



Managing for Impact

A Management Development Series for Managers and Supervisors

To achieve great things in today's organizations, managers have to enable others to act. They create a culture for others to do good work. They understand that those who produce results feel a sense of personal power and ownership.

Today's managers understand they must find a balance between the traditional command and control techniques and modern philosophy of empowerment.

The goal is to give people what they need to feel strong, capable and committed to do excellent work.

Great managers foster collaboration and trust.

Loeb Leadership Development Group is a management and leadership development company dedicated to cultivating high achievers and high potentials in law firms, businesses, non-profits, and student and community leadership. We provide expert training and leadership coaching services to all levels of leaders, delivering measurable results by combining training and coaching expertise with a passion that paves the way for success. Services include in-house training and development, public workshops, one-on-one executive and leadership coaching, assessments, 360's, retreats and speaking engagements.

We do this by:

- Helping clients to build solid management skills and successful leadership practices.
- Collaborating with clients to understand their culture and build practical training and coaching methods to aid in the development of their current and future leaders.
- Inspiring all levels of leaders to utilize their capabilities and demonstrate leadership practices to move themselves, others and their organizations towards success.
- Valuing diverse backgrounds, perspectives, opinions, thoughts, and experiences of clients to leverage each unique quality and bring innovative ideas to the organization.





Managing with Impact is a highly interactive development series dedicated to those responsible for supervising or managing others. Whether managers have been “promoted from within” or transitioned into the industry, it’s the manager’s responsibility to build a collaborative environment to support the needs of their teams and to align processes and people with the goals and initiatives of the organization.

This five course series provides managers with non-negotiable skills required to be an effective manager. Each session runs from 9:00am – 4:00pm once a week for five consecutive weeks. The facilitators are skilled in working with leaders at all levels and provide expert feedback as well as coaching. They guide participants as they gain confidence and the skills required to be an effective manager in today’s fast paced and demanding environment. In addition, participants support one another as they experience the series together.

After each session, participants return to the workplace eager to apply their newly acquired skills. Optional homework assignments are provided to participants at the end of each session. The assignments gives managers an opportunity to reflect and practice what they have learned in the session. At the following session, the facilitator will debrief any skills or techniques implemented by a manager along with key insights from the experience. As participants return each week to share their experiences and reflect on their observations, an intensive learning and development takes place.

Participants are also offered one complementary one-on-one coaching session with a Loeb Leadership executive coach. The managers are encouraged to use this 45 minute time slot at any time during the series or up to three months upon completion of the series in order to help them solidify their leadership skills or receive advice on a particular challenge.

“What’s really driving the boom in coaching, is this: as we move from 30 miles an hour to 70 to 120 to 180... the whole game changes, and a lot of people are trying to keep up, learn how not to fall.” - John Kotter, Professor of Leadership, Harvard Business School

Managing with Impact is offered live in New York City and Washington D.C. Investment for all five sessions including materials is \$3,500.00 per participant. The fee includes a complementary 45 minute one-on-one coaching session for each participant. Breakfast and snacks are provided with the exception of lunch. On the final (5th) day, Loeb Leadership invites all participants to join the facilitator for a group luncheon.





Session 1 Becoming the Boss

“Congratulations” seems like the natural response when someone gets promoted to supervisor or manager. But research shows that for many, taking on a management position at work is one of life’s most challenging and/or stressful events. The transition to formal or informal leader represents major changes in orientation of what people believe is important, how they allocate their time, and what aspects of the job they draw satisfaction from. This requires some degree of personal transformation if the new manager is to fully achieve results at his or her new level. **Becoming the Boss** is designed to help participants successfully transition from an individual contributor to a formal or informal leader.

As a result of participating in **Becoming the Boss** participants will:

- Build a vocabulary around the attributes of an effective manager/leader
- Understand the business case for managerial excellence
- Appreciate the challenges and opportunities in the transition process from an individual contributor to a manager
- Enhance their capacity as a manager by understanding and building time management/prioritization, delegation and workforce engagement skills



Becoming the Boss Outline

1. **Introductions: Getting to Know One Another**
2. **Setting Context for the Series**
 - 2.1. Program Goals
 - 2.2. Agenda
 - 2.3. Group Norms
 - 2.4. Participant expectations
 - 2.4.1. What will be different after the five weeks?
3. **Setting Context for the Day**
 - 3.1. Description
 - 3.2. Goals/Objectives





4. Icebreaker: Embodying the Role of Manager

- 4.1. Reflect on a great boss. What made him/her great? Impact on you/organization? What he/she more than a manager. A leader?
- 4.2. Based on these insights and your sense of what you/your organization expects as well as needs in its managers, what are the skills, behavioral attributes, values, roles and responsibilities that you believe you need to embody?

5. Case Study

- 5.1. Participants review case study
 - 5.1.1. Case Study highlights the differences between technical expert and manager; specifically, “Kelly’s” challenges with time management, delegation, employee engagement/morale and employee life cycle issues. All of these topics are addressed in the series.
 - 5.1.2. In pairs, participants draft a performance review for Kelly
 - 5.1.3. Group discussion – Skills, behaviors, attributes, values that a good manager must embody?

6. Setting Context: What We Know from the Research

- 6.1. Research results on management practices
- 6.2. What resonates with you based on your role/experiences at your organization?

7. Cementing Your Effectiveness from Day 1 with Everyone: Workforce Engagement

- 7.1. Review Gallup Tenets on Workforce Engagement
- 7.2. Participants complete an “assessment”
 - 7.2.1. Importance to their job
 - 7.2.2. Their own opportunity for improvement
- 7.3. Identify skills/attributes/responsibilities that are needed to support each Gallup tenet

8. Cementing Your Effectiveness from Day 1: Time Management

- 8.1. Introduction of Covey Priority Matrix
- 8.2. In small groups, participants use previous case study to complete priority matrix
- 8.3. Participants assess own alignment with priority matrix and explain what gets in their way
- 8.4. Homework Assignment – Complete priority matrix for three days

9. Cementing Your Effectiveness from Day One: Delegation

- 9.1. Point/Counter Point Activity
 - 9.1.1. Participants form two teams.
 - 9.1.2. One team is responsible for making all the possible arguments against delegation. The other team is responsible for making all the possible arguments for delegation.





- 9.1.3. Group discussion about which of both arguments get most in manager's way and why. What to do about it?
- 9.1.4. Homework Assignment– Delegation challenge for next week. Delegate something new and also offer to take on something new from your boss.

10. Day One Summary

- 10.1. Journaling - Each participant reflects and shares one take away and its potential impact on managerial effectiveness
- 10.2. Homework Review
 - 10.2.1. Priority Matrix
 - 10.2.2. Delegation challenge
- 10.3. Preview of Day 2
 - 10.3.1. Inclusion
 - 10.3.2. DiSC® Assessment and its implications

Session 2 Inclusive Management

Inclusive Management teaches participants how to understand and appreciate the various styles of the people they work with. The results a more productive team and working relationships. Using the Everything **DiSC® Model**, a powerful yet easy-to-use, research-validated learning model, participants learn how to improve the quality of their workplaces by forming solid working relationships, to minimize conflict and communicate more effectively. This workshop uses online pre-work and engaging facilitation with contemporary video to create a personalized learning experience. All participants are invited to join a complementary online dashboard that stores their DiSC® profiles for “just-in-time” use. The dashboard also provides additional tips and information on how to apply the lessons from the workshop.

As a result of participating in **Inclusive Management** participants will:

- Deepen understanding and appreciation for inclusive management knowledge, skills and behaviors
- Build self-awareness regarding strengths and opportunities for development in managing inclusively
- To discover the world of DiSC® and its relationship to managing
 - Introduction to the Everything DiSC® workplace map
 - Individual DiSC® style with priorities, motivators and stressors
 - Similarities and differences amongst the DiSC® styles





Inclusive Management Outline

1. Welcome Back

1.1. Homework Report Out

- 1.1.1. Half group reports out on learning from delegation assignment while other half reports out on learning from priority matrix homework

2. Setting Context for the Day

2.1. Description

2.2. Goals/Objectives

2.3. Participant expectations

3. Am I an Inclusive Manager?

3.1. Participants complete a brief self-assessment

3.2. Discuss “results” with partner and as a group

4. DiSC®: Setting Context

4.1. Self -Awareness Quotes/Implications

4.2. Johari Window

4.3. How You See Yourself Exercise

5. DiSC®: Introduction to Your Workplace Style

5.1. Cornerstone Principles

5.2. Profile Overview and Reflection

5.2.1. Explanation of Dots/Priorities

5.2.2. Your Style

5.2.3. Your Priorities

5.2.4. Motivators and Stressors

5.3. Planning a Retreat – Strategic and Team Building Content

5.3.1. Interview Questions

6. DiSC®: Building More Effective Relationships

6.1. Applying DiSC® to Workplace Interactions

6.1.1. Video Vignettes

6.2. Increase Your Effectiveness

6.2.1. Report Information

7. DiSC®: People Reading





8. DiSC®, Your Style and Your Unique Role as Manager

- 8.1. Consider your distinct responsibilities as a manager
- 8.2. Consider the culture and environment in which you work
- 8.3. Consider your team “style profile”
 - 8.3.1. What opportunities exist to leverage your style?
 - 8.3.2. What opportunities exist to flex your style?
 - 8.3.3. What opportunities exist for others to leverage or flex their styles?
 - 8.3.4. What is your plan
- 8.4. Homework Assignment
 - 8.4.1. Inclusion Opportunity
 - 8.4.2. Identifying a staff member with whom you have a more challenging relationship.
Assess through DiSC®
 - 8.4.3. How does DiSC® impact your relationship with your own boss?
 - 8.4.4. Bring in a job description for a position for which you recruit OR your own position

9. Day Two Summary

- 9.1. Journaling - Each participant shares one take away and its implications
- 9.2. Homework Review
 - 9.2.1. DiSC® Employee Analysis
 - 9.2.2. DiSC® Manager Analysis
- 9.3. Preview of Day 3
 - 9.3.1. Selection and On-Boarding

Session 3 Selection and On-Boarding

The cost of making a bad hire exceeds beyond the salary and benefits costs that were invested into the new employee who ultimately didn't pan out. While the loss of salary, productivity, and poor morale are all clearly painful, another one of the biggest cost of a bad hire is the emotional energy and time spent by managers dealing with the poor performance of a bad hire. Dealing with underperformers is a drain on managers' mental capacity and has far-reaching implications on the organization's overall productivity. To avoid these scenarios, managers must understand the rationale for a strong selection process and consider their organization's selection strategy and how to support it. Using key behavioral techniques during the interview process significantly improves a manager's chances of selecting the right candidate 2:5 ratio over traditional processes. It focuses on *how* the candidate works rather than on skills, qualifications, and first impressions. Upon acceptance of an offer by the applicant, effective on-boarding practices leads the employee through a smooth transition into the organization along with higher chances for increased workforce engagement.





As a result of participating in **Selection and On-Boarding** participants will:

- To develop deeper understanding for an effective selection process
- To identify the competencies and motivational issues that provide the content for behavioral based interviews
- To develop skills for behavioral based interviewing
 - Learn how to develop behavioral based interviewing questions
 - Learn the boundaries for a legal interview
 - Gain ideas for structuring and having a productive interview discussion
 - Learn techniques to probe for the right information
- To design a comprehensive and positive on boarding experience for new employees



Selection and On-Boarding Outline

1. Welcome Back

1.1. Homework Report Out

1.1.1. Learning

1.2. Icebreaker

1.2.1. Most important messages to convey during interview and on-boarding process at your organization

2. Setting Context for Rest of Series: Where We've Been, Where We Are Going

2.1. How a manager shows up every day versus distinct "requirements" at different stages of employee life cycle

2.1.1. Roles/responsibilities

2.1.2. Skills

2.1.3. Behaviors/attributes

2.1.4. Knowledge

3. Setting Context for the Day

3.1. Description

3.1.1. Selection and On-Boarding

3.2. Goals/Objectives

3.3. Participant expectations

4. Interview/Selection: The Why?

4.1. Group Discussion: Rationale for a solid selection process (e.g. Costs)

4.2. Rate Your Organization on its selection approach

4.2.1. Strategy





- 4.2.2. Process
- 4.2.3. Success

5. Candidate Selection: The How?

- 5.1. The Big Picture:
 - 5.1.1. Organization Strategy/Approach
 - 5.1.2. Interview Preparing, Conducting, Evaluating
- 5.2. Preparing
 - 5.2.1. Group Brainstorm
- 5.3. Conducting – General
 - 5.3.1. Legal Question Quiz
 - 5.3.2. Best/Worst interview questions you've heard or experienced
 - 5.3.3. Different Types of Questions (Closed, Open, Situational, Behavioral)

6. Behavioral Interviewing

- 6.1. Overview
 - 6.1.1. Premise
 - 6.1.2. "Selection" problems it addresses
- 6.2. Preparing for Behavioral Based Interview
 - 6.2.1. Job Description Analysis and Competency Mapping
 - 6.2.2. Areas that Require Employee "Motivation"
 - 6.2.3. Developing Questions
- 6.3. Conducting the Interview
 - 6.3.1. Asking behavioral based questions
 - 6.3.2. Looking for S.T.A.R. responses
 - 6.3.3. Asking motivational fit questions
- 6.4. Evaluating the Candidate

7. Skills Practice

8. On-Boarding (a.k.a they're hired, what's next?)

- 8.1. Activity: In a new country, what do you need to know?
- 8.2. Partner discussion
- 8.3. Group debrief

9. Re-visit the of Tenets Workforce Engagement

- 9.1. First two tenets are all about the initial employee experience
 - 9.1.1. Knowing what's expected of them
 - 9.1.2. Having the materials and equipment to do their job.





10. Framework for On-Boarding

- 10.1. Speaking the Language (e.g. organizational culture)
- 10.2. Learning How Things Get Done (e.g. organizational processes)
- 10.3. Hitting the Ground Running (job effectiveness/mastery)
- 10.4. Integrating into the Community (meeting people)

11. Application Activity

- 11.1. Individual work
 - 11.1.1. Assess current on-boarding processes using framework
 - 11.1.2. What stays the same? What needs to be added? What is not as useful?
 - 11.1.3. What is your role as a manager in this process?
- 11.2. Group Discussion
- 11.3. Planning for Refined On-Boarding Strategy
 - 11.3.1. Content
 - 11.3.2. Implementation

12. Day Three Summary

- 12.1. Journaling - Each participant shares one take away and its implications
- 12.2. Homework Review
 - 12.2.1. Selection or on-boarding application opportunity
 - 12.2.2. Two employee profiles – high performer and challenging
- 12.3. Preview of Day 4 and 5
 - 12.3.1. Nuts and bolts managing/developing

Session 4 It's Ok, [Actually] Essential to Be the Boss

Once an employee has been selected and on-boarded, it's the manager's responsibility to provide the appropriate level of coaching, feedback, support and guidance for the employee to succeed. For a number of reasons supported by an ever increasing body of research, managing people is harder today than ever before. There are four generations of employees working side by side in today's workforce. There's no room for downtime, waste, or inefficiency. Managers need to accomplish more with less and some employees have become high maintenance. It's not unusual for employees to disagree openly and push back. At times they may not trust vague promises of long-term rewards. Today's managers have to be clear when setting expectations with employees and must also be clear on what's expected of them in order to foster collaboration and trust. It's Ok, [Actually] Essential to Be the Boss reminds managers that employees rely on them to be successful and in order for that to happen, they need to be highly engaged with their employees through effective performance management techniques.





As a result of participating in **It's Ok, [Actually] Essential to Be the Boss** participants will:

- Develop a deeper understanding and appreciation for management essentials (and excellence) over the course of an employee's life cycle
- Understand the importance for himself/herself, their employees, and their organization to being strong, highly engaged managers
- Recognize the consequences of under managing while challenging the assumptions of seven "management myths"
- Learn five back-to-basics techniques for help their employees succeed
- Learn how to transition from performance manager to performance coach



It's Ok, [Actually] Essential to Be the Boss Outline

1. Welcome Back

1.1. Homework Report Out

1.1.1. Learning

1.2. Icebreaker

1.2.1. Job of managers/supervisors/leaders is to get stuff done and ensure that employees are successful and satisfied in getting things done

1.2.2. How do your employees experience you on a daily basis? Manager, developer, coach?

1.2.3. How would you assess yourself?

2. Setting Context for the Day and Beyond

2.1. Description

2.1.1. We've selected the employee

2.1.2. We've on-boarded him/her

2.1.3. Now we have to manage, coach, develop him/her

2.2. Goals/Objectives

2.3. Participant expectations

3. Manager Nuts and Bolts

3.1. Consequences of Under Management

3.2. Top 7 Management Myths

3.3. Management is not One-Dimensional/Single Note/One Size Fits All

3.3.1. Diversity in talent (e.g. skills, style, tenure, job responsibilities)

3.3.2. Stakes (optics/importance of project, manager roles/responsibilities, expectation of others)



- 3.4. Techniques
 - 3.4.1. Manage Every Day
 - 3.4.2. Make Accountability a Process
 - 3.4.3. Make Expectations Clear
 - 3.4.4. Track Performance
 - 3.4.5. Solve Small Problems Early
 - 3.4.6. List of great manager behaviors

4. Managing Every Day

- 4.1. Challenge/Opportunity
- 4.2. Return to Covey – Quadrant II
- 4.3. 1:1 individual and team conversations
- 4.4. Knowledge/Behaviors/Attributes that gets in your way

5. Making Expectations Clear

- 5.1. Challenge/Opportunity
- 5.2. Exercise – Describing a New Task
- 5.3. The Expectation Mantra – Outcomes, Knowledge, Skills/Competencies, Process & Parameters
- 5.4. Return to Delegation
- 5.5. Knowledge/Behaviors/Attributes that gets in your way

6. Solving Small Problems Early

- 6.1. Challenge/Opportunity
- 6.2. Partner Discussion: Problems that snowball gets in your way
- 6.3. Ways to frame problems
- 6.4. Knowledge/Behaviors/Attributes that gets in your way

7. Making Accountability a Process

- 7.1. Challenge/Opportunity
- 7.2. Seven Complications
- 7.3. How to hold people accountable
- 7.4. Knowledge/Behaviors/Attributes that gets in your way

8. Tracking Performance

- 8.1. Challenge/Opportunity
- 8.2. Ways to Monitor Performance
- 8.3. Knowledge/Behaviors/Attributes that gets in your way

9. Question & Answer Activity using Frequently Asked Questions from New Managers





10. Championing Performance (Part I)

10.1. The Performance Management Process

10.2. Benefits

10.2.1. Return to Engagement Principles. Some engagement principles are directly tied to effectively managing performance.

10.3. Self- Assessment

10.4. Year Long

10.4.1. Prior

10.4.2. During

10.5. S.M.A.R.T. Goals and Success Metrics

11. From Performance Manager to Coach

11.1. Distinctions

11.2. Benefits

11.2.1. Return to Engagement Principles. Some engagement principles are directly tied to development/coach.

11.3. Coaching Topics and Strategies

11.4. Individual Development Planning

12. Day Four Summary

12.1. Journaling - Each participant shares one take away and its implications

12.2. Homework Review

12.2.1. Two employee profiles – high performer and challenging

12.2.2. Reflection on the Series

12.3. Preview of Day 5

12.3.1. Skills Practice

12.3.2. Return to Where We Started

Session 5 Championing Performance

In order to develop performance and sustain motivation throughout the year, managers must manage and champion performance. Doing this consistently throughout the year leads to a productive and successful annual performance review with no surprises. Employees enter their performance review discussion with a growth mindset ready to exchange feedback along with sharing ideas for progress in the following year. Championing employee performance teaches managers how to seamlessly manage and coach performances that results an upturn in workforce engagement and deliver an effective annual performance review. Most importantly, managers learn how to use effective communication skills to facilitate professional relationships grounded in trust, candor and mutual respect that maximizes employee performance.





At the closing session, participants re-visit the case study introduced in the first session with a new set of “eyes” and share ideas on what they would do differently. A final exercise challenges each participant to list the attributes of how they would like to be described as a manager moving forward. Each individual’s list of words is collected by the facilitator and sent to Loeb Leadership headquarters where a “word cloud” is created and delivered to each participant following the series. This visual motivational aid is intended to keep each participant’s commitment visible every day!

As a result of participating in **Championing Performance** participants will:

- Learn how to manage and champion performance
- Develop a deeper understanding for what it means to champion performance, including process and coaching considerations and their distinctions
- Learn how to prepare and conduct an effective performance evaluation
- Practice handle “challenging” employee behaviors
- Learn techniques for on-going coaching and development planning throughout the year
- Crystalize the critical skills, behaviors, personality attributes and knowledge that support one to be a highly engaged and effective manager



Championing Performance Outline

1. Welcome Back

1.1. Icebreaker

- 1.1.1. Managers/Supervisors/Leaders job is to get stuff done and ensure that employees are successful and satisfied in getting things done.
- 1.1.2. How do your employees experience you on a daily basis? Manager, developer, coach?
- 1.1.3. How would you assess yourself?

2. Setting Context for the Day and Beyond

2.1. Description

- 2.1.1. Skills and Practice Makes Perfect
 - 2.1.2. Final Activity
- #### 2.2. Goals/Objectives
- #### 2.3. Participant expectations





3. Skills for Success

- 3.1. Effective Listening
- 3.2. Ask Powerful Questions
- 3.3. Provide Feedback

4. Practice

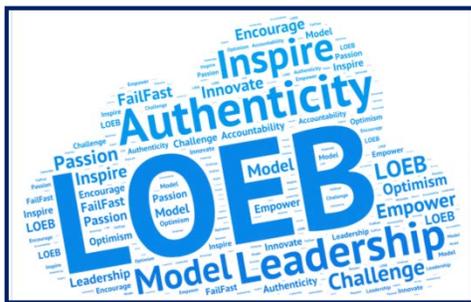
5. Beware! Situations

6. Return to Where We Started

- 6.1. “Kelly” Revisited
- 6.2. How Kelly spends her day tactically
- 6.3. Skills/Attributes she demonstrates- Participants rewrite the case study to reflect all their lessons from series

7. Day Five Summary

- 7.1. Journaling - Each participant shares one take away and its implications
- 7.2. Embodying My Role as Manager
- 7.3. Revise Word Cloud - Participants will revisit the word cloud activity to incorporate terms that reflect their newly acquired management discoveries and self-awareness. Loeb will re-produce the word clouds and send them to participants a week or so after the series ends.



Sample word cloud

7.4. Wrap up and “Complementary Coaching” Reminder

- 7.4.1. Invitation to Loeb Leadership “Linked in” Group for additional support and resources.

For additional details, please contact:

Jill Schellenberger

Director of Business Development

Jill@loebleadership.com

www.loebconsultinggroup.com

info@loebconsultinggroup.com

866-987-4111

Managing with Impact Page 15 of 15

