on them.	51
Summary activity	Create an action plan of your 'talking performance' practices and identify what you will focus on over the next 6-12 months. You can use this information in your Performance Development Plan.	74
Snapshot activity	Develop a profile of each of your team members (who they are, what they are doing and where they are going) through answering a range of questions. This information will assist you to adapt your 'talking performance' approach to individual team member's needs.	85

The following activities may benefit from being completed in a group setting, where people can share their ideas and discuss the scenarios.

Activity	Explanation	Page
Acts worth appreciating	List the contributions that your staff make to the workplace, which are worth appreciating.	25
Video activities	A range of activities designed to facilitate your reflections on the five videos, and help you apply their key learnings to your team.	57-73
Case study: Set the right goals	Develop a strategy for how Sarah (a manager of a team of 12) can motivate her staff and make their work more interesting.	77
Case study: Showing appreciation & building rapport	Develop a strategy for how Matthew (an experienced manager with strong technical expertise) can build better relationships with his staff.	81
Case study: Coaching concerns	Use the WW/DD template to help Diana prepare for a coaching session to address the performance problems of her staff member John.	82



# Talking Performance Overview



1

# 1. Talking Performance overview

## Talking Performance Principle:

Make time for talking performance activities. They are an essential part of every manager's job.

Managing performance is a fundamental part of every manager's job, yet it is not always given the time it deserves. Some managers report that '*managing performance*' is the part of their job that they dislike and actively avoid. Others simply put it off, either deliberately or by not prioritising it as an important activity.

## 1.1 What is Talking Performance?

The phrase *Talking Performance* is intended to capture what you, as a manager, can do each day to support your team to work at their full potential. It promotes a mindset of creating an environment in which people are:

- **motivated** – so they want to do their best; and
- **empowered** – so they are able to succeed.

This means developing a strong, collaborative relationship with each person in your team, and thinking about the bigger picture of how team members relate to each other and the wider organisation.

### Performance = Results + Behaviour

Throughout this guide '**performance**' includes both tangible results and interpersonal behaviours.

It is important to produce great results. However, the way a person behaves towards others in order to achieve these results is equally important.

**e.g.**

A person may do their job well, but cause disruption and arguments in a team. If their behaviour isn't addressed, it can have serious repercussions and can undermine the goals of the organisation.

## 1.2 How can talking performance benefit you?

When you manage your team's performance effectively, using the principles and skills explored in this guide, you will:

○ make better work allocation and promotion decisions...	because →	○ you will better understand the strengths and motivations of each person, and more accurately judge any potential risks
○ have more time for your other tasks...	because →	○ you will be confident to delegate more work more often
○ foster a more positive and less stressful work environment...	because →	○ you will build good relationships with your team members
○ spend less time managing conflict...	because →	○ you will have picked up the source of the workplace conflict early and addressed it before it becomes a major problem
○ hold easier coaching conversations that deliver results...	because →	○ you will have a greater personal connection with each person and a clear set of agreed goals to relate the conversation back to
○ meet your Key Objectives as a manager...	because →	○ you will be able to get the best from your people, thereby achieving the goals and objectives of your team

## 1.3 What does *Talking Performance* consist of?

This guide focuses primarily on three essential elements in a well rounded approach to performance conversations. You are likely to recognise each of these aspects in your current management style, but the value of this simple framework is that it will focus your mind on when and how best to use each of these elements with each team member.



Communication underpins each of these elements. Effective communication is fundamental to individual and team performance. People need to be informed of their performance progress, receive feedback and have their queries listened to. While face to face communication is best, remote sites and different working hours may require communication by fax, email, phone, video and electronic message.

Importantly, *Talking Performance* also helps you think about how to adapt your approach when applying each of these elements to individual people and situations.

## 1.4 When is 'talking performance' important?

### Talking Performance Principle:

Monitor performance regularly throughout the year, not just at the formal half-yearly and annual performance reviews.

Each element of talking performance is important across the entire cycle of a person's employment in a role: from recruitment to departure, and across the ups and downs of a person's performance as they experience challenges and successes.

## 1.5 Ten Talking Performance principles

The following is a summary of the overall principles and guidelines required for managers to effectively 'talk performance'. They are covered throughout this guide (page number indicated in brackets).

### Overview principles

1. **Make time for talking performance activities.** They are essential parts of every manager's job (p.7).
2. **Empower, motivate, develop and assist each team member to achieve their goals,** rather than coercing, micromanaging or under-supporting them (p.31).

### Core guidelines: what and when

3. **Help each team member set clear, measurable goals** that relate to the objectives and values of the team and organisation, and to their own strengths and career goals (p.17).
4. **Show appreciation frequently and build rapport continuously,** focusing on optimising motivation and relationships (p.23).
5. **Provide regular and timely coaching,** informally as well as formally, that is focused on achieving goals (p.31).
6. **Monitor performance regularly throughout the year,** not just at the formal half-yearly and annual performance reviews (p.9).

### 'How to' advice

7. **Plan ahead for each coaching conversation,** using the 5Ps (Purpose, Product, People, Process, Preparation) or another appropriate framework (p.33).
8. **Adapt your approach to suit your purpose and each team member's style and motivations (p.47).**
9. **Adapt your communication style to each individual's needs,** to ensure that the impact of the messages you are sending matches your intention – with a preference for collaborative, two-way conversations (p.52).
10. **Follow up by planning and implementing a range of 'next steps' as appropriate (p.41).**



2

What's your talking performance approach?



## 2. What's your 'talking performance' approach?

The way you approach your 'talking performance' discussions will directly impact the outcomes of those discussions – and therefore the performance of your staff. So it's critical to hone your strengths and address any weaknesses in your approach. But, before you can refine your approach, the first step is awareness.

This survey will help you identify your current talking performance style or approach. To fill it out, please review the following statements and rate yourself according to the 4-point rating scale. Answer according to how you typically discuss things with your staff. As with any assessment, the more honest your responses, the more value you will gain from it.

### 2.1 Survey questions

1. I consider how each of my staff members prefer to receive coaching feedback (e.g. informally, over coffee, or in a formal office setting, etc) and cater to those preferences.

Strongly disagree       Disagree       Agree       Strongly agree
2. When I offer suggestions that a staff member may not want to hear, I always back it up with a clear, well-considered rationale.

Strongly disagree       Disagree       Agree       Strongly agree
3. I take the time to find out what motivates each individual in my team to perform at work (e.g. financial reward, personal fulfilment, challenging work, etc.)

Strongly disagree       Disagree       Agree       Strongly agree
4. When I show appreciation, people sometimes interpret my comments as insincere.

Strongly disagree       Disagree       Agree       Strongly agree
5. When dealing with poor staff performance, I consciously spend time exploring their perspective to gather data and evidence before making decisions or recommendations.

Strongly disagree       Disagree       Agree       Strongly agree
6. I take the time to listen attentively to any individual's concerns either immediately when they arise or very soon after.

Strongly disagree       Disagree       Agree       Strongly agree

7. I make time before coaching conversations with my staff to consider my purpose for the conversation and exactly how I would like it to progress.
- Strongly disagree       Disagree       Agree       Strongly agree
8. I think certain people in my team may feel uncomfortable approaching me to ask for help or advice.
- Strongly disagree       Disagree       Agree       Strongly agree
9. When helping staff develop themselves and their careers, I usually suggest they attend training courses as their primary method of development.
- Strongly disagree       Disagree       Agree       Strongly agree
10. I regularly go out of my way to thank staff for their efforts, contributions and achievements (informally in conversation or through more formal 'rewards').
- Strongly disagree       Disagree       Agree       Strongly agree
11. I provide specific examples to substantiate my feedback.
- Strongly disagree       Disagree       Agree       Strongly agree
12. When a staff member's work is poor, I worry that I could send the wrong message if I acknowledge challenges that may be contributing to their poor performance.
- Strongly disagree       Disagree       Agree       Strongly agree
13. When I coach staff, I usually provide a brief overview of what's working well and then give detailed feedback on what they could improve.
- Strongly disagree       Disagree       Agree       Strongly agree
14. When showing appreciation to my staff, I try to focus on what specific work tasks they've done well.
- Strongly disagree       Disagree       Agree       Strongly agree
15. I usually ask staff members to communicate with me in accordance with my own preferences (e.g. via email instead of face-to-face, etc), rather than having to adapt to everyone else.
- Strongly disagree       Disagree       Agree       Strongly agree
16. When I set goals with staff members, I try to customise them to their specific interests, strengths and motivations – not just the organisational needs.
- Strongly disagree       Disagree       Agree       Strongly agree



17. I often spend time coaching the solid performers in my team.
- Strongly disagree       Disagree       Agree       Strongly agree
18. If there is an issue with an individual's performance, I find that the best time for raising it is the annual (or half-yearly) performance review.
- Strongly disagree       Disagree       Agree       Strongly agree
19. I meet regularly with each of my team members for the purpose of general coaching, regardless of whether a specific performance issue has arisen.
- Strongly disagree       Disagree       Agree       Strongly agree
20. Once I've identified an individual has a performance issue, I work with them to jointly diagnose the possible cause of the problem.
- Strongly disagree       Disagree       Agree       Strongly agree
21. I find the time to connect with everyone in my team by having regular conversations and/or catch-ups.
- Strongly disagree       Disagree       Agree       Strongly agree
22. I spend time exploring and listening to staff member's reasons on why a performance issue has arisen.
- Strongly disagree       Disagree       Agree       Strongly agree
23. Once the cause of a performance issue is clear, I instruct my staff on what solutions are most appropriate and ask them to take the necessary steps.
- Strongly disagree       Disagree       Agree       Strongly agree
24. After a coaching conversation, I usually leave it to the individual to work out how they will action/ implement the learning and suggestions.
- Strongly disagree       Disagree       Agree       Strongly agree

## 2.2 Self-scoring tables

To calculate your results, simply look at what you selected for each question, and put the corresponding number into the 'score' column. Once you have got a score for each of the questions, add these up to give you your **total score**.

### How you relate to people

Question number	People focused	Score
3.	Strongly disagree = 1, Disagree = 2, Agree = 3, Strongly agree = 4	
4.	Strongly disagree = 4, Disagree = 3, Agree = 2, Strongly agree = 1	
6.	Strongly disagree = 1, Disagree = 2, Agree = 3, Strongly agree = 4	
8.	Strongly disagree = 4, Disagree = 3, Agree = 2, Strongly agree = 1	
10.	Strongly disagree = 1, Disagree = 2, Agree = 3, Strongly agree = 4	
12.	Strongly disagree = 4, Disagree = 3, Agree = 2, Strongly agree = 1	
14.	Strongly disagree = 4, Disagree = 3, Agree = 2, Strongly agree = 1	
21.	Strongly disagree = 1, Disagree = 2, Agree = 3, Strongly agree = 4	
<b>Total Score:</b>		

### How you adapt to individual differences

Question number	Flexible	Score
1.	Strongly disagree = 1, Disagree = 2, Agree = 3, Strongly agree = 4	
9.	Strongly disagree = 4, Disagree = 3, Agree = 2, Strongly agree = 1	
15.	Strongly disagree = 4, Disagree = 3, Agree = 2, Strongly agree = 1	
16.	Strongly disagree = 1, Disagree = 2, Agree = 3, Strongly agree = 4	
<b>Total score:</b>		

### How you view your role as coach

Question number	Intentional, regular	Score
7.	Strongly disagree = 1, Disagree = 2, Agree = 3, Strongly agree = 4	
17.	Strongly disagree = 1, Disagree = 2, Agree = 3, Strongly agree = 4	
18.	Strongly disagree = 4, Disagree = 3, Agree = 2, Strongly agree = 1	
19.	Strongly disagree = 1, Disagree = 2, Agree = 3, Strongly agree = 4	
<b>Total score:</b>		

## How you make decisions

Question number	Collaborative	Score
20.	Strongly disagree = 1, Disagree = 2, Agree = 3, Strongly agree = 4	
22.	Strongly disagree = 1, Disagree = 2, Agree = 3, Strongly agree = 4	
23.	Strongly disagree = 4, Disagree = 3, Agree = 2, Strongly agree = 1	
24.	Strongly disagree = 4, Disagree = 3, Agree = 2, Strongly agree = 1	
<b>Total score:</b>		

## How you communicate feedback

Question number	Specific	Score
2.	Strongly disagree = 1, Disagree = 2, Agree = 3, Strongly agree = 4	
5.	Strongly disagree = 1, Disagree = 2, Agree = 3, Strongly agree = 4	
11.	Strongly disagree = 1, Disagree = 2, Agree = 3, Strongly agree = 4	
13.	Strongly disagree = 4, Disagree = 3, Agree = 2, Strongly agree = 1	
<b>Total score:</b>		

## 2.3 Understanding your results

The survey results give you an insight into your current feedback style, including which areas you might need to work on. The scores are assessed across the following categories:

1. **How you relate to people** – people focused vs. task focused.
2. **How you adapt to individual differences** – flexible vs. rigid.
3. **How you view your role as coach** – intentional and regular vs. ad hoc.
4. **How you make decisions** – collaborative vs. directive.
5. **How you communicate feedback** – specific vs. conclusional.

Your score will range from 0 to 32 in the “How you relate to people” category, and 0 to 16 in each of the remaining categories. The higher your score, the better – and the more likely it is that you are operating in line with best-practice principles.

## How you relate to people

A score of **less than 24** indicates you may need to spend more time connecting with your team and building rapport. Your team members need to feel appreciated for their efforts and valued as individuals. So don't be afraid to say 'thanks' often – it will go a long way. The '*Showing Appreciation and Building Rapport*' chapter of this guide provides information and suggestions for improving working relationships.

A score of **24 or more** indicates you are well on your way to motivating your team! You spend time trying to get to know your team members and make an effort to show your appreciation for their efforts. Keep it up!

## How you adapt to individual differences

A score of **less than 12** indicates you may tend towards a 'one size fits all' approach when it comes to coaching and showing appreciation. It's important to recognise that people have different styles, motivations, interests, strengths, backgrounds, experience levels and abilities. Best practice principles suggest it's worth taking these differences into account. More information on this point is covered in the '*Adapting talking performance activities*' chapter.

A score of **12 or more** indicates you understand the importance of not adopting a 'one size fits all' approach to giving feedback. Continue to learn and discover individual preferences and motivations of your team members. They will appreciate that you have sought to understand them!

## How you view your role as coach

A score of **less than 12** indicates that it's important to start putting aside regular time in your diary to focus on coaching your staff members – both the high performers and the lower performers. Remember, coaching doesn't have to be formal, nor does it have to be a long conversation. In the '*Coaching*' chapter, you will see a common theme around the importance of making coaching a deliberate, regular part of a manager's role.

A score of **12 or more** indicates you are clear that coaching is an integral part of your role. Continue spending time coaching all your staff members, both formally and informally, and you will see the benefits!

## How you make decisions

A score of **less than 12** indicates you will find the '*Coaching*' chapter useful. You will see there is a common theme around working collaboratively with your team members to set goals, diagnose performance issues and devise action plans.

A score of **12 or more** indicates you make an effort to involve people in setting goals, diagnosing performance issues and devising action plans. Continue to support your team throughout the performance cycle. Good work!

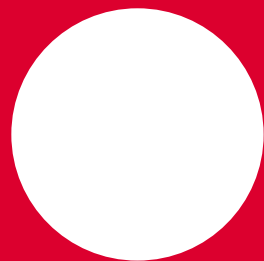
## How you communicate feedback

A score of **less than 12** indicates you may be providing feedback that is too broad (ie. broad conclusions, rather than specific details). If so, the individual may not appreciate what exactly they did wrong or how they can improve. Rather than just offering your broad conclusions, try to provide specific data as well as your rationale to help them understand. Have a look at the '*Coaching*' chapter and in particular, how to use a '*Ladder of Inference*'.

A score of **12 or more** indicates you recognise the importance of providing examples when giving feedback. This will help the individual understand your perspective and offer concrete ideas on how they can improve in the future. Keep it up!

Set the right goals

3



### 3. Set the right goals

#### Talking Performance Principle:

Help each team member set clear, measurable goals that relate to the objectives and values of the team, organisation and to their own strengths and career goals.

Goal setting is helping each team member to set goals, clarify expectations and outline tasks to identify clear measures of success.

Goal setting is critical to staff performance and development because goals provide staff with a clear sense of direction and focus for their activities.

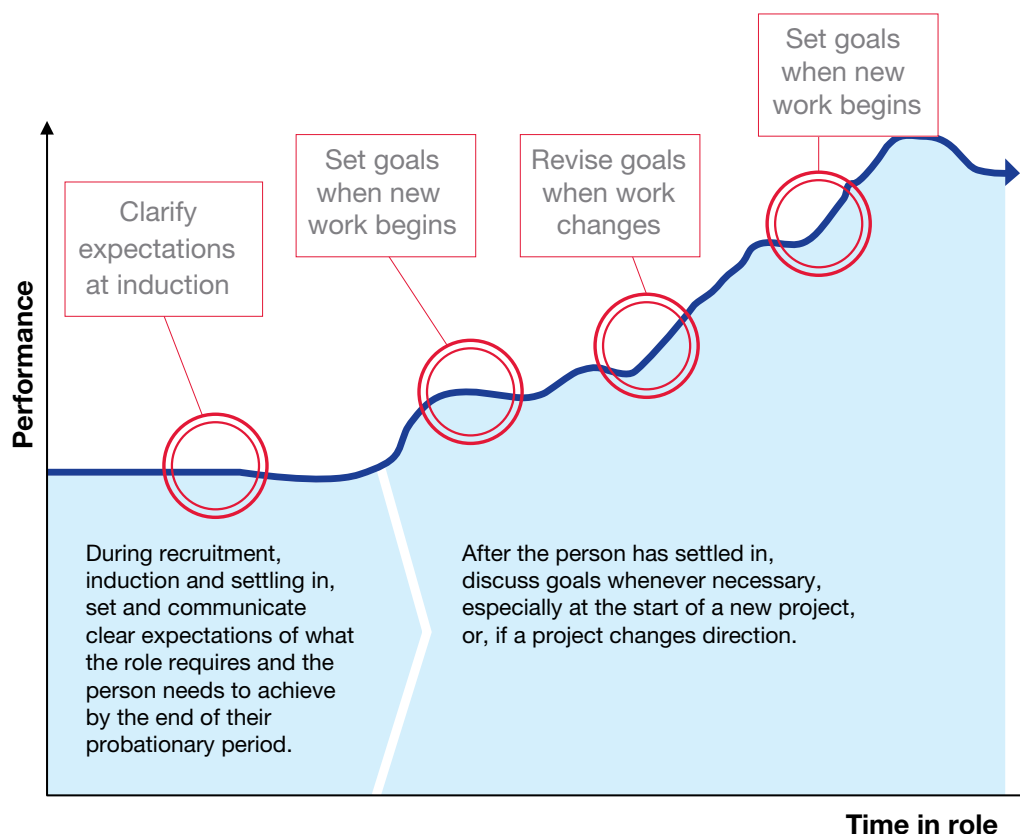
When the chosen goals not only align with the objectives and values of the team and organisation, but also with the person's own strengths and career goals, they are more likely to fully engage and motivate that person.

Clear, measurable and aligned goals help managers get the best from new and existing team members. They become the agreed benchmarks around which targeted and meaningful coaching conversations can occur.

It's helpful to refresh or reset goals:

- when a person's aspirations or capabilities change;
- whenever expectations are misaligned; or
- as part of an annual performance review.

The diagram below illustrates opportunities when you can set goals and clarify expectations:



### 3.1 Set goals collaboratively

People are far more likely to 'own' a set of goals, or feel inspired about achieving them, if they have set the goals for themselves. Goals that you dictate to a person may be measurable benchmarks, but they won't do much to inspire performance and may even be resented.

Some people may need help or guidance in setting goals, especially in aligning their individual goals with the organisation's strategic objectives. That is a critical role that you as a manager can play. But you can do so in a genuinely collaborative way.



Explain the organisational and team level goals, and then ask the person how they think they can contribute. Ask them to suggest goals that build on their personal strengths and interests.

### 3.2 Set goals for behaviours and results

Remember, goals should not only include tangible results to be achieved, but also the standard of behaviours expected. Your organisation should have a set of behavioural goals or expectations. If none exist, develop behavioural goals collaboratively with your team to maximise understanding and ownership.



An organisational goal may be: to lead and engage the Victorian public sector in continually improving services, standards, governance and workforce development.  
A behavioural goal may be: to openly communicate and collaborate with colleagues and stakeholders.

### 3.3 Set SMART goals

The SMART goals checklist can assist you to set clear, measurable goals with your team.

A **SMART** goal is:

<b>Specific</b>	it clarifies the task a person is expected to do.
<b>Measureable</b>	it can be measured to determine success or failure.
<b>Achievable</b>	it's realistic, given a person's time, skills and other tasks.
<b>Relevant</b>	it's clearly linked to the organisation's objectives and behaviour based goals/values and any other mandatory performance standards.
<b>Time-bound</b>	it sets a clear deadline for completion of the goal.



A goal like “*deliver projects effectively and efficiently*” sounds reasonable, but by itself, isn't SMART.

The goal statement doesn't include a deadline for completion and it's not clear what project is being referred to. If 'efficiently and effectively' are to be the measures, what do they mean? How would you measure efficiency and effectiveness?

To turn the above goal into a SMART goal, you would re-write it in the following way:

*“Deliver project X and project Y on time within the \$60K budget and to the satisfaction of key stakeholders, by December 1<sup>st</sup>”*

The colour coding (see table above) indicates how each part of the goal statement relates to the individual SMART components.

You will notice that the 'achievable' and 'relevant' parts of the SMART checklist haven't been included. Generally these checks are discussed between the manager and staff member and assumed in the goal.

However, direct relevance could be written into the goal in several ways as the example below illustrates.

**Relevance example:** *“Deliver project X and project Y, within the organisation's strategic objective of ABC, to the \$60K budget and to the satisfaction of key stakeholders, by December 1<sup>st</sup>.”*





### Smarten Up Activity

Rewrite the following goal statements to make them SMART goals.

Think about how the statement might apply in your own workplace and rewrite it so that it would be relevant for your team. Use your own examples to fill in any information gaps.

Goal	SMART goal
1. Complete project X to a high standard.	
2. Consult more frequently with team members.	
3. Improve relationships with clients.	



### Skills Builder

To sharpen your skills in setting SMART goals you might like to watch video 4 (on the DVD included with this guide) and read a corresponding excerpt of the script (p.75) in the 'Set the right goals' section of the *Skills Builder* chapter.

## 3.4 Clarify the “how-to” as well as the “what”

For most people, SMART goals alone are not enough. Most people need direction around how to achieve these goals – in other words, the specific behaviours, actions or activities they should undertake in pursuit of their goals.

Of course, this advice must be customised to each person's needs. Some will simply need high-level 'how-to' advice; whilst others will require more detailed guidance.

e.g.

The SMART goal *“Deliver project X and project Y within the \$60K budget and to the satisfaction of key stakeholders, by December 1st”* is useful, but it doesn’t help people understand the actual activities they should focus on to achieve that goal.

Some people will need details like: *“Create a clear project plan, including setting timelines, clarifying resource needs, deciding on strategy and implementing review points”*.

Less experienced, capable or confident staff members may need even greater direction such as: *“When you set timelines, consult the stakeholders involved in implementation to ensure that timelines are realistic and to get their buy-in. When you clarify resource needs, start by looking for innovative ways to reduce costs while upholding quality.”*

Remember, the time spent in setting SMART goals up front improves the chances of the goal being achieved effectively, efficiently and as intended.

### Manager Reflection

If you already have individual work plans in place, you might like to review them:

- Are the goals SMART goals?
- Have the plans been created through collaboration?
- Do the goals **best** match the staff member’s own strengths, interests and career goals (keeping in mind that it’s not always possible for staff to work on everything they like)?
- Has there been any change in the workplace, work team, or the aspirations and capabilities of the individual? If so, do the listed goals need to be revisited?



### Skills Builder

To sharpen your goal setting skills you might like to work through the case study in the *‘Set the right goals’* section (p.77) of the *Skills Builder* chapter.

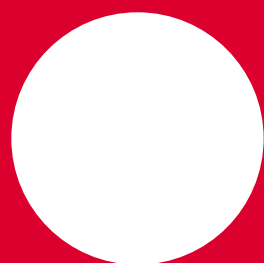
## Quick Tips

- Clear, measurable and relevant goals are critical in providing direction and focus to staff.
- Goals should align with the objectives and values of the team and organisation.
- Goals that match a person's skills, interests and aspirations will engage and motivate.
- To get the best from team members, set goals collaboratively, set SMART goals and remember to clarify the 'how-to' as well as the what.
- Use goals as a basis for coaching conversations.
- Refresh or reset goals at regular intervals and whenever circumstances change.

**Hot Tip:** to experience what a goal setting conversation might look and sound like, watch Video 4.

Showing appreciation  
and building rapport

4



## 4. Showing appreciation and building rapport

### Talking Performance Principle:

Show appreciation frequently and build rapport continuously, focusing on optimising motivation and relationships.

Managers need to build productive and motivating relationships within the team and with each team member. To achieve this it is important for managers to show appreciation frequently and build rapport continuously. You don't have to be best friends with your team, but you should build relationships in which people feel that you understand and value them beyond the outputs of their work.

**Showing Appreciation** is all about encouraging and motivating people through praise, recognition and acknowledgement of their achievements and the challenges they face. While coaching aims to help people achieve goals and reach their potential, showing appreciation aims to build and maintain motivation. Showing appreciation can include formal recognition of individual and team effort, but will most often involve informal comments or gestures.

**Building rapport** is about connecting with people at a personal level. Understanding who they are, what their interests are and what are some of the things that are important to them in life.

### 4.1 What are the benefits?

#### 4.1.1 Showing appreciation

Most people are motivated by positive recognition, especially from their manager. Of course motivation alone can't guarantee high performance, but without it, even highly skilled people will fail to achieve their potential. By showing appreciation – and better yet, building a culture in which everyone shows appreciation where it's warranted – you help create a positive and personally rewarding working environment where people can shine.

#### 4.1.2 Building rapport

As well as being personally satisfying, building rapport with your team contributes to performance in a couple of ways:

- it helps build a positive work environment, which contributes to productivity; and
- it builds the kinds of relationships that support effective coaching – if people believe your assessment of their work is based on a genuine interest in their well-being, they're more willing to ask for help, and more open to feedback to enhance their performance.

## 4.2 Timing: when and how often?

It's important to show appreciation whenever it's warranted. Showing appreciation is usually the sort of thing you can do quickly, and as frequently as sincerity permits – so don't just use it at the start of coaching conversations.

Building rapport takes time and is ongoing. Some managers do it naturally; others find it hard to get to know people. The key is to make time to relate to people at an individual level, not just at the task level.

The diagram below illustrates some opportunities for showing appreciation and building rapport:



## 4.3 Tips to show appreciation and build rapport

There are many ways to show appreciation and build rapport, but you need to start by developing your ability to **focus on the person** – as distinct from the quality of their performance.



If you receive a draft report from a person you might say, *“Thanks for getting this to me quickly; you really pulled out all the stops.”* Adding that you’ll get back to them later with detailed comments makes it clear that your ‘thanks’ is a message of appreciation for their efforts, not an assessment that the report has ‘hit the mark’.

Most importantly, remember to **be sincere**. People will sense if you attempt to convey appreciation that you do not mean. So find something you can genuinely appreciate – their time, their effort, the challenges they’re experiencing, even their good intentions.



### Acts Worth Appreciating

In the hustle and bustle of the day’s work it is all too easy for the good actions of your team members to go unnoticed.

To build your skills – and new habits – in showing appreciation, why not develop a list of ‘acts worth appreciating’. Once you know what you’re looking for it will be much easier to see it in action – and remember to acknowledge it.

The following list represents contributions that people in a workplace often make that others generally appreciate. Add some acts in the blank column relevant to your own work team.

Acts worth appreciating	
Freely giving assistance to another person	
Organising a morning tea or other function	
Staying back to complete a project/task on time or ahead of time	
Volunteering to take the lead on tasks	
Travelling extra distances to attend meetings	
Often doing that little bit extra	
Making regular contributions at team meetings	
Hanging in there when the going gets tough/ remaining positive	
Doing the jobs everyone else ignores	
Proactively offering ideas for improvements to work processes	

## 4.4 Practical ways to show appreciation and build rapport

Although there is no one right way to demonstrate appreciation and build rapport, the following are some simple, practical things you can think about doing.

Remember to watch for signals as to what is appropriate for the team and for the individual. Sometimes you can plan, but often you must seize the moment!

### 4.4.1 Ways to show appreciation

Email	Send a quick thank you email for their hard work or for getting something done on time. Share your praise by copying the team and more senior managers.
Team Events	Praise individual and team achievements at meetings. Organise a lunch or other event to celebrate a milestone.
Awards	Encourage people to show appreciation for each other via presentations, newsletter notes and other formal systems.
Personal Approach	Acknowledge work issues that may be making things hard for someone (i.e. appreciate the challenges they are facing).

### 4.4.2 Ways to build rapport

Listen	Pay attention when people talk of their sporting interests, hobbies, volunteering, weekend activities and other things outside work.  Listen interactively. People like to feel heard and understood.
Support	If someone tells you that they are going through a tough time in their personal life, help them by being available to listen, or by giving them extra support at work.
Communicate	If someone is away from the office (e.g. working remotely, on maternity leave, extended leave, or Workcover) contact them regularly, if appropriate, so they still feel part of the team.
Remember	Ask people about things they have previously mentioned (e.g. how their child's party went or the menu for a dinner party). Remember, not everyone wants to bring up things they have told you, so follow cues from someone before raising a topic.
Accommodate	Accommodate each person's well-being and working style. For example, schedule mid-morning meetings if a person's family commitments make it hard for them to arrive early.



## Conversation starters

The following examples give you some ideas on initiating conversations focused on showing appreciation and rapport building. As always, be mindful that everyone is different and no single phrase or question will be suitable for every occasion. But you have to start somewhere, so if you're struggling for ideas, try developing your version of one or more of these prompts.

### 4.4.3 Statements that help to show appreciation



- *"I just wanted to thank you for agreeing to work with the team and to have a chat with you about how you are settling into the new role."*
- *"Thanks everyone for joining us for morning tea. Let me take this opportunity to thank the whole team for your fantastic contributions to the project we've just completed."*
- *"I just wanted to thank you for agreeing to travel to Bendigo for work at such late notice last week. Let's discuss how we can make up for the extra time and effort you put in."*
- *"I know you don't like to be singled out in public, so I've sent you this email as a way of saying how much I appreciate everything you've been doing behind the scenes for this team."*

### 4.4.4 Statements that help build rapport



- *"Welcome to the team!' Before I give you a run down on everyone's roles and tasks, let me tell you a bit about myself... How about you; what's your background?"*
- *"Hi, I'm just calling to check in. Before we talk business, how are you going out there in (offsite location)?"*
- *"Hey, I heard you had a tough meeting this morning. How are you feeling about it?"*
- *"Thanks for telling me about your sick mum. Just letting you know that I understand this may be a difficult time for you and if there's anything I can do at work to make things easier, please let me know."*



#### Skills Builder

For some more examples on how you can initiate conversations focused on showing appreciation and building rapport (p.80), check out the 'Showing appreciation and building rapport' section of the *Skills Builder* chapter.

### Manager Reflection

- Have I shown appreciation today?
- What were people's reactions when I showed them appreciation?
- Have I stopped to ask my staff how they are?
- Have I followed up on important things people have told me, if appropriate (e.g. a birthday party or a dinner party they were hosting)?
- If I haven't shown appreciation or taken the time to talk to my team, why haven't I?

### Activity

### The Rapport Challenge

Think about a team member you know little about or one you feel less comfortable with. List three practical actions you can take to learn more about this person and build rapport.

1.

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2.

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3.

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## 4.5 Create a culture of appreciation and rapport building

The motivation you're aiming to build through appreciation and rapport is not something you create single-handedly or instantaneously. It's something that arises from the overall environment your team works in.

In creating a culture of appreciation and rapport, it's important that you don't withhold messages of appreciation from someone who is underperforming because you think it will send the wrong message. Even if someone hasn't hit the mark on a report, you can thank them for getting it to you in a timely manner, or for the effort they have put in.



### The Ripple Effect

Now that you have been given some tips and ideas on how to show appreciation and build rapport, how do you encourage your team members to do it? How do you create that ripple effect that, over time, builds a culture of appreciation and rapport?

List three practical actions you can take to encourage people to show appreciation to each other and build rapport. (Role modelling appreciation yourself is a good start!)

1.

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2.

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3.

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### Skills Builder

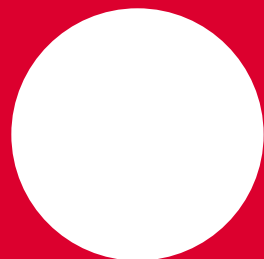
To sharpen your skills in showing appreciation and building rapport with your staff, try the case study (p.81) in the '*Showing appreciation and building rapport*' section of the *Skills Builder* chapter.

## Quick Tips

- Showing appreciation means acknowledging and praising people to encourage and motivate them.
- Building rapport means connecting with people on a personal level.
- By showing appreciation you also build rapport.
- Learn what motivates each person and adapt your approach to suit.
- Always try to show appreciation and build rapport 'in the moment'.
- Show appreciation frequently and build rapport continuously.
- Focus on the person, as distinct from the quality of their performance.
- If someone is underperforming, don't withhold appreciation. Instead, find simple ways to acknowledge them as a person.
- Building a culture where everyone participates in showing appreciation creates a positive and more productive workplace.

Coaching

5



## 5. Coaching

### Talking Performance Principle:

Empower, motivate, develop and assist each team member to achieve their goals, rather than coercing, micromanaging or under-supporting them.

Coaching means helping people to realise their potential. Not just to achieve what they're currently capable of doing, but seeing a vision of what they could achieve in the future and helping them take steps towards that vision.

It involves working in partnership with each team member to help them achieve a range of goals (e.g. tasks, projects, personal development goals). It applies to all your team members, from the high performers to the poor performers.

### You can help your people achieve their goals by:

- motivating them so they want to succeed;
- empowering them by entrusting them with real responsibility;
- 'taking stock' of how they're tracking;
- enabling them to develop the necessary capabilities; and
- helping them solve problems and providing any other support they need to succeed.

### 5.1 Timing: when and how often?

### Talking Performance Principle:

Provide regular and timely coaching, informally as well as formally, focusing on achieving goals.

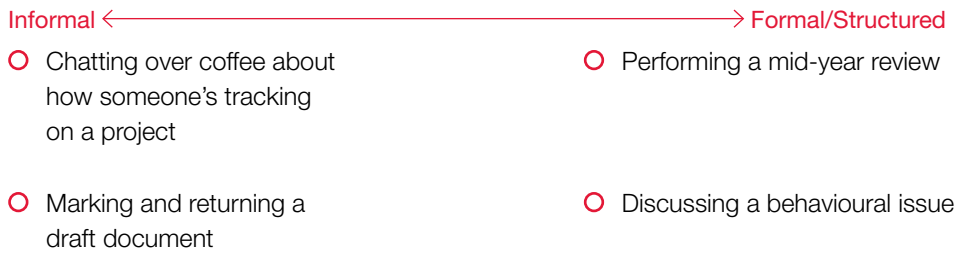
Coaching should occur regularly, not just when things go wrong. It should be intensified if people face particular challenges or if they show signs of disengaging. Regular check-ins (e.g. weekly/fortnightly) help you and your team detect and prevent issues. Don't wait for the next scheduled meeting to query potential issues.

The 'timeliness' guideline also applies to daily tasks. If a report hasn't hit the mark, talk with the person about required changes or lessons that can be learnt for next time. If you see someone being rude, talk with them immediately (or as soon as they have cooled off).

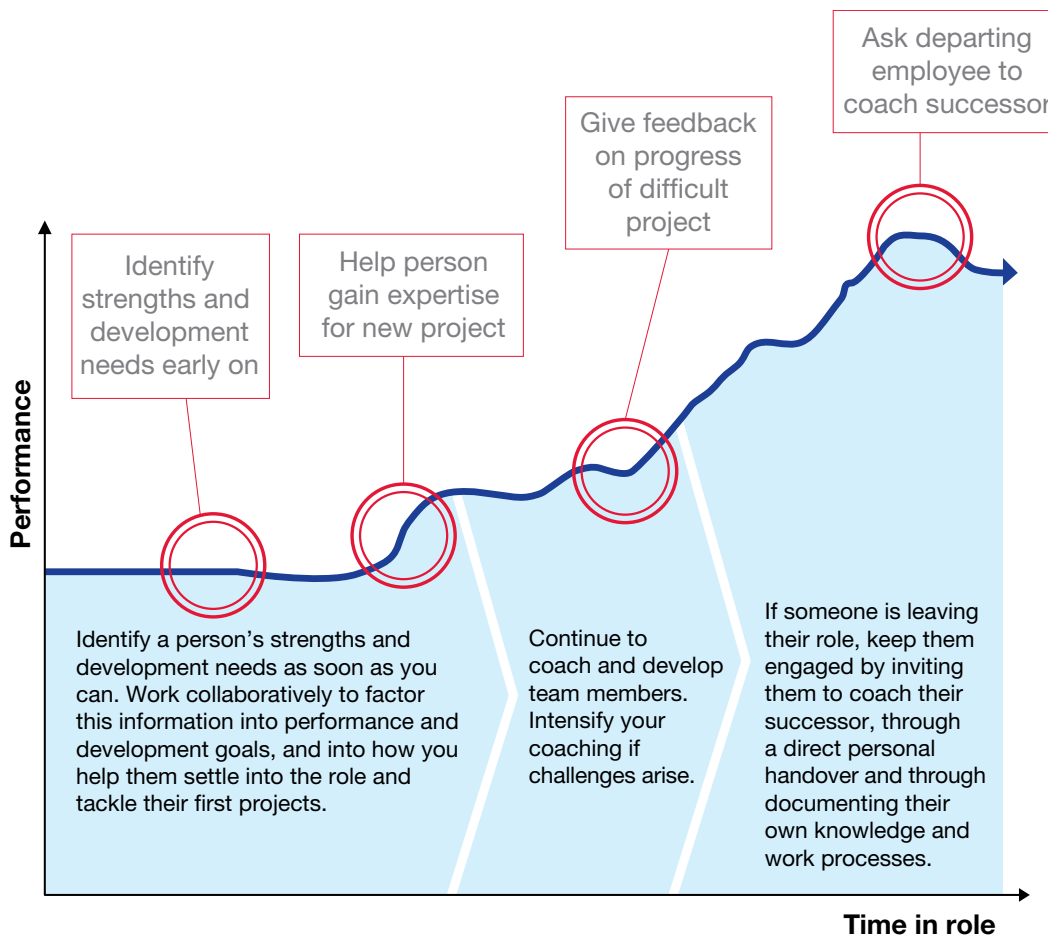
### 5.1.1 Coaching includes informal & formal conversations

Coaching includes a spectrum of conversations, ranging in structure and formality, aimed at ‘taking stock’ to help people achieve their goals.

Given the importance of regular and timely coaching, you should aim to have **many informal** conversations. The following scale provides examples of informal versus formal conversations:



The diagram below shows that the most effective managers draw on a systematic coaching approach:



## 5.2 Coaching tips

Below are some tips for helping you get into the right performance coaching mindset.

### 5.2.1 Plan your coaching conversations: The 5Ps

#### Talking Performance Principle:

Plan ahead for each coaching conversation using the 5Ps or another appropriate framework.

It is important you are prepared for each coaching conversation, whether it's an informal chat or a more formal meeting. A structured framework can organise your thinking and help the conversation run smoothly. Communicating the purpose and the process of the meeting clearly to the other person will help them feel comfortable and open to discussion.

Being prepared doesn't mean having a script. Real conversations don't always go down the path you intended, but having a framework in mind ensures that along the way, all key points are covered.

The 5Ps (purpose, product, people, process and preparation) is a framework you can use to help plan as well as conduct your coaching conversations.

Listed below are some questions to consider when using the 5Ps as a planning tool, as well as some conversation starters to get the coaching off to a successful start.

#### 1: Purpose

**Planning considerations:** Why are we having this meeting (e.g. coaching, not formal evaluation)? Does the other person know and understand this purpose or do I need to explain it?



**Conversation starter:**

*"Thanks for coming in John. As I flagged in my email, I just wanted to have a chat about how things are going on the stakeholder engagement project. It's an important project and I want to offer you as much support as I can."*

#### 2: Product

**Planning considerations:** What specific results or outcomes should this session achieve (e.g. written notes, or new goals and actions plans)?



**Conversation starter:**

*"At the end of this discussion, I'd like us to have a draft list of actions that I can undertake to support you."*

#### 3: Process

**Planning considerations:** Given the purpose, intended outcome (product), and people involved, what process will be most helpful? For example, a structured, two-way discussion of what's working well and what needs to be done differently could be most useful.



**Conversation starter:**

*"We've got 30 minutes set aside. In that time, I'm keen to reflect on what's working well, as well as some possible areas for how things may be done differently. Are you happy to make notes on any key lessons as we go, while I jot down some actions I think I can take to support you? Then we can formalise our actions by email next week."*



#### 4: People

**Planning considerations:** Does anyone else need to be involved in this meeting? Is everyone's role clear? Am I the best person to be giving this feedback? What is our working relationship like?

“ ”

**Conversation starter:**

*“Even though you were working very closely with Susan on this project, I haven't asked her to join us, as I wanted to get your perspective on a few things. I think I was close enough to the project to have a good understanding of how things progressed. I'll have a similar catch up with Susan later.”*

#### 5: Preparation

**Planning considerations:** What else needs to be done by way of preparation for the session? Do you need to send the person an invitation and suggested agenda or advise them to read certain documents or bring them to the meeting?

“ ”

**Conversation starter:**

*“I've brought the proposal we sent them. Do you have the scoping and planning documents I suggested you bring?”*

Changing the order of the 5Ps to create a good logical flow is fine. Just keep in mind that the purpose of the meeting should always be stated at the start of the conversation.



#### Think of your own conversation starters using the 5Ps

Purpose:

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Product:

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People:

---



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Process:

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Preparation:

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## 5.2.2 Use a structured process: Working well/do differently

One way of organising a coaching conversation is to structure the conversation around what's **working well** and what could be **done differently (WW/DD)**. This structure encourages managers to provide balanced feedback on what is working and what could be improved for each of a person's SMART goals. From there, you can jointly tailor an action plan.

Listed below is an explanation of how you can use the WW/DD to plan a coaching session, and to keep the conversation on track.

### Working well/do differently approach

Objectives & SMART goals	What is working well (WW)?	What should be done differently (DD)?	Plan of action & new goals
Objective: SMART Goal:	Summary: Specific examples:	Summary: Specific examples:	Action item: What: Who: By when:



**When planning:** you can use current goals as the basis for coaching, use the main tasks that are part of the person's role, or other relevant topics.

**When you meet:** confirm relevant goals, tasks or topics, then work through each goal, one at a time.



**When planning:** list specific examples of what you think is working well in each area, including steps in the right direction.

**When you meet:** ask the person to identify what they think is working well, then confirm or add to their thoughts.

Rather than artificially balancing negatives with positives, help the person identify and build on their genuine strengths.



**When planning:** list specific examples of your concerns and what you think the person needs to do differently. Reconsider your conclusions against all evidence (including what has been working well).

**When you meet:** ask the person what they think can be improved – they may already know. Then, share your concerns and specific examples. Work together to identify the best solution.



**When planning:** develop options based on your observations and experience.

**When you meet:** ask for their ideas. Work in a spirit of joint problem solving.

A good action plan is a response to both WW and DD. It defines action items or new goals, action steps, timelines, clarification of who is responsible and review points for major or complex items.



### Skills Builder

To sharpen your skills in the WW/DD structure you might like to work through the case study (p.82) in the 'Coaching' section of the *Skills Builder* chapter. You might also like to watch video 4 to experience a WW/DD conversation in action and then complete a WW/DD template (p.83) based on the video.

### Manager Reflection

Using the WW/DD process, reflect on one of your previous coaching conversations with a staff member. What worked well? What could you have done differently? What will you do in the future?

## 5.2.3 Be flexible in your approach

**It is important to adapt your coaching style to suit each person in your team.**

Is an 'asking' or 'telling' approach going to be helpful, or do you need to adopt a 'joint problem solving' style? Is the person detail oriented or high level-big picture? Does the person instantly process information or do they like to reflect?

Person's style	Suggested approach
Motivated and highly competent	Give support if needed but encourage them to try things out and solve problems themselves. This approach aims to empower people, so you need to be reasonably 'hands-off'.
Motivated but lacks expertise	For someone who is well-intentioned but lacks knowledge or experience, it may be more appropriate to provide specific recommendations about how they can achieve their goals.
Unmotivated but shows potential	Collaborate to create more inspiring goals.

**Note:** Coaching discussions with team members who are also friends, should use specific and direct language. Being too relaxed and friendly will most often result in misunderstandings about objectives, roles and monitoring criteria. Using a structured framework such as the **5Ps model** is an effective way to keep work discussions on track.



### Skills Builder

You might like to try the Snapshot activity (p.85) in the 'Coaching' section of the *Skills Builder* chapter to help you focus on each team member so you can develop a clear picture of who they are, what they are doing and where they are going.

You might also like to look at the conversation starters (p.86) regarding how to use the 5Ps approach to manage a coaching conversation when the issue is under-performance, and the team member is also a friend.

## 5.2.4 Focus on enhancing performance, not on judging the person

In coaching, it's critical to focus on the person's performance and behaviour, rather than evaluating them as a person. This is especially important where performance is poor, because there is additional risk that they may feel judged as a person. If that happens, they may become defensive and closed to learning.

Avoid judgemental language in favour of goal-oriented language.



Instead of saying "*Your performance is terrible*", which can be heard as 'You are terrible', try, "*To achieve your goals, something needs to change. Let's discuss what and how.*"

## 5.2.5 Be open to other perspectives

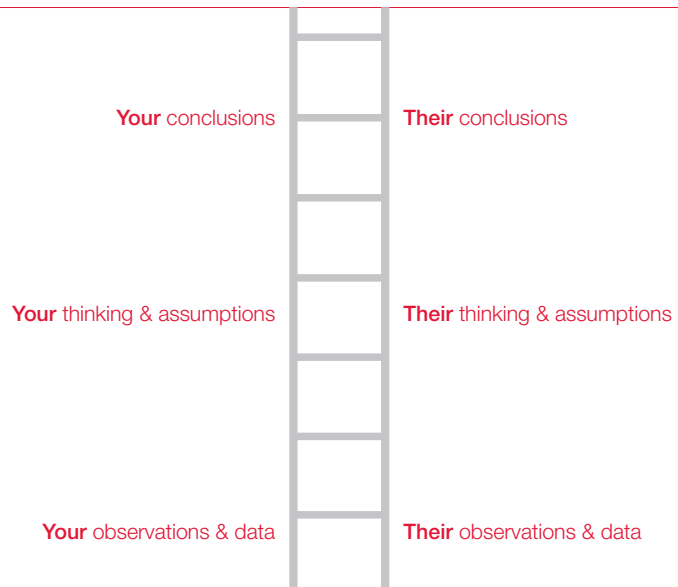
Always listen to the other person's perspective, rather than simply telling them what's wrong and how to fix it. Your information might be limited and your interpretation of events and priorities may not be the only valid one, so it's essential to ask the person for their assessment of the situation, particularly when suggesting things could be done differently.

Ask a series of open questions such as 'why', 'when' and 'how'. This will help open your mind to their perspective and allow for more effective joint problem solving.

## Ladder of inference

The Ladder of inference is a powerful tool for helping you discuss and understand other people's perspectives in your coaching conversations.

When we look at data or information, we often form what we think are obvious **conclusions**. We can then feel frustrated or confused when others disagree or become defensive with our conclusions. Part of the problem is that we haven't communicated the basis or rationale for our conclusions – in other words, our **data** and **thinking**.



There are many ways to use the Ladder of Inference in coaching conversations. Below is a guide to get you started.

### Begin coaching conversations by sharing your data

- Data is much less controversial than conclusions. It makes conclusions objective and persuasive.
- Data can be observed behaviours, documents, eye-witness reports or performance metrics.



#### Conversation starters:

*"Here's what I've noticed/observed..."*

e.g. *"I've noticed lately that you have been raising your voice and have been quite blunt when delegating work to others in the team."*

### Share your thinking, assumptions and conclusions

- Once you've shared your data, you will need to convey your interpretation and possible conclusions.
- Be objective and use language that demonstrates that you are open to new information. This will help to avoid defensive reactions.



#### Conversation starters:

*"In my experience, I've found that..../This leads me to think...."* (thinking & assumptions)

e.g. *"I'm worried about the impact you may be having on them, but I can also understand that you may be getting frustrated with their responses."*

*"For these reasons I think we should..."* (conclusions)

e.g. *"For these reasons, I suggest we sit down together as a team and discuss openly people's concerns and suggestions for how to improve things."*

### Seek the other person's perspective

- Give the person an opportunity to explain their views – you may gain new information that changes your view or confirms it.
- Either way, you create an atmosphere of openness and respect that will assist your coaching efforts.



#### Conversation starters:

*"Is that how you see it?"*

*"Are you aware of that?" (data)*

*"What are your views on the situation?" (thinking)*

*"Does that sound like a good way forward?" (conclusion)*

### What if they disagree?

- Having explored the issues, what do you do if they disagree?
- Don't 'hit back' with your view, or invoke your authority. Explore their data and reasoning first, to see the basis for their views.
- If you still believe you are correct, contrast their data with the data you're relying on by stepping them through your thinking process.
- The way in which you explore potential disagreement is critical to maintaining the working and coaching relationship.



#### Conversation starters:

*"If you believe that the situation is not as it seems, how do you see the situation?"*

*"It sounds like we have quite different opinions on what's going on. I wonder if you could share your line of thinking with me."*

*"Can you tell me what you've observed that has led you to that conclusion?"*

e.g.

Consider a person whose report was, in your view, substandard.

You could say: *"Look, my view is that the report doesn't really hit the mark. It's full of gaps, and you need to do more research on X before you resubmit it."*

However you risk causing a defensive reaction because the person is wondering how you've arrived at that view. They may also be confused because there is not enough specific detail in the statement to help them know exactly how to improve.

By contrast, you could say: *"I had a look at your report. There's a lot that's working well and some things that could be done differently too. The aspects that are working well are... but on page 4 there's a particular statistic that I can't see the reference for. We don't want the validity to be questioned so I think it's worth locating the source. I could be missing something, what's your view?"*

### Manager Reflection

Think about a past conversation/feedback session/coaching conversation that did not go particularly well. Think about how the conversation progressed and use the Ladder of Inference to assess where things might have gone astray. For example, thinking back, did you talk about your conclusions without giving the other party a chance to share their data?



### Skills Builder

To sharpen your skills in the Ladder of Inference approach you might like to watch video 2 and read a corresponding excerpt of the script (p.87) in the 'Coaching' section of the *Skills Builder* chapter.

## 5.2.6 Empower your people to achieve

Empowering means giving people the space to try things out, to accept and meet responsibilities, and to demonstrate what they're capable of. Without the space to spread their wings, people (especially high-performers) may lose motivation.

You can empower your staff by working with them to identify the knowledge and skills they need to do the job; then give them the autonomy, access to resources and development required to get the job done.

Sometimes you'll have to take a 'balanced risk' to let them work on tasks they've never done before. This is where you'll need to step back to allow them to find solutions to challenges.

However, there is a difference between giving people space and abandoning them. To find the right balance, explain your purpose, ask questions and seek the person's perspective.

e.g.

To strike the right balance of empowerment versus abandonment, you could say: *"I want this project to stretch you but I don't want you lost in the dark. How do you feel about this?"*

Ask them to state their preferred level of independence – and be ready to share any reservations you might have: *"I see you're keen to do this alone, and I want you to build skills in this area. But I know you haven't done anything like this before. How can we ensure you cover everything?"*



### Skills Builder

To learn more about how to empower your staff by helping them develop the capabilities required for success in their current and future roles, read *'Helping people develop'* (p.89) in the *'Coaching'* section of the *Skills Builder* chapter.

## 5.2.7 Set a good example

Though you are a coach, you don't have to be the expert. By acknowledging your own limitations and thoughtfully considering the perspective of others, you demonstrate the trust, openness and problem-solving mindset that you are asking of your staff.

## 5.2.8 Create an action plan

### Talking Performance Principle:

Follow up by planning & implementing a range of "next steps" as appropriate.

The whole purpose of coaching is to improve performance, so you should always end a coaching session with an action plan summary of who will do what, and by when. Even if the discussion has been fairly open ended, make a point of summarising the key lessons and outcomes.

A verbal summary may be sufficient for informal day-to-day coaching on specific tasks. In most cases, however, you and your staff member should document the outcomes of the conversation. Don't do this as a 'record of interview' to be used in evidence against a person later (this is guaranteed to restrict the conversation!), but rather as a valuable guide to return to in subsequent coaching conversations.

Another reason you should keep good documentation is because you may be in a situation where you need to hand over team management responsibilities. This can occur when you go on annual or other extended leave or if you are promoted to another position.

When considering what would be useful to document, imagine that a new manager had to step into your shoes. What guidance could you provide them about the goals, plans and specific action items that you have discussed and agreed upon with each team member?

Use the suggested frameworks of **SMART goals**, **Working Well/Do Differently** and the **Ladder of Inference** to assist you in creating relevant, useful documents that map the progress of coaching conversations with your team.



## 5.3 Causes of performance challenges

In each coaching conversation, you should work together to diagnose the root of any identified performance challenges (e.g. feeling overwhelmed, lack of challenge, performance problems) before moving to the last stage of developing an action plan.

In particular if you have given feedback regarding an area of dissatisfaction, you must work with your team member to learn what caused it. Only then can you work together towards solving the problem.

At a fundamental level, performance concerns have three possible causes:

1. <b>Capability</b>	The person doesn't have the ability, skills, knowledge or confidence to do what's expected
2. <b>Resources</b>	Time, equipment, data or processes are insufficient or inappropriate.
3. <b>Motivation</b>	The person lacks desire due to boredom, low morale, lack of understanding as to the importance of the task, or as a result of some other significant personal issue that is affecting their energy and focus e.g. major illness, relationship problems, significant life changes.

This, of course, assumes that clear measurable goals have been set and agreed to.

While you may have some thoughts on the possible causes, you should ask for the person's view first. One powerful approach is to facilitate their thinking through targeted questions.

---

**You could say:** *"I have some ideas of what might be causing this issue, but I'd really like to hear your perspective first... What do you think is leading you to...?"*

---

This may elicit new information about which you weren't aware (especially regarding personal issues). The person's collaboration in the process will typically increase their commitment to the solution.

## 5.4 Creating workable solutions

Once you have agreed on areas that need to change and identified the causes, work together to generate solutions. Engage the person by facilitating a collaborative problem-solving discussion around solutions.

While people need various levels of guidance depending on their experience, ability, motivation and other individual differences, it is best to seek their ideas, rather than 'enforcing' your own.

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**You could say:** *"Assuming that the cause is X, how do you suggest we address this issue?"*

---

Once you have engaged them, it is usually okay to introduce your own ideas of a solution into the conversation.

---

**You could say:** *"Here are a couple of other ideas I had. What do you think of them?"*

---

Finally, remember that the solutions you both generate should respond directly to the agreed causes. The following examples are solutions you might consider.

e.g.

If the person is bored and switched off (Motivation) Try giving them a more challenging task, providing them with more autonomy, or getting them to use their expertise to coach others within the team.

If the root cause is lack of knowledge or skill (Capability) Your role as coach is to help the person come up with solutions to address these gaps. For example, you might suggest shadowing opportunities, regular 1:1 coaching (either with you or with someone else), or training courses.



## Coaching Activity

Select a staff member in your team. The staff member may be:

- someone who is in a learning phase;
- someone who has not quite been meeting performance expectations; or
- someone who is performing well but needs to be taken to that next level.

Think about the next coaching conversation you are going to have with them, and consider the following:

### 1. When preparing for the meeting:

- Use the **5Ps** approach to plan a coaching meeting.
- Use the **WW/DD framework and template** (in the *Skills Builder* chapter) to prepare your feedback for each of your staff members' work goals/tasks.

### 2. When conducting the coaching meeting:

- Consider the staff member's **communication style preference**.
- Remember to use the **Ladder of Inference** approach to check data, assumptions and conclusions about performance.
- Check the new (or existing) goal statements and make sure they are **SMART** goals.
- If there was a performance issue, was this due to **capability, resources or motivation?**

### 3. When reflecting on the coaching meeting:

- What worked well?
- What didn't work well?
- What could have been done differently?
- What improvements will you now make to the process or your communication?
- Based on this coaching experience, how might you need to coach this person moving forward?

## 5.5 Coaching high performers

For many managers, the need to coach poor performers is clear, even if they find it challenging to hold these conversations. However, it is also important that you invest time to support, empower and stretch the solid performers. Almost everyone, no matter how high performing, will have things to work on. All of the performance advice already discussed can also apply to high performers.

The major difference between high performers and others, is that you will often need to emphasise **challenging and 'stretching'** high performers. To do so, jointly review each person's goals to ensure they are 'stretch' goals – targets that push them beyond what they have already achieved.

High performers may also appreciate being delegated additional, challenging work; further training/mentoring to develop capabilities for the next step in their career; or being invited to offer coaching/assistance to other members of their team.

---

**You could say:**

*"To take the next step in your career, you'll need to be able to...  
How can I support you to reach that goal in the next 12 months?"*

---

Staff who are not considered high performers also need stimulating challenges, but high performers are likely to feel the 'lack of challenge' more acutely given their skills and motivation. However, not all high performers wish to achieve more, in which case it's more about coaching to maintain good performance.

**Remember:** no-one wants to be left alone to fail, and even high-performers appreciate offers of guidance from time to time.



## High performers – High Stakes activity

The following questions are designed to stimulate your thinking around the high performers in your team (you can also adapt these questions for other team members). You might like to do this after you have completed the Snapshot activity (p.85) in the *Skills Builder* chapter.

Identify the high performers in your team. Think about each one individually and consider the following questions.

- What is it specifically that makes this person a high performer?
- Is the high performer also a high potential team member i.e. does their capability (or their career plan) extend beyond their current job or role?
- What skills or knowledge do you believe would be useful for them to develop (this should incorporate the individual's personal development interests)?
- What opportunities or challenges could you provide for them to develop those skills and knowledge? What opportunities constitute a 'balanced risk'?
- What development opportunities or challenges could be provided by other managers/departments or affiliated organisations?
- If the person is a high performer but not a high potential i.e. they currently have no ambition to work beyond their current role, what interesting challenges can you provide?
- What aspects of your current job could be delegated in order to provide development opportunities to this high performer?

**Remember:** It is important for you to prepare your thoughts as manager, but even more important to give high performers sufficient scope to develop their goals in collaboration with you.

## 5.6 Coaching poor performers

If after applying the coaching techniques in this guide you find that a person's performance or behaviour continues to be unsatisfactory, you may need to implement your organisation's policies and procedures for dealing with issues of poor behaviour in the workplace. This will certainly be the case where the performance issue is of a more serious nature.

The guidelines for dealing with poor performance or behaviour should be outlined in your organisation's formal performance improvement policy.

The SSA's '*Managing poor behaviour in the workplace*' guide can also provide assistance in dealing with performance issues in the workplace.

## Quick Tips

- Performance coaching involves partnering with people to help them achieve their potential by developing and empowering them to set and achieve goals.
- Coaching can be formal and informal, and should be regular and timely.
- The keys to a performance coaching mindset are: be flexible; focus on enhancing performance and behaviour; be open minded; empower your staff; set a good example; use a structured process; create an action plan.
- Plan ahead for each coaching conversation using the 5Ps approach: Purpose; Product; People; Process; Preparation.
- Examine progress against SMART goals by adopting a 'working well/do differently' approach and end with a documented action plan.
- Use the Ladder of Inference approach to help clarify data, thoughts and conclusions.
- Once goals have been set, performance problems generally have three possible causes: capability of the person; resource limitations; motivation.
- High performers generally need 'stretch' goals.
- If a performance issue is serious or coaching has been unsuccessful check your organisation's policy for dealing with poor performance.

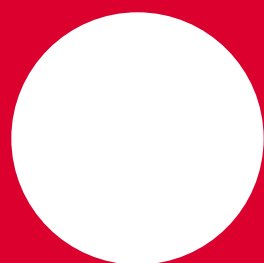
**Hot Tip:** to experience many of the skills described here in action, you may like to watch video 2 and video 4.

Use the 5Ps or the WW/DD templates in the *Skills Builder* chapter to help you prepare for coaching conversations.

Read the SSA's guide '*Managing poor behaviour in the workplace*'.

# Adapting talking performance activities

6



## 6. Adapting talking performance activities

### Talking Performance Principle:

Adapt your approach to suit your purpose and each team member's style and motivation.

Your role as a manager is to help enhance team performance. We have focused on some fundamental elements to enable you to do this, including setting goals, showing appreciation, building rapport, and providing coaching. So, how do you apply these elements to individuals who have different styles, motivations, interests, strengths, backgrounds, experience and abilities?

In short, it requires **flexibility**. It is important as a manager to adapt your approach to suit your purpose and each team member's style and motivation.

### In practice, this means:

- applying all the elements you have learned so far in a way that responds to each person's individual style and motivations; and
- communicating in ways that suit each person.

### Manager Reflection

For each individual in your team, taking into account their style and motivations, think about:

- When will you set goals? What kind of goals will you set?
- How and when will you connect with each person in your team?
- What kind of feedback and coaching will you give? When will it be most effective?

## 6.1 Identify people's working styles and motivations

While there are many different theories about what motivates people, most agree that different things motivate different people; and that different things can motivate the same person at different times.

**In the workplace, some common motivators for people may include:**

- (the prospect of) promotion;
- flexible work arrangements;
- the chance to work on a satisfying project; and
- the ability to effect change or make a difference.

The most effective managers seek to understand the style and motivations of each of their team members. The more you understand someone's motivations or how they like to work, the better you can tailor your approach.

Consider the two strategies of **asking** and **observing** to get you started.

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**Ask:**

The most fundamental strategy is to directly ask someone how they like to work and what they care about. People with a similar personality or background may not work in the same way or be motivated by the same things.

That is why there's a fundamental underpinning principle: *engage your team in collaborative dialogue at every stage*. What you think their preferences are and what they actually are may be worlds apart!

Do they prefer to respond immediately to ideas, or reflect first? Do they prefer lots of detail, key points or an overview? Do they prefer to receive tasks face to face or by email? Do they prefer regular emails or phone calls when working remotely?

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**Observe:**

Observing members of your team in various situations and keeping note of their reactions to certain events, will also provide valuable insights. In particular, watch for repeating patterns.

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## Manager Reflection

As you observe your team members, think about:

- how they typically react to different tasks;
- types of things they do without being asked, and what they never do unless pushed;
- topics that make them withdrawn, passionate or angry;
- issues or topics they will argue with, 'push-back on' or challenge;
- non-work related topics they talk about most (e.g. hobbies and interests);
- whether they talk about themselves and life outside work at all; or
- topics they always have an opinion on.



## Skills Builder

In the '*Adapting talking performance activities*' section of the *Skills Builder* chapter:

- read '*What motivates people*' (p.93) to learn more about tailoring your approach to people's motivations;
- read an excerpt of the script (p.95) whilst watching video 5 to see a manager using the strategies of asking and observing to explore the style and motivations of a team member.

### 6.1.1 Identify people's communication preferences

Beginning with yourself, for each of the following communication scales:

- reflect on your own behaviour in a variety of situations (e.g. in meetings, in general discussions with peers or when receiving new information); and then
- circle the style point you believe best reflects your preference in most situations. There is no right or wrong answer, so be as honest and objective as you can.

Does your style tend to be more at this end of the scale?		Or does your style tend to be more at this end of the scale?
<b>Visual</b> You prefer to use pictures and diagrams	←—————→	<b>Verbal</b> You use words to convey or clarify the message
<b>Comfortable with conflict</b> It's OK to talk with some 'heat' in the room	←—————→	<b>Conflict averse</b> You take time out & don't press through conflict
<b>Assertive</b> You like to express your view	←—————→	<b>Passive</b> You like to 'sit back' & let others do the talking
<b>Detail oriented</b> You like detail, with specific examples	←—————→	<b>Big picture</b> You like an overview or summary of key points
<b>Instant processor</b> You don't need much thinking time to respond	←—————→	<b>Reflector</b> You like to think about things before responding
<b>Formal</b> You prefer formal language, tone and environment	←—————→	<b>Informal</b> You prefer informal language, tone and environment
<b>Direct</b> You like to get to the point – quickly!	←—————→	<b>Indirect</b> You use softer language to make your point
<b>Likes to be told</b> You prefer to be given guidance	←—————→	<b>Likes to work it out</b> You prefer to think things out for yourself



## Style Check Activity

Once you have reflected on your communication preferences, you might like to check your perception with others who are important to you and are able to provide honest, reliable feedback.

- Do others see your style the same way you do, or are their perceptions different?

It is good to know your own style, but even better to develop awareness of the impact of your style on your team members, your manager and your clients. The following questions are designed to get you thinking about the impact of your style on others:

- Is your communication usually well understood the first time around or do you often find that there are misunderstandings?
- Do some staff seem irritated or bored while you are doing your best to give them guidance?
- Are there times when you have explained things to a member of staff, yet they keep asking for more information or a clearer instruction on exactly what you want them to do?
- Is there a particular person you always struggle to understand or who seems to have difficulty understanding you?



## Skills Builder

Once you have reflected on your own communication style, use your observations of each person in your team to consider their style or preference. The Communication Style Scale (p.96) is repeated in the '*Adapting talking performance activities*' section of the *Skills Builder* chapter for you to complete for each team member.

Sharpen your skills by trying the Self Assessment (p.97) in the '*Adapting talking performance activities*' section of the *Skills Builder* chapter.

## 6.2 Tailor your approach

Once you understand a person's motivations, work and communication style, you can adapt your talking performance approach. Consider the following ideas when you:

- **Set goals:** Tailor those goals to build on a person's interests, strengths and motivations, rather than framing them purely as a statement of organisation and team objectives.
- **Show appreciation:** Think about if a person prefers public or private recognition.
- **Provide coaching:** Assess where a person is on the 'likes to be told/likes to work it out' scale. Some like to be told what to do; others prefer collaborative goals and the autonomy to achieve them.

If diagnosing unsatisfactory performance, assess whether it's a skills, motivation or resources problem and act accordingly.

**Remember:** tailoring means that there cannot be a 'one size fits all' approach.

## 6.3 Communicate for maximum impact

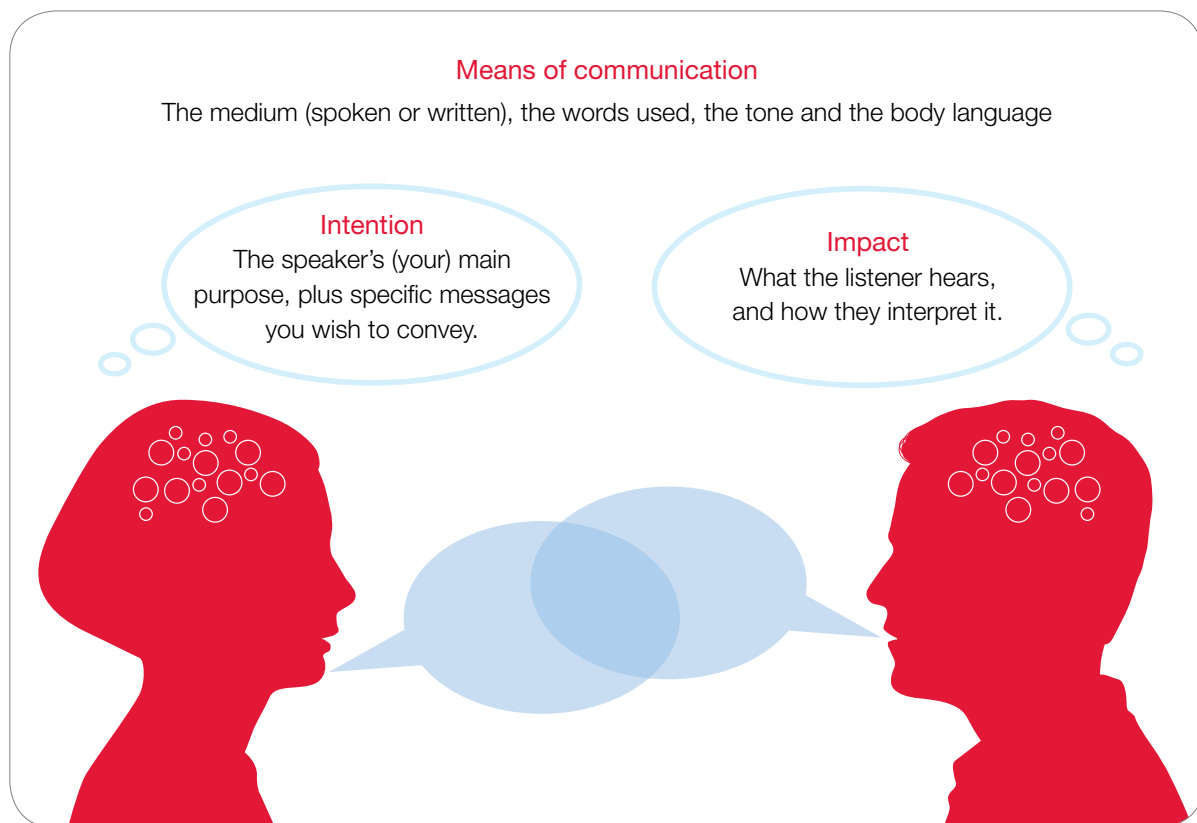
### Talking Performance Principle:

Adapt your communication style to each individual's needs to ensure the impact of the messages you are sending matches your intention. Manage the communication with a preference for a collaborative, two-way approach.

When communicating with your team, it's important to take into account the communication preferences of the person. Like any communication, the critical test for any performance related interaction is whether the **impact** on the listener matches the **intention** of the speaker.

As no two people are the same, a question or statement can impact listeners differently.

This is most obviously the case when there is a significant language barrier. But different age groups may also use words and expressions quite differently and some people respond better to visual cues than to verbal communication.



If you identify a person's communication preferences, you can anticipate and manage potential challenges when communicating with them.

**Remember:** communication is a two way activity – staff are also responsible for ensuring that communication is open and effective. As a manager, however, it's important that you lead by example.

### 6.3.1 Communication Tips

The following are some general tips to encourage good communication with your team.

Think about the person	Use the strategies of <b>observing</b> and <b>asking</b> to identify each person's communication preferences.
Speak to be understood	Accommodate the preferences you've identified by tailoring the language, tone and setting of your communication to the person.
Clarify your intentions	Be entirely clear on what you're saying. If you're unsure, the person will be too.
Focus on your impact	Take responsibility for the impact your communication has on the person. Your good intentions are not enough. You must deal with the impacts; even those that were unintended.
Check their understanding	Confirm that the person has understood your message. Either summarise and seek their feedback, or ask them to summarise, e.g. " <i>Would you mind giving me a quick overview of the key points I've made to make sure we're on the same page?</i> "
Listen interactively	When listening to someone, don't formulate 'arguments' in your head. Instead, ask clarifying questions and paraphrase what you've heard, e.g. " <i>So, you seem to be saying... Is that right?</i> "
Be careful of stereotyping	While it's sound advice to be mindful of communication differences within cultural groups, it's equally important to avoid stereotyping specific individuals because of their culture. Treat each person as an individual.
Know your approach	While it's important to understand the other person's communication preferences, it's also important to understand your own. Take time to reflect on your own background, upbringing and preferences, and ask others how they perceive you. Use this information to tailor your communication to suit a wide range of individuals.

## Quick Tips

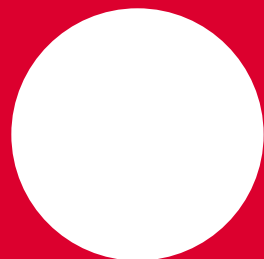
- Adapt your coaching approach to suit your purpose and each person's style and motivation.
- Use 'asking' and 'observing' as ways to discover a person's style and motivations.
- The critical test for communication is whether the impact on the listener matches the intention of the speaker.
- Consider a person's communication style against the communication style scales.
- To be an effective manager tailor your approach when you set goals, when you show appreciation and when you coach.
- When communicating, remember the 8 communication tips: think about the person; speak to be understood; clarify your intentions; focus on your impact; check their understanding; listen interactively; avoid stereotyping; and know your own approach.

**Hot Tip:** for a demonstration of the skills required to adapt your talking performance activities watch video 5.

Complete the 'What's your talking performance approach' survey in chapter 2 to learn more about your communication style and preferences.

7

Mythbusters



## 7. Mythbusters

**Myth:** I should only provide feedback during formal performance appraisals

**Reality:** Performance feedback should be regular, timely and mostly informal. Regular check-ins help you and your staff to detect and prevent issues. Don't wait until the mid-year or end-of-year performance appraisal to provide feedback – the opportunity has been lost and issues have been left to compound and escalate. During formal performance appraisals staff should not be met with any surprises! To this end, although there is a place for formal performance appraisals, they simply should be seen as another coaching conversation in a continuous cycle of conversations.

**Myth:** Giving critical feedback causes conflict and makes me look like the 'bad guy'

**Reality:** Providing staff with critical feedback is unlikely to cause conflict if it's done correctly. If feedback is provided in a regular, timely and informal manner, staff will have a clear understanding about how they are performing. Use the working well/do differently template and the ladder of inference to learn how to have effective coaching conversations. Showing appreciation and building rapport frequently with your staff also helps ensure they will be more open to feedback.

**Myth:** I don't need to manage the performance of my high performing staff

**Reality:** Almost everyone, no matter how high performing, will have things to work on. No one wants to be left alone to fail and even high performers appreciate offers of guidance from time to time. High performers are more likely to feel the 'lack of challenge' more acutely than others given their skills and motivation.

**Myth:** Staff should just know that they are doing a good job, I don't need to tell them

**Reality:** It's not a guessing game! Positive recognition of good work is an important motivator for staff. Without it, even the most skilful people will fail to achieve their potential as they feel unrecognised and taken for granted. Providing positive feedback helps create a positive and personally rewarding working environment in which people are much more likely to shine!

**Myth:** Managers should not show appreciation or build rapport with staff who are underperforming as it will send the wrong messages

**Reality:** It is important that you don't withhold messages of appreciation from someone who is underperforming because you think it will send the wrong message. Even if someone hasn't hit the mark on a report, you can thank them for getting it to you in a timely manner or for the effort they have put in, without saying anything about the quality of their work. Establishing a good relationship with someone supports effective coaching. People will be far more willing to ask for help and more open to feedback if they have an underlying trust that your assessment of their work is based on a genuine interest in their well-being.



**Myth:** Showing appreciation takes too much time

**Reality:** Showing appreciation is usually the sort of thing you can do quickly, and as frequently as sincerity permits. It might be as simple as saying thanks to someone at the end of the day or acknowledging the pressure someone is under.

**Myth:** Staff goals should only be aligned with the team and organisation's goals

**Reality:** Whilst it is important that staff goals be aligned with the team and organisation's goals, where possible goals should also be aligned with a person's own strengths and career goals, to ensure they are fully engaged and motivated. Set goals collaboratively – goals that you dictate to a person won't do anything to inspire performance and may even be resented.

**Myth:** People's output and results are the most important thing

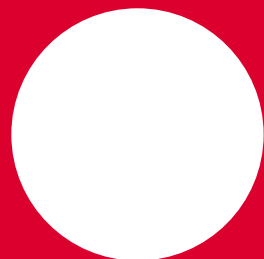
**Reality:** Whilst it's important to produce great results, the way a person behaves towards others in order to achieve these results is equally important. Remember, good performance = results and behaviour.

**Myth:** I shouldn't ask people about their weekend, hobbies and interests as it's not work related and people may not like to be asked.

**Reality:** Whilst some people may not like talking about their weekend and hobbies, it is nevertheless important to connect with people at a personal level to form a positive work environment in which people are engaged and motivated. People like to feel valued as a person, not just their work, so it's important to understand who they are and learn some of the things that are important to them in life. You will need to watch and listen for cues that reveal a person's likes and dislikes. You will pick up their preferences through what they choose to talk about, their facial expressions, body language and tone. This will help you develop a sense of the person and enable you to adapt your approach to match.

Video scenarios

8



## 8. Video scenarios

Five videos have been developed to illustrate the Talking Performance principles in action. The videos focus on performance conversations that are unsuccessful until a structured and tailored approach is introduced. The strategies used enable both the manager and team member to achieve positive outcomes.

This chapter gives you a summary of each video and some points to consider when watching them.

It is recommended that you work through the videos in the order that they are presented, on the DVD included within this guide.

### Video 1: A well-performing employee – poorly managed

**Anne** manages a busy team of ten. She seems frequently disorganised, unavailable and time poor. In her hurry to move things along, she cuts people off and is cynical about time spent on training.

**Sally** is the high-performing team leader: bright, talented, organised and enthusiastic. Anne assumes she can handle anything.

Sally wants to do her best for the team, who respect her and in many ways see her as their manager. Yet Sally finds aspects of leadership draining. Anne doesn't have time for her, so she feels unsupported. As the situation seems unlikely to change, Sally's having private doubts about staying in the role.

In this video Sally's manner indicates de-motivation, de-skilling and disempowerment as a result of Anne's behaviour.



#### Activity 1

**When watching video 1 think about:**

- How Anne prepares for and prioritises her conversations with Sally.
- The impact this has on the outcomes of the meeting and on Sally's motivation.
- How you would prepare for the meeting.

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After watching video 1, please complete the following activities.



### Activity 2

Think about your conversations with staff in the past month. Have there been times when you might have appeared busy or distracted? If so, what steps can you now take with the individual concerned?

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### Activity 3

Anne says she is concerned about setting precedents and raising expectations around increased flexibility in workplace practices.

- a) Are there any fears and concerns you, as a manager, have around:
- creating flexibility in your team's work practices;
  - giving concessions; or
  - acknowledging and rewarding people?

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- b) What could be the benefits of creating flexibility in your workplace practices?  
(possible answers listed in the answers section at the end of the Skills Builder chapter)

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#### Activity 4

Sally has good ideas about changes to workplace practices. How do you currently manage staff's good ideas for changes to workplace practices? Do you greet them with enthusiasm or wary suspicion? Do you make it easy for people to implement or explore new ideas; or do you tend to put ideas on hold using reasons like too busy, bad timing, not a priority, or prepare a business case to justify the idea?

What could you do to better manage ideas from staff?

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### Activity 5

Who are the high performers in your team? What have you done to acknowledge their high performance? Have you provided specific examples of what makes their performance exceptional? What do you know of their career aspirations?

**What can you do to encourage continued motivation, engagement and growth in your high performers?**

*(possible answers listed in the answers section at the end of the Skills Builder chapter)*

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#### Other observations from the video:

- Being polite and apologising (as Anne does) is not a substitute for good management.
- Take care that when you ask people to go away and document their ideas or prepare a business case that you are not creating an unnecessary work task in order to simply 'buy time' (or roadblock an idea).
- When it comes to fitting in coaching activities, being 'too busy' may be an acceptable reason in the short term but not in the longer term. In today's workplace, everyone is busy! Coaching needs to be seen as a valid and valuable task in its own right. Managers should schedule regular coaching sessions into their diary, ensuring they don't fall into the habit of re-scheduling coaching time to address 'slippages' in work.

## Video 2: A well-performing employee – well managed

**Anne** manages a busy team of ten. She seems frequently disorganised, unavailable and time poor.

**Sally** is the high-performing team leader: bright, talented, organised and enthusiastic.

Sally wants to do her best for the team, who respect her and in many ways see her as their manager. Anne hasn't had time for her in the past, so Sally has felt unsupported.

Anne has reflected on the conversation she had with Sally (in Video 1) that went badly. In this video, Anne shows appreciation and some of the skills required to coach Sally. Anne's changed behaviour promotes motivation, skill development and empowerment on Sally's part.

**After watching video 2, please complete the following activities.**



### Activity 1

Anne makes a number of observations about Sally and the team e.g. "I've observed that you often volunteer for work that others should be doing."

What observations could you make about your team members and how they are working? What data supports these observations? What conclusions can you draw? Have you checked these conclusions with your team? Is there anything that needs attention or adjusting in the way the team performs or behaves as a team?

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### Activity 2

Who are the volunteers in your team? Who might you currently see as unmotivated?

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### Activity 3

Sally mentions her training course on several occasions but Anne seems to respond in vague terms. If managers want to maximise the outcomes of sending staff to training programs (and their training dollar), what can they do?

*(possible answers listed in the answers section at the end of the Skills Builder chapter)*

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### Activity 4

1. Think about a coaching conversation that would be useful for you to have.
2. Use the 5Ps to plan for it.
3. Develop a conversation starter for each step of the 5Ps.

Purpose: .....

Product: .....

People: .....

Process: .....

Preparation: .....



### Activity 5

At the start of Video 2 Anne makes good use of the Ladder of Inference, when she suggests that they should discuss observations without explanations to avoid arguing over their different experiences.

Consider the Ladder of Inference and develop three conversation starters that would be handy to remember to help you guide your coaching conversations.

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#### Other observations from the video:

- Anne aims to build rapport and set the scene by opening with, "I've reflected on what you said..."
- Even though Sally is a high-performer she is still concerned about the meeting e.g. "Is this a formal assessment?" "Am I going under the microscope?" Until you build a habit of having regular coaching sessions you can expect staff to be wary, anxious or awkward.
- The Ladder of Inference takes discipline and practice. If you find yourself or your staff member jumping to conclusions, reset the conversation according to the Ladder of Inference as soon as you can.

## Video 3: A poorly-performing employee – poorly managed

**Tony** is a manager who's formed close relationships with some of his team over many years. He regularly socialises with Simon.

**Simon** has been in his role for some time. Lately, he's missed deadlines and made careless errors in his reports.

Rather than registering Tony's subtle, informal feedback, Simon has complained about other team members and the IT system.

He has a 'line' for most situations, but these are no longer funny.



### Activity 1

**When watching video 3 think about:**

- How Tony provides feedback to Simon.
- The impact of this feedback on Simon.
- How you would provide the feedback.

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After watching video 3, please complete the following activities.



### Activity 2

If you need to have a difficult conversation with a staff member, how can you create a level of comfort – or at least minimise the discomfort – so that the conversation can be productive?

*(possible answers listed in the answers section at the end of the Skills Builder chapter)*

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### Activity 3

Consider awkward/difficult situations you are likely to encounter in your team e.g. lateness, inappropriate behaviours, personal hygiene/habits, taking short-cuts in workplace processes, treating others with disrespect. Develop three conversation starters.

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If you had to give difficult feedback to a close colleague/friend, how would you open the discussion?  
Develop a conversation starter.

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#### Activity 4

Think about conversations in your workplace that have the potential to become heated (reflect on a real conversation/conflict if you can). What are these conversations generally about? What is it that typically causes the conflict?

What can you include in your approach to these conversations to minimise or deal with the potential conflicts? (Refer Communication Styles Scale on p.50, Ladder of Inference on p.38, Capability-Resources-Motivation concept on p.42, 5Ps on p.33.)

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#### Activity 5

What can you do if you are in the middle of a conversation and it suddenly becomes heated or escalates?

*(possible answers listed in the answers section at the end of the Skills Builder chapter)*

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### Activity 6

Thinking about the Talking Performance lifecycle: if Simon has been with the team for quite some time, what could be causing his performance to suffer a recent fall – apart from personal issues?

*(possible answers listed in the answers section at the end of the Skills Builder chapter)*

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### Activity 7

Who are the people in your work team who have been there for some time? How are they currently performing? Has their performance plateaued? Is there anyone in your team whose performance has been erratic/dropping?

If you think in terms of the Talking Performance Lifecycle, what could a career discussion potentially achieve at this point?

**NOTE:** career is not just about moving up the ladder but about setting new personal goals, undertaking stretching challenges or incorporating variety into the existing job.

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## Video 4: A poorly-performing employee – well managed

**Tony** is a manager who's formed close relationships with some of his team over many years. He regularly socialises with Simon.

**Simon** has been in his role for some time. Lately, he's missed deadlines and made careless errors in his reports.

Rather than registering Tony's subtle, informal feedback, Simon has complained about other team members and the IT system.

Tony has reflected on the poorly executed conversation with Simon (seen in video 3), and is now addressing the issue again. He first addresses their friendship, then moves on to collaboratively diagnose the cause of Simon's poor performance and work together to agree to some workable solutions.

**After watching video 4, please complete the following activities.**



### Activity 1

Tony opens the meeting with an apology, suggests a change of style is required from both of them, and says, "It's not easy having these kinds of conversations with friends." What is Tony aiming for with this well chosen approach?  
(possible answers listed in the answers section at the end of the Skills Builder chapter)

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### Activity 2

Tony indicates that there is a problem using a casual approach to address issues with friends and that the conversation should follow a structure. Should this always be the case? Why?

*(possible answers listed in the answers section at the end of the Skills Builder chapter)*

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### Activity 3

**a)** How do you deal with behavioural issues in your work team? What practical tools can you use to help facilitate/clarify your requests for behavioural change?

*(possible answers listed in the answers section at the end of the Skills Builder chapter)*

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**b)** What are the consequences of allowing poor/inappropriate behaviour to go unaddressed?

*(possible answers listed in the answers section at the end of the Skills Builder chapter)*

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### Activity 4

Based on the discussions in video 3 and 4, decide whether each of Simon's issues are most likely due to limitations in Simon's capability (i.e. skill), resources, or motivation. Indicate your response by circling the appropriate word(s) in the third column. (answers listed in the answers section at the end of the Skills Builder chapter)

Issue	Discussion Clue	Due to
Missing deadlines	Simon says: "That's half the problem frankly. Too much work, too little time."	Capability Resources Motivation
Quality of reports	In video 3 Tony asks Simon about the style guide he referred him to, but Simon seems dismissive and says: "the main thing is just to get it finished...".	Capability Resources Motivation
Simon's interactive style	Tony indicates it is important to listen to people even though we may disagree with them. Simon says "I might need some help with that."	Capability Resources Motivation

#### Other observations from the video:

- Right up front Tony makes a point of getting Simon's agreement to the agenda BEFORE they proceed any further. When creating workable solutions you need to be sure that the person is ready to even discuss workable solutions. What Tony asks for here is a 'verbal agreement to proceed' with the discussion.
- When Tony asks Simon to focus on the working well side of the discussion, notice how Tony takes time to add his own observations to the list. Though they have a few hot issues to discuss, Tony appears to dedicate time and focus to discussing working well.
- Don't leave all of your working well discussions to the point in time where things go wrong. Having working well discussions regularly gives you an opportunity to build on a team member's skills AND build trust and rapport. It's this trust and rapport – built in advance – that help you both overcome the difficult times.



## Video 5: Performance conversation – taking into account individual difference

Tony is a manager keen to encourage a young employee, Meena, to work more flexibly and collaboratively with her team mates.

Meena's commitment to processes and rules has been valuable for much of the work she's done. Yet she finds it hard to collaborate on projects with no set rules or processes.

Tony is struggling to address this without causing Meena to become de-motivated or withdrawn.

When the coaching conversation starts badly, Tony follows guidelines to identify Meena's communication preferences, then uses appropriate techniques to overcome the problems.

These techniques include interactive speaking (to check impact) and interactive listening (to understand Meena's concerns).



### Activity 1

**When watching video 5 think about:**

- How Tony changes his approach with Meena throughout the conversation.
- Which aspects of the conversation and Meena's behaviour initiate the change in Tony's approach.

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After watching video 5, please complete the following activities.



### Activity 2

What actions did Tony take that reflected his observation and acknowledgement of Meena's style?  
*(possible answers listed in the answers section at the end of the Skills Builder chapter)*

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### Activity 3

What more might Tony need to do to build Meena's 'skills' in developing her non-preferred styles?  
*(possible answers listed in the answers section at the end of the Skills Builder chapter)*  
**(NOTE:** This is not about changing Meena's natural style. This is about encouraging growth in her non-preferred area to equip her better for typical workplace challenges.)

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#### Activity 4

Is there any member of your team who stands out as different from the rest of the team? How would you assess their personal style (using the styles scales)? What impact is this having on the team?

**(NOTE:** be sure the issue here is one of personal style and not performance.)

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#### Activity 5

What could you do to better manage this style difference? List three specific actions you could take.

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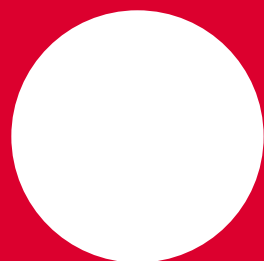
## Summary activity

In light of your learnings from working through this resource, use the WW/DD template below to sum up your own 'talking performance' practices. What is working well? What could you do differently? What new goals would you set over the next 6–12 months? What will the success measures be? How will you monitor your achievements? Who can give you feedback? etc

Objectives & SMART goals	What is working well (WW)?	What should be done differently (DD)?	Plan of action and new goals



Skills builder



## 9. Skills builder

### Skills Builder 1: Set the right goals

#### 1.1 Video 4: Script excerpt SMART goals

You may like to watch video 4 with this script in hand, to observe SMART goals being set in action.

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##### The Goal must be **specific**

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**Tony** So, we want something quite *specific* on each of these issues,...

**Simon** Okay, so for the reports...

**Tony** Adequate advance notice if you're struggling to meet a deadline...?

**Simon** (*nodding*)

**Tony** ...and prioritising your work in the lead-up to reports?

**Simon** That's half the problem... I mean, there's frankly too much work, too little time, and...

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##### The Goal must be **measurable**

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**Tony** ...so: advance notice of *forty eight hours* that you're struggling to meet a deadline?

**Simon** That's fair enough...

**Tony** And identifying what you could do differently before we point to IT – or anyone else?

**Simon** (*looking exasperated*)

**Tony** Look, Simon, I know these situations can be complicated. I'm interested in what you can control, not what's *out* of your control...

**Simon** (*nods*)

**Tony** Yes. And with that: reporting to the agreed guidelines on content and style?

**Simon** Yeah, okay. Fine. So what about...

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**The Goal must be achievable & aligned with other goals**

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**Tony** Will that work?

**Simon** Yes.

**Tony** It's realistic? I mean, do we need to revisit your other responsibilities?

**Simon** Presumably if I'm snowed under *and* give advanced notice, we can look at work allocation for that week...?

**Tony** What about more generally?

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**The Goal must be relevant**

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**Tony** Let's make sure what we're suggesting here is relevant to our general objectives.

**Simon** Measuring what's on the list against what the team's supposed to be achieving – as a whole?

**Tony** That's it...

**Simon** Okay, so if we start with adjusting the style of reports – consistent with those guidelines...

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**The Goal must be time-bound**

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**Tony** So if we're happy with all this, when might we have achieved it?

**Simon** I appreciate your approach to this... Things haven't been easy... for much of this year...

**Tony** Is that something you want to talk about?

**Simon** (*pause*) Not today – but probably... sometime...

**Tony** Alright, meanwhile – we have a plan for managing deadlines and writing to agreed standards... And we'll check that we've achieved all this when – three months from now?

**Simon** That feels about right... Three months from now...

**Tony** ...with regular monitoring in-between?

**Simon** Yes, that's fine...

## 1.2 Case study: Set the right goals

You are Sarah, a manager in a medium-sized government organisation. You manage a team of 12 whose performance levels range from average through to high performing.

Depending on how you see it, your group could be considered the first link in the chain – or the last. In other words, your group doesn't get much say in the type of work it does. The team's goals are largely set by higher management or dictated by the nature of the work itself. The goals are handed to you and, to keep things moving efficiently, you have always allocated the work to the first available team member.

You can generally rely on your team to do their job but it's clear to you that the tasks themselves don't always generate enthusiasm; that they often lack motivation. You believe that, in part, this is just the nature of the job. The problem is that your average performers aren't inspired to develop beyond average and your high performers move on as soon as an opportunity becomes available.

You would really like to hang on to your high performers a little longer; recruiting and training new starters is always time consuming and costly. You also believe there is more potential in some of your average performers than you are currently getting from them.

You need to think of ways to motivate your staff and find ways to make the work more interesting – somehow.

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**Consider:** If things aren't constantly falling through the cracks do you need to change anything? If team members are not underperforming do you need to be concerned?

What would you do if you were Sarah? Is what you are aiming for realistic? If the goals or tasks are largely dictated by others what scope might there be to create flexibility in work practices? What benefits could result from making such changes?

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*(A suggested response to this case study is in the answers section of this chapter on p.98.)*



### 1.3 Goal-setting template

Here is a goal-setting template that illustrates by example how goal-setting may be documented. The template is designed to flow logically from left to right, with key questions to answer at each stage. Answering the questions naturally leads towards setting SMART goals and identifying all the steps required to achieve them. The goal-setting template can be easily adapted to suit your workplace.

Organisation's strategic objectives	Staff member's KRAs	SMART goals	How-to
What does the organisation care about most?	What are the key result areas and expected behaviours/values for this staff member's role?	Within each KRA, what specific, measurable, time-bound target will best help the person meet the organisational objectives?	What specific steps should the person take to achieve the SMART goals?
<b>Improving road safety</b>	Delivering road maintenance projects within the X and Y regions.	Deliver the X and Y maintenance projects by 1 December, within the \$60K budget and to the satisfaction of key stakeholders.	<p><b>High-level advice:</b></p> <ul style="list-style-type: none"> <li>○ Create a clear project plan/brief, including timelines, key stakeholders, resource needs, the strategy, key project review dates, identification of potential project risks etc.</li> </ul> <p><b>Expanded steps:</b></p> <ul style="list-style-type: none"> <li>○ Identify the key stakeholders (both internally and externally) involved in the project.</li> <li>○ When you set timelines, first consult the stakeholders involved by forming a focus group to ensure that timelines are realistic, and to get their 'buy in'.</li> <li>○ When you clarify resource needs, start by looking for innovative ways to reduce costs while upholding quality.</li> <li>○ When you analyse the potential risks that may be caused to the project, look at past similar projects and/or talk to people who have been involved in similar projects.</li> </ul>

Organisation's strategic objectives	Staff members KRAs	SMART goals	How-to
What does the organisation care about most?	What are the key result areas and expected behaviours/values for this staff member's role?	Within each KRA, what specific, measurable, time-bound target will best help the person meet the organisational objectives?	What specific steps should the person take to achieve the SMART goals?
<b>Improving stakeholder relationships</b>	Effectively communicating and consulting with stakeholders.	Present 3 public information workshops by 1 December with positive stakeholder feedback overall.	<p><b>High-level advice:</b></p> <ul style="list-style-type: none"> <li>○ Plan steps to research, draft and practice each presentation.</li> <li>○ Determine where you will hold the information workshops and who you will invite.</li> <li>○ Develop a feedback form for stakeholders to complete following each workshop to assess their success.</li> </ul> <p><b>Expanded steps:</b></p> <ul style="list-style-type: none"> <li>○ Determine the best method for contacting each stakeholder to invite them to the workshop i.e phone, email, letter.</li> <li>○ Seek feedback from stakeholders in relation to the relevance of your presentation, how it could assist them and how useful they found it.</li> <li>○ When you practise your presentation, aim to project a clear strong voice</li> <li>○ Practice on colleagues within the organisation.</li> <li>○ Seek feedback from colleagues about the clarity of your expression and your use of plain English.</li> </ul>

## Skills Builder 2: Showing appreciation & building rapport

### 2.1 Ideas for conversation starters



1. "I noticed yesterday that you spent some time helping Chris sort out his IT problem and I just wanted to say thanks for helping him out."
2. "I'm so grateful for the way you spoke up in the meeting today. You really helped us get the ball rolling."
3. "You never seem to lose your cool, even under pressure. I think this is a fantastic quality."
4. "You're the one person we can always depend on in a crisis. I can't thank you enough for that."
5. "I know this job can be fairly repetitive in nature but you always start every day with a smile. It really keeps everyone's spirits up."
6. "I notice that Sam often looks to you for advice and I just wanted to thank you for taking her under your wing."
7. "I noticed that you stayed back to finish that paperwork yesterday. I just wanted to say thanks for being so dedicated."
8. "I heard you cleaned up that mess in the kitchen yesterday. It's a job no-one seems to want to do so thanks for taking responsibility and making it happen."
9. "Thanks for covering the phones during the team meeting today. I know you were run off your feet so we all appreciate your great efforts there."
10. "Jo, you've always got your hand up volunteering to do the little extras around here. I wanted to let you know that I do appreciate that and that I really value your efforts."

## 2.2 Case study: Showing Appreciation and building rapport

You are Matthew, an experienced manager within a large government organisation. You have been part of this organisation for more than 10 years and have been in a team leadership role here for the past five years. Prior to taking on the leadership position you had led several short-term project teams.

You are well qualified and have many years of technical experience. You know for a fact that many of your colleagues genuinely respect your subject matter expertise.

Your personal approach has always been one of focusing long and hard on the present challenge and working until the job is done. You have always prided yourself on being self-managing and minimizing the distractions that get in the way of doing the job. It is this work ethic that you have tried to instil in your team.

Your team is a relatively young one – a different generation to you – and some are new to the field.

Recently your manager, Joe, called you into the office for a chat. Much to your surprise Joe gave you feedback that your team felt you were disconnected from them; that you were living in your own work bubble. They said they couldn't tell if you were pleased with the work they did – you seemed too busy to notice. They had reassured Joe that they thought you were good at your job but that you were quite impersonal. Some had said you were 'robotic'.

You were surprised. Surely you were being paid to do the job and if your results indicated that you were doing a good job, personalities shouldn't come into it.

Joe reassured you that your work was valued by the division, but he said that there was more to the job than doing the practical task components. Joe explained that managers needed to focus on building personal connections with their staff because good relationships make for good teamwork and productivity. You had always seen that as 'touchy-feely, fluffy stuff'; but Joe said it is about recognizing and appreciating people so that they feel comfortable to contribute to the best of their abilities. He said that this is what motivates them to 'go the extra mile'. He also reminded you that staff who feel unappreciated or unnoticed end up dissatisfied and start looking for work elsewhere.

Truth be told, you felt uncomfortable with the idea mostly because it wasn't your natural style to be praising people or talking to people about 'non-work related' things. You always believed people knew when they'd done a job well; they didn't need a pat on the back for it. And how would you fit in anything extra with your workload?

But you value your team and you think it's important to set a good example. You have agreed to think about things you could do to build better relationships with your staff.

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**Consider:** What would you do now if you were Matthew? What habits or behaviours would you change? What practical activities would you undertake to begin to build better relationships with your staff?

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*(A suggested response to this case study is in the answers section of this chapter on p.100.)*

## Skills Builder 3: Coaching

### 3.1 Case study: coaching concerns

You are Diana, an experienced Manager within a medium-sized government organisation. Among a host of other tasks, your role requires you to coach your team members on both their technical and people management skills.

Recently, you identified some problems with the performance of a particular senior employee in your division. His name is John. He is the head of Special Projects in your team and he has been a part of the organisation for nearly 15 years (five years longer than you). In his role, he's supposed to drive and manage major internal projects – as well as to oversee and coach those supporting him. Unfortunately, problems have arisen – and you are not particularly excited about giving him coaching feedback. He is notorious for only seeing the world from his own perspective. In your view, that is part of his problem.

#### Dealing with colleagues

Over the last few months, at least three employees in your team have approached you to complain about the way John relates to them. One staff member even asked to change teams. He claimed that John never treats them with respect, “barking orders and treating staff like his personal servants.” You decided to conduct a more detailed survey of staff perceptions. While everyone appreciated that John makes time to give them feedback on tasks, they also made comments like: “When we hand in a piece of work to John for review, he always and only criticises. There's no positive feedback whatsoever.” Or: “When we complete a task, he always points out the errors, and never wants to hear our view. He just shuts off the discussion as soon as he's finished talking. Oh, and he never bothers to say thanks for the effort either.”

These comments seem to indicate a disturbing theme: although John is a senior employee, he is failing to demonstrate respect or appreciation for his colleagues, and seems to have trouble opening himself up to other views. You are not sure if this is a skills problem (i.e. he doesn't know how to do it) or an attitude issue (i.e. he doesn't see why he should do it). You suspect it's the latter, but you'll need to check this.

#### Project management

Unfortunately, there is also another issue: a potentially embarrassing project management error. John is currently driving a new initiative to streamline the way in which your organisation engages with its key stakeholders. One of his real strengths is his efficiency. And, true to form, he is already a month ahead of schedule on this project.

But what is distressing (and ironic) is that he has come up with a grand new plan for how to change the current communication systems, but in developing it, he hasn't consulted some of your key stakeholders for their views. And he is supposed to be advising the organisation on best-practice stakeholder management!

Thankfully, you heard that he consulted the EAP, but you are pretty sure he failed to ask the two other organisations that work closely with you for their views (DASI and MTT). You are basing this on a brief conversation with Jane, a junior employee supporting John on the project. So you'll have to check this with John personally.

**Please use the following WW/DD template to prepare for a coaching session with John.**

*(A suggested response to this case study is in the answers section of this chapter on p.101.)*

To see how Diana may have used the WW/DD structure and the Ladder of Inference to explore the issues with John, take a look at the sample conversation in section 3.3 of this chapter.

### 3.2 Working well/do differently template

Name: .....

Date: .....

Key Objectives & SMART goals	What is Working Well (WW)?	What needs to be Done Differently (DD)?	Plan of action and new goals
<p>1. Key Objective:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>SMART goal:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Summary:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>Specific examples:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Summary:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>Specific examples:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Action item:</p> <p>What: .....</p> <p>.....</p> <p>.....</p> <p>Who: .....</p> <p>.....</p> <p>.....</p> <p>By when: .....</p> <p>.....</p> <p>.....</p>
<p>2. Key Objective:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>SMART goal:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Summary:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>Specific examples:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Summary:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>Specific examples:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Action item:</p> <p>What: .....</p> <p>.....</p> <p>.....</p> <p>Who: .....</p> <p>.....</p> <p>.....</p> <p>By when: .....</p> <p>.....</p> <p>.....</p>

### 3.3 Sample conversation: Coaching concerns

Following on from the previous case study, here is an example of the type of conversation Diana might have with John. Notice that Diana uses the WW/DD structure with the Ladder of Inference.

Share <b>Went Well</b> feedback, with data & reasoning underpinning conclusions	<p>“John, from what I’ve observed, there seems to be a lot going well so far. In your progress report, you noted that you’re one month ahead of schedule. Great effort; the sooner we can improve these systems the better.”</p> <p>“I’ve also heard from a number of your colleagues that you’ve been taking an active interest in their development, offering them significant amounts of coaching feedback. I’d certainly like that to continue; this is an important development opportunity for them.”</p>
Share <b>Do Differently</b> feedback	<p>“John, in addition to what’s going well, I wanted to highlight some possible areas for how things may be done differently – in particular, around your feedback approach and around a couple of project management decisions.”</p>
Start with your <b>data</b>	<p>“I mentioned that your colleagues genuinely appreciated receiving coaching from you. At the same time, I’ve received some comments that I’d like to raise with you and check your perspective. One of your colleagues mentioned that they’ve received mainly negative feedback from you since the project began – and very little or no positive feedback. Another mentioned that they don’t often receive thanks from you after completing tasks, and that perhaps you’re not as open to their views as they’d like.”</p>
Share your <b>reasoning &amp; conclusions</b> – tentatively	<p>“I’m certainly not suggesting that I have all the facts, but given their reports, I’m wondering whether there are some misaligned expectations around project feedback. And I’m concerned that if we leave this, it will lead to low morale.”</p>
Ask for <b>their perspective</b>	<p>“So I’m keen to hear your views on what’s happening. How do you see it?”</p>
What if they disagree?	<p>(If John rejects the feedback:) “Oh, come on. They can handle a bit of constructive criticism. They’re not kids.”</p>
> ask for their <b>data &amp; reasoning</b> ; and	<p>“It sounds like you don’t think positive feedback is important. I’m interested... what’s your thinking there?”</p>
> Clarify your own <b>data &amp; reasoning</b>	<p>“I appreciate what you’re saying – that when you were learning the ropes, you didn’t get complimented and you didn’t feel you needed it. In my experience with this generation of employees, they’re expecting something different: more respect and more appreciation. In fact, our recent internal survey of departing employees showed that ‘not feeling valued’ was number two in their top five ‘reasons for leaving’.”</p>
Once feedback is assimilated, work together to devise an <b>action plan</b>	<p>(<i>Since he’s an experienced manager, he may not need as much ‘direction’ around action planning:</i>) “Given that we both now agree that a balance of positive and improvement feedback is helpful, what’s the best way forward in your view?”</p> <p>“Ok, I’m comfortable with that broad approach. Let’s just clarify exactly what needs to happen, who’s responsible and when it should be done by.”</p>

### 3.4 Snapshot activity

There will be times in your role as manager, that you will be called upon to exercise your knowledge of your team members (e.g. when allocating new work/projects).

The following activity will encourage you to focus on each individual in your team and develop a clear picture of who they are, what they are doing and where they are going.

Name of team member:	
What is this person's current project/ key work task/role?	What is this person's next career goal?
.....	.....
.....	.....
What are this person's strengths?	What are this person's weaknesses?
.....	.....
.....	.....
What are this person's likes (e.g. tasks/ways of working?)	What are this person's dislikes (e.g. tasks/ways of working?)
.....	.....
.....	.....
How/in what way does this person 'fit' with the team?	What do others (e.g. team members, clients) generally say about this person?
.....	.....
.....	.....
What is this person's communication style preference?	How would you describe this person?
.....	.....
.....	.....
What is the greatest contribution that this person makes or has made to the team?	Would you describe this person as: a) motivated & highly competent; b) motivated but lacks experience; c) unmotivated but shows potential?
.....	.....
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### 3.5 Conversation starters using the 5Ps to manage underperformance

This example shows how you might use the 5Ps approach to manage a coaching conversation if the issue was under-performance. In this situation the employee also happens to be a friend.

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<b>Purpose</b>	“Chris, I’d like to talk to you about some concerns I have about specific aspects of your performance and what we can do to ensure you’re on target to achieve the goals we set. I want you to know this is not a formal assessment, but rather, an opportunity for us to work together to enhance your performance.”
<b>People</b>	“Given our friendship outside of work, we agreed earlier that we would provide each other with the same honest and frank feedback as we do outside of work. The occasion has now arisen when I need to provide you with some feedback about your work.”
<b>Process</b>	“We’ve got 60 minutes set aside in our diaries. I’d like to start by sharing some of my observations, and then I’d like to focus on your perspective on why these things are happening and what we can do about it.”
<b>Product</b>	“By the end of the meeting, I’d like us to have an agreed action plan on where to from here.”
<b>Preparation</b>	“You would have seen that I included some questions for you to think about when I sent you the invitation for this meeting. Did you get a chance to do some thinking around those questions in advance?”

---

### 3.6 Script excerpt video 2: ladder of inference

You may like to watch video 2 with this script in hand, to observe the Ladder of Inference being used in action.

**Use the Ladder of Inference to share and compare different:**

Information → Interpretations → Conclusions

#### (Screen) Share Information

**Anne** (looking at list) “Well, our first issue was team dynamics. If we’re focusing on what we’ve observed.”

**Sally** “Yes, well that course I attended got me thinking about how team meetings have been running in general, and comments between particular individuals – through the course of a typical day.”

**Anne** “What’s an example?”

**Sally** (Provides detailed example)

**Anne** “Well, I wasn’t aware of most of that. That’s good to know.”

**Sally** “What had you noticed?”

**Anne** “Well, that you tend to volunteer in team meetings – for work that others really should be doing. You’re left working extra long hours.”

**Sally** (nods; shrugs)

**Anne** “Could I back you up a bit – by looking at how you could delegate work better?”

**Sally** (nods; shrugs)

**Anne** “A related issue is: people asking you for so much assistance that you must be struggling to get your own work finished?”

**Sally** “Yes, sometimes.”

**Anne** “I noticed last week, when Kerry and Marcus were looking for help on that paper... you looked frustrated.”

**Sally** (defensively) “Did I? That wasn’t my intention. What did you think was going on?”

**(Screen) Share Interpretations**

- Anne** “So it looked like one of those situations where you know they ought to do it, and at the same time you’re thinking: “It’d be easier just to do this myself”.
- Sally** (surprised) “Really? That’s how it looked?”
- Anne** “Yes.”
- Sally** “I wasn’t thinking that at all.”
- Anne** (surprised) “No?”
- Sally** “No, I remember specifically thinking about the link between training and motivation... I mean, I really enjoy mentoring them, but it would be much more efficient if they’d had the basic training. But I don’t control the budget.”
- Anne** (quizzically, pointing to her own head) “And all this while you were talking with them?”
- Sally** “Yes, because they’d already asked about training for that project.”
- Anne** “You weren’t looking happy.”
- Sally** “I suppose I was frustrated about not being able to help as much as I’d like... Perhaps I need to calm down.”
- 

**(Screen) Share Conclusions**

- Sally** “That explains a lot. I didn’t realise that you had so much on – I mean at home, as well as here.”
- Anne** “I didn’t want to bother you with my own stresses.”
- Sally** “Well, it’s good to know.”
- Anne** “And I suppose I’ve been too ready to explain what I’ve been observing as just unmotivated individuals.”
- Sally** “It’s more complicated than that.”
- Anne** “Sure – I realise that now!”
- Sally** “It’s this link between team communication and their development opportunities.”
- Anne** “And your development opportunities... which brings me to the research project.”
- Sally** “So what should we do?”
- Anne** “How about we list options for each issue... perhaps starting with team communication?”
-

## 3.7 Helping people develop

There are several steps your staff need to undertake in order to develop the knowledge, skills and behaviours required for success in their current and future roles.

Your fundamental task is to help your staff at each step by talking to them, asking them questions and giving them suggestions.

The purpose of these conversations is to ensure that staff become accountable for their own development and remain focused on achieving tangible and valuable outcomes for the development they undertake.

This is also of value in helping staff see that 'development' does not mean participating in 'courses'. Depending on what needs to be developed, courses can be expensive or ineffective. Development through on-the-job experiences or through mentoring or buddy arrangements, can often be more effective than formal training.

### Step 1: Staff identify their own development needs and goals

You should ask your staff to think about and write down what they need to develop and why. Then, you should set aside time to discuss this with them.

A key role for you to play in this discussion is to 'hold the mirror' as part of their self-assessment. Prompt questions include:

- **Why are you seeking development at this time? What are you seeking to achieve?**  
Explore with your staff members their motivations for seeking development in terms of performance goals. These goals can relate to immediate work needs or events. Or else they can relate to longer term career aspirations and organisational needs.
- **What do you need to develop?**  
Explore with your staff members the specific knowledge, skills and behaviours they need to develop now in order to achieve, or take a step towards achieving, their performance goals.

Once you have agreed on the why and the what, you are ready to move to step 2: the how.

### Step 2: Staff identify options for development available to them

You should ask your staff to think about what types of learning and development activities would appeal to them. Again, you should set aside some time to talk about this with them.

A key role for you to play here is to help staff identify activities that will provide the opportunity to learn through action, experience, making mistakes, reflection and trying different things.

Some notes on identifying and undertaking different development activities are included at the back of this section. These can be given to your staff and used to stimulate your conversations with them. You can also assist by asking them to consider practicalities, including:

- How quickly do you need to develop the knowledge, skills or behaviours?
- Is an emphasis on theory or practice (or both) important?
- How expert do you need to become?
- When can you set aside time to undertake development activities, including time for thought and reflection?

Your staff should, in collaboration with you and your HR Division, be able to identify specific development activities that will help them achieve their performance goals.

Step 3: Staff plan to undertake development activities

Step 4: Staff undertake development activities

Step 5: Staff apply newly-acquired knowledge, skills and behaviours in their work

For development activities to be effective, staff need to remain focused on the reasons they are participating in development and have sufficient 'space' to undertake the activity.

Your role is crucial here. Your key task is to ensure that before, during and after development activities staff give themselves enough time and space to benefit from the activity, and that they remain focused on the goals.

You might find it useful to share with your staff the notes included at the end of this section about undertaking development activities.

You can also ask your staff to:

- (just prior to the activity) write down what they want to do differently as a result of the development activity and what this will look like in terms of things people will notice;
- arrange a time with you during and/or immediately after the development activity to tell you about the experience and what they are going to do differently as a consequence; and
- present an overview of the development activity and lessons learnt at a staff meeting.

Step 6: Repeat steps 1–5.

#### Different types of development activities

The development and application of particular knowledge, skills and behaviours occur as a result of participation in a number of different activities, not just a single one-off activity such as a half-day course.

Staff will need a balance of practice and theory in order to develop new knowledge, skills and behaviours.

The majority of development (70 per cent) should be based on experience (learning by doing, experimenting, making mistakes, trying different approaches and talking about the experience). Twenty per cent of development should occur through peer or one-on-one interactions. Formal courses and classroom style learning should be the least prevalent (10 per cent). This is known as the 70:20:10 Principle.

Development activities that allow participants to influence the content, sequence, pace and similar aspects of the activity are most effective. Development activities in which the participants are passive and have little opportunity to influence the content or delivery of the activity are not very effective.

Not all development activities will be available at any given time.

### Experiential development

- **Higher duties / job swaps / rotation:** Performing, for a set period of time, a leadership or another higher duty role within their current organisation, often in a different area or division.
- **Secondments:** Performing, for a set period of time, a leadership or higher duty role in a different organisation.
- **Special work projects:** Participating in a project team, for a set period of time, to work on a project that is outside, or at a higher level, than their regular work.
- **Scenario and simulation activities:** Playing a role within a facilitated role play or hypothetical discussion exercise that focuses on situations that are grounded in reality.
- **Shadowing:** Accompanying and observing, for a set period of time, a person (e.g. leader, technical expert) in a different role (whether within the organisation or in a different organisation) as they undertake their daily tasks.
- **Active experimentation and reflective journaling:** Maintaining a regular record of specific work tasks and challenges, different strategies they have tried in addressing these challenges, the impact and effectiveness of these different strategies, things they would try differently next time, and reflections about the emotional aspects of the challenges and response strategies.

### Peer and relational development

- **Coaching:** Having a subject-matter expert work with them on a one-on-one basis for a set period of time to help them develop, apply and refine a particular skill or behaviour.
- **Mentoring / critical friend:** Having someone who has working knowledge of the challenges of a particular role, act as a 'sounding board' for the person as they deal with a range of challenges.
- **Learning circles:** A group of staff, often working in different areas, who meet on a regular basis to discuss and collaboratively find solutions to the challenges of their type of role. The topics of focus and the solutions discussed come wholly from within the group. Every member of the group equally shares the responsibility for ensuring the discussions are of value.
- **Professional communities of practice / networks:** A group of people, often working in the same field, come together on a regular basis to share information about topics of common interest. Unlike a learning circle, communities of practice and networks will often have formal roles (such as Chair and Secretary), will conduct activities in line with a program or agenda determined ahead of time, and often have guest speakers.
- **Developing others:** Taking on a role as coach or mentor to someone else. The act of helping others develop their skills provides an opportunity for the coach or mentor to consolidate their own skills and knowledge and to develop a range of people skills (such as effective communication).

### Curriculum-based development programs

- **Workshops:** A series of activities (often including lectures/presentations, discussions and, possibly, role playing exercises) delivered by a subject expert to a group of people in line with a set or standard curriculum. Participants often have limited opportunity to influence the content and design of the workshop. Participation is often acknowledged by a certificate.
- **Courses:** A combination of development activities—often including workshops, set reading and written assignments—delivered by subject-matter experts to a group of people over a long period of time in line with a set or standard curriculum. Participants often have limited opportunity to influence the content and design of the course. Demonstration of learning, based upon successful completion of assignments, is often acknowledged by a formal qualification.

- **Conferences:** A series of presentations or small workshops delivered by different subject-matter experts over one or two days. Typically, each individual session or workshop is prepared by the presenter in isolation from other aspects of the program, but is brought together by conference organisers around particular themes. The audience has little or no opportunity to influence the way the conference is conducted.

### Reading

- **Online programs:** On the whole, online development involves reading (or listening to) set text and, often, viewing short videos. While many online programs do have interactive elements, typically these do not allow the participant to influence the content or delivery of the program. Also, there is typically little or no opportunity to ask questions or to discuss the ideas presented.
- **Professional books and journals.**

### Undertaking development activities

The following actions will help staff to get the best from any development activity while it is taking place.

- **State their goals:** A good facilitator will actively seek this information. If not, the staff member may have to create their own opportunity for explaining their reasons for participating in the development activity and their expectations of it.
- **Give it a go:** Give any activities or exercises a go. Make mistakes and keep a sense of perspective.
- **Keep the activity on track:** Staff should speak up when the development activity could be enhanced to meet their development needs better. Good facilitators appreciate feedback and suggestions about what can be done to make it work for people.

Staff should be careful not to confuse feelings of discomfort with dissatisfaction about the development activity. Feelings of discomfort, even frustration or anger, are a normal part of the learning experience, especially as people grapple with new ideas or behaviours.

- **Learn from other participants:** Interact with others who are participating in the development activity. Often some of the richest learning will come from discussions with other people going through the same development experience.
- **Teach others what you have learnt:** Explaining something new to someone else is a powerful way to consolidate new knowledge and skills. For a particularly intense activity, staff may consider debriefing by phone with their supervisor or a colleague during a suitable break in the activity.
- **Withdraw if warranted:** Staff should not be afraid to withdraw from an activity if, after giving it a good go, the activity is not delivering the knowledge, skills or behaviours they need to develop.

Keep in mind, however, that there are likely to be costs associated with a withdrawal. These can be financial. There can also be costs in terms of the person's reputation and the development opportunities offered to them in the future.

If a staff member does withdraw from a particular activity, they should seek out an alternative activity as soon as possible.

## Skills Builder 4: Adapting talking performance activities

### 4.1 What motivates people?

Motivation is all about what drives people to do certain things.

People can be motivated by:

- 'push' factors – people act in certain ways in order to *avoid* something (such as pain, hunger or discomfort), and
- 'pull' factors – people act in certain ways to *gain* something (for example, safety, pleasure or status).

It's also useful to consider where the motivation comes from:

- Intrinsic motivation – people act because they want to, because the task is inherently valuable or important to them. People gain satisfaction from simply doing the work.
- Extrinsic motivation – people undertake something because it leads to an external reward (for example money, promotion, adulation) or avoids something unpleasant (punishment).

Older theories about management and leadership tended to focus on using extrinsic motivation to achieve staff performance; offering material rewards for 'good' performance.

More recent management and leadership theory has tended to focus on using intrinsic motivation to achieve performance; getting staff to perform well because they want to (*Talking Performance* is grounded in this 'transformational' approach, with an acknowledgement that extrinsic motivation still plays a role).

#### Common motivators

While there are many different theories about what motivates people, most agree that different people are motivated by different things, and that the same person will be motivated by different things at different times or in different situations.

Some theories suggest that there is a hierarchy to what motivates people. 'Basic' needs (such as food, shelter and safety) must be addressed first. More sophisticated motivators (such as status or 'feeling good') won't work until these basic needs are met.

Some of these theories also suggest that once a need or desire has been met, that need or desire no longer serves to motivate. So, once someone has enough food, shelter, safety or money to satisfy their needs, more food, shelter, safety or money will not encourage them to do something or change their behaviour.

This all explains why the promise of more money (a pay rise or bonus) only motivates some people up to a certain point. If someone has 'enough' money, the promise of more money will be less effective as a motivator than, for example, the offer of more annual leave or the opportunity to work on a really satisfying project.



## Motivation and performance

One way of thinking about motivation and performance may be to consider the 16 types of motivation that researcher Steven Reiss has identified<sup>1</sup>:

The table that follows is loosely based upon these 16 common motivators.

	<b>If an individual currently has a strong need/desire to</b>	<b>and/or</b>	<b>they are likely to perform well if they are able to, for example...</b>
<b>Power</b>	gain power	avoid powerlessness	make key decisions or lead a project/task
<b>Curiosity</b>	gain knowledge	avoid ignorance	work on new things, undertake research tasks and/or engage their intellect
<b>Independence</b>	gain independence	avoid interdependence	work by themselves and/or on things that are not contingent upon the work of others
<b>Status</b>	gain status	avoid no or low status	work on things that will make them more visible and/or lead to promotion
<b>Social contact</b>	gain social contacts	avoid social isolation	work collaboratively and/or in ways that provide opportunity to maintain social contacts outside of work
<b>Vengeance</b>	win	avoid losing	work competitively and/or on in situations involving a high degree of combativeness
<b>Honour</b>	be loyal	disloyal	work on things that support tradition and/or the status quo
<b>Idealism</b>	make society better	avoid making society worse	work on things that have a clear social benefit and/or in ways that provide opportunities to volunteer for social causes outside of work
<b>Physical exercise</b>	undertake physical activity	avoid being sedentary	work on things that allow physical activity and/or in ways that provide opportunities to participate in physical activities outside of work
<b>Family</b>	create a family	avoid destroying a family	work on things related to family welfare and/or in ways that provide opportunity to spend time with family
<b>Order</b>	gain order	avoid disorder	work in an environment characterised by predictable processes and systems and/or clear goals
<b>Acceptance</b>	gain acceptance	avoid rejection	work on things that are clearly appreciated
<b>Tranquillity</b>	gain safety and security	avoid anxiety and fear	work on things that are uncontroversial, will not make people angry and/or will not threaten sense of self of self-confidence
<b>Saving</b>	save	avoid wastage or loss	work on things involving collection and storage and/or involving cost reductions

The final two of the 16 motivators – eating and romance – are not included in this table as they do not have an immediate application in talking performance in the contemporary public service workplace.

<sup>1</sup> Reiss, Steven (2004), "Multifaceted nature of intrinsic motivation: The theory of 16 basic desires", *Review of General Psychology* 8 (3): 179-193,

## 4.2 Script excerpt video 5: 'Asking and observing' approach

The statements listed below are excerpts from the coaching conversation between Tony and Meena in video 5.

In this conversation, the manager (Tony) demonstrates the use of the 'asking and observing' approach to explore specific styles and motivations.

You might like to play video 5 to see this conversation in action.

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**Tony** "Tell me what it is – in your current work – that you most enjoy? Would you like to be doing more of anything in particular?"

**Meena** "What I enjoy?"

**Tony** "I'm asking because what I think your preferences might be, and what they actually are could be worlds apart."

**Meena** "Sorry, I see. Yes. Well I like challenging projects – with clear instructions."

**Tony** "Yes. (pause) So I'm trying to work out how we can fit that preference with the needs of the team – particularly on collaborative projects. And there's a related issue, which is how we address issues at team meetings. There's an obvious contrast between all those extroverts at the table and a smaller group..."

**Meena** "Like me?"

**Tony** (sensing Meena's engagement) "Who have a different style."

**Meena** "Yes."

---

### 4.3 Communication Styles Scale – Developing awareness of others

This activity provides you with an opportunity to develop awareness of the preferred communication style of others. You can use it to map your perception of the styles of your team members, your peers, your manager and your clients.

Consider the Communication Style Scales and focus on one particular individual at a time. Think about how this person tends to behave in a variety of situations e.g. in meetings, in general discussions with peers, with clients or when receiving new information? For each scale, circle the style point you believe best reflects that individual's preference in most situations. The statements underneath each style point are simple approaches you can take to adapt your communication to suit that style preference.

Does the person's style tend to be more at this end of the scale?	Or does the person's style tend to be more at this end of the scale?
<b>Visual</b> Use pictures and diagrams	<b>Verbal</b> Use words to convey or clarify the message
<b>Comfortable with conflict</b> It's OK to talk with some 'heat' in the room	<b>Conflict averse</b> Don't press on through conflict; take time out
<b>Assertive</b> Give them space to express their view	<b>Passive</b> Gently support them through questioning
<b>Detail oriented</b> Give extensive detail, with specific examples	<b>Big picture</b> Give an overview or summary of key points
<b>Instant processor</b> No need to provide significant thinking time	<b>Reflector</b> Give them time to think before and after feedback
<b>Formal</b> Use more formal language, tone and environment	<b>Informal</b> Use less formal language, tone and environment
<b>Direct</b> Get to the point	<b>Indirect</b> Use softer language
<b>Likes to be told</b> Give guidance	<b>Likes to work it out</b> Support their thinking



Once you have used the Communication Style Scales to map your perception of an individual's style, you can ask questions of them and make further observations to refine your perception. From there you can modify your style to better communicate with theirs.

- Identify 3 scales you could focus on to explore communication or improve communication with this individual.
- Develop 3 questions you could ask to explore that individual's preference on each of the scales you have chosen to focus on.
- Identify 3 situations in which you could observe their behaviour for clues as to their style preference.
- Suggest 3 practical ways you could adapt your communication style to better match theirs.

#### 4.4 Self assessment

This activity provides you with an opportunity to sharpen your ability to read clues as to a person's preferred communication style.

The statements listed below are excerpts from the coaching conversation between Tony and Meena in video 5. Read the statements and identify some of the determining factors of Meena's communication style.

Circle the style point you believe best reflects Meena's preference based on Tony's comments. The correct answers can be found in the answers section of this chapter.

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Tony says, "There's an obvious contrast between all those extroverts at the table... and a smaller group..." and Meena replies, "Like me?"

**Assertive**

Allow them space to express their view



**Non-assertive**

Actively and gently guide them through questioning

---

After discussing 'rules for negotiations', Tony makes the offer, "I'll e-mail you the specifications..."

**Detail oriented**

Provide extensive detail, with specific examples



**High level/big picture**

Provide overview or summary of key points

---

Tony comments, "I've noticed in team meetings – you tend to have reflected thoroughly on issues that we've discussed previously."

**Instant processor**

Need not provide significant thinking time



**Reflector**

Give them time to think – before and after feedback

---

Tony comments about team members having to work things out for themselves. Meena asks, "Isn't it easier if someone just decides that in advance?"

**People who like to be told**

Offer more direction and guidance



**People who like to work it out for themselves**

Support and facilitate their own thinking process

## Answer section

### 5.1 Answers: Set the right goals activities

Case study 1.2 (p.77): suggested response.

**Use it as a guide as your response may vary and may be equally valid.**

Sarah began by scheduling one-to-one meetings with her team members. They discussed personal strengths and weaker areas and spoke about likes, dislikes and any career aspirations.

Through discussions it became clear that some team members liked the routine tasks that others found boring; while others liked dealing with problems that some found intimidating. Their natural styles and their likes and dislikes about various work tasks explained why some people got bogged down or complained about jobs that others were more than happy to do.

Sarah now has a very good snapshot of each individual.

Sarah then took a closer look at the kind of work the team did. She found that it fell mainly into two categories; work that required active contact with other departments and clients, and work that was more administrative and computer based. When she examined the work further she found other differences worth noting.

Whilst her work practices to date had been to allocate the next incoming task to the first available team member, Sarah began to think about juggling tasks so she could allocate new work to best match team members' preferences where ever possible. This would be challenging for her but worth the effort.

She decided that any tasks that were not a great match with a person's skills or interests could provide an opportunity for them to gain new skills; or at least close a gap on their weaker points. If they were to discuss these tasks as stretch goals, Sarah was hopeful team members would be motivated to rise to the challenge. She figured she might need to offer additional coaching and encouragement during these times but that the outcome would be worth it.

Sarah documented her ideas, including the issues that had driven her thinking and the benefits of making a change. She then approached her manager, Tom, to talk things through.

Initially Tom was concerned that any change in work processes might cause a drop in the overall productivity of the team. So they agreed to a six month trial period and some simple ways of measuring how things were going.

With regard to stimulating high performers, Tom suggested that Sarah choose some of her own work tasks to delegate on a rotational basis as development opportunities.

They discussed other options for providing variety and interest and decided that some issues that had been sitting in the 'too hard' basket would provide great skilling and business opportunities for small cross-divisional project teams.

It was agreed that Sarah would schedule a meeting to get the team's input on the possibilities of project team work and the kinds of issues that would be worth tackling.

From there, Sarah and Tom discussed the best way to collaborate with staff and involve them in the details that would bring the whole plan to life.

**In summary, Sarah planned to achieve her aims by:**

- Building a profile of information on each team member that included their natural strengths and task preferences, and linking this profile with their preferred communication style.
- Discussing her aims with her manager – outlining the issues and the benefits of change, and negotiating flexibility in the work allocation process and completion timelines.
- Relieving her manager's concerns by agreeing to a trial period of six months with clear and simple measureables.
- Adapting the task allocation process to better match the given tasks with individual's strengths and interests.
- Identifying tasks that required individuals to work against their natural preferences and repositioning these as personal growth opportunities (stretch goals) with the individuals concerned in order to increase their motivation.
- Monitoring progress and giving extra support to individuals working against their natural preferences so that they were stretched not stressed.
- Aiming to maintain a balance between stretch tasks and comfort zone tasks based on an individual's needs.
- Jointly reviewing progress and growth with individuals at regular intervals and after each stretching challenge.
- Discussing career goals with high performers, and jointly developing task allocation and development plans aligned with their interests and aspirations.
- Delegating some of her management tasks on a rotational basis.
- Creating interest and variety through special project work to resolve long-standing/cross-departmental issues.
- Getting the team involved in developing aspects of the plan and project team work.

## 5.2 Answers: Showing appreciation & building rapport activities

Case study 2.2 (p.81): suggested response.

**Use this as a guide as your response may vary and alternative ideas may be equally valid.**

Matthew began by treating this challenge of building better relationships with his team as a task in its own right. He scheduled time in his diary to fully consider the challenge. He was comfortable with this approach because he was using his natural style to help him look for ways to adapt.

Matthew began by building a picture of his team members. He wrote down what he knew about each individual – their strengths and weaknesses as he saw them, the work contribution each had made and what he valued about those contributions.

As he thought about each person, Matthew remembered snippets of personal information; things he had overheard his team members discussing about their weekend activities. He listed these as well and resolved to take more of an active part in these conversations.

Matthew immediately scheduled time in his diary each month to speak regularly to individuals about how they were going, what their interests were and how he could best support them.

He also decided he needed to be more visible and to notice more of what the team was doing. Although he had scheduled time in his diary for regular catch-ups with each team member, Matthew realized that most conversations with his staff would be spontaneous and he would need to seize the moment! So, on occasions when he grabbed a coffee or went for a break, Matthew took the longer route back, walking through the team area and having informal discussions. It was easier than he thought it would be and, to his surprise, it kept him up to date, and gave him clues as to each person's likes and dislikes. It also gave him opportunities to do on-the-spot coaching.

Once he started focusing his attention on his team, Matthew began to notice the helpful things they did for each other and other teams in the area. He noticed who volunteered to do the boring stuff that actually kept the office ticking over – like un-jamming the photocopier. And now that he noticed these things, Matthew made sure to tell people how much he appreciated their efforts.

Though he had initially been concerned that time spent in these activities would take him away from his job, Matthew found that the team became more productive overall because the on-the-spot coaching helped cut down on rework. And showing appreciation to people for their good efforts was very quick and easy. Staff members started coming to Matthew to ask for help and became more open and receptive to his feedback. Matthew started feeling more comfortable with staff interactions.

**In summary, Matthew built relationships by:**

- Using his natural style to plan an approach to the challenge.
- Scheduling time in his diary for regular coaching meetings.
- Thinking about individuals and building a snapshot of information on each.
- Becoming a more visible presence in the office.
- Making regular informal contact with staff.
- Taking the opportunity to do on-the-spot coaching.
- Noticing the extra effort individual's put in – and showing appreciation for it.

## 5.3 Answers: Coaching activities

Case study 3.1 (p.82): suggested response.

Use it as a guide as your response may vary and may be equally valid.

Standard coaching framework – WW/DD

**Name:** John

**Date:** 24 October

Key Objectives & SMART goals	What is Working Well (WW)?	What needs to be Done Differently (DD)?	Plan of action and new goals
<p><b>1. Key Objective:</b></p> <p>Working well with colleagues.</p> <p><b>SMART goal:</b></p> <p>Majority of positive comments from colleagues over next 6 months – based on anecdotal and 360° degree feedback.</p>	<p><b>Summary:</b></p> <p>Proactively offers feedback to develop staff.</p> <p><b>Specific examples:</b></p> <p>Informal staff survey indicated that he makes time to give them regular feedback on tasks.</p>	<p><b>Summary:</b></p> <p>Demonstrating respect for and appreciation of colleagues.</p> <p><b>Specific examples:</b></p> <p>Staff reports indicating that:  “...he always/only criticises. There’s no positive feedback whatsoever.”  “...he never wants to hear our view.”  “...he never says thanks.”</p>	<p><b>Action item 1:</b></p> <p><b>Attend coaching skills training</b></p> <p><i>What:</i> Research training providers; attend training; report back on learning.</p> <p><i>Who:</i> John to do research; I will approve.</p> <p><i>By when:</i> present recommendation by end of week.</p> <p><b>Action item 2:</b></p> <p><b>Demonstrate appreciation more frequently</b></p> <p><i>What:</i> Offer support, give thanks and acknowledge genuine effort, regardless of results.</p> <p><i>Who:</i> John to offer to all colleagues on project.</p> <p><i>By when:</i> at least one person each day or as and when it’s warranted.</p>



Key Objectives & SMART goals	What is Working Well (WW)?	What needs to be Done Differently (DD)?	Plan of action and new goals
<p><b>2. Key Objective:</b></p> <p>Project management.</p> <p><b>SMART goal:</b></p> <p>Deliver the 'stakeholder engagement' project by 3 December under 30K budget, to the satisfaction of all stakeholders.</p>	<p><b>Summary:</b></p> <p>Very efficient in delivering projects.</p> <p><b>Specific examples:</b></p> <p>Already one month ahead of schedule.</p>	<p><b>Summary:</b></p> <p>Lack of stakeholder consultation.</p> <p><b>Specific examples:</b></p> <p>Report that he didn't consult critical stakeholders like DASI and MTT on their views.</p>	<p><b>Action item 1:</b></p> <p><b>Consult with key stakeholders</b></p> <p><i>What:</i> meet with DASI and MTT; incorporate their feedback in new processes.</p> <p><i>Who:</i> John to meet with reps from DASI and MTT.</p> <p><i>By when:</i> meet within two weeks.</p> <p><b>Action item 2:</b></p> <p><b>Present a summary of key recommendations for preliminary approval before progressing project</b></p> <p><i>What:</i> Show which stakeholders were consulted, their insights/ feedback and how it was incorporated into the project.</p> <p><i>Who:</i> John to present to me.</p> <p><i>By when:</i> Set up presentation time within three weeks.</p>

## 5.4 Answers: Adapting talking performance activities

Self assessment activity 4.4 (p.97).

- Non-assertive
- Detail oriented
- Reflector
- People who like to be told

## 5.5 Answers: Video activities

Video 1

### Activity 3b (Chapter 8, p.59)

Possible answers:

- increased motivation and engagement, rapport, team spirit and bonding, better retention.

### Activity 5 (Chapter 8, p.60)

Possible answers:

- Link (allocate) workplace tasks/projects with their career aspirations;
- delegate some of your management tasks to provide extra challenges and up-skilling opportunities;
- give them an opportunity to improve workplace processes;
- allow them to act as workplace representatives on cross-divisional project teams;
- use shadowing and mentoring to build skills and behaviours that can be learnt but are not easily taught;
- include them in management team meetings.

Video 2

### Activity 3 (Chapter 8, p.62)

Possible answers:

Make sure the training program matches the staff member's need. Jointly discuss expectations of the training program beforehand and set personal goals with the staff member. Diarise a time soon after the training program to discuss learnings with the staff member. Jointly discuss opportunities for applying the new learnings (or experimenting with them) in the workplace as soon as possible.

## Video 3

**Activity 2 (Chapter 8, p.65)**

## Possible answers:

- Consider your conversation starters (scene setting statements).
- Use a few well chosen words to acknowledge the (awkwardness of the) situation and get their agreement to proceed, for example:
  - “I’ve asked you in to help clarify something that’s been puzzling me…”
  - “I need to discuss something with you, which I feel a little awkward about. Please bear with me while I explain it.”

**Activity 5 (Chapter 8, p.66)**

## Possible answers:

- Slow it down.
- Back up to the last point of agreement or understanding and move forward carefully to try to isolate the point at which the conflict occurs.
- Focus on one issue at a time.
- Use the Ladder of Inference as a mental map for guiding the discussion.
- Use a ‘park it for now’ approach to deal with other, unrelated issues (e.g. team criticisms). If you ‘park’ something, you must commit to dealing with it later.

**Activity 6 (Chapter 8, p.67)**

## Possible answers:

- He could be moving from a plateau in his performance into boredom and decline.
- It could be that he needs more challenging assignments, increased responsibility, or some variety in his work.
- He needs to reconnect with his career aspirations.

## Video 4

**Activity 1 (Chapter 8, p.68)**

## Possible answers:

Tony is aiming to rebuild rapport, by taking responsibility for his part in the conflict, acknowledging the friendship and suggesting a way to proceed with the difficult conversation to follow.

If you have finished a previous coaching/performance conversation on a heated or uncomfortable note, use a few well chosen words to make a more positive start to the follow-up coaching conversation.

### Activity 2 (Chapter 8, p.69)

Possible answer:

The conversation should definitely follow a structure, though it need not be 'formal' in tone. This is because unstructured performance conversations, especially those that sound very relaxed and casual, can result in misunderstandings about objectives or intentions. An overly casual tone to the performance request can leave a staff member thinking that change is optional and at their discretion, when in fact it is not.

### Activity 3 (Chapter 8, p.69)

Possible answer for a):

Both managers and staff often need to see something practical in order to understand behavioural issues and accept behavioural change. Practical tools you can use to facilitate discussions are organisational values, codes of conduct, capability/skill frameworks with behavioural indicators, team agreements, and behavioural goals that have been included in performance review documentation.

Possible answer for b):

- It can affect the productivity of the whole team/other teams.
- It can affect the morale of the team.
- It can cause retention issues.
- It can affect the team's reputation with clients and other workgroups.
- It can impact your reputation as manager of the team.

### Activity 4 (Chapter 8, p.70)

Issue	Discussion Clue	Due to
Missing deadlines	Simon says: <i>"That's half the problem frankly. Too much work, too little time."</i>	Capability √ Resources Motivation
Quality of reports	In video 3 Tony asks Simon about the style guide he referred him to, but Simon seems dismissive and says: <i>"the main thing is just to get it finished..."</i> .	Capability Resources √ Motivation
Simon's interactive style	Tony indicates it is important to listen to people even though we may disagree with them. Simon says <i>"I might need some help with that."</i>	√ Capability Resources Motivation

## Video 5

**Activity 2 (Chapter 8, p.72)**

## Possible answers:

- Acknowledged Meena's style and spoke about the impact of that particular style for some workplace projects.
- In consideration of Meena's style, Tony agreed to provide written documentation of project guidelines/literature, which would give Meena time to reflect and an opportunity to come back with questions.
- Tony also agreed to speak to the whole team about rules for working relationships on collaborative projects

**Activity 3 (Chapter 8, p.72)**

## Possible answers:

- Put in place a coaching plan with some simple initial goals for Meena to achieve (e.g. demonstrating that she can develop processes and rules for her own part of the project work when there are none handed down; building her ability to collaborate with others in the development of project rules).

Tony then needs to monitor Meena fairly closely in the early days of that plan to build her comfort and confidence. His style needs to focus on asking and observing rather than instructing, otherwise he falls into the habit of 'feeding' Meena's natural style rather than nurturing growth.

- Tony could consider role-playing scenarios with Meena to help build her confidence.
- Tony could consider a buddy-up relationship using a respected team member who can role model the desired behaviours.
- Tony could consider appropriate training programs to build Meena's skills (e.g. assertiveness training, project management).

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