



Judy Hartley & Associates

Supervising for Performance – LEADERSHIP ESSENTIALS Series Overview



Judy Hartley Biographical Sketch on last page of this document

Easily Customizable for In-House Deliveries

Professional Development Series for Front Line Leaders

* Utilizing SOCIAL STYLE and Versatility Profiling via

TRACOM GROUP
THE SOCIAL INTELLIGENCE COMPANY

Judy Hartley & Associates
LEADERSHIP and TEAM DEVELOPMENT
<http://www.JudyHartleyTraining.com>



LEARNING EXPERIENCES AND PROCESSES

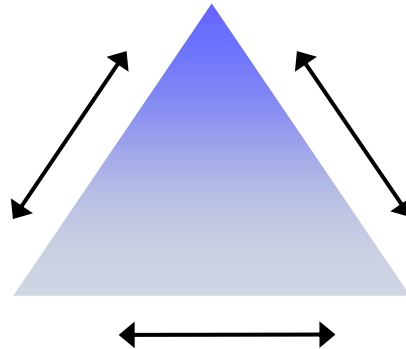
The Supervising for Performance *LEADERSHIP ESSENTIALS* Series utilizes a wide variety of learning experiences and processes that includes:

- ▶ Customized Leadership Competencies Assessment instruments tying training content to your company-specific performance management systems
- ▶ Facilitator-led large group presentations and discussions
- ▶ Small group exercises and skill practices
- ▶ Current training videos and case studies
- ▶ Multiple feedback instruments, including self-assessment and multi-rater assessments
- ▶ General assignments for all participants to apply learning back on the job
- ▶ Individualized post-class application planning
- ▶ Interactive assignments that encourage the ongoing involvement of the participant's manager and/or direct reports
- ▶ As desired, follow-up content/learning assessments (review quizzes) to reinforce key concepts, serve as a means of learning evaluation and foster accountability for learning
- ▶ Job-aids to serve as an on-the-job reminder of critical skills and techniques, customized to YOUR COMPANY if desired
- ▶ As desired, previews and reviews of module objectives, key points to reinforce and ideas for skills application, made available to both participants and their managers to help foster training transference back-on-the-job and ensure training return-on-investment
- ▶ As desired, job aids and learning content review materials made available electronically and may also be linked in with company intranets, etc.
- ▶ As desired, individualized or group verbal and/or internet-supported coaching from facilitators

TRAINING RETURN ON INVESTMENT (“ROI”) THROUGH SHARED RESPONSIBILITY AND AGREEMENT

Instructors

- Design relevant content
- Accommodate business needs with regard to scheduling of training
- Offer practical “hands on” exercises
- Accommodate adult learning style needs
- Provide job aids and exercises to promote on-the-job application of learning



Participant’s Manager

- Meet with employees before sessions to discuss expectations and identify special requests
- Meet with participants 2-4 weeks after training to ask about and discuss plans for and efforts made to apply skills being learned
- Provide opportunities to apply skills
- Provide feedback for applying skills

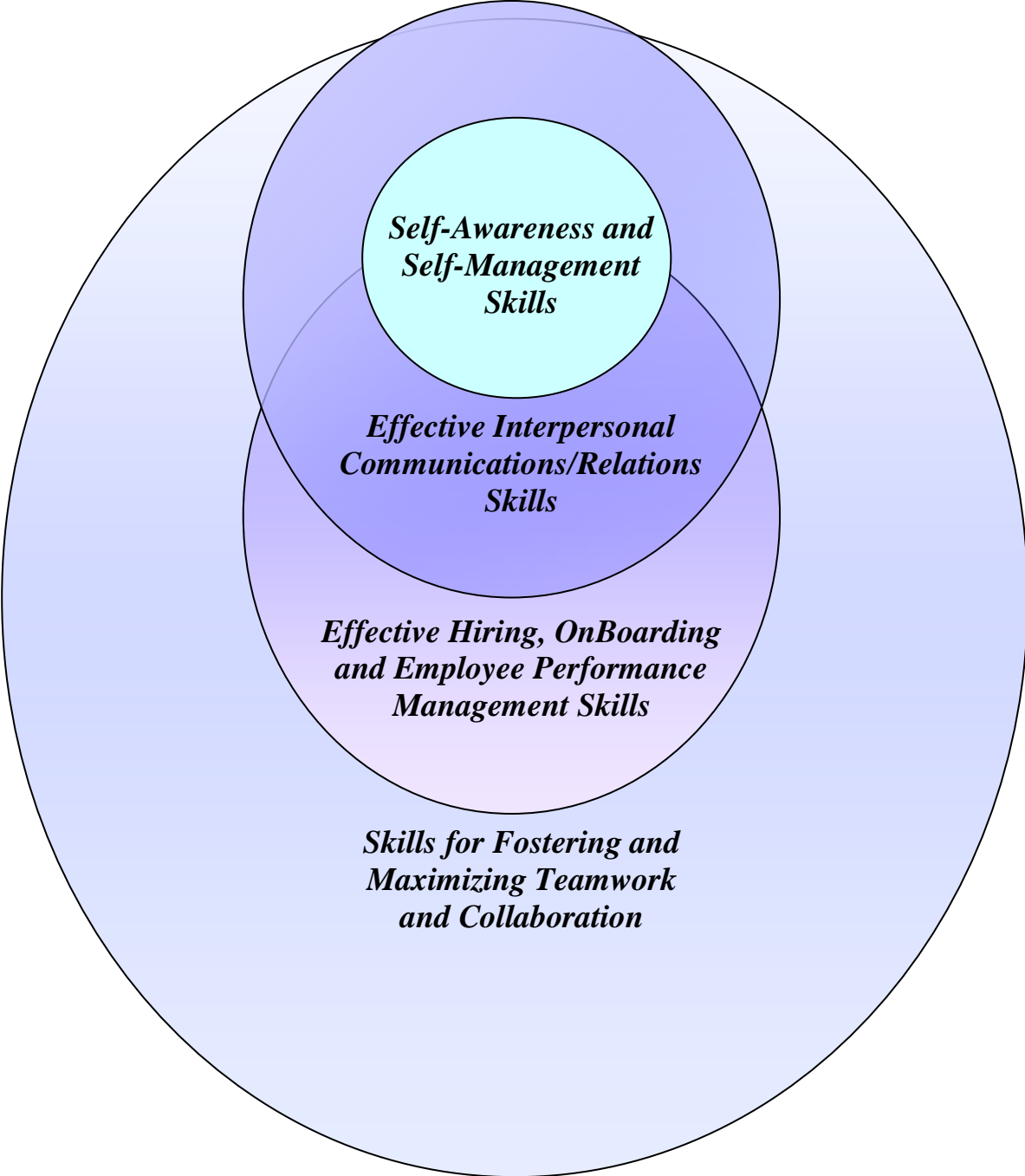
Participant

- Attend all sessions and participate fully
- Do requested pre-work and all exercises during sessions
- Follow up with your manager to discuss plans for and efforts made to apply skills being learned
- Seek opportunities to share learning and apply skills at work with direct reports

ROI Insurance Through Program Design



LEADERSHIP DEVELOPMENT MODEL



STANDARD* LEADERSHIP DEVELOPMENT MODULES/SERIES

Self Awareness and Self-Management

- Role of the Leader -- *Making the Shift from Hands-on Work to Leading Others*
- Leadership Style and Versatility*

**Using SOCIAL STYLE and Versatility profiling via*

** Style Awareness and Versatility reinforced throughout remainder of series*



Effective Interpersonal Communications/Relations Skills

- Conflict, Communication, and Collaboration (Principled Negotiations)*

Additional module of training not included in Twin Cities LEADERSHIP ESSENTIALS OPEN series but available for in-house delivery:

- *Individual and Team Time Management*

Effective Hiring, OnBoarding and Employee Performance Management

- Impact Hiring and *Effective OnBoarding** -- *Laying the Foundation for Success*
- Employee Performance Management and Coaching*

Skills for Maximizing Teamwork and Collaboration

- Maximizing Team Performance*
(*Twin Cities OPEN Series will also include some "basics" of Project Management*)

Additional modules of training not included in Twin Cities LEADERSHIP ESSENTIALS OPEN series but available for in-house delivery:

- *Customer-Focused Problem Solving and Process Improvement (full day program)*
- *Project Management (full day program)*

** Additional topics available and/or may be created and added as desired by client
Topics may also be deleted, combined, shortened or expanded as desired by client*

WHO IS SUPERVISING FOR PERFORMANCE DESIGNED FOR?

- ▶ Supervisors accountable for managing one or more individual contributors
- ▶ Supervisors who have full hiring and firing authority over one or more employees
- ▶ Individual Contributors/Professional Staff being groomed for future leadership responsibilities
- ▶ Supervisors new to a leadership position
- ▶ Middle managers needing foundational tools and/or a refresher course

Standard Training Materials:

- ▶ Participant Guide: one per class
- ▶ Assessment instruments and assignments are distributed throughout the series
- ▶ Job Aid Cards and electronic files as desired

Scheduling Options:

Supervising for Performance is designed as a spaced-learning/ongoing professional development series for those in first-line leadership positions. Most typically, it is delivered one day per month or one day every two weeks, over the period of several months, but the program is flexible enough to be delivered in shorter or longer time spans.

Role of the Leader – Making the Shift from Hands-on Work to Leading Others

Summary: Learn and discuss with others what it means to *make the shift* from hands-on work to leading others. Better understand the importance of interpersonal communication skills in the leadership role and the need to *let go* of personally *doing all work*, focusing more on delegating to and directing the work of others, setting others up for success and coaching them to achieve it. In addition, learn skills and techniques for influencing others to help gain commitment and buy-in to new ideas and necessary changes.

Benefit: *When supervisors are clear on their role, focus on doing the right things and know how to effectively delegate work to others, their personal productivity as well as that of their staff is maximized. Supervisors who understand organizational direction and are able to help sell ideas and changes, ensure organizational alignment around business goals.*

Role of the Leader is designed for:

- ▶ Supervisors/Managers new to a leadership position
- ▶ Supervisors/Managers accountable for managing one or more individual contributors
- ▶ Individual Contributors/Professional Staff being groomed for future leadership responsibilities
- ▶ Supervisors/Managers who have never received formal leadership training
- ▶ Supervisors/Managers who are seeking foundational tools and/or who are seeking a refresher course on tools/techniques for effective supervisory leadership

Class Objectives

- Increase awareness of what's required to be a great boss/great first-line leader
- Identify the multiple constituencies a first-line leader serves
- Describe phases of change and their impact on one's success in the role of a first-line leader
- Describe traps/pitfalls common to new leaders and how to avoid these
- Increase awareness of personal motivation needs and how they may impact effectiveness as a first-line leader
- Identify and use important interpersonal influence skills to effectively sell ideas to others in the organization (downwards and upwards)
- Recognize the impact of trust and credibility on the ability to influence others, and identify factors that build and destroy this trust

Applied Skills

- ▶ Recognize and fulfill increased communications responsibilities inherent in the role of a first-line leader
- ▶ Avoid traps/pitfalls common to new leaders
- ▶ Make effective decisions about which work assignments to complete personally and which to delegate to others
- ▶ Effectively delegate work to others by communicating performance expectations and setting up systems to monitor
- ▶ Understand how to foster buy-in from others to new ideas and change
- ▶ Clearly walk and talk your leadership values and priorities in order to build personal trust and credibility

Optional Assessment Instruments:
Leadership Competencies Assessment (customizable)

Personal Inventory of Needs

Course Length: 1 day

Leadership Style and Versatility*

* Style Awareness and Versatility also reinforced throughout remainder of series

Summary: Gain an understanding of two basic dimensions of behavior that create differences in personal style/SOCIAL STYLE. Increase awareness of personal Style strengths and potential blindspots, plus general expectations and preferences of various Styles. Develop skills in adapting one's own Style to work more effectively with various individuals and to increase overall effectiveness as a leader.

Benefit: *Greater awareness of your leadership Style in the workplace, and an increased ability to adapt to differences in people, improves communication, reduces interpersonal tension, and allows employees to focus on productivity.*

Leadership Style and Versatility is designed for:

- ▶ Supervisors/Managers new to a leadership position
- ▶ Supervisors/Managers accountable for managing one or more individual contributors
- ▶ Individual Contributors/Professional Staff being groomed for future leadership responsibilities
- ▶ Supervisors/Managers who have never received formal leadership training
- ▶ Supervisors/Managers who are seeking foundational tools and/or who are seeking a refresher course on tools/techniques for effective supervisory leadership

Class Objectives

- Develop participants' understanding of two basic dimensions of behavior where people differ and which create differences in personal/SOCIAL STYLE
- Describe four basic SOCIAL STYLEs, including both the strengths and potential blind spots of each Style
- Emphasize the importance of Versatility skills for success as a leader
- Increase participants' awareness of how they are perceived in terms of SOCIAL STYLE and Versatility
- Share information on the four Styles' general preferences and expectations
- Increase participants' skills in recognizing SOCIAL STYLEs and adapting to SOCIAL STYLE differences in order to improve work relationships
- Foster action planning for applying an understanding of SOCIAL STYLEs to improve professional effectiveness and to coach others in the same

Applied Skills

- ▶ Be aware of how you are perceived in your workplace
- ▶ Recognize differences that may exist between your own and others' Styles and suggest ways to work more effectively together
- ▶ Modify your personal Style/expand beyond your personal comfort zone to better meet the needs of a situation or the preferences and expectations of others
- ▶ Utilize the feedback and suggestions for Versatility to improve effectiveness in working with others, especially as a leader
- ▶ Coach others on how to recognize, appreciate and adapt to differences in Style in order to improve their personal and professional effectiveness

Assessment Instrument: SOCIAL STYLE and Versatility profiling provided by

TRACOM GROUP
THE SOCIAL INTELLIGENCE COMPANY

Course Length: 1 Day

Conflict, Communication, and Collaboration (Principled Negotiations)

Summary: Better understand the nature of conflict in the workplace, prevent unnecessary and unproductive conflict, appropriately raise issues, and work through conflicts in a collaborative fashion using interest-based problem solving skills and techniques.

Benefit: *When unproductive conflict is prevented and potentially productive conflict is both encouraged to surface and worked through in a win-win fashion, supervisors and employees work more efficiently and achieve more effective outcomes.*

Conflict, Communication, and Collaboration (Principled Negotiations) is designed for:

- ▶ Supervisors/Managers new to a leadership position
- ▶ Supervisors/Managers accountable for managing one or more individual contributors
- ▶ Individual Contributors/Professional Staff being groomed for future leadership responsibilities
- ▶ Supervisors/Managers who have never received formal leadership training
- ▶ Supervisors/Managers who are seeking foundational tools and/or who are seeking a refresher course on tools/techniques for effective supervisory leadership

Class Objectives

- Review ways to prevent unnecessary and unproductive conflict at work, especially through effective communications
- Increase awareness of the critical role that self-management skills play when dealing with conflict situations
- Increase awareness of personal tendencies regarding approaches to conflict situations and review when various approaches are most appropriate
- Study techniques for how to effectively raise difficult issues
- Provide techniques for handling defense mechanisms people exhibit when dealing with conflict (confrontational/fight behavior and non-confrontational/flight behavior)
- Describe strategies and techniques for effectively working through issues using interest-based problem solving skills (aka collaboration or principled negotiations)

Applied Skills

- ▶ Differentiate between productive and unproductive conflict
- ▶ Prevent unnecessary and unproductive conflict through various means, especially by means of effective communications
- ▶ Appropriately raise issues in a way that demonstrates positive intent in order to foster collaborative discussion
- ▶ Effectively select the appropriate modes for dealing with conflict situations
- ▶ More effectively listen to better understand and work through workplace issues
- ▶ Practice interest-based problem solving (collaboration skills) to find win-win solutions on important issues
- ▶ Help mediate conflict between coworkers

Assessment Instrument:

Thomas-Kilmann Conflict Mode Instrument or [JHSA](#) Conflict Styles Assessment

Course Length: 1 Day

Individual and Team Time Management

– Not included in Twin Cities ESSENTIALS OPEN but available for in-house delivery

Summary: Learn and share current techniques and approaches to managing time (and stress) in the workplace today. Techniques and approaches include strategies for efficient use of various communications modes, including e-mail and other forms of business communication. Learn, too, how basic concepts of business process improvement can be applied in order to help self and others *work smarter* and be more productive.

Benefit: *When supervisors and their staff “work smarter” as individuals and as a team, both productivity and job satisfaction increases.*

Individual and Team Time Management is designed for:

- ▶ Supervisors/Managers new to a leadership position
- ▶ Supervisors/Managers accountable for managing one or more individual contributors
- ▶ Individual Contributors/Professional Staff being groomed for future leadership responsibilities
- ▶ Supervisors/Managers who have never received formal leadership training
- ▶ Supervisors/Managers who are seeking foundational tools and/or who are seeking a refresher course on tools/techniques for effective supervisory leadership

Class Objectives

- Promote understanding of how time management is really a matter of self-management and self-discipline
- Increase participants’ awareness regarding personal strengths and weaknesses regarding current time management practices and behaviors
- Describe and promote sharing of effective techniques and tools for personal time management as well as team time management
- Describe potential impacts of SOCIAL STYLE on time management and how to best deal with potential problems
- Provide guidance on effectively choosing and using various communication media available today (especially e-mail)
- Provide guidance on how to minimize risks associated with inappropriate use of various communication media and foster effective communications within teams both locally and at-a-distance

Applied Skills

- ▶ Recognize personal tendencies for time management and utilize strategies to combat those that are problematic
- ▶ Effectively utilize various planning tools
- ▶ Utilize strategies for combating perfectionism and procrastination
- ▶ Appropriately choose plus efficiently and effectively use communication media
- ▶ Effectively incorporate risk management and time management as a means of prioritizing tasks for self and others
- ▶ Apply basic concepts of process improvement to individual and team work processes in order to *work smarter*
- ▶ Effectively balance/integrate work with personal life (and help others to do the same)

Assessment Instrument:

Time Management Behavior and Practices (Self-Assessment Instrument)

Course Length: 1 Day

Impact Hiring

Summary: This seminar provides leaders with knowledge, tools and techniques for effective interviewing and selection. Participants learn critical skills for effective selection processes and for making effective hiring decisions. Emphasis is placed on developing skills in behavior-based (performance-based) interviewing techniques. Participants also learn the importance of providing realistic job previews.

Benefit: *When supervisors have and follow an effective process for interviewing and selection, the chances are greatly increased that a good hire will be the result. Also, the organization should see a reduction in costs due to turnover, retraining, lack of productivity as well as negative impacts on customer service and department morale (all of which can result when the wrong person is hired for the job).*

Impact Hiring is designed for:

- ▶ Supervisors/Managers new to a leadership position
- ▶ Supervisors/Managers accountable for managing one or more individual contributors
- ▶ Individual Contributors/Professional Staff being groomed for future leadership responsibilities
- ▶ Supervisors/Managers who have never received formal leadership training
- ▶ Supervisors/Managers who are seeking foundational tools and/or who are seeking a refresher course on tools/techniques for effective supervisory leadership

Class Objectives

- Communicate the importance of an effective selection and hiring process and decisions
- Stress the importance of being clear on the essential requirements for a position
- Raise awareness of two critical purposes of selection interviews:
 - To help an employer accurately assess a candidate's suitability for a position
 - To help a candidate accurately assess a position/company's suitability for him/her
- Provide guidance on what can and cannot be asked in an interview and promote the value of performance-based interviewing
- Provide opportunity to practice defining requirements for a job, developing effective and appropriate interview questions and developing realistic job previews
- Raise awareness of the potential impact of SOCIAL STYLE on the interviewing process and how to best manage that impact

Applied Skills

- ▶ Effectively help with recruitment and job applicant screening
- ▶ Effectively prepare for conducting a selection interview
- ▶ Construct performance-based interview questions that are related to the essential requirements of a position
- ▶ Prepare information to share with job candidates to sell the position/company and manage expectations about the position/company
- ▶ Confidently conduct effective and legal interviews based on the essential requirements of a position
- ▶ Be conscious of and avoid inappropriate impact of style on the interview process
- ▶ Effectively assess candidates' qualifications and experience necessary for the position

Course Length: ½ day - 1 day depending on client needs/desired configuration of modules

Effective OnBoarding – Laying the Foundation for Success

– Full program not included in Twin Cities ESSENTIALS OPEN but available for in-house delivery. Some "basics" will be addressed in OPEN series in conjunction with program on Impact Hiring.

Summary: This seminar provides leaders with an introduction to an employee success assurance model and emphasizes the importance of getting employees off to a good start. Participants learn a number of techniques to help orient new employees to their jobs and department, provide them with a strong sense of job purpose, and provide them with effective on-the-job training. Participants also learn how to positively use the power of expectations to help others perform.

Benefit: *When a supervisor's knowledge and skills increase around employee orientation and initial on-the-job training, the learning curve is shortened for new hires, leading to higher productivity in less time.*

Effective OnBoarding is designed for:

- ▶ Supervisors/Managers new to a leadership position
- ▶ Supervisors/Managers accountable for managing one or more individual contributors
- ▶ Individual Contributors/Professional Staff being groomed for future leadership responsibilities
- ▶ Supervisors/Managers who have never received formal leadership training
- ▶ Supervisors/Managers who are seeking foundational tools and/or who are seeking a refresher course on tools/techniques for effective supervisory leadership

Class Objectives

- Increase understanding of the supervisor's role and responsibilities with regard to OnBoarding of new employees and orienting them to their job and their department
- Describe critical factors involved in getting new employees off to a good start: orienting new employees to their department, fostering a sense of job purpose for the new employee, providing structured on-the-job training and communicating expectations for high performance.

Applied Skills

- ▶ Have a clear sense of what to include as part of a work unit's new employee orientation training
- ▶ Provide new employees with a clear sense of job purpose
- ▶ Develop and ensure others follow structured on-the-job training plans
- ▶ As needed, address issues of diversity in the training process
- ▶ Provide on-the-job training in accord with basic principles of adult learning
- ▶ Clarify roles of trainees and trainers and be able to ensure effective on-the-job training (delivered personally or through others)
- ▶ Develop and provide job-aids to assist employees in performing skills on-the-job
- ▶ Follow-up on training (provide for application opportunities, reinforce skills and ensure skill maintenance)

Course Length: ½ day - 1 day depending on client needs/desired configuration of modules

Employee Performance Management and Coaching

Summary: Learn skills for setting clear goals and communicating clear behavioral expectations with employees. Learn to provide effective day-to-day performance feedback, both reinforcing and corrective/constructive feedback. Learn to identify obstacles to job performance as well as job satisfaction and gain awareness of tools for achieving and sustaining high performance/job satisfaction. Analyze performance problems and effectively address performance issues *or work habit issues* through informal and formal coaching methods. Effectively plan for and conduct performance reviews.

Benefit: *As a result of increased knowledge and skills regarding employee performance management, managers will experience improved work output and job satisfaction from employees (enhanced motivation to perform and put forth discretionary effort) leading to greater productivity and reduced turnover.*

Employee Performance Management and Coaching is designed for:

- ▶ Supervisors/Managers new to a leadership position
- ▶ Supervisors/Managers accountable for managing one or more individual contributors
- ▶ Individual Contributors/Professional Staff being groomed for future leadership responsibilities
- ▶ Supervisors/Managers who have never received formal leadership training
- ▶ Supervisors/Managers who are seeking foundational tools and/or who are seeking a refresher course on tools/techniques for effective supervisory leadership

Class Objectives

- Increase participants' awareness of critical factors that contribute to high performance and job satisfaction
- Provide techniques for and opportunity to practice skills in setting goals and communicating behavioral expectations for employees to serve as the foundation for performance management
- Increase awareness of the importance of providing day-to-day reinforcing and corrective performance feedback
- Provide tools and techniques for planning, conducting and documenting a formal coaching session with employees, especially those with continuing performance problems
- Review various approaches to preparing for and conducting formal performance reviews

Course Length: 1 – 1 ½ day depending on client needs/desired configuration of modules

Applied Skills

- ▶ Clearly communicate performance goals and behavioral expectations of employees
- ▶ Improve employee performance by providing effective reinforcing feedback on a day-to-day basis
- ▶ Provide effective constructive performance feedback that includes observations of performance
- ▶ Analyze the causes of performance problems
- ▶ Effectively address serious performance issues by planning, conducting and documenting formal coaching conversations
- ▶ Utilize tools and techniques to identify what is truly rewarding and what may be demotivating to employees
- ▶ Conduct an effective formal performance review meeting
- ▶ Discuss employees' ongoing training and development needs

Maximizing Team Performance

– Twin Cities ESSENTIALS OPEN will also incorporate some “basics” of Project Management

Summary: Learn techniques and tools to promote effective teamwork at multiple levels within an organization. Experience and learn about typical barriers to teamwork as well as critical success factors. Through use of a Team Performance Profile, learn how members of your team perceive the team in terms of strengths and opportunities for improvement. Gain tools and develop a preliminary action plan for creating a higher performing team.

Benefit: *Supervisors who are aware of barriers to teamwork, and aware of the critical success factors required for teamwork, are better equipped to foster true collaboration between the members of their work team and potentially with those outside the team. When true teamwork is achieved the positive results include less duplication of efforts, fewer communication breakdowns, improved business processes and greater productivity.*

Maximizing Team Performance is designed for:

- ▶ Supervisors/Managers new to a leadership position
- ▶ Supervisors/Managers accountable for managing one or more individual contributors
- ▶ Individual Contributors/Professional Staff being groomed for future leadership responsibilities
- ▶ Supervisors/Managers who have never received formal leadership training
- ▶ Supervisors/Managers who are seeking foundational tools and/or who are seeking a refresher course on tools/techniques for effective supervisory leadership

Class Objectives

- Provide a shared experience demonstrating typical barriers to teamwork and critical success factors for teamwork
- Promote the notion of teambuilding as a process as opposed to a single event
- Enable participants to receive feedback from a current team regarding team members’ perceptions of their team’s strengths and opportunities for improvement
- Share tools and techniques for maximizing team performance including tools for establishing:
 - Alignment on mission/purpose and shared goals/priorities
 - Clearly defined complementary roles
 - Effective team processes for communications, decision-making and rewards/recognition
 - Effective interpersonal relationships and inter-group relations

Course Length: 1 day

Applied Skills

- ▶ Better clarify and align members of a team regarding shared purpose/goals/priorities
- ▶ Clarify roles within a team
- ▶ Have ideas for shared rewards and recognition for teamwork
- ▶ Implement ideas to foster effective communications within a team
- ▶ Know how and when to involve others in decision making in order to gain commitment vs. mere compliance from team members
- ▶ Build effective interpersonal relationships and trust among the members of a work team
- ▶ On an ongoing basis, assess teamwork effectiveness and take actions to improve

Assessment Instrument:

Team Performance Profile (customizable)

Customer-Focused Problem Solving and Process Improvement **– Not included in Twin Cities ESSENTIALS OPEN but available for in-house delivery**

Summary: Increase awareness of the importance of attending to customer service and customer satisfaction. Learn and apply proven tools and techniques for problem solving, process improvement and general tracking and monitoring of customer service/satisfaction.

Benefit: *When supervisors have tools and techniques for solving business process problems and improving business processes, the end result is more customer focused business units that show improved business performance by retaining satisfied customers.*

Customer-Focused Problem Solving and Process Improvement is designed for:

- ▶ Supervisors/Managers new to a leadership position
- ▶ Supervisors/Managers accountable for managing one or more individual contributors
- ▶ Individual Contributors/Professional Staff being groomed for future leadership responsibilities
- ▶ Supervisors/Managers who have never received formal leadership training
- ▶ Supervisors/Managers who are seeking foundational tools and/or who are seeking a refresher course on tools/techniques for effective supervisory leadership

Class Objectives

- Emphasize the importance of customer satisfaction/commitment, plus the challenges associated with achieving and maintaining customers who are highly satisfied/committed
- Review various techniques and tools for problem solving and process improvement in order to have business processes that foster and maintain customer satisfaction/commitment
- Review basic concepts and tools for data-based problem solving and process improvement including use of a seven-step process
 - 1) Define the problem/ask the right question
 - 2) Analyze the problem/the current situation
 - 3) Generate a number of potential solutions/actions which might improve the situation
 - 4) Evaluate and narrow down alternatives
 - 5) Select an alternative and create an action plan
 - 6) Implement solution (preferably on a small scale)
 - 7) Evaluate solution (check for intended as well as unintended effects)
- Provide opportunity to experience and practice various techniques and tools for analyzing and improving processes from a service perspective

Applied Skills

- ▶ Apply a seven-step process and various tools for problem solving and process improvement in order to ensure business processes that foster customer satisfaction and commitment
- ▶ More effectively define process problems
- ▶ Utilize various tools for analyzing process problems/breakdowns in customer service
- ▶ Make use of various methods and tools for collecting and analyzing feedback from customers and employees in order to better understand breakdowns in processes impacting customer service
- ▶ Utilize methods and techniques for getting to the root cause of problems
- ▶ Develop process changes/improvements that align with customer-focused organizational design principles
- ▶ Effectively empower employees and customers in order to best assure customer satisfaction

Course Length: 1 Day

Project Management

– Full program not included in Twin Cities ESSENTIALS OPEN but available for in-house delivery. Some "basics" will be addressed in OPEN SERIES via session on Maximizing Team Performance.

Summary: Learn a basic process for successfully planning and managing projects, dealing with *the people/team dimensions of a project* as well as the task side of things. Gain techniques for effectively leading and managing a project through four critical project phases: project definition, planning, implementation and project conclusion.

Benefit: *Project leaders and organizations will see greater cross-functional collaboration and more realistic/well thought-out project plans to which team members have a greater sense of commitment. As a result, projects themselves have a greater chance of meeting critical project parameters.*

Project Management is designed for:

- ▶ Supervisors/Managers new to a leadership position
- ▶ Supervisors/Managers accountable for managing one or more individual contributors
- ▶ Individual Contributors/Professional Staff being groomed for future leadership responsibilities
- ▶ Supervisors/Managers who have never received formal leadership training
- ▶ Supervisors/Managers who are seeking foundational tools and/or who are seeking a refresher course on tools/techniques for effective supervisory leadership

Class Objectives

- Increase understanding of the components of effective project management and what it takes to be an effective project leader throughout all phases of a project
- Emphasize the importance of attending to both the task *and the people/team dimensions* in a project and increase participants' awareness of tools and techniques to help teams progress through normal team stages
- Provide various tools and techniques for clearly defining, planning and monitoring progress on projects
- Provide opportunity for skill practice regarding defining and planning a project and guidance on how to prepare for and respond to potential problems that may arise during project implementation
- Review important techniques and tools for effectively concluding projects

Course Length: 1 Day as part of a series; longer if topic is offered as a stand-alone program and application work is desired

Applied Skills

- ▶ Solidify a project charter that clarifies the project scope, team's boundaries and expected team deliverables
- ▶ Apply influence strategies to gain team members' commitment to a project and get the project team working together.
- ▶ Create a project plan effectively utilizing team members to co-author the plan
- ▶ Construct a chart to graphically display the time relationship of the steps required for project completion
- ▶ Define the critical path on a project (the shortest time in which the project can be completed as currently resourced and planned)
- ▶ Utilize methods and tools for effectively monitoring and keeping others up-to-date regarding project progress
- ▶ Recognize and evaluate options for handling various problems that tend to arise during project implementation
- ▶ Effectively bring projects to a conclusion



Judy Hartley

Biographical Sketch

Judy Hartley is an independent performance consultant/facilitator specializing in leadership and team development. Judy has designed and developed her own **easily customizable** baseline supervisory leadership training curriculum entitled **Foundations of Leadership – Supervising for Performance**. Judy has also helped to create several other leadership development series including the *Learning to Lead in Manufacturing Series* (which she developed in conjunction with the Manufacturers Alliance). Judy has worked with several organizations to create and deliver customized leadership development programs for clients seeking to integrate training with the roll-out of new performance management systems. Judy is also experienced in assisting organizations in the roll-out of initiatives aimed at developing **Customer Service Excellence** and respectful workplaces. A key element of nearly all professional development programs Judy designs, develops and delivers is training regarding **SOCIAL STYLE awareness and Versatility Skills**. These skills can be applied to leadership, conflict management, team building, customer service and more. Judy is certified to facilitate training in SOCIAL STYLEs through both Wilson Learning and TRACOM, **the creator of SOCIAL STYLE**.

Judy's industry experience spans manufacturing, financial services, information technology, engineering, healthcare, communications/broadcasting, food processing, education and government. As client needs dictate, Judy functions as a designer/developer of customized training programs, as a facilitator in the classroom, as a trainer of other trainers, a team/process facilitator, or as an independent advisor on how to create and maintain customer-focused, high-performance/high commitment work environments.

Judy's strength as a consultant comes from her *20 plus* years of experience in management development, organizational development, employee communications, and quality improvement. This experience was gained initially through several professional and managerial positions and then later as both an independent and staff consultant.

Work History

Judy began her learning and organizational development career working for Honeywell in its Management Development Center. From there she went on to manage Employee Communications/Relations for United HealthCare. Next, Judy joined Hoffman Engineering, initially as Manager of Human Resource Development, and then as Manager of Quality Improvement. After several years back in manufacturing Judy returned to the healthcare sector, first as an Organization Development consultant for HealthPartners and then eventually as Manager of Service Culture Development for the General Electric Disability Benefits Center. As an entrepreneur, Judy successfully created and still maintains her own independent consulting firm.

Education and Professional Affiliations

B.A. Interpersonal and Small Group Communications, University of Minnesota

M.A. Organizational Communications, University of Minnesota

Adjunct Faculty Member, University of Minnesota, Carlson School of Management,

Manufacturers Alliance, member plus co-creator and facilitator of *Learning to Lead in Manufacturing*

Minnesota Council for Quality, trained as a Minnesota Quality Award Examiner

International Society for Performance Improvement (ISPI), member



Judy Hartley & Associates

LEADERSHIP and TEAM DEVELOPMENT
<http://www.JudyHartleyTraining.com>

