



pci Bottom-Line Leadership®

PEOPLE

TEAMS

METRICS

SKILLS

STANDARDS

QUALITY

CUSTOMER
SERVICE

DECISIONS

REPORTS

PERFORMANCE

CONTROL
COSTS

Leadership Research

- What is Leadership anyway? Leadership in the Digital Age
- How many levels of Leadership are there that we need to train and develop?
- What Supervisors/Team Leaders and Managers really do
- The 2 key roles for Supervisors and 4 Key roles for Managers
- Soft Skills for Supervisors and Soft Skills for Managers – the same or different?
- Common Pressure: Getting more done with less
- Which tools each group needs
- Are you NOW investing or wasting – leadership training money



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THE RESEARCH



What is Leadership:

Everyone is talking about Leadership but who has a really accurate up to date definition of leadership; especially in this digital age. Leadership is NOT being a “boss”, telling everyone what to do or taking credit for team success. Leadership today is getting people to work together constructively in a team to use all available tools (and technology) to meet, or exceed, company objectives (especially for productivity, customer service, quality and cost control).

Million Dollar Businesses:

If you add up the cost of people, equipment and materials entrusted to your supervisors, you will discover they are managing a business with assets approaching 1 million US dollars per year. Managers with larger organizations made up of multiple units each, with their own Supervisor, typically have to manage or set a budget many times higher. THESE ARE IMPORTANT JOBS THAT DESERVE SERIOUS ANALYSIS AND ATTENTION.

“More with Less”

Supervisors and managers both share the same pressure. They are both pressured daily to produce more quality work with the same/less people than last year. They are asked to increase quality and customer service - all at lower unit cost.

Leadership “Soft” Skills vs. “Interpersonal skills”

Every book, speaker and YouTube video list the same “Soft skills”: Communications, motivation, conflict resolution etc. These are NOT Leadership Skills. These are **inter-personal skills**; needed by **everyone** – at every organizational level – to work successfully in ANY organization; business, medical center, government agency or nonprofit.

Level Specific

Research found: (1) Soft Leadership skills vary by level – they are not standard. For example, the first level; (a) Team Leaders need coaching, counseling and discipline skills (b.) managers need behavioral interview, performance appraisal and delegation, (2) the ‘soft skills’ at each level are built on a base of interpersonal skills; the starting point for all leadership skills and (4) each new higher level ‘soft skills’ forms a base - and will be needed at the next higher level as well – as one climbs the Leadership Ladder. The basis for understanding which soft skills are needed at each level comes from analyzing what each level does. Let’s Start with Supervisors and Team Leaders...

What Do Supervisors/Team Leaders Really Do?

Time and motion studies show that supervisors spend:

30% of their time (at most) on people/team leadership (soft skills) and 70% on “other” activities

The “Other” 70% Consists of:

Planning and scheduling work assignments for teams and temps, communications with non-team people, meetings, logistics, human resource policies and procedures, productivity, quality, customer service, finance and cost control and hiring and interviewing new team members.

Traditional 1st Level Training Concentrates On:

- Interpersonal Skills
- Company-specific policies and procedures
- Nothing about the other 70%

The Training Methodologies Most Commonly Offered Are:

- Classroom-Based
- Video-Based “Behavioral Modeling”
- E-Learning

An On-Going Study Of Video-Based Behavioral Modeling Training Asked:

"Do your graduates use these skills back on the job?"

Our own survey found ... 10 out of 12 video-based customers said NO! NOW... A video-based behavioral modeling vendor reports 83% of graduates do NOT use skills or tools back on the job.

When Asked –

"Why aren't your graduates using these interpersonal skills back on the job?"

The Overwhelming Response Was: THEY ARE TOO BUSY!!!

Too busy doing what?

Graduates reported they are too busy to do "soft" skills because they are pushed daily by their managers to do more with less to increase these 'hard' performance metrics to get more productivity with the same or less staff; more service-quality at lower cost. That is what their Managers judge them on daily – and base salary increases and promotions on.

THE MISSING LINK:

Unless and until you provide leadership training that links soft skills to increasing those critical hard performance metrics your trainees will continue to decline to use them ON THE JOB.

Training Millennials

Talent Management and Development professionals with 20 + years of experience are baffled by how best to train the largest group of upcoming managers- first and second level managers. These are increasingly staffed by Millennials. Senior HR offices despite spending millions (on all the wrong skill training) complain "nothing is working" and worry how to get through to Millennials. WHAT DO MILLENNIALS LIKE TO DO BEST? *PLAY ONLINE GAMES.*

THE 4 ROLES

In addition, our research shows Supervisors are asked to play the first 2 (of the 4) roles simultaneously on the job. **Today's first-level managers are being asked to play all 4 roles simultaneously.** These roles and competencies are:



1. Productivity Manager (to get more with less)

- Plan and schedule work
- Manage performance
- Achieve “more with” - increase productivity - diagnose problems
- Coach and give performance feedback



2. People/Team Leader (one-on-one and building teams)

- Communicate clearly and concisely with today's workforce
- Manage motivation and morale
- Quality and service leader
- People manager (one-on-one)
- Team leader
- Performance management
- Training and skill building



3. Human Resources/Legal Policy Administrator

(in the USA* - diversity, harassment, avoid lawsuits, etc.)

- Human resource policies
- Legal issues
- Staffing and layoffs
- Regulatory requirements, environmental safety and health



4. Decision Maker

(proactive management, setting priorities, basic finance)

- Set priorities and balance 4 roles
- Decision making and problem solving
- Manage against budget and control costs
- Performance appraisal and career development
- Complete special projects

Each role is demanding by itself. All 4 roles combined equal an enormous amount of responsibility. **The competencies and skill set of all 4 roles are outlined in detail on the following pages.**

**issues vary by country*

1. PRODUCTIVITY MANAGER



Competencies and Skill Sets

Plan and Schedule Work

- Transition from staffer to supervisor
- Get work done and be a part-time leader
- Handout assigned work
- Review assigned work and correct

Manage Performance

- Know skills required and manage skill level (rating)
- Know/apply standards of performance
- Measure performance vs. standards

Increase Productivity

- Know why people do NOT perform
- Diagnose performance gaps and skill deficiencies
- Get agreement for performance gap remediation plan
- Track and report basic performance measures

Coach and Give Performance Feedback

- Demonstrate and model the desired behaviors
- Re-measure and provide constructive feedback
- Continuously shape improving performance
- Create performance aids and help your people apply existing tools

2. PEOPLE/TEAM LEADER



Competencies and Skill Sets

Achieve: “More With Less”

- Workflow Analysis - identify roadblocks/time wasters
- Capacity Analysis - how much work can your team handle
- Volume Forecasting - how much work is coming
- Assign people to the right job(s)/workstations

Quality and Service Leader

- Remove inefficiencies and roadblocks
- Increase customer focus - meet deadlines
- Improve quality - reduce errors/rework
- Measure, evaluate, chart service-quality results and provide feedback

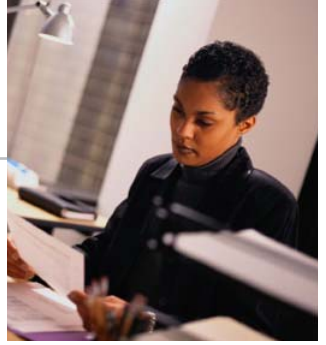
People Manager: (One-on-One Counselor)

- Performance management; relate motivation and morale
- Provide training and skill building
- Lead high-performers, standard players and marginal staff
- Recognize results and praise successes
- Counsel problem employees and discipline violations

The Team Leader

- Build a team from individual contributors
- Lead the team (set vision) by example
- Manage the team through changes and turbulent times
- Develop your team and yourself

3. HUMAN RESOURCES/LEGAL POLICY ADMINISTRATOR



Competencies and Skill Sets

Policies:

- Compensation and job classification
- Labor relations and discipline
- Overtime
- Company personnel policies

Legal Issues: (USA*)

- Manage diversity and prevent discrimination
- Sexual harassment
- Substance abuse
- Termination

Staffing:

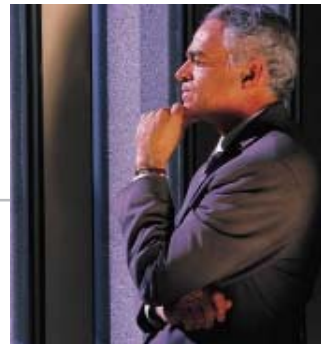
- Help set hiring criteria
- Conduct fair interviews - behaviorally based
- Selecting best candidates to hire
- Prepare fact-based evaluations/ratings for hiring and layoffs

Regulatory Requirements Environment Safety and Health:

- Avoid environmental/health hazards
- Avoid regulatory/compliance problems
- Maintain safety program

**issues vary by country*

4. DECISION MAKER



Competencies and Skill Sets

Set Priorities:

- Prioritize and balance 4 roles
- Be more proactive - less reactive
- Control Headcount: Balance full-time vs. part-time vs. overtime
- Apply powers - positive and negative - to get work done right, first time

Decision Making and Problem Solving:

- Making good business decisions "trade-offs", decisiveness
- Performance appraisals and career development
- Balance strategic needs with effective tactics
- Set staff levels: manage headcount, hours, hiring and layoffs

Manage the Work-People Matrix:

- Manage the work/people matrix
- Manage equipment and supplies
- Identify/track jobs that need to be done
- Complete special projects while maintaining on-going work

Finances, Budgets and Cost Control:

- Finance: read basic cost reports
- Track and control costs vs. budget
- Control overtime, turnover and absences
- Help set budget and implement cost reduction

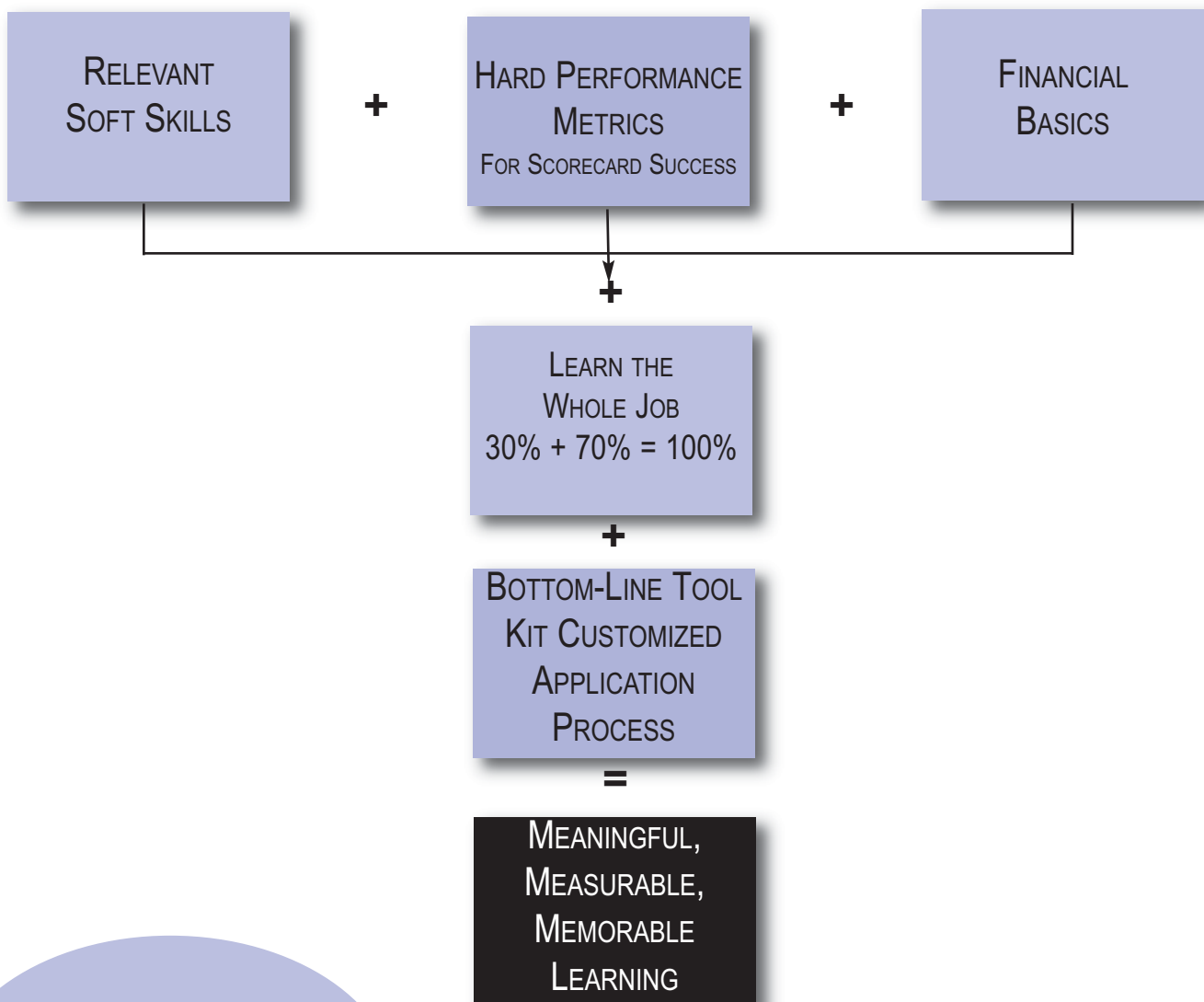
BREAKTHROUGH

FIRST TIME EVER.....

At each level, identify key soft skills:

Supervisors & Team Leaders – Coaching, Counseling, Discipline

First Level Managers – Interviewing, Appraisal, Delegation (E)



Breakthrough --

Learn soft skills, practice each with scored results. Learn financial basics to run unit as a business. Then integrate and apply all three sets of skills in the simulation with immediate feedback on results to do the whole job.

Each tool learned and practiced with feedback:

- Capacity Analysis Worksheet
- Skills Matrix Worksheet
- Key Success Criteria
- Job/Task Analysis Worksheet
- Diagnosing a Performance Problem
- Performance Management File
- One-on-One Instruction Checklist
- Feedback Model Checklist
- Coaching Plan
- Documentation Log
- Hiring/Interview Worksheet
- Analyze Your People
- Promotion Potential
- Counseling Plan
- Counseling Plan Scorecard
- Discipline Process

Note: Not all tools used in all classes

BOTTOM-LINE LEADERSHIP

3 LEVEL LEADERSHIP CURRICULUM

LEADING PEOPLE AND TEAMS IN A DIGITAL METRIC WORLD

Leaders today, at every level and industry, must master and integrate soft skills plus financial basics with technology and hard performance metrics they're judged by, to successfully lead people and build teams in a globally competitive, cost conscious, technology driven scorecard world.

They must master the 2 - 4 roles leaders play simultaneously and communicate clearly with all 4 generations (especially Millennials) to convey targets and desired behaviors without giving offense. They must also motivate and read financial reports to get "more with less"; more productivity and service-quality with fewer staff and costs!

One size no longer fits all. **So, PCI has built and proven a 3-course integrated curriculum to grow new leaders from campus to middle management.** Our 3-day 'hands-on' courses at 3 levels include:

LEADER OF LEADERS

FIRST LEVEL MANAGERS

SUPERVISORS & TEAM LEADERS

BOTTOM-LINE LEADERSHIP



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