Investing in People and Performance

Management Center

Welcome!

Please update your Zoom nametag to reflect name / pronouns / organization.

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Agenda

11:00 am – 11:35 am	Welcome and Introduction
11:35 am – 12:30 am	Addressing Performance Problems
	15 min Break
12:45 am – 1:45 pm	Investing in People
1:45 pm –2:00 pm	Takeaways and Evaluation

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Distinguish Between Issues

Performance Problems: staff member is not meeting expectations in one or more required elements of their role

Development Areas: skills that would help take a staff member from good to great in their role, or grow into a new role

Management Issues: staff member's success is limited by something their manager is doing or not doing

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Breakout #1

Spotting Performance Problems

Group Size 4

Time 10 mins

Instructions

First

Introductions (share name, pronouns, org, role)

Then

Discuss scenarios: Is it most likely a performance, development, or management issue?

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Practice Activity #1

Reflection

Time 4 min

First

Choose 1-3 people you manage and identify 1 thing you'd like each person to improve.

Then

Determine whether each improvement is a performance issue or a development opportunity.

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Addressing Performance Problems

Key Idea

When we encounter a performance problem, we should partner with our staff member to address it without treating *them* as the problem.

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Addressing Performance Problems

Things to keep in mind

- **Own** your part
- Be **curious**, kind, and compassionate
- Focus on what's **really needed** from this role
- Be **clear** and decisive

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Breakout #2

Case Study

Group Size 4–6

Time 15 mins

Instructions

First

Read or listen to the case study.

Then

Discuss the case using the reflection questions as a guide.

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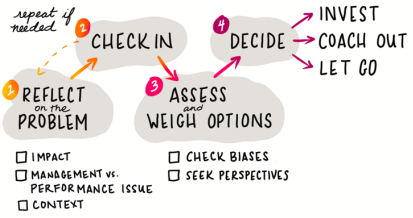
Steps to Address Performance Problems



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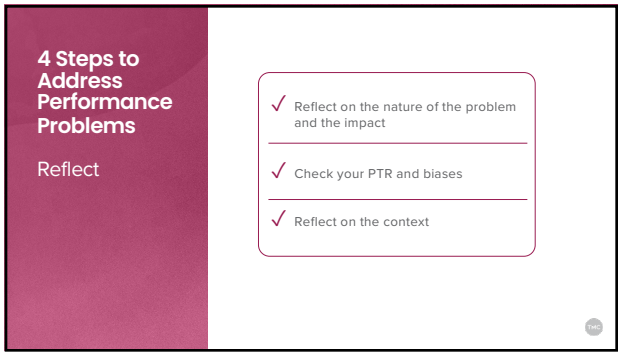
4 Steps to Address Performance Problems
Reflect
✓ Reflect on the nature of the problem and the impact
✓ Check your PTR and biases
✓ Reflect on the context

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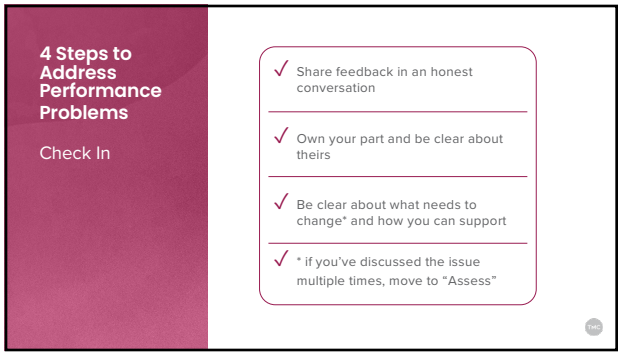
4 Steps to Address Performance Problems
Check In
✓ Share feedback in an honest conversation
✓ Own your part and be clear about theirs
✓ Be clear about what needs to change* and how you can support
✓ * if you've discussed the issue multiple times, move to "Assess"

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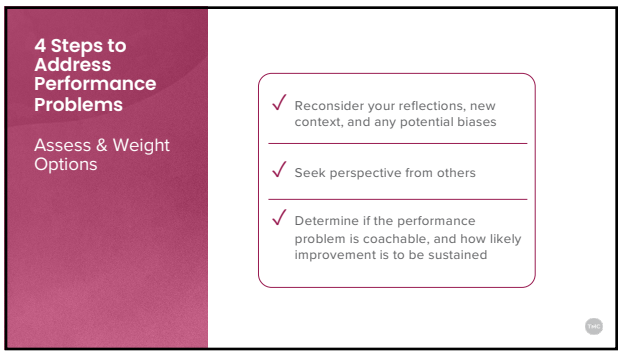
4 Steps to Address Performance Problems
Assess & Weight Options
✓ Reconsider your reflections, new context, and any potential biases
✓ Seek perspective from others
✓ Determine if the performance problem is coachable, and how likely improvement is to be sustained

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4 Steps to Address Performance Problems

Decide

- ✓ **Invest** when it's coachable and you have capacity
- ✓ **Coach out** when investing hasn't worked or the person isn't interested in changing
- ✓ **Let go** when necessary (like when the problem is significant and the person is unwilling or unable to grow)

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Practice Activity #2

How to Say It

Time 4 min

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We're taking a break

Time Remaining 15:00

We've covered

Distinguishing performance issues and development areas

Addressing performance problems

After the break

Investing in people

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Investing in People

Key Idea

Investing in people makes us, our teams, and the work better. It also improves retention, builds our team's power, and creates impact!

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"I tell my students, 'When you get these jobs that you have been so brilliantly trained for, remember that your real job is that if you are free, you need to free somebody else. If you have some power, then your job is to empower somebody else."

—Toni Morrison

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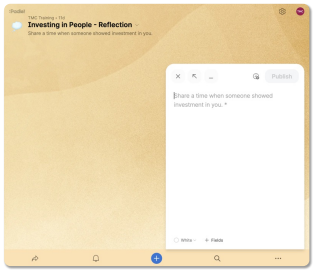
Padlet #1

When has someone shown an investment in you, and what impact did it have?

Time 3 mins



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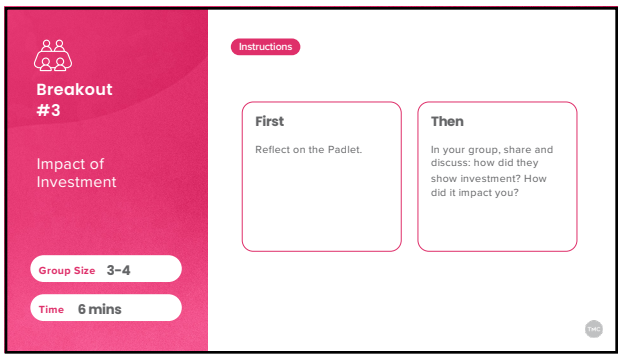
Breakout #3
Impact of Investment
Group Size 3-4
Time 6 mins
Instructions
First
Reflect on the Padlet.
Then
In your group, share and discuss: how did they show investment? How did it impact you?

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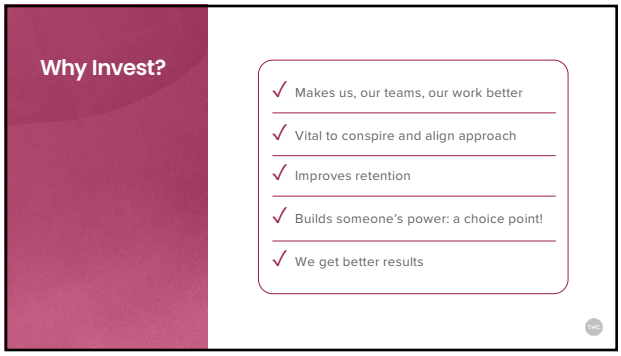
Why Invest?
✓ Makes us, our teams, our work better
✓ Vital to conspire and align approach
✓ Improves retention
✓ Builds someone's power: a choice point!
✓ We get better results

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Principles for Investing in People
Adopt an investment mindset for all your staff. Assume the best, give honest feedback, and open doors to growth opportunities.
Know what you (and they!) can change, and what you can reasonably invest in change.
Focus on impact (getting from good to great, and impact on the results).
Pay attention to the margins and your implicit biases.

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Modeling: I do, We do, You do

I do: Model what you want to see. Name the skill and break it down.

We do: Perform the skill or task together while they are learning.

You do: Have the staff person do the whole task. While you watch and give actionable feedback.

Debrief & share feedback each time!

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Stretch & Scaffolded Assignments

Stretch: allows for **practicing new skills** on an assignment with higher stakes, complexity, or volume.

Be clear about the stretch and the skills to practice.

Build in support – or scaffolding – to help them be successful.

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Delegating a Stretch Assignment

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Practice Activity #3

Planning to Develop a Skill

Time 4 min

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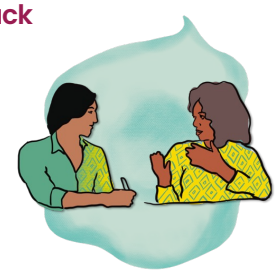
Investing with Feedback

- Check-Ins
- 2 x 2s
- Performance Evaluations



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How to Develop People

Get Aligned with Your Staff Person
Make sure you both agree about what you want to develop

Make the Implicit Explicit
Name the skill and break it down

Make a Plan of Action
Create development goals, identify the steps to take, and how to support them

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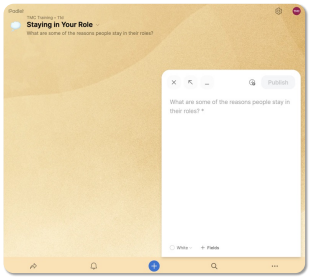
Padlet #2

What are some reasons people stay in their roles or at their organizations?

Time 2 mins



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Retaining Staff

Think about the whole experience – roles, goals, culture and relationships, pay, benefits, and hours.

- ✓ Be proactive – have a stay interview!
- ✓ Offer great compensation and benefits
- ✓ Invest in intangible benefits
- ✓ Maintain a healthy culture
- ✓ Don't retain everyone at all costs

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Reflection

zoom Chat

What's something you want to try moving forward?

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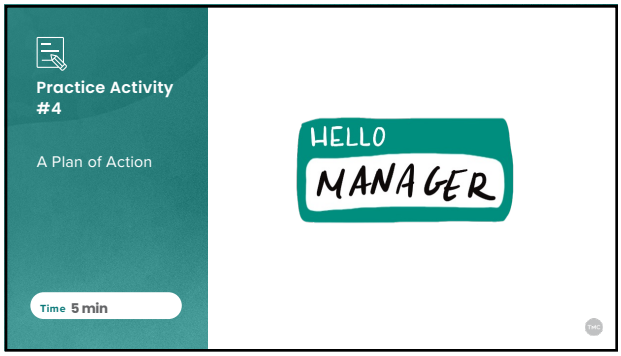
Practice Activity #4
A Plan of Action
Time 5 min
HELLO
MANAGER

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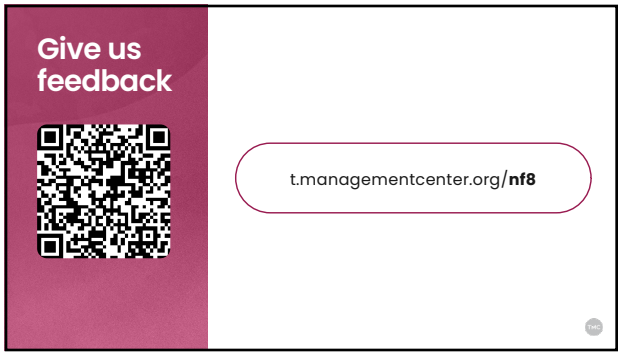
Give us feedback
t.managementcenter.org/nf8

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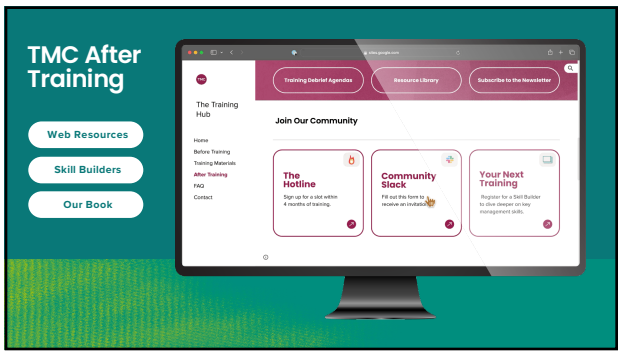
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