



Strategic Solutions

Managing for High Performance™ Training Program Modules

- 1) ***Creating Accountability: Establishing Team Goals and Action Steps*** – Half-day session during which Managers learn how to communicate the credit union’s and their department / branch’s annual goals to their team and then work with their team to develop action steps to achieve those goals. This process builds teamwork while ensuring immediate employee buy-in and participation, along with accountability –major tenants in high performance cultures. Both managers and their team understand their roles in achieving the credit union’s goals and are more willing to focus and direct their efforts accordingly. Prior to this training session, the CU’s CEO/Senior Management Team meet by phone with our Training Consultant to breakdown the CU’s annual goals into appropriate SMART goals for each Manager. Each Manager’s goals, in turn, serve as their team’s goals. Discussion also covers processes for tracking and reporting progress on each goal.

- 2) ***Creating Accountability at the Individual Employee Level*** – Half-day session during which Managers learn how to use the credit union’s annual and department / branch goals to align and set individual employee goals, how to successfully communicate those goals to the individual employee, and then how to guide each employee in developing action steps to achieve those goals. This module is structured to help managers gain their employee’s buy-in and participation right away, thus raising employees’ “internal” motivation and desire to succeed. By using the techniques taught in this module, employees understand the part they play in helping to achieve the credit union’s and their team’s goals and are more willing to focus their efforts accordingly. We recommend that the CU have established team (department / branch) goals in their organization for at least one year prior to engaging in this management development session. To ensure the most successful outcome, the Training Consultant will review the CU’s team goals to determine if additional pre-work around writing SMART goals is needed before beginning this module.

- 3) ***Leading Effective Team Meetings*** – Rather than focusing mainly on operational matters during a staff meeting, managers learn during this half-day module how to keep staff focused on and excited about the credit union’s vision and goals all year long. Specifically, managers gain skills to help them review team

progress toward goals; highlight success stories that have led toward achievement; strategize new action steps with the group, as needed; give employees various forms of recognition which continually increases their motivation; and incorporate ongoing training into their meetings to further develop their employees skills. Many ideas are covered on ways to keep meetings “fresh” and exciting while ensuring staff participation.

- 4) ***Coaching Employees Performance*** – Once managers have clarified expectations with their team and/or individual employees, they are ready to continually cultivate the internal motivation of their employees by using effective coaching processes. The following half-day training and coaching modules are available to guide managers in learning, developing, and using appropriate coaching skills to accomplish your credit union’s goals. All coaching modules build managers’ skills at positively reinforcing what the employee is doing well while developing the employee’s skills at identifying problems and developing solutions to improve performance that is not up to par.
- ***Informal Day-to-Day Coaching*** – Building employee’s confidence is an essential step toward building their competence. In this module, Managers gain a comprehensive understanding of the power of coaching and learn how to immediately and regularly reinforcing good work when they see it so as to encourage employees to repeat desired performance.
 - ***Goals Progress Coaching*** – Managers learn successful communication techniques for regularly meeting with individual employees to discuss their progress toward accomplishing their individual annual goals, reinforcing what the employee is doing well, and working with the employee to adjust action steps or performance for goals that are not on track.
 - ***Observational Coaching*** – Reinforcing the correct use of recently learned service or sales skills can be ratcheted up a notch when managers learn how to observe an employee using those skills, and follow-up that observation session with specific feedback. Observation can occur at the moment the employee is providing service to an external or internal “customer”, or following it by reviewing recent transactions. Either way, Managers learn how to support employees in seeing opportunities they may have missed in their conversation with a member / co-worker.
 - ***Developmental Coaching*** – Managers learn how to enhance an employee’s service or sales skills by further developing or refining their use of specific aspects of a desired skill. In this module, Managers gain a process for working one-on-one with an employee to define the skill that’s desired, model it for their employee, and then coach their employee until the employee can successfully demonstrate the desired skill level,
- 5) ***Performance Planning (Evaluating Performance)*** – Rather than focus on an employee’s past behavior once a year in a “report-card” type of review, managers learn how to integrate the results of their ongoing coaching meetings with a forward-

looking annual performance planning process - without adding hours to their workload! Performance planning helps the employee to not only gain the necessary skills and confidence to continually advance their performance but, just as importantly, to find ways to increase the employee's personal happiness and satisfaction with their job and with working for the credit union. Happy, satisfied employees treat members the same way – which leads to more business while reducing turnover costs for the credit union.

Each of the above training modules includes the following:

- discussion regarding why the particular management skill is important and how it will help the manager,
- a video segment or demonstration which shows a manager correctly using the skill,
- an opportunity for each manager in the training session to think through and develop real-life situations in which they would use the skill, and
- an opportunity to practice the skill in a safe setting which includes feedback, before they have to use that skill “live” with their employees.

Follow-up Support: Coaching the Coaches – Even managers need coaching to continually enhance and refine their performance management skills. On one or more occasion, our Master Trainer can return to your credit union to observe and provide one-on-one coaching to each of your managers on their use of one or more of the skills learned in your customized *Managing for High Performance* training program. Additionally, throughout the course of your management development program, phone coaching consultations with your Training Consultant are available to any manager in your credit union at any time. We are committed to your success with this program, every step of the way.

Move your organization toward a higher performance level today.

To learn more about our systematic approach to enhancing organizational performance, or to request a proposal, **contact Jeanne Murphy at 651-351-9241.**