

PERFORMANCE BREAKTHROUGHS, INC. (PBI)



Guiding Your Journey to Excellence

PBI's Management Offerings

Does your organization have managers that people "would follow anywhere"? Are you one of them? Think about the loyalty, commitment, and performance you would get from a "follower" who felt like that. Not only is it the right thing to do, but the payback is absolutely worth the investment! PBI **differentiates** leaders from managers by using the expectations and "scorecard" of followers.

Leadership is more about vision. Followers will ask:

- "Is this the person/group that can figure out where we need to go?"
- "Is this the person/group that can help us get there?"

Management is more about execution. Followers will ask:

- "Are they fair?"
- "Are they consistent?"



Those questions form both the expectations (before) and evaluation scorecard (after) of followers. Whether leaders and managers realize it or not, they are being judged on the above criteria. PBI helps develop leaders and managers from that context. (We fully realize that sometimes an individual will play both the leader and manager role, so it's not always easy to segregate the roles as we've done above.)

Developing leaders and managers is generally done via a combination of workshops/courses that supplement workplace practice and feedback.

- We see **leadership roles** as inspiring people, modeling the core values, thinking strategically (vision, mission, core values, measures of success), communicating powerfully, developing people, cultivating external relationships, acquiring resources, getting new business, and leading change.
- We see **management roles** as more tactical: planning, organizing, directing, controlling, communicating, staffing, and decision-making on a daily basis.

PBI workshops/courses (which can be tailored to fit your needs or combined with follow-on consulting and/or coaching) help participants achieve **knowledge, skill, and confidence objectives**. A few of these objectives include:

- Improve interpersonal communication skills to gain more collaboration and trust
- Understand the importance of and commit to sharing the vision and mission of the organization
- Learn and practice the elements necessary for building and sustaining a motivational and highly productive work environment
- Create effective communications channels within the team
- Establish trusting relationships with and among team members
- Practice your team leadership and management skills and incorporate feedback from the class/facilitator

Experiential learning: Our leadership and management development work draws heavily on the experience of the students and coachees. We ask participants to think about that leader or manager they would follow anywhere and identify "What did they say or do? What did they not say or not do?" From that, we create a template of desired leadership traits and behaviors, which come from a personal and emotional connection and are in the context of our client organization.

PBI's Management Workshops

1. Foundations For Management Excellence

Foundations For Management Excellence is PBI's 3-day management development course that incorporates the levers of building and sustaining high performance organizations. It uses small group discussions, exercises, and learning from peers to teach practical and applied management development techniques and reinforce positive, enduring people management principles. Experienced as well as new managers can gain significant learning from this course and create personal/team action plans for immediate use. We have tailored and taught this workshop for Fairfax County and Fairfax County Economic Development Authority (EDA), Virginia. It accomplishes the following objectives:

Knowledge

- Develop a deeper understanding of your managerial values, preferences, and style
- Define the needed elements to build trust and assess the trust level within your group
- Describe the importance of recognition and rewards and identify strategies that are personalized to your staff's "unique motivators"

Skills

- Choose best practice manager character traits and behaviors to model
- Develop strategies to balance the people and task roles of management
- Articulate a vision that aligns the individual's work to the vision of the organization
- Leverage your follower's needs/wants and connect them to organizational goals
- Enhance productivity by effectively leveraging communications preferences
- Utilize self/time management principles in performing management functions
- Explain the factors needed to create your personal "Island of Excellence" and produce an action plan that describes your motivation and future commitments

2. Time Management for Frantic Professionals

Time Management for Frantic Professionals is PBI's applied, half-day course that allows participants to re-discover their self-management/time management strengths to help balance their many competing priorities. They will learn how their time wasters negatively impact their performance and the management functions of planning, organizing, directing, controlling, communicating, staffing, and decision-making. Participants will also learn 7 Survival Tips that lessen stress levels and enhance their confidence in gaining control over the events in their professional and personal lives. We have taught this course in Virginia for Fairfax County, the City of Alexandria, Towns of Vienna and Herndon, and Washington Gas. It accomplishes the following objectives:

Knowledge

- Learn/review basic time management principles
- Identify your major time-wasters and their impact on your productivity/performance
- Learn team-building strategies that effectively use time to enhance both individual and group productivity
- Think about "how to use time" from a management perspective

Skills

- Apply/tailor best practices of time management theories
- Distinguish "important vs. urgent" and focus on important work
- Commit to work habits that contribute to strategic goals
- Effectively use planning and scheduling tools to manage multiple priorities
- Lessen personal stress by increasing individual confidence levels

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3. Look Who's Talking to Your Customers

Look Who's Talking to Your Customers is PBI's applied half-day course that helps employees/staff and managers learn the principles, skills, and techniques of establishing and delivering effective customer service (which we stretch to Customer Delight) to their internal and external customers. Desired course outcomes will be evaluated through the student's manager. Students will be encouraged to work with their manager to determine or revisit the department's desired service outcomes and processes to ensure the employee is delivering the desired outcome and providing a very positive experience. We have recently taught this course for the Northern Virginia Community College, Towns of Vienna and Herndon in Virginia, and the Washington, D.C. Chapter of Federally Employed Women. It accomplishes the following objectives:

Knowledge

- Describe the concept and importance of Customer Delight
- Identify the core elements of Customer Delight
- Understand personal communications preferences to adapt to others
- Identify individual, team, and organizational barriers to delivering Customer Delight

Skills

- Determine how you will apply/personalize the Customer Delight concept
- Practice utilizing effective Customer Delight techniques in a team-based environment
- Determine and develop team-based solutions/approaches to overcome resource and organizational barriers
- Strengthen individual, team, and organizational trust

4. Project Management

Project Managers are responsible for balancing a project's scope, cost, and schedule to help teams plan, manage, and control their work efforts. PBI provides project management workshops to help organizations and/or individuals work smarter and more effectively to produce products, services, and effective teams that think and work collaboratively to get the job done. Beyond the basic project management knowledge and skills (charters, life cycle approach, work breakdown structures, risk management plans, communication plans, etc.), these workshops provide applied and contextual instruction on managing and leading projects; negotiation and conflict management; project estimating, measures, and control; and managing risk and complex projects.



There's a wonderful synergy between PBI's organizational excellence (High Performance Organization) work – which **positions** organizations for excellence... and this project management work – which helps teams and the organization **execute** that which they've committed to accomplish.

PBI's Management Consulting/Organizational Development

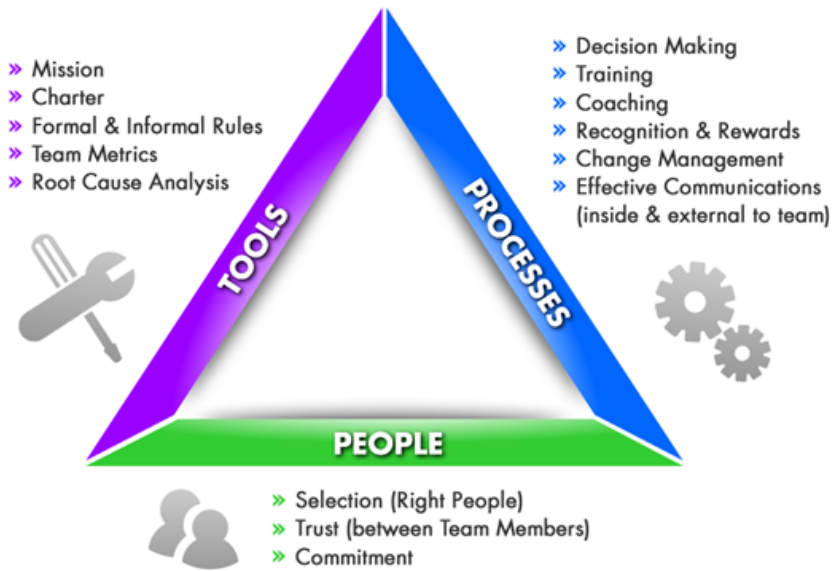
Building and Sustaining a High Performance Team (HPT)

Are you just a workgroup, a team, or a High Performance Team (HPT)? Many times "teams" are formed with little forethought or planning – "Poof ... you're a team!" PBI believes that teams are appropriate when the tasks that people perform are interdependent – where different members of the team need each other's support to make the whole better than the parts (such as a surgical team, where each person has their own specific role and responsibilities). We define a workgroup as when everyone is performing the same or a similar task independently (such as multiple floor nurses), and this should not be confused with or called a team.

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Teams have many different purposes, come in a variety of structures, and have a wide range of lifespans. They typically go through a sequence of stages – Forming, Storming, Norming, Performing, and Mourning (the closure of the team) – although changes can cause them to cycle back and repeat certain stages.

As illustrated by our triangle graphic, we have found that HPTs require three critical components: Tools, Processes, and People. All are important, but the people element is even more critical in teams (vs. organizations) because of the smaller size of the group and the essential/utility role played by every single individual in the team.



If you build, nurture, and reinforce the team, your team will reward you by delivering outstanding results ... and will be positioned (ready, willing, and able) for the next round of challenges. This work requires a commitment to assess/identify your team against HPT criteria, leverage the strengths, and work to improve those areas that need attention.

We are experts in building High Performance Teams, and have our own proprietary "Framework for Team Excellence," which we use for consistency in the assessment, diagnosis, and planning phases. Our approach is unique in that we focus energy on desired Team Behaviors and Team Results – translating the oft-used phrase "We need more team around here" into an approach that is simple, pragmatic, and engages all team members. We firmly believe that trust is a key component of success in team engagements. To help us move toward the High Performance Team goal, we use the following "performance chain" to guide our work:



We handle HPT engagements on a case-by-case basis, given the unknown nature of the current and desired states and the work/time needed. Call us for a no-cost consultation

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PBI's Management Coaching

Coaching is "an ongoing partnership that helps clients produce fulfilling results in their personal and professional lives. Through the process of coaching, clients deepen their learning, improve their performance, and enhance the quality of their life. Coaching concentrates on where clients are today and what they are willing to do to get where they want to be tomorrow." (This definition is from the International Coach Federation.)



Management Coaching

PBI provides one-on-one or small group coaching to support the learning, professional, and personal development of leaders, managers, and supervisors. The following are typical topics that are covered in a one- to six-month coaching engagement:

- **Relationships** – relating better with leaders/managers, clients, staff, and/or peers
- **Managerial Style** – seeing themselves as others see them; understanding the impact of the gap; making the commitment to change; undertaking a multifaceted approach to behavior change
- **Collaboration, Trust, and Communication** – building collaboration and trust in your team; establishing/communicating a Vision; leading/managing change to "win hearts and minds"
- **Performance Consulting** – diagnosing/solving performance problems; rewarding excellence
- **Developing the 2nd Tier** – grooming the next level of managers and leaders using a performance model/comprehensive approach; training managers how to be coaches; helping new managers understand role expectations; developing competencies

We can provide coaching in a "pay as you go" approach or via a "package" of sessions (the number, frequency, and time-duration to fit your needs).

Suggested issues to consider when choosing a coach include the following:

- **Background and Experience** – Can the coach relate to your situation? Has the coach been a senior executive? Has the coach had at least one major career transition in their life? Does the coach seem to have a good life/work balance?
- **Chemistry** – Did you hit it off when you met with or interviewed the coach? Did you make a good connection with the coach or have a good feeling about him/her? Have you interviewed at least 2-3 coaches before making your selection?
- **References** – How long has the person been a coach? How successful has he/she been as a coach? Can they provide references from others they have coached?
- **Coaching Philosophy and Approach** – What is the coach's primary philosophy and approach to coaching people? Do you agree with it? Do you think it will work for you?
- **Certifications** – Is the coach officially certified? If so, by what organization(s)? If not, why not? What other certifications does the coach have?
- **Other Aspects** – Can you easily meet with the coach locally? Can you have some sessions via telephone? Do you feel comfortable with the coach's gender and ability to understand your situation?