

# Northern New England School of Banking



NORTHERN NEW ENGLAND  
SCHOOL OF BANKING

## **On the Road from Supervisor to Leader**

*Becoming A Leader*

*Employee Engagement*

*Effective Communication*

*Tools for Success*

# **REAL LEADERSHIP STARTS WITH “U”**

- Are you ready to show up today?
- Are you ready to open your mind?
- Are you ready to actively participate?
- Are you ready to be authentic?

**Put a smile on your face, raise your energy level it all starts  
NOW...**

Sphere of Control/Influence

# Supervision vs. Leadership

## What are the differences between management vs leadership?

The main difference between leaders and managers is that leaders have people follow them while managers have people who work for them.

Category	Leadership	Management (Supervision)
Thinking process	Focuses on people, looks outward.	Focuses on things, looks inward.
Goal setting	Articulates a vision and sets direction.	Executes plans, improves the present and sees the results.
Employee focus	Aims at the growth and development of his team.	Aims at accomplishing the end results.
Operation	Uses a transformational leadership style.	Uses a transactional leadership style.
Governance	Uses influence and acts decisively.	Uses authority, avoids conflict, and acts responsibly.

**Leadership does not necessarily mean you lead people or a team. Many of you don't have any direct reports. However, you still are a leader in the organization and everything we speak to today will apply to leading at any level.**

*“Being a leader is not the same as being a manager, and vice versa. Managers create order out of complexity; they keep the trains running on schedule. Leaders, in contrast, deal with ambiguity, change, and opportunity; they push the train tracks where they’ve never gone before. This distinction is not entirely singular, as leaders must also manage. To be effective, leadership is more than inspiration and grand visions, leadership must also be about getting results.”*

In your opinion, what does it take to be a good leader? **List traits for success?**

---

---

---

---

# Engagement in 2022

Employees don't leave companies, they leave supervisors.

## Engagement – What really matters?

- Engagement: The emotional and intellectual commitment of employees to deliver high performance.
- Today's Key Drivers of Engagement:
  - The Direct Supervisor's relationship with the employees.
  - Belief that Senior Leadership is competent.
  - Belief that Senior Leadership is trustworthy.
  - Pride in working for the organization.

## **DIRECT SUPERVISOR: What is your Brand? Leading employee engagement today:**

- Respond and act quickly.
- Perceived fairness and yes, your personality matters.
- EQi – Empathy balanced with accountability. Caring managers and leaders.
- Accountable to high performers.
- Remove obstacles and provide resources.
- Career Pathing – discuss opportunities for career growth.
- Quarterly employee 1-page reviews/conversations that foster open dialogue.

## **SENIOR LEADERSHIP: must articulate a clear vision to all employees and be more transparent.**

- Authentic leadership: trust, openness, possibilities for the future.
- It's the little things that matter.
- Workplace wellness today includes mental health.
- Common Day 1 mistake – Visit them where it matters.

## **PRIDE: The Perception of How the Employee is:**

- Knows is the individual's purpose.
- Appreciated and listened to.
- Contributing to team and individual achievements.
- Has honest career pathing options.
- Able to get continuous learning.
- Feels they are making a difference.
- Working with flexibility and creativity.
- It's not about the money!

***“Effective leaders create a vision that others will support with their hands and minds.”***

What is your bank's .....

---

---

***“What drives a given individual to excel or to become complacent? It’s the responsibility of his or her immediate supervisor to find out”***

*–Bob Kelleher, Author of Louder Than Words*

## **Are you a caring manager?**

Define it:

---

---

### **Caring Managers**

- Foster positive supportive relationships in peer to peer, manager to manager and manger to employee.
- Provide career advancement.
- Have one-on-one meetings.
- Demonstrate how passion for performance can co-exist with a genuine concern for staff – who they are as people.

### **Coaching/Accountability – Effective employee relations matter.**

- Not holding poor performers accountable effects more than just the poor performers.
- Dealing with difficult people – fear of:
  - Waiting to say something or stuffing emotion with the *silent burn*?
  - What if they quit?
  - What if we retrain them and they leave?
  - What if we DON'T train them and they stay?
  - Why can't everyone get along?
- Yes, top performers should be treated differently, not different

# Effective Communication

## The Difference between Communication and Effective Communication

What is the #1 challenge your organization faces in communication?

What is the #1 challenge you face in communicating yourself?

## TOP Communication Challenges at Work

### Lack of feedback

Acting on the feedback we gather—adjusting our behaviors, attitudes, and approaches to improve our perceptions in the workplace—is the primary differentiator between those who rise quickly through an organization and those who seem to be stuck.

### Email Overload

It is not email overload; it is process/filter failure.

### Overall Lack of Communication

A lack of communication can ultimately lead to **low morale**. Ineffective communication can create misunderstandings, missed opportunities, and conflict. The dissemination of misinformation and mistrust may cause employees to feel defeated.

### Device Chaos/too many devices

Now we're **Zooming, e-mailing, texting, messaging, and chatting** so much, a **phone** call comes as a fresh surprise.

### Language Barriers

There are no language barriers when you are smiling. Technology tools can be used to assist comprehension.

### Overload of Irrelevance

In today's digital world employees are bombarded with **irrelevant** information, mismanaged communication channels and a lack of targeted communication.

### Lack of Mutual Respect / Trust

## 5 “C’s” of Effective Communication

- Clear
- Concise
- Concrete
- Correct
- Coherent

## The Four Types of Communication

- Verbal
  - Use a strong, confident speaking voice.
  - Avoid extra words or filler words. Don’t over explain.
  - Avoid industry jargon if possible.
- Non-Verbal
  - Notice how your emotions make YOU feel.
  - Be intentional about your nonverbal cues:
    - Body language, facial expressions, eye roll, smirk
    - Overall demeanor
  - Mimic nonverbal cues you find effective.
- Visual
  - Consider your audience.
  - Only use visuals if they add value.
  - Make sure visuals you do choose are clear and easy to understand.
- Written
  - SIMPLICITY
  - Review all written communications

# Four Steps to Listening with Understanding (Active Listening)

One of the most effective tools in communication is active listening and listening with understanding. This shows the other party or parties that you care, but also can help the speaker further develop their own thought process around the communication.

*“Most people do not listen with the intent to understand; they listen with the intent to reply.” – Steven Covey*

- **Contact**
  - Connect with the speaker.
  - Establish eye contact.
  - Keep an open posture.
  - Nod your head or other nonverbal response that shows acceptance (not necessarily agreement).
  - Watch yourself on video calls!
  
- **Absorb**
  - Take in all aspects of communication, verbal and non-verbal.
  - Do not evaluate the positive or negative.
  - Listen to understand.
  
- **Reflect**
  - Mirror reflect or give feedback on what you heard.
  - Reflect the speakers’ points.
  
- **Confirm**
  - Confirm whether you have understood the speaker’s message.
  - If not, have them restate and attempt to reflect and confirm again.

**Exercise:**

---

---

---

---

---



# Action Plans for Implementation in the Workplace

Planning for communication is a process.

1. Identify the purpose of your communication – Why are you trying to communicate? What is your desired outcome? \_\_\_\_\_

\_\_\_\_\_

2. Identify your audience- who are you trying to reach? You will need a different message for different groups or different people. \_\_\_\_\_

\_\_\_\_\_

3. Plan and design your message- what is your message? Are you hoping to change something? Behavior? Attitudes? \_\_\_\_\_

\_\_\_\_\_

4. Anticipate Obstacles \_\_\_\_\_

\_\_\_\_\_

5. Strategize how to connect with your audience \_\_\_\_\_

\_\_\_\_\_

6. Create an action plan \_\_\_\_\_

\_\_\_\_\_

7. Evaluate your communication – was it effective? How could you have communicated better? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Giving Feedback

Type	Definition	Purpose	Impact
<b>SILENCE</b>	No response provided No news is not good news!	Maintains status quo	Decreases confidence reduces performance creates surprises, can create loss of trust and insecurity.
<b>CRITICISM</b>	Identifies behaviors or results that were undesirable, not up to standard.  Example: "Sue you did a poor job running that meeting this morning."	Stop undesirable behavior/ results	Generates excuses and blaming of others. Tends to eliminate other related behaviors. Decreases confidence and self-esteem. Leads to escape and avoidance of manager and work. Hurts relationship
<b>ADVICE</b>	Identifies behaviors or results that are highly regarded and often specifies how to incorporate them in the future.  Example: "Sue, let's discuss some guidelines on conducting effective meetings before your next staff meeting so you feel good about the process."	Shape or change behavior/ results to increase performance	Improves confidence Can improve relationship Increases performance
<b>REINFORCEMENT (Positive)</b>	Identifies behaviors or results that were desired, up to or exceeding standards. Example: "Sue, I noticed how you planned and posted an agenda before your meeting today."	Increased desired performance/ results	Increases confidence Increases performance Increases motivation Increases willingness to take on new tasks and be more visible.

# How do you use feedback?

While thinking about the type of feedback you use to supervise your employees – take the following quiz.

When I supervise, I use this type of feedback:	Almost Always	Frequently	Occasionally	Never
1. Silence	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2. Criticism (Negative)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3. Reinforcement (Positive)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4. Advice	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Case Studies on Giving Feedback

What type of feedback should the supervisor use? Write in the spaces provided the type of feedback you would use and what you would say in each of the following situations.

**A = Advice    P=Positive Feedback    C= Criticism    S = Silence**

- 1) Fred, a recently hired marketing specialist, has just turned in his first monthly marketing report. Your impression is that the report was done in a hurry and was not well thought out. You did not train Fred on how to develop the report.

**You would use:** \_\_\_\_\_

**What would you say to Fred?** \_\_\_\_\_

---

- 2) Teresa has been filling in for a teller on medical leave for the last 6 weeks. Recently you have received complaints from several tellers that she has been arriving late at the line.

**You would use:** \_\_\_\_\_

**What would you say to Teresa?** \_\_\_\_\_

---

- 3) Nick is your new assistant. He has just given you a report you asked him to prepare. The report was well prepared and finished on time.

**You would use:** \_\_\_\_\_

**What would you say to Nick?** \_\_\_\_\_

---

- 4) Don has just submitted his part of a proposal you are responsible for coordinating. It is Monday and you know he worked most of the weekend to get his piece to you. His deadline was pretty tight, and you are grateful he put in the extra time to meet it. Unfortunately, you are racing out the door to catch a plane with the proposal in your hand.

**You would use:** \_\_\_\_\_

**What would you say What would you say to Don?**

---

# Authentic Praise

- 1) **Spontaneously:** Catch people doing something right and thank them on the spot.
- 2) **Specifically:** Praise people for specific accomplishments or efforts.
- 3) **Purposefully:** Take an employee to lunch or dinner at a great restaurant to show your appreciation.
- 4) **Privately:** Go to your employee's office to give a personal thank you and praise
- 5) **Publicly:** Praise an employee in the presence of others (peers, boss, and family).
- 6) **In Writing:** Send a letter, memo or e-mail, and send a copy to team members or higher-level management.

## ACTION PLAN

What: \_\_\_\_\_

\_\_\_\_\_

How: \_\_\_\_\_

\_\_\_\_\_

By When: \_\_\_\_\_

\_\_\_\_\_

What: \_\_\_\_\_

\_\_\_\_\_

How: \_\_\_\_\_

\_\_\_\_\_

By When: \_\_\_\_\_

\_\_\_\_\_

What: \_\_\_\_\_

\_\_\_\_\_

How: \_\_\_\_\_

# COUNSELING AND COACHING – ACCOUNTABILITY TOOLS

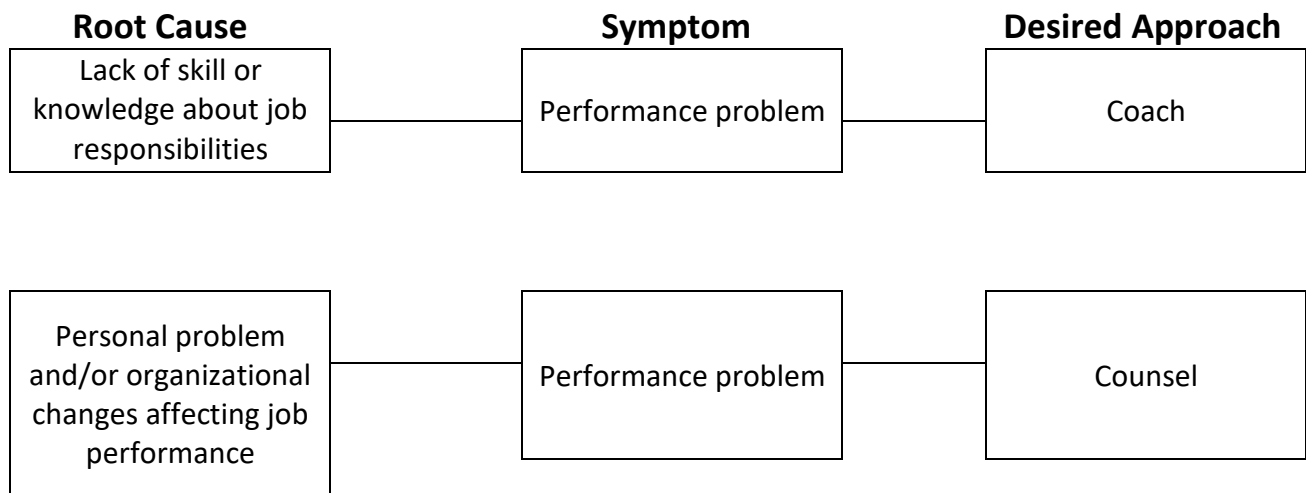
By the end of this section, you should have a clear idea of what counseling and coaching are and what skills they require. Your ability to coach and counsel contributes to your effectiveness as a supervisor.

## DEFINITIONS

**Counseling:** A supportive process by a manager to help an employee define and work through personal problems or organizational changes that affect job performance.

**Coaching:** A directive process by a manager to train and orient an employee to realities of the workplace and to help the employee remove barriers to optimum work performance.

**Counseling and coaching share many of the same skills. At times they may seem to overlap. When they do, remember the following diagrams. These diagrams, shown below, will help you differentiate the two processes.**



# WORK SITUATIONS THAT MAY REQUIRE COUNSELING

Check any that you have personally encountered:

1. Reorganizations.
2. Layoffs - counseling for those who are laid off and the "survivors".
3. Demotions due to organizational changes
4. Salary freezes; decreases in salary, status or responsibility.
5. Employee faced with other career opportunities inside or outside of the organization.
6. Employee faced with no career opportunities inside the organization.
7. Employee unhappy with you as a boss.
8. Employee unhappy with work assignment.
9. Employee who has conflict with peer.
10. Employee that feels stressed, burned out, or is having a grief reaction due to loss.
11. Employee who feels insecure about skills or ability to do the job.
12. Employee quitting to take new job.
13. Employee who has been promoted and is scared.
14. Employee that shares personal problem requiring support.
15. Employee whose personal problems are affecting performance of others.
16. Performance problems that persist.
17. Employee who is experiencing failure.
18. Employee who is disappointed in new job.

***Can you think of any other situations from your personal experience where counseling would have been effective?***

# WORK SITUATIONS THAT MAY REQUIRE COACHING

Check any that you have personally encountered:

1. Orientation and training of a new employee.
2. Teaching a new job skill.
3. Need to explain standards of the work unit.
4. Need to explain cultural norms and political realities of the organization.
5. Simple corrections to performance are required.
6. Goals or business conditions change.
7. You are new to a group.
8. Employees facing new work experience.
9. Employee that needs help setting priorities.
10. Follow up to a training session.
11. Employee that displays low or moderate performance.
12. Employee who needs reinforcement for good performance.
13. Employee wants to become peak performer.
14. Formal or informal performance reviews.
15. Employee needs preparation to meet his/her future career goals.
16. Employee needs preparation for more challenging work assignment.
17. Employee needs self-confidence developed.
18. When power or control battles are affecting team cohesiveness.

***Can you think of any other situations that may require coaching?***



# Case Studies to Evaluate Your Skills

	Counsel	Coach
1. You have just hired Miguel who has a degree in Finance. He has a lot of energy and enthusiasm for his new job. You want him to get off on the right start.		
2. Sally has been with your branch for one year now. She has just been promoted to Marketing Manager. She has shown creativity in her marketing campaigns and lots of drive. She has extremely high standards of performance and pushes herself and others equally hard. Unfortunately, her behavior seems to have created a morale problem in her unit. She has her unit working overtime and weekends as she attempts to oversee every detail. Sally demands perfection. You have had several complaints from her employees.		
3. Fred, a Teller, has been working for you for three years. He has been a superstar, increasing productivity in his unit by more than 70% in the last year. Due to his tremendous talents in dealing with people you have offered him a promotion to Head Teller. Fred has stopped by your office to talk about his fears and insecurities regarding the new position. You have no doubt that Fred can do it well.		
4. Samantha has been a conscientious employee with a good track record. She shows a lot of initiative and enthusiasm for her job. She has stopped by your office to discuss a personal problem that may interfere with her job – she has just discovered that her mother is dying of cancer. She is close to her mother and seems very upset.		
5. Joe, one of your employees, has been with your group for six months. His performance has been substandard in many ways. He shows up late for work at least two days a week, is disruptive in departmental meetings and has made many errors.		

# PREPARING FOR A COUNSELING OR COACHING SESSION

***If a counseling or coaching session goes poorly it is usually because the manager or supervisor has not prepared properly.***

By using the checklists on pages 4 and 5 you will be able to determine the type of session you need. Now you are ready to prepare for the session by completing each of the following items:

- 1. Consider how many sessions I will need, the degree of trust, and the employee's confidence level.
- 2. Be clear about my reason for the session and define my goals.
- 3. Review the work goals and past performance of the employee.
- 4. Give the employee notice of the time and place.
- 5. Allot a minimum of 30 minutes for the session.
- 6. Remove all distractions (phone, visitors, etc.) from the meeting place.
- 7. Remove physical barriers between me and the employee (i.e., don't sit behind a desk).
- 8. Write out what I plan to say and rehearse it. Keep my notes in front of me during the session to avoid the feeling of losing control.
- 9. Plan to take notes to document the session and develop a record of the corrective action plans and performance improvements. Retain in employee file.

# GUIDELINES FOR CONDUCTING A SUCCESSFUL COACHING OR COUNSELING SESSION

You are ready to begin your counseling session. You feel confident prepared, ready to listen, have notes and a pencil. Your employee walks in, you begin your session.

## ***REMEMBER THE FOLLOWING:***

1. Put the employee at ease by being warm and friendly and using positive body language, lots of eye contact and physically facing the person.
2. Define the reason for the discussion if you called the session or encourage the employee to define its purpose.
3. Ask open-ended questions about the employee's feelings and thoughts.
4. Paraphrase the content and feelings of the employee's message.
5. Encourage the employee to identify alternatives to solve the problem or resolve the issue.
6. Seek the employee's feelings about the possible consequences of each of the alternatives.
7. Avoid expressing your views but remain alert to provide information on company policies that may help the employee decide.
8. Demonstrate empathy for the employee and show confidence in his/her ability to solve problems.
9. Provide support and/or resources when appropriate.
10. Refer the employee to Human Resources and/or employee assistance program if the problem is beyond your scope.
11. Summarize key points at the end of the discussion to clarify and seek understanding. Document and retain in the employee file.

# EMPLOYEE COACHING/COUNSELING WORKSHEET

Employee Name: \_\_\_\_\_

Date: \_\_\_\_\_

Managers Name: \_\_\_\_\_

Department: \_\_\_\_\_

Issue(s) Discussed:

---

---

---

Employee Response:

---

---

---

Agreed-upon Action Steps and Follow up Dates:

---

---

---

Manager Signature: \_\_\_\_\_

Date: \_\_\_\_\_

# CASE STUDIES FOR COACHING AND COUNSELING

Develop a coaching and/or counseling plan for each of the following situations and compare your ideas with other participants. Include in your plan the type of feedback you will use to motivate the employee.

## Case Study 1

John has worked for you for the past year. He has been a steady moderate performer, but lately you have become very concerned about his work. For the past six months you have noticed him coming in late, taking long lunches and leaving early. You have discussed your concerns with him and coached him on the importance of good work habits. He confided in you that he was having marital problems and his wife was seeking a separation. You gave him two weeks to “sort things out” but told him you expected him to be punctual and get back on track by then. Four weeks have gone by, and his performance has continued to deteriorate. He has become belligerent and hostile and other members of the team have complained about his behavior. One mentioned that John has been drinking excessively every day at work.

You would:      Coach \_\_\_\_\_      Counsel \_\_\_\_\_

---

---

---

## Case Study 2

Marsha is a Loan Officer in your branch. She has been with the bank for five years and seems to love her job. She was promoted last month to Senior Loan Officer due to her ability to get along well with coworkers, customers, and management. You have been swamped and have not had much time to spend with her. She just stopped by to discuss how she feels about her new job. She has stated that she is feeling overwhelmed by all the responsibilities and is unsure of her ability to handle all the pressure.

You would:      Coach \_\_\_\_\_      Counsel \_\_\_\_\_

---

---

---

### Case Study 3

Your boss of the last three years, Will, stopped by for a chat. He has seemed “out of sorts” lately – depressed and irritable. You genuinely like working for Will and feel he is an excellent role model for you as a manager. You don’t know much about his personal life except that he is a family man and his wife, Mary, is Vice President of a large insurance company. Will has three kids aged six, eight, and ten. He is now saying that his wife has been offered a job in charge of a new division in Chicago and she really wants to take it. He is very concerned about the problems of relocation. He doesn’t want to take the kids out of school. Also, he is a candidate for a promotion. He is having a difficult time trying to decide what to do. Will asks for your advice.

You would:      Coach \_\_\_\_\_      Counsel \_\_\_\_\_

---

---

---

### Case Study 4

Joan, your Production Control Supervisor, has been working for you for three years. She has been your star performer. She has implemented a new PC System, organized the workflow procedures and got along well with all of the group managers. Unfortunately, a recent merger with ABC Bank has led to a budget freeze. Although you have an open manager’s position, you are currently unable to promote Joan, even though she is your first choice. You know that Joan has a strong future with your bank and want her to stay and “weather the current financial crisis.” She has called you to set up an appointment to discuss her career options.

You would:      Coach \_\_\_\_\_      Counsel \_\_\_\_\_

---

---

---

**Case Study 5**

Ned is a Marketing Specialist who is quite ambitious. He's been working for you for three months and you are basically pleased with the work he's done, although you have seen him overstep his boundaries at department meetings. You have had complaints from other team members about how he forces his ideas on others and seldom listens to theirs. He also seems to talk about his needs, career goals, and strengths constantly. On two occasions you noticed he took credit for the ideas of other team members in front of senior management.

You would:      Coach \_\_\_\_\_      Counsel \_\_\_\_\_

---

---

---

# PERSONAL ACTION PLAN

*I will look for opportunities to use my coaching and counseling and feedback skills with the following people by the specified date:*

PERSON: \_\_\_\_\_ Date: \_\_\_\_\_

PERSON: \_\_\_\_\_ Date: \_\_\_\_\_

## 3 Top Leadership Tools

Generational Differences  
Being a Change Agent  
EQi



# Does your organization value multiple generations?

The statements below help a team, department, or organization diagnose their effectiveness at creating a culture where all generations can thrive.

The larger number of statements that match behaviors at your organization, the more you're likely to be "generations-friendly."

- When we put a project team together, we consciously include a variety of perspectives.
- There's not just one type of person who is successful here.
- We talk openly about what we want from our jobs.
- We treat employees like customers.
- We talk openly about our different viewpoints.
- Our policies are based on what customers and employees want.
- Our work atmosphere is relaxed and informal.
- We have a lot of fun together.
- We're known for being straightforward with each other.
- The people who work here have the big picture along with specific goals and measures, and feel free to find their own best way of reaching them.
- We expect the best from everyone here, and we treat them as if they have great things to offer and are motivated to do their best.
- We focus on retention every day.
- Our work assignments are broad, providing variety and challenge, and allowing each employee to develop a range of skills.

**How did your organization do? \_\_\_\_\_ out of 13 total**

**Copyright cmacareer.com**

# Workplace Characteristics

## The Baby Boom Generation (1946-1964)

### Assets

Service orientation, dedication, team perspective, experience, and knowledge

### Liabilities

Not necessarily “budget minded,” uncomfortable with conflict, reluctant to go against peers, may put process ahead of result

### They prefer to work for managers who:

- Are consensual and treat them as equals
- Take a democratic approach
- Work with the group to define a mission
- Show warmth and caring
- Assure them they are making a difference

### Motivation:

Baby Boomers tend to be motivated by leaders who get them involved and show them how they can make a difference.

### Motivational Statements

- “Your opinion is valued.”
- “You can work as long as you want to.”
- “Your contribution will be recognized.”
- “We need you.”



### Rewards

Personal appreciation, promotion, and recognition.

### Preferred methods of communication

Phone calls, personal interaction.

### Recruiting and Coaching

Offer flexible work arrangements: telecommuting, adjustable scheduling, personal time to handle family and caretaking matters. Provide challenging work opportunities, horizontal movement, learning opportunities. Offer phased retirement programs. Offer health and wellness programs to foster healthy lifestyles.

### Managers who drive them crazy....

- aren't open to input
- are bureaucratic
- send a “my-way-or-the-highway” message
- are brusque
- don't show interest
- practice one-upmanship

# Workplace Characteristics

## Generation X (1965 – 1981)

### Assets

Adaptability, techno-literacy, independence, creativity, willingness to buck the system

### Liabilities

Skeptical, distrustful of authority

### They prefer to work for managers who are:

- Competent, direct and straight forward Genuine
- Comfortable giving them a deadline and turning them loose to meet it
- Informal
- Supportive of training and growth opportunities
- Flexible
- Results-oriented



### Motivation

Allow them to get the job done on their own (what might seem unorthodox) schedule.

### Motivational Statements

"Do it your way." "We've got the newest hardware and software." "There aren't a lot of rules around here."

### Rewards

Free time, upgraded resources, opportunities for development, bottom-line results, certifications to add to their resumes

### Preferred methods of communication

- Voice mail
- email

### Recruiting and Coaching

Show them lots of options for their workplace schedule. Allow them to work autonomously. Tap into their adaptability. Generation Xers are typically flexible, and many are independent operators. Give them an important task that needs to get done; they'll likely get it handled! Give FAST (frequent, Accurate, Specific, Timely) feedback in order for them to build their skills and improve their resumes.

### Managers who drive them crazy...

- micro-manage
- don't walk the talk
- spend too much time on process and too little on results
- are flashy
- are bureaucratic
- schmooze

# Workplace Characteristics

## GenY (1982-1994)

### Assets

Collective action, optimism, ability to multi-task, and technological savvy

### Liabilities

Need for supervision and structure; inexperience-particularly with handling difficult people issues

### They prefer to work for managers who are:

- Educational and know their personal goals
- Positive
- Comfortable coaching and supporting them
- Collaborative
- Organized and create a reasonable structure
- Achievement-oriented
- Motivational



### Motivation

Gen Y tends to be motivated when their managers connect their actions to their personal and career goals.

### Motivational Statements

"You will be working with other bright, creative people." "You and your co-workers can help turn this company around." "You can be a hero here."

### Rewards

Awards, certificates, tangible evidence of credibility

### Preferred methods of communication

Instant messages, blogs, text messages, emails

### Recruiting and Coaching

Tap an outstanding employee from the Millennial Generation to talk to the candidate about the company. Provide flexibility to allow them to pursue their many outside interests. Get them involved in meaningful volunteer efforts. These workers are community oriented and are graduates of required community service hours.

Count them in on benefits like 401(k) plans. Gen Y are financially savvy. Use their capability to access and share information quickly. This is the most technologically and globally aware generation. Pair them up with older mentors. On surveys, Gen Y say they resonate most with the Baby Boom and World War II generations. Help them learn interpersonal skills for the workplace. They may need to be rescued from difficult situations while they develop these skills.

### Managers who drive them crazy....

- are cynical and sarcastic
- treat them as if they are too young to be valuable
- are threatened by their technical savvy
- are condescending
- are inconsistent and disorganized

# Workplace Characteristics

## Z Generation (1995-2010)

### Assets

More self-reliant, tech savvy and ambitious than previous generations

### Liabilities

Have only known cell phones, have a fear of missing out, worried that they are not moving ahead fast enough in comparison to everyone else and not the most patient generation. Don't be surprised if Gen Z scoffs at your workplace systems.

### They prefer to work for managers who:

- Managers who truly want to connect with their youngest employees will take the time to talk in person and hear them out.
- Managers can cultivate a culture of loyalty if they nurture these newbies and offer avenues for them to excel in the workplace.
- Helping them progress and acquire new skills is a great way to gain their loyalty for the long term.

### Motivation

Seventy-six percent of Gen Z said we are willing to start at the bottom and work their way up. Paying dues is back on the radar! In return, you'll get self-motivated go-getters who will not only think outside of the box; they'll reinvent it altogether.

### Motivational Statements

- work smart, not hard
- Gen Zers want their ideas heard, but they also desire daily constructive feedback on how they are doing.

### Rewards

- Corporate social responsibility and charitable impact
- Mentorship
- Updated Technology

### Preferred methods of communication

- In person one on one communication



### Recruiting and Coaching

If you want to attract bright young up-and-comers, you're going to need to give them the necessary tools.

### Managers who drive them crazy....

- Don't provide daily feedback, guidance direction and support
- Don't understand technology
- Micromanagers and don't allow independence and creativity
- Don't value loyalty

## EQ-i 2.0 Model of Emotional Intelligence

### SELF-PERCEPTION

**Self-Regard** is respecting oneself while understanding and accepting one's strengths and weaknesses. Self-Regard is often associated with feelings of inner strength and self-confidence.

**Self-Actualization** is the willingness to persistently try to improve oneself and engage in the pursuit of personally relevant and meaningful objectives that lead to a rich and enjoyable life.

**Emotional Self-Awareness** includes recognizing and understanding one's own emotions. This includes the ability to differentiate between subtleties in one's own emotions while understanding the cause of these emotions and the impact they have on one's own thoughts and actions and those of others.

### STRESS MANAGEMENT

**Flexibility** is adapting emotions, thoughts and behaviors to unfamiliar, unpredictable, and dynamic circumstances or ideas.

**Stress Tolerance** involves coping with stressful or difficult situations and believing that one can manage or influence situations in a positive manner.

**Optimism** is an indicator of one's positive attitude and outlook on life. It involves remaining hopeful and resilient, despite occasional setbacks.

### DECISION MAKING

**Problem Solving** is the ability to find solutions to problems in situations where emotions are involved. Problem solving includes the ability to understand how emotions impact decision making.

**Reality Testing** is the capacity to remain objective by seeing things as they really are. This capacity involves recognizing when emotions or personal bias can cause one to be less objective.

**Impulse Control** is the ability to resist or delay an impulse, drive or temptation to act and involves avoiding rash behaviors and decision making.

### SELF-EXPRESSION

**Emotional Expression** is openly expressing one's feelings verbally and non-verbally.

**Assertiveness** involves communicating feelings, beliefs and thoughts openly, and defending personal rights and values in a socially acceptable, non-offensive, and non-destructive manner.

**Independence** is the ability to be self directed and free from emotional dependency on others. Decision-making, planning, and daily tasks are completed autonomously.



### INTERPERSONAL

**Interpersonal Relationships** refers to the skill of developing and maintaining mutually satisfying relationships that are characterized by trust and compassion.

**Empathy** is recognizing, understanding, and appreciating how other people feel. Empathy involves being able to articulate your understanding of another's perspective and behaving in a way that respects others' feelings.

**Social Responsibility** is willingly contributing to society, to one's social groups, and generally to the welfare of others. Social Responsibility involves acting responsibly, having social consciousness, and showing concern for the greater community.

# Becoming a Change Agent

The speed of change is accelerating, and leaders must be change agents today.

## Leaders must:

- Detect signs in the internal and external environments
- Be aware of threats and opportunities
- Encourage others to respond in ways that will lead to success and survival.

## Change Agents

Have one foot in the old world and one foot in the new..... creators of a bridge across which others may travel.

- Articulate the need for change
- Accepted by others as trustworthy and competent
- See and diagnose problems from the perspective of their audience
- Motivate people to change
- Work through others in translating intention into action
- Stabilize the adoption of innovation
- Foster self-renewing behavior in others so that they can “go out of business” as change agents

## Is Your Organization Change-Ready?

Being a change agent will not be effective if your organization isn't ready for change.

An organization is ready for change if it:

- Has respected and effective leaders.
- Is motivated to change; is uncomfortable with the status-quo;
- Is committed and comfortable with working together.

## DO YOU HAVE THE COURAGE TO MAKE CHANGE HAPPEN?

# Leading Today

Today in 2022, leaders and managers face challenges that can test anyone. When the foundations of your personal norms are challenged and safety, health and security are thrust into the forefront, your ability to stay positive and be positive as well as being authentic is critical.

Key components for success:

- Recognize that you must take care of yourself first.... Yes first!
- Empathy is critical but it must be paired with accountability.
- “Smart” communication from the leadership. Your words and actions matter.
- Confidence not arrogance.
- Work still must get done... Be open to solutions not ever thought possible. Now is not the time to say NO. Now is the time to say, how can we?
- Stay current with the rules and laws. If you don’t know them, partner with those who do and make it a top priority.
- Yes, you are going to have to do things and allow things that you don’t like. Get over it.
- Stay focused and alert.

“Today’s formal and informal leaders must be alert and enterprising. Owing to the rapid pace of change, they must be able to recognize opportunities and threats, and be capable of mustering organizational responses to them. More than anything, they must be able to maintain positive energy in the fact of risk, ambiguity, and change. And they must balance the tensions that exist in every organization.”

(Manager’s Toolkit, Harvard Business Essentials)



## THANK YOU FOR PARTICIPATING TODAY!

Learn more from CMA's leadership and HR podcasts on The HR Power Hour podcasts at <https://hrpowerhour.buzzsprout.com> or [www.hrpowerhour.com](http://www.hrpowerhour.com).

Learn more about CMA's HR and organizational training programs at [www.cmacareer.com](http://www.cmacareer.com).

### What are you going to do differently from what you learned today?

What: \_\_\_\_\_

\_\_\_\_\_

How: \_\_\_\_\_

\_\_\_\_\_

By When: \_\_\_\_\_

\_\_\_\_\_

What: \_\_\_\_\_

\_\_\_\_\_

How: \_\_\_\_\_

\_\_\_\_\_

By When: \_\_\_\_\_

\_\_\_\_\_

What: \_\_\_\_\_

\_\_\_\_\_

How: \_\_\_\_\_

\_\_\_\_\_

By When: \_\_\_\_\_

\_\_\_\_\_

***Change only happens when you make the effort to take one step at a time.***