Building Successful High-Performance Teams

Empowering your staff & your firm

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Your Presenter

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AXA

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Risk Manager, AXA XL, Design Profession Loss Prevention & Client Education (June 2016)

14 years, A/E/C Project Delivery Consultant, PSMJ Resources, Inc. and Construction Management Consultant & Trainer (2002-2016)

13 years, Senior Project Manager of design/build environmental engineering projects, The RETEC Group, Inc. (1989-2002)

- Certified Project Management Professional (PMI)
- B.S., M.S.(abt) Colorado State University
- M.B.A. University of Denver
- 7 years - mining industry

Agenda

1. Where do you add value?

2. Five Steps to Delegation & Feedback

3. Program Wrap-up

Workshop Learning Objectives (2.0 AIA CES LUs)

1. In this program, through the examination of the five steps to 2+2 feedback, attendees will discover the definition, use and relevance of the five components of feedback: balanced, timely, specific, focused and follow-up; for use in creating a feedback process of encouragement based on a sincere desire to support staff success.

2. In today's program participants will learn how to distinguish and determine the difference between high-value and low-value activities in their work environment; and explore the high-value activities that should be the focus of their daily actions.

3. As a result of completing this program attendees will have acquired the tools to plan their work assignments and prepare for the handoff of the assignment to their staff in a well-defined framework; providing more successful outcomes for the delegator and delegatee.

4. At the conclusion of this program attendees will have this slide deck to explain and communicate the importance of planning for the delegation of work, defining and communicating the assignment expectations, specifying the schedule and the available hours to complete the task, and assessing progress through multi-step follow-up actions with staff.

WIIFM

- Increases job performance

- Decreases workloads

- Allows you to focus on high-value tasks

- Trains your replacement

WIIFM

- Vehicle for mentoring & coaching

- Provides opportunity for staff

- Builds teamwork

- Elevates employee morale

Where do you add value?

1

Where do you add value?

Contributions that make your firm better, more profitable <u>and</u> a nicer place to work

- Happy clients
- Successful projects
- Profitable projects
- Save money/resources
- Win more work

- Problem Solver
- Get the work done
- Happy Employees
- Grow the firm

Where do you add value?

HANDOUT: Self-assessment
High-Value Activities

Part 1

5 **HIGHEST-VALUE ACTIVITIES**

→

- Write Letter **H** next to five highest-value activities

OR

- Write-in highest-value activities at the bottom of the handout

Where do you add value?

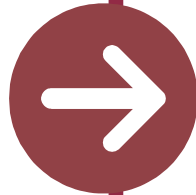**HANDOUT:** Self-assessment
Low-Value Activities

Part 2 →

5 LOWEST-VALUE ACTIVITIES

- <u>Write Letter **L**</u> next to five lowest-value activities

OR

- <u>Write-in</u> lowest-value activities at the bottom of the handout

Where do you add value?

HANDOUT: Self-assessment
High-Low Value Activities

Part 3

→ **Estimate:**

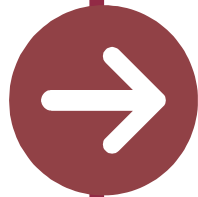Percentage (%) of work week spend on **each of the ten** activities

Barriers?

Where do you add value?

HANDOUT: Self-assessment
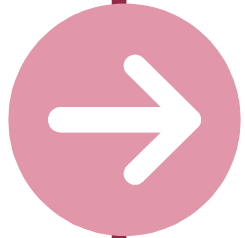**Single Obstacle**

Part

4 →

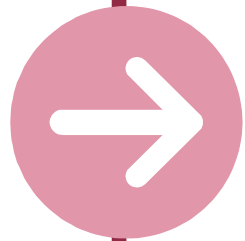**What is your single biggest obstacle to delegation?**

Select one obstacle or write-in an obstacle

Where do you add value?

Check-in

→ Are you spending enough of your time on high-value activities?

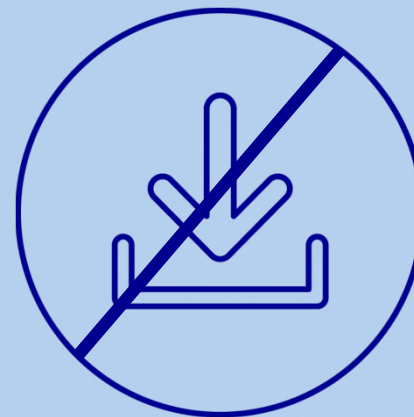→ Can you manage your biggest barrier to delegation?

Five Steps to Delegation

2

What is delegation?

Assignment of responsibility to another person
to carry out specific activities, yet remain accountable
for the outcome of the delegated work. (Wikipedia)

Synonyms:
- entrusting
- giving
- empowering

Not just a download

Why Delegate?

The Delegation Payoff

2 DELEGATEE's time to complete task

1 Your time to COMPLETE routine task

3 Your time to DELEGATE routine task

Time to complete routine task

1 2 3 4 5 6 7 8 9 10

Number of times routine task is completed
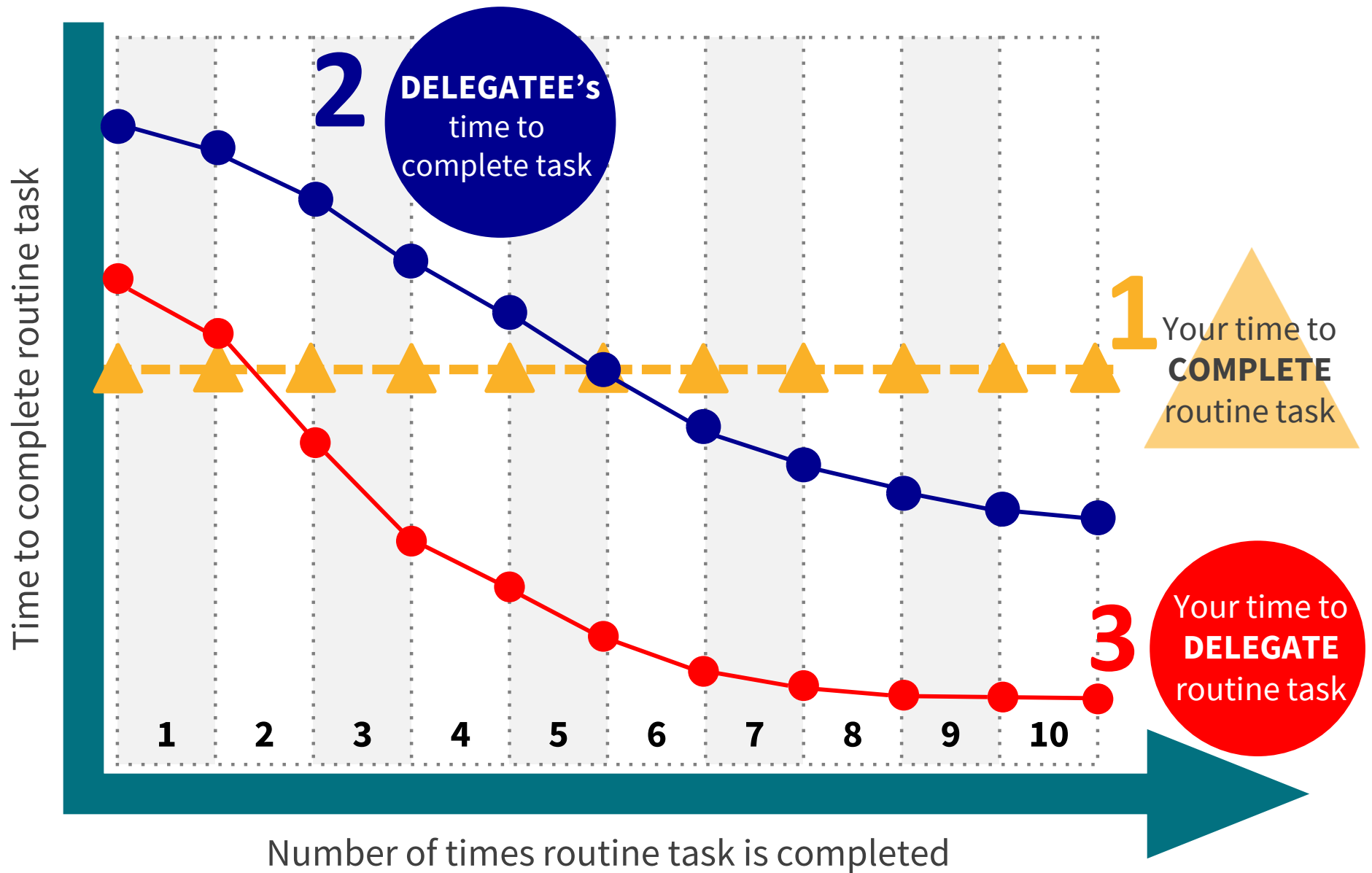
Good delegator requirement

Set people up for success

Role of Delegator

PLAN

what to delegate

DELEGATE

dynamic process

FEEDBACK

2 + 2

- Planning from proposal phase through project completion

- Define the work to be completed

- Obtain Staff Commitment

- Follow-up

- Provide balanced feedback on execution & deliverables

5 Steps

Five Steps to Dynamic Delegation

1. **PLAN** – the assignment and the handoff

2. **DEFINE & COMMUNICATE**– be specific and detailed about the deliverable. Clearly communicate expectations.

3. **FRAMEWORK** – schedule (due date) and level of effort (hours)

4. **FOLLOW-UP** – manage communications and status of work

5. **PROVIDE FEEDBACK** – balanced discussion on execution and outcome

Step 1: Plan

PROPOSAL

- Engage early
- Don't skip

PROJECT START

- Prepare for handoff discussion

Plan - Proposal

Proposal - Engage

1) <u>MOST IMPORTANT:</u> Engage staff in proposal process

2) Identify project team

3) Communicate any role they may have in proposal

Plan - Project Start

Project Start - Organize

1) Review proposal, contract, budget, & schedule

2) Determine all project work at a task level

3) Determine resources needed (skills required) for each task

Plan - Project Start

Project Start - Organize

4) Determine which tasks (and range of responsibilities) to delegate

5) For junior staff, determine:
   - Routine opportunity
   - Learning opportunity
   - Available learner

Plan - Project Staffing (Resource Loading)

Task No.	Sub Task	Project Task	Task Manager	Start Date	Finish Date	PM $130	Eng $95	Arch $105	CADD $70	Admin $45
**Project Schedule & Resources (template)**									
100		**Project Management**								
	101	Project Management Plan	PM	1/15	1/22	6	2	2	1	0
	102	Project Kick-off meeting	PM	1/19	1/26	10	5	5	1	1
	103	Project Status Report	PM	1/22	6/15	30	6	6	3	0
	104	Monthly Project Meeting	PM	1/29	6/17	12	6	6	0	0
	105	Subcontractor Management	PM	1/15	5/31	40	0	0	0	0
200		**TASK 2**								
	201	Task	Name 1	Date	Date	24	40	16	8	0
	202	Task	Name 1	Date	Date	24	24	24	24	0
	203	Task	Name 1	Date	Date	24	24	8	48	8
300		**TASK 3**								
	301	Task	Name 2	Date	Date	40	0	80	20	0
	302	Task	Name 2	Date	Date	16	8	60	40	16
	303	Task	Name 2	Date	Date	26	8	40	8	0
					Subtotal	252	123	247	153	25

Step 2 Define & Communicate

COMMUNICATION QUIZ	COMMUNICATION METHOD	SPECIFICS
• You wanted what?	• Best form of communication	• The assignment handoff • Define the work to be completed • Manage the ongoing work

COMMUNICATION QUIZ
Did you catch all of that?

Directions

Communication Quiz

Nº1

QUICKLY

review the sentence on the following slide

Nº2

Count

the number of times the

letter f

appears in the sentence

Nº3

KEEP YOUR ANSWER TO YOURSELF!

AXA

Fame and fortune will be the result of years of consistent focus on successful end results if you remember the value of taking big steps.

Raise your hand to answer

How many of you counted only . . . .

__ **1**

__ **2**

__ **3**

__ **4**

__ **5**

__ **6**

__ **7**

__ **8**

__ **9**

Fame and **f**ortune will be the result of years of consistent **f**ocus on successful end results if you remember the value of taking big steps.

Fame and **f**ortune will be the result **of** years **of** consistent **f**ocus on succes**f**ul end results **if** you remember the value **of** taking big steps.

Did you count 8?

What did you miss?

- When you communicate with people are they comprehending **what you think** you are telling them?

Confirm Understanding

What is the best form of communication?

Communication Media	Email	Phone	In-person
Issuing simple instructions			
Delivering bad news			
Confirming an understanding			
Discussing a simple issue			
Discussing a complex issue			

AXA

Specifics – The assignment handoff

Set up for success

1. Clearly define the task/tasks to be completed

2. Provide sample of work or source material for assignment

3. Is all the information available to do the work?

Specifics – The assignment handoff

Assignment Risks

1. Discuss all risks with task completion when defining the work
   - areas of concern
   - potential problems

2. Have a contingency plan ready to address problems

Step 3: Framework

Always consider

- Staff's level of experience
- Familiarity with the project
- Projects you have worked on together
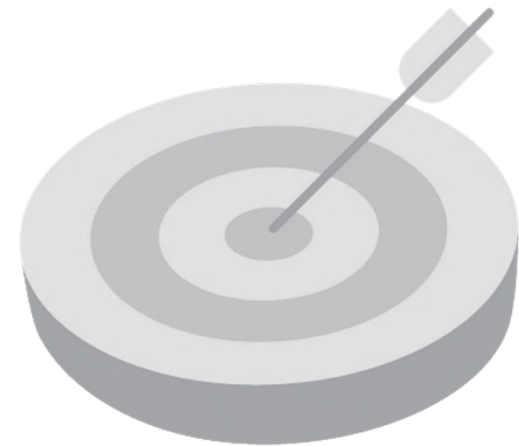
SCHEDULE

- Defined due dates

LEVEL OF EFFORT

- Define hours available to do the work
- Manage the ongoing work
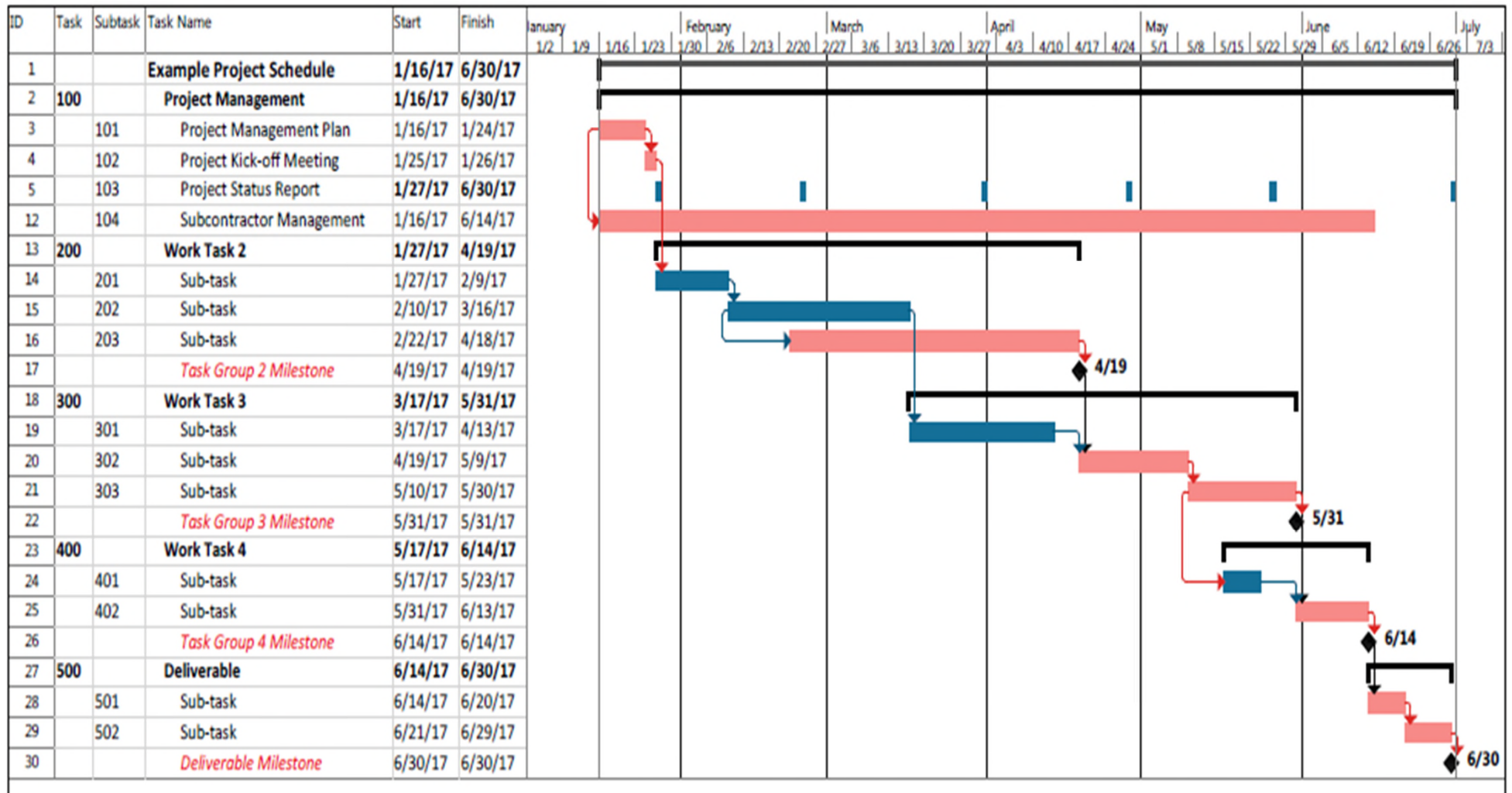
Framework - Schedule

Set up for success

1. Clearly state the time frame within which the work must be completed

2. Define a due date and stick with it

3. Discuss schedule for completing portions of the task

Schedule – Milestone Chart

Task Description	Task Mgr	Start Date	Finish Date	Budget	PM Hrs	Task Mgr Hrs	CAD Hrs	Admin Hrs	Sr Mgr Hrs
Project Management									
Ongoing project management	PM	1-Feb	31-Mar	$480	4.0				
Prepare PMP	PM	1-Feb	8-Feb	$150	0.5	0.5			
Conduct Kick-off Meeting	Team	8-Feb	8-Feb	$212	0.5	0.5	0.5		0.5
Task - Report Preparation									
Develop report outline	TM	9-Feb	12-Feb	$160	1.0	0.5			0.5
Prepare draft figures	Cad	15-Feb	4-Mar	$1,185	2.0	3.0	10.0		
Prepare draft tables	TM	15-Feb	4-Mar	$1,283	3.0	10.0		2.0	
Prepare draft text	TM	29-Feb	18-Mar	$2,100	5.0	8.0	2.0		
Complete internal review	Sr Mgr	21-Mar	24-Mar	$571	1.0				3.0
Incorporate comments	TM	25-Mar	29-Mar	$531	2.0	2.0	1.0	1.0	
Issue report to client	TM	31-Mar	31-Mar	$587	2.0	2.0	1.0	2.0	
Totals				$7,259	21.0	26.5	14.5	5.0	4.0

Schedule – Gantt Chart

ID	Task	Subtask	Task Name	Start	Finish
1			**Example Project Schedule**	1/16/17	6/30/17
2	100		**Project Management**	1/16/17	6/30/17
3		101	Project Management Plan	1/16/17	1/24/17
4		102	Project Kick-off Meeting	1/25/17	1/26/17
5		103	Project Status Report	1/27/17	6/30/17
12		104	Subcontractor Management	1/16/17	6/14/17
13	200		**Work Task 2**	1/27/17	4/19/17
14		201	Sub-task	1/27/17	2/9/17
15		202	Sub-task	2/10/17	3/16/17
16		203	Sub-task	2/22/17	4/18/17
17			*Task Group 2 Milestone*	4/19/17	4/19/17
18	300		**Work Task 3**	3/17/17	5/31/17
19		301	Sub-task	3/17/17	4/13/17
20		302	Sub-task	4/19/17	5/9/17
21		303	Sub-task	5/10/17	5/30/17
22			*Task Group 3 Milestone*	5/31/17	5/31/17
23	400		**Work Task 4**	5/17/17	6/14/17
24		401	Sub-task	5/17/17	5/23/17
25		402	Sub-task	5/31/17	6/13/17
26			*Task Group 4 Milestone*	6/14/17	6/14/17
27	500		**Deliverable**	6/14/17	6/30/17
28		501	Sub-task	6/14/17	6/20/17
29		502	Sub-task	6/21/17	6/29/17
30			*Deliverable Milestone*	6/30/17	6/30/17

Framework: Level of effort

Set up for success

1. Estimated hours to complete a draft of the work

2. Estimated hours for revisions and final document

3. Budget vs. reality

• Ask: Is this reasonable given your understanding of the work?

Level of Effort

Project Schedule & Resources (template)										
Task No.	Sub Task	Project Task	Task Manager	Start Date	Finish Date	PM $130	Eng $95	Arch $105	CADD $70	Admin $45
100		**Project Management**								
	101	Project Management Plan	PM	1/15	1/22	6	2	2	1	0
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300		**TASK 3**								
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	302	Task	Name 2	Date	Date	16	8	60	40	16
	303	Task	Name 2	Date	Date	26	8	40	8	0
					Subtotal	252	123	247	153	25

Step 4: Follow-up

Always consider

- Staff's level of experience
- Familiarity with the project
- Projects you have worked on together

Excellence in Delegation

- Organized Delegation
- Daily Check-in
- Weekly confirmation
- Reinforcing Ownership

AXA

Follow-up: Delegator

Organized

1. Record date you delegate task

2. Record date you expect it to come back to you

3. Have place in organizational system to list delegated tasks

4. Keep your list current

5. Review list on weekly basis

Follow-up: Delegator

Daily Check-in

1. Know who is and is not working on your project

2. Update team on project changes

3. Clarify expectations and assignments

4. Monitor areas of task that you consider to be high risk

5. Be available to answer questions or set time to meet

Follow-up: Delegator

Confirm Weekly

1. Designated staff are working on project

2. Staff are charging to correct project & task numbers

3. Hours charged are appropriate & within budget for assigned work

4. Follow-up on areas of a task that you consider to be high risk

5. Provide Feedback

Follow-up: Delegator

Reinforce Ownership

1. Does not interfere during performance of task, but is fully informed

2. Takes on role of adviser—major decisions are agreed upon jointly

3. Uses delegated task and opportunity to develop delegates' skills and experience

Step 5 Feedback

Bad Feedback	Good Intent	2 + 2 Feedback
• The "Poop Sandwich"	• Celebrate success • Provide correction	• 5 Components

Bad Feedback – the "Poop Sandwich"

Compliment - Warm up for real feedback

The real feedback - **Criticism**

Compliment - Soften the real feedback
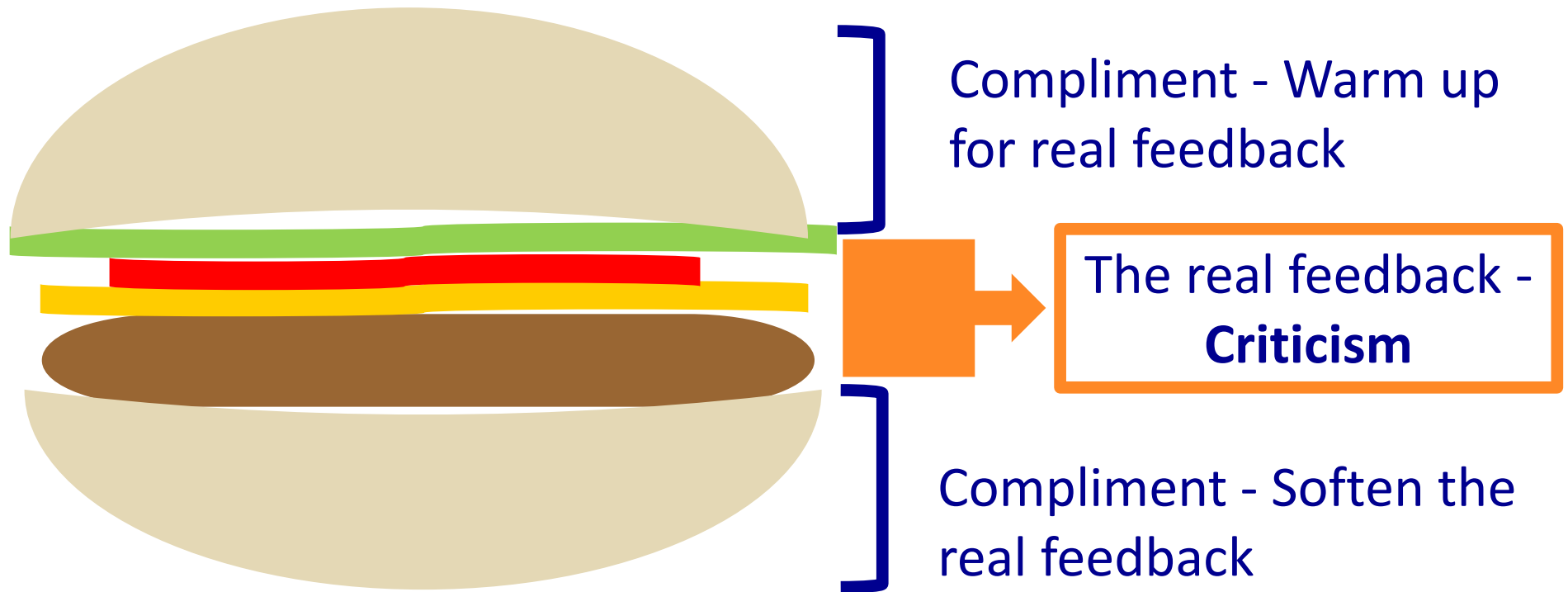
STOP YOURSELF!

Intent – the feedback differentiator

What is feedback intent?

Good intent

1. A celebration of success as well as a correction of problems

2. A process of encouragement with a sincere desire to help

3. Need to promote a positive, learning culture with accountability

4. Goal of achieving a meaningful and comfortable exchange of perspectives

Based on the book: Formula 2 + 2, The Simple Solution for Successful Coaching, Ken Blanchard Series, Doug Allen and Dwight W. Allen , 2004.

2 + 2 Feedback Framework

Straightforward Process
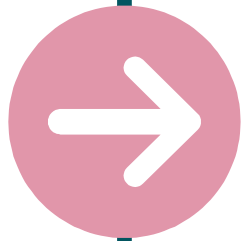
Two compliments - recognize successes

THEN
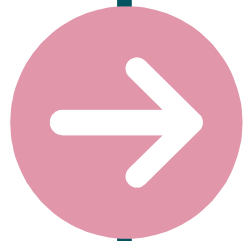
Two suggestions - for improvements

Based on the book: Formula 2 + 2, The Simple Solution for Successful Coaching, Ken Blanchard Series, Doug Allen and Dwight W. Allen , 2004.

2 + 2 Feedback Components

Components

- **Balanced**
- **Timely**
- **Focused**
- **Specific**
- **Follow up**

Based on the book: Formula 2 + 2, The Simple Solution for Successful Coaching, Ken Blanchard Series, Doug Allen and Dwight W. Allen , 2004.

2 + 2 Feedback Components

Balanced

- Reinforce strengths

- Recognize successes so they can be reinforced and repeated

- Provide opportunities for improvement

- Compliments are <u>not</u> a prelude to discussions on improvements

- BOTH are equally important

- BOTH are offered sincerely

2 + 2 Feedback Components

Timely

- Powerful feedback has a short shelf life

- Give close to time assignment is completed

- Do not save up feedback

- Must be given regularly

- You have failed as a manager
  - if staff are surprised by your feedback during a formal performance appraisal

2 + 2 Feedback Components

Focused

- Not a comprehensive laundry list

- Focus on most important performance areas

- Identify priority areas of improvement

- Avoid the fire hose effect - a long list of items that are quickly forgotten

2 + 2 Feedback Components

Specific

- Provide detailed examples

- Always provide specific examples for each feedback item – the more specific the better

- Examples should directly apply to the issues at hand

- Critical to credibility

2 + 2 Feedback Components

Follow-up

- Develop an improvement plan

- Access progress at appropriate intervals

- Determine if the agreed-upon course of action is working

- Hold people accountable for agreed-upon changes

- Reinforce improvements

- Outline further need for change

2 + 2 Feedback Takeaways

Takeaways

- STRUCTURE - A 2 + 2 conversation provides structure for communication and problem solving

- PREPARATION - Effective feedback requires preparation

- THE PROCESS – A discussion of the 2 + 2 process <u>before</u> providing feedback improves the success of the discussion

- FOLLOW-UP - builds accountability

Good Feedback? or Bad Feedback?

Successful project completion

" Great job on the last project".

OR . . .

Good Feedback? or Bad Feedback?

Successful project completion

" Great job on the last project. I talked to the client and one of the things they were pleased about was the project was on schedule and within 3% of the original budget. They also mentioned that they enjoyed your pro-active communication. I really appreciate that you and the project team were able to accomplish this".

Good Feedback? or Bad Feedback?

Poor attitude

"You don't seem to be paying very close attention to your work and I am not sure what the problem is".

OR . . .

Good Feedback? or Bad Feedback?

Poor attitude

"On the project we just completed, I had to send my markups back to you three times before they were all addressed, usually one round of comments and revisions is adequate. Additionally, when I tried to chat with you about questions you may have had on my comments, you shrugged and said you "had it" and then it became apparent you didn't.

Let's set a time to talk about what needs to be done differently to more efficiently address markups and improve our communications going forward".

Program Wrap up

Dynamic Delegation & Feedback

Where do you add value?

1. What are your highest value actions and activities?

2. What are your biggest obstacles to delegation?

3. What changes could you make that would allow you to do more high-value activities?
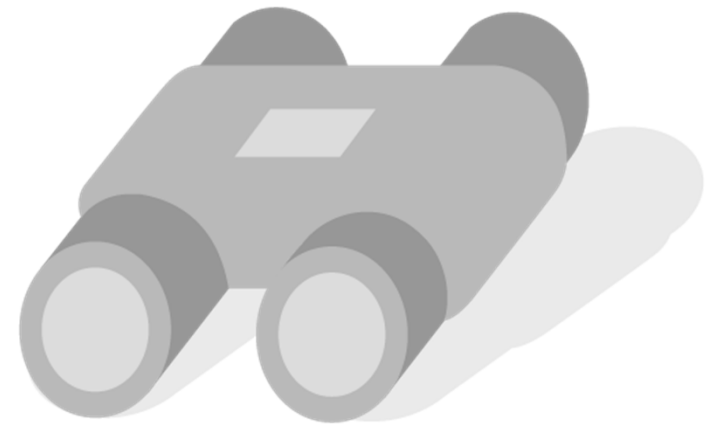
Dynamic Delegation & Feedback

5 Steps

1. Plan

2. Define & Communicate

3. Framework

4. Follow-up

5. 2 + 2 Feedback
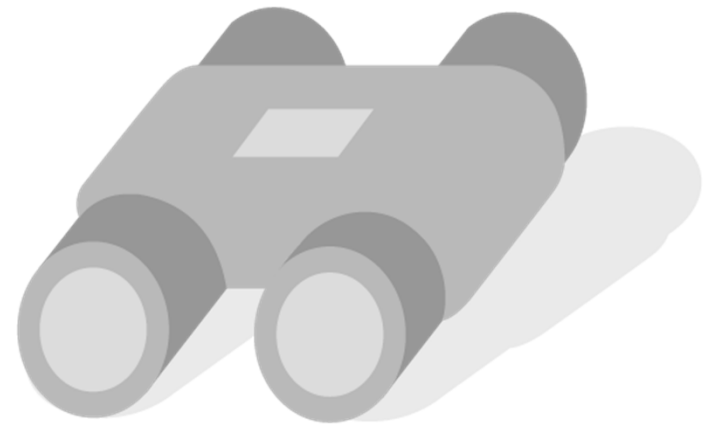
Dynamic Delegation & Feedback

5 Components of Feedback

1. Balanced

2. Timely

3. Focused

4. Specific

5. Follow up
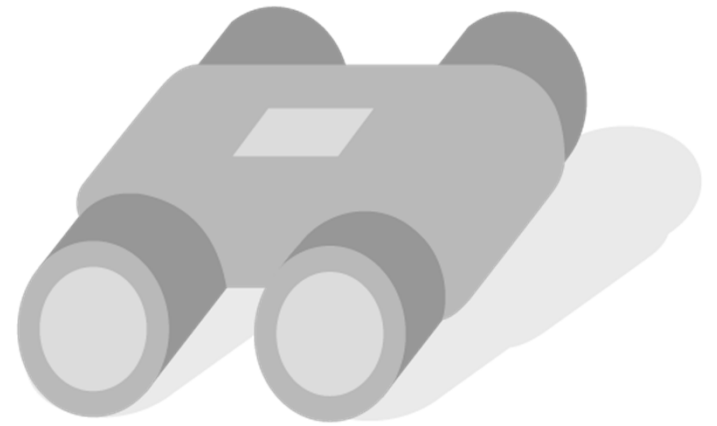
Questions?

Connect with me!

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Patricia (Patty) Huntley

Risk Consulting

Know You Can

Thank you