



Development Guide

A Resource for Leading, Managing and Developing Your Team Members

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Managing From The Inside Out
Facilitator + Licensor

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The Purpose of the Development Guide

Dear Leader Manager,

We're grateful to be on the journey with you and do not take it for granted that you've picked up this Guide as a resource to develop yourself and others using the **1-1 Coaching Process** within **The Code**. We are lifelong learners who see each day as an opportunity to encourage, influence and inspire others.

This Development Guide will always be a work-in-progress (just like us) and we hope the current tools, resources and information in these pages will provide you with a Road Map to lead, manage and develop your Team to the highest levels of effectiveness (there's no perfection this side of heaven!).

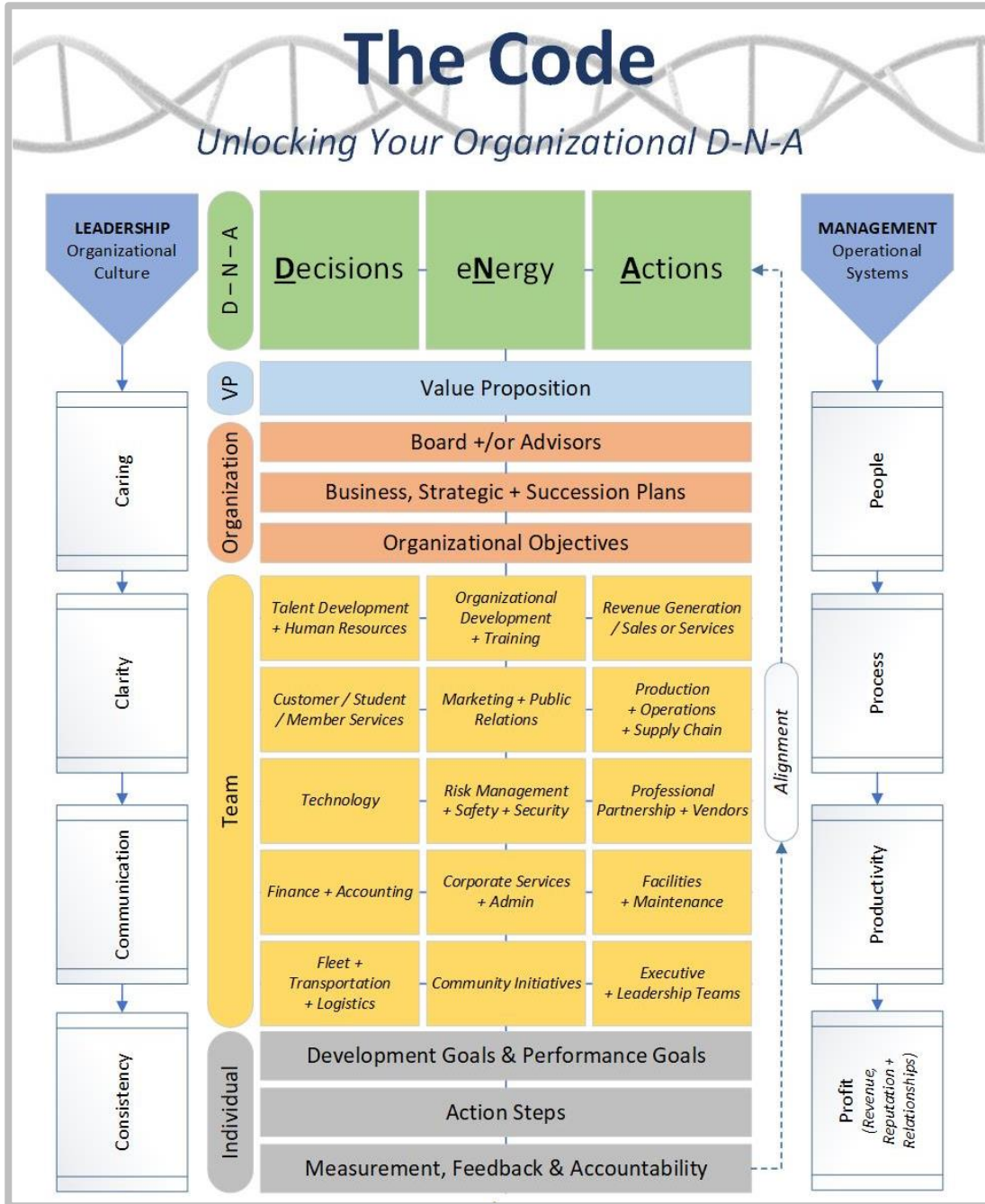
If we can answer any questions or provide additional resources or materials, please reach out. Like we mentioned, we're lifelong learners and welcome your feedback and insights from your perspective and journey.

With gratitude,

The LSCA Team

Organizational Alignment & Feedback

A Values, Vision and Mission guides an organization's decisions making and creates behavioral boundaries. It's the **D-N-A (Decision – eNergy – Action)**! The 1-1 Coaching Process develops Team Members, brings clarity and provides the opportunity to consistently give and receive feedback to ensure alignment at the individual, team and company level.

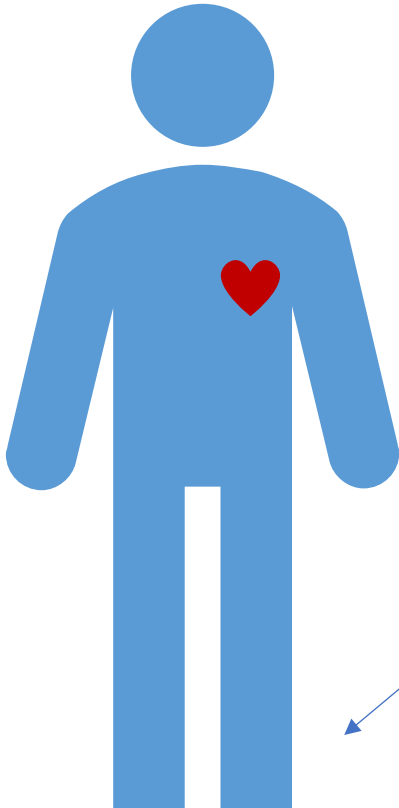


“Feedback is the breakfast of champions.”

– Ken Blanchard

Organizational D-N-A & Value Proposition Definitions

Our DNA: **D**ecisions, **eN**ergy **A**ction



Our **D**ecisions | What Principles Direct Our Thoughts

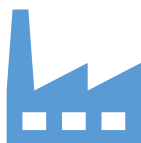
- create the decision making and behavioral boundaries within an organization – generally they are non-negotiable
- are inspirational and/or aspirational principles
- should be held in our **minds** as what we believe and think as Individuals, on a Team, and as the Organization

Our **eN**ergy | What We Are Passionate About

- provides the passion, energy and enthusiasm to be a part of a team that is working for a common purpose
- defines how we see the world and/or how we want to be seen

Our **A**ctions | What We “Do Unto Others”

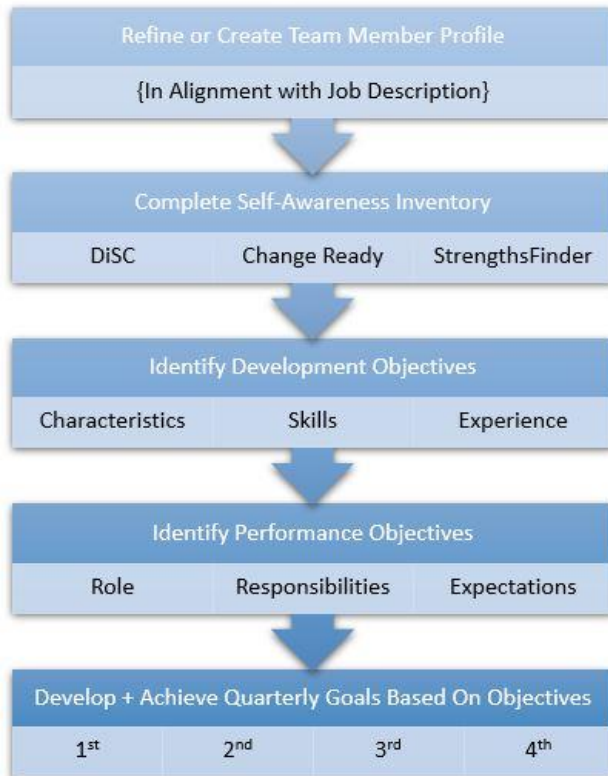
- provides the framework for daily actions
- should define environment we create in the workplace
- is how we treat each other or what we do “unto others” with our **hands and feet**



Value Proposition is the business you’re “IN,” the markets you serve, and the sources of revenue generated

Coaching Purpose & Process

Coaching is applying yourself personally to the process of **developing** those you are leading to their fullest **potential** and highest **productivity**.



Implement Monthly 1-1 Coaching

What is Coaching?

Coaching...

is...



- Focused on Being More Effective
- Behavior Based
- Seeking + Providing Clarity
- Aspirational
- Giving + Receiving Feedback
- Values Driven
- Focused on Greater Good

is not...



- Focused on Perfection
- Activity Based
- Remedial
- Operational
- Corrective or Punitive
- "Fixing" People
- Focused on Short Term

A Few Notes to Keep in Mind...

“Leaders and Managers care about their Team Member’s Quality of Life and the Quality of Work.”

As a Leader Manager, **you are both a Student** (*Developing Yourself*) and a **Participant** (*Developing Others*). This guide outlines the steps to take with each of your Direct Reports and your Supervisor/Leader Manager. Keep in mind these steps can be a **circular process** and are **not always linear**



Before you get started, take a moment to reflect and consider how 1-1 Coaching is connected to someone’s **Welfare, Accountability and Development...**

1-1s are *not* operational. If you find that your discussions become more operational, consider scheduling a consistent and on-going Operational Meeting (weekly, bi-weekly, etc.,).

During your 1-1, be sure to ask your Direct Report **how they are doing**, discuss any **workplace challenges**, uncover if they’ve experienced any **significant personal trials** recently, identify **celebrations**, discuss **gaps in communication**, review **assessments/profiles** and more. This is consistent and scheduled time to **give and receive feedback**.



Leaders and Managers have a dual role challenge - **the 4 Ps** and **the 4 Cs**.

Leaders demonstrate **caring**, seek and provide **clarity, communicate** and ensure **consistency**.

Managers develop **people**, create **processes**, ensure **productivity** and grow **profit**.



Session Format & Agendas

Session Format & Agendas

What's a meeting without an agenda?!

We're big believers in agendas for every meeting (yes, every meeting). Agendas communicate to each person: who's attending, date/location/time and the question everyone asks: why are we here and what action steps do we take afterwards?

Coaching Sessions are no different. 1-1s are focused on the development of a direct report and are not operational. They provide a consistent opportunity to discuss celebrations, successes, challenges, team communication, training and give and receive feedback between a Leader Manager and Direct Report.

Initial + On-Going Agendas

We recommend using an Initial Agenda (see the following pages) for the first time a Leader Manager and Direct Report sit down to meet. These meetings are typically 1.0 hour in length and are held on a monthly basis.

Each month following the Initial 1-1, the On-Going Agenda can be used. If it's challenging to identify questions to ask or topics to discuss, we've also included a list of Talking Points in this section.

Also, if you find the discussions consistently return to operational items, consider adding a specific Operational Meeting to your schedules (weekly, bi-weekly, etc.,).

What materials should be included?

Each Leader Manager ideally should have a notebook with a tab for each Direct Report. A notebook serves as a resource for storing and referencing Agendas, Notes, Development Plans, Team Member Profiles, Assessments and more.

Direct Reports should also have 1-1 Coaching Notebooks including tabs for the following:

1. Organization's VVM
2. 1-1 Agendas
3. Development Plan (includes objectives and goals)
4. Team Member Profile
5. Benefits + Wages Overview (if appropriate)
6. Profiles + Assessments (DiSC / Change Ready / Strengths)
7. Notes Pages

Template: Initial Coaching Agenda

CONFIDENTIAL AGENDA

Meeting: Initial 1-1 Coaching Session
Attendees: Direct Report + Leader Manager
Date: TBD
Time: TBD
Location: TBD

- I. Purpose and Format:**
 - a. Being & Becoming More Effective
 - b. Give & Receive Feedback
 - c. Student & Participant Approach
 - d. Confidentiality Guidelines

- II. Methods:**
 - a. Accountability (Making & Keeping Promises)
 - b. Skill Builder and Recommended Reading
 - c. (i)deal Team Member Profile Creation/Refinement
 - i. Characteristics/Skills/Experience (CSE) Creation
 - ii. Roles/Responsibilities/Expectations (RRE) Creation
 - d. Personal and Professional Development

- III. Profile and Assessment Review and Discussion:**
 - a. DiSC Preferred Behavioral Approach
 - b. Change Readiness Profiles (CRP)
 - c. StrengthsFinder (if appropriate / applicable)
 - d. Emotional Intelligence 2.0 (if appropriate / applicable)
 - e. Leadership Practices Inventory (if appropriate / applicable)

- IV. Coaching Objectives Identification:**
 - a. Development
 - i. Characteristics
 - ii. Skills
 - iii. Experience
 - b. Performance
 - i. Role
 - ii. Responsibility
 - iii. Expectations

- V. Goals Focus:**
 - a. Quarterly Development & Action Steps

- VI. Action Plan**

- VII. Direct Reports:**

- VIII. Next Meeting:** Date / Time / Location

Template: On-Going Coaching Agenda

CONFIDENTIAL AGENDA

Meeting: 1-1 Coaching
Attendees: Direct Report + Leader Manager
Date: TBD
Time: TBD
Location: TBD

I. Celebration, Successes, & Challenges:

II. Direct Reports:

1. _____
2. _____
3. _____
4. _____
5. _____

III. Discussion Items / Action Items:

1. _____
2. _____
3. _____
4. _____
5. _____

IV. Skill Builder – Role Development & Mastery:

1. _____
2. _____
3. _____
4. _____
5. _____

V. Open Issues / Ideas / Concerns:

VI. Action Plan / Next Meeting: Date / Time / Location

1-1 Coaching Talking Points

Prepare three thoughtful questions for every 1-1 coaching meeting.

Examples:

1. How is the class you are taking we discussed at our last 1-1 unfolding?
2. What do you wish you had more time to do outside of work?
3. You shared your daughter is choosing a college. How is the selection process going?

-
- What are some successes, challenges, and celebrations you have had since our last meeting?
 - Review of personal and professional goals, and quarterly objectives.
 - Follow up on action items from previous meetings “Did you do what you said you would do?”.
 - Discuss why or why they do not agree with their DiSC and CRP assessment results.
 - Identify areas of growth you would like them to pursue as a result of those assessment results.
 - Share any open issues/ideas/concerns or challenges you are facing or anticipate before next 1:1 coaching session.
 - Exchange praise, encouragement, feedback and support for any current project, action, behavior, or attitude that is positive.
 - Agree to read a book or commit to a specific action step to help tackle a problem, solve an issue or engage in personal or professional growth.
 - Challenge individuals to take specific steps to own communication “transactions”, problem solve and tackle project management and implementation.
 - What’s getting in the way of your personal and professional development?
 - What questions are you grappling with now that I can help you with?
 - How can I help you? What can I do to be more effective/better as your Leader Manager?

Additional Coaching Session Questions:

1. Provide an example of how Teamwork is encouraged and/or practiced within the last month at our organization.
2. What is one way you've seen a Leader Manager care about an employee's wellbeing?
3. Can you share a personal goal that ties into goals of the organization?
4. How do you see Leaders and Managers at our organization listening or not listening to employee concerns?
5. Do you believe that you receive adequate training to do your job well?
6. Are you receiving helpful feedback that enables you to be more successful and effective at your job?
7. What is one way you've seen a Leader or Manager show respect to you, a Team Member, Customer, or the Community in the past month?



Team Member Profiles

Team Member Profiles

Creating and Refining Team Member Profiles

One of the most significant and commonly used resources we recommend for every person in the organization (yes, everyone!) is the Team Member Profile.

We've found while a traditional job description can be helpful, a Team Member Profile provides extreme clarity to Team Members and equips Leader Managers with the language to effectively coach behavior and manage performance.

It also serves as an excellent tool to integrate into the hiring / onboarding / training process, 1-1 Coaching Sessions and Team Member Development.

The format sets out to clearly define the WHO and DO of a Role. WHO includes Characteristics, Skills and Experience essential to the role which an individual can strive to acquire and DO outlines the Role, Responsibilities and Expectations crucial to effectively fulfill and carry out the role.

Who is a Team Member Profile intended for??

- Every single Team Member in an organization.

Where do you start?

- Locate and review the current job description. Reclassify everything in the current job description to a Characteristic, Skill, Experience, Responsibility or Expectation. Begin to identify and incorporate any appropriate additional items.

Tell me more!

- Below is a brief overview of the "WHO" and "DO" Sections on a Team Member Profile. WHO is a person BEING while they're DOING and fulfilling the functions of the role.
 - **WHO / Characteristics:** What are the behavioral expectations of the role? Does the individual need to be willing, creative, and/or patient?
 - **WHO / Skills:** What abilities are necessary to carry out the functions of the role? Is there a need to have excellent public speaking or project management skills?
 - **WHO / Experiences:** Consider any life, vocational or educational experiences this role should have to set someone up for success. What degree, certification, leadership or volunteerism should be required or preferred?

Continued...

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Continued...

- **DO / Role:** Restate the title of the role such as "The Indispensable Assistant" or "Human Resources Director."
- **DO / Responsibilities:** Identify 6-10 Areas of Focus for a role. This may be Business, Strategic and Success Planning, Client Services, Relationship Development etc.,
- **DO / Expectations:** These are the detailed outcomes and objectives under each area of focus. For example: Create and share monthly reports of prospective and current customers for Monthly Business Developer Meeting.

Then what?

- Review the drafted/ revised Team Member Profile with a Leader Manager, ask for feedback on the draft and make any additional adjustments.

The Team Member Profile can be used as a tool for continuous formal and informal coaching. At a minimum, the Team Member Profile should be evaluated in terms of relevancy on an annual basis during 1-1 Coaching Sessions.

Who do I share this with?

- In addition to discussing the Team Member Profile with a Leader Manager, the document should be shared with the Human Resources Team for their records, review, insight and approval.



(i)deal Team Member Profile Template

Organization:		
Role:		
Name of Candidate or Team Member:		
Leader Manager:		
Date:		Date of Hire:

CHARACTERSTICS, SKILLS + EXPERIENCE

CHARACTERISTICS | *Behavioral*

- _____
- _____
- _____
- _____
- _____
- _____

SKILLS | *Abilities*

- _____
- _____
- _____
- _____
- _____
- _____

EXPERIENCE | *Life, Vocational, Educational*

- _____
- _____
- _____
- _____
- _____
- _____
- _____

ROLE, RESPONSIBILITIES + EXPECTATIONS

ROLE

- _____

RESPONSIBILITIES | General Overview and Categories of Responsibilities

1. _____
2. _____
3. _____
4. Individual, Team and Company Participation

EXPECTATIONS | Specific Tasks/Goals/Daily, Monthly, Expectations

1. _____
 - a. _____
 - b. _____
 - c. _____
 - d. _____
2. _____
 - a. _____
 - b. _____
 - c. _____
 - d. _____
3. _____
 - a. _____
 - b. _____
 - c. _____
 - d. _____
4. Individual, Team & Company Participation
 - a. Monthly Direct Report Meetings if applicable
 - b. Monthly Team Leader Meetings w/Supervisor
 - c. Operational Meetings as needed (Daily/Weekly/Monthly)
 - d. All Team Meetings Monthly
 - e. Company-wide Meetings (Monthly/Quarterly/Annually)
 - f. Special Events Attendance + Support both Internally + Externally when appropriate

(i)deal Team Member Profile Example

Organization:	Lancaster Metal Works	
Role:	Master of Smooth Operations	
Name of Candidate or Team Member:	James Greene	
Leader Manager:	Iris Santos	
Date:	August 2020	Date of Hire: July 19, 2018

CHARACTERISTICS, SKILLS + EXPERIENCE

CHARACTERISTICS | *Behavioral*

- Willingness
- Emotional Maturity
- Humility
- Optimism
- Visionary
- Motivated
- Driven
- Results Oriented
- Initiative / Self - Starter
- Empathy
- Patience
- Sense of Urgency
- Creative
- Professional
- Decisive
- Authentic
- Integrity
- Caring
- Resourcefulness
- Strategic
- Passion
- Dependable
- Confident

SKILLS | *Abilities*

- Management Proficiency
- Relationship Management Internally & Externally
- Professional Sales Knowledge
- Leadership Ability
- Organization
- Excellent Communication (Written, Verbal, Presentation & Facilitation)
- Project Management
- Analytical & Critical Thinking
- Delegation
- Adaptability & Flexibility
- Scheduling / Time Management
- Conflict Resolution & Management
- H/R– Interviewing/Hiring/Discipline Ability
- Conflict Resolution & Management
- Business, Strategic & Succession Planning

EXPERIENCE | *Life, Vocational, Educational*

- Bachelor’s Degree Ideal in HR or related field of Organizational Development
- Associates Degree or Equivalent Work Experience
- 3 -5 Years’ Experience Leading/Managing
- 3-5 Year HRIS Administration/Implementation
- Community/Civic Engagement
- Professional Association Involvement

ROLE, RESPONSIBILITIES + EXPECTATIONS

ROLE

- Master of Smooth Operations

RESPONSIBILITIES | General Overview and Categories of Responsibilities

1. Human Resources
2. Office Management / Administration
3. Event Planning
4. Executive Assistant
5. IT
6. Individual, Team and Company Participation

EXPECTATIONS | Specific Tasks/Goals/Daily, Monthly, Expectations

1. **HR Related Responsibilities**

- a. Assist with employee issues as needed
- b. Follow up with Team Leader regarding Annual Review dates for employees
- c. Ongoing communication with employees regarding benefit changes/updates, hiring info., upcoming training, events
- d. Stay current on labor/employer related issues/changes
- e. New employee on-boarding
 1. Orientation
 2. Required paperwork/documentation
 3. COBRA administration
 4. Health/Disability & Misc. enrollments
- f. Employee Records & Benefits Administration
 1. Vacation Tracking/Staffing Coverage and submit for approval
 2. Provide Vacation/Sick Tracking Spreadsheets for Employees
 3. Maintaining accurate employee profile information
 4. Maintaining Staff Contact Information
 5. Maintaining Staff Back Up Lists
 6. Assist employees with Benefit Questions/issues
 7. Schedule and facilitate annual employee benefits open enrollment meetings
- g. Hiring/Recruiting
 1. Post all job openings in office through social media, website, etc.
 2. Screen candidates
 3. Facilitate interview process with applicable team members
 4. Follow upon All candidate submissions (yes or no response)

2. Office Management Responsibilities

- a. Maintain proper inventory levels and order all office supplies
- b. Handle all building related issues with appropriate vendors
- c. Serve as point of contact for all office related vendors – review pricing and contracts on an ongoing basis
 - 1. Coffee, Water
 - 2. Janitorial
 - 3. Pest Control
 - 4. HVAC
 - 5. Utilities
 - 6. Telecom Services
 - 7. Security
 - 8. Office Equipment + Furniture
- d. Handle all office equipment issues with appropriate vendors
- e. Maintain general and professional aesthetics and organization of all public spaces

3. Office Administration Responsibilities

- a. Answer & Distribute Incoming Phone Calls
- b. Maintain Telephone Systems
 - 1. Change phone messages
 - 2. Set up staff voice mail boxes
 - 3. Change phone extensions
 - 4. Setup & maintain user passwords
- c. Mail
 - 1. Open, Sort & Distribute
 - 2. Pick up mail from individual “Out” bins
 - 3. Prepare Outgoing Mail
 - 4. Update Postage Meter, etc.
- d. Scanning
 - 1. Provide daily scanning support to agents
- e. Database Upload/Downloads
 - 1. Run Company specific Upload/Downloads
 - 2. Import Policy downloads to organization customer management system
- f. Administrative Support
 - 1. Mailing labels, Form Letters
 - 2. Customer Mass Mailings
 - 3. Updating Customer Information in agency management system

4. Event Planning

- a. Facilitate all internal company events
 - 1. Organization Staff Meetings
 - 2. Partner Meetings
 - 3. Special events
 - 4. Outside vendor meetings with employees
 - 5. Holiday Party
 - 6. Training Events
- b. Plan and facilitate all public company events
 - 1. Lunch & Learn Sessions
 - 2. Open House
 - 3. Requested Tours
 - 4. Shadowing Requests

5. Executive Assistant Responsibilities

- a. Handle scheduling for Executive In Charge
- b. Handle all scheduling for company-wide events/special events/training events/et.
- c. Special projects assigned by Executive In Charge
- d. Meeting with Executive In Charge on a biweekly basis to review any company related issues/projects/upcoming events, etc.
- e. Maintain up to date files for all non-customer related contracts and agreements

6. IT

- a. Organization Customer Management System – Maintenance
- b. PC Troubleshooting
- c. Protocol and Procedure Creation & Documentation

7.

Individual, Team & Company Participation

- a. Monthly Direct Report Meetings if applicable
- b. Monthly Team Leader Meetings w/Supervisor
- c. Operational Meetings as needed (Daily/Weekly/Monthly)
- d. All Team Meetings Monthly
- e. Special Events Attendance & Support



Profiles and Assessments

Profiles + Assessments

Overview of the Profiles

Our communication with one another and understanding our own perspectives during those interactions is invaluable both personally and professionally.

How do we equip ourselves to effectively communicate, listen and respond to others from our informal greetings between colleagues to our formal interactions with customers and partners?

We start with and recommend the following tools for the Leader Managers we engage with:

Primary Tools

- DiSC Preferred Behavioral Approach – Communication Style
- Change Readiness Profiles (CRP) – Level of Change Readiness
- StrengthsFinder – Natural Talents

Secondary Tools

- Emotional Intelligence 2.0 – Understanding Emotions and Behavior
- Leadership Practices Inventory – Leadership Style and Effectiveness

You can check in with your Leader Manager or HR Professional to identify which tool(s) could be most helpful to you.

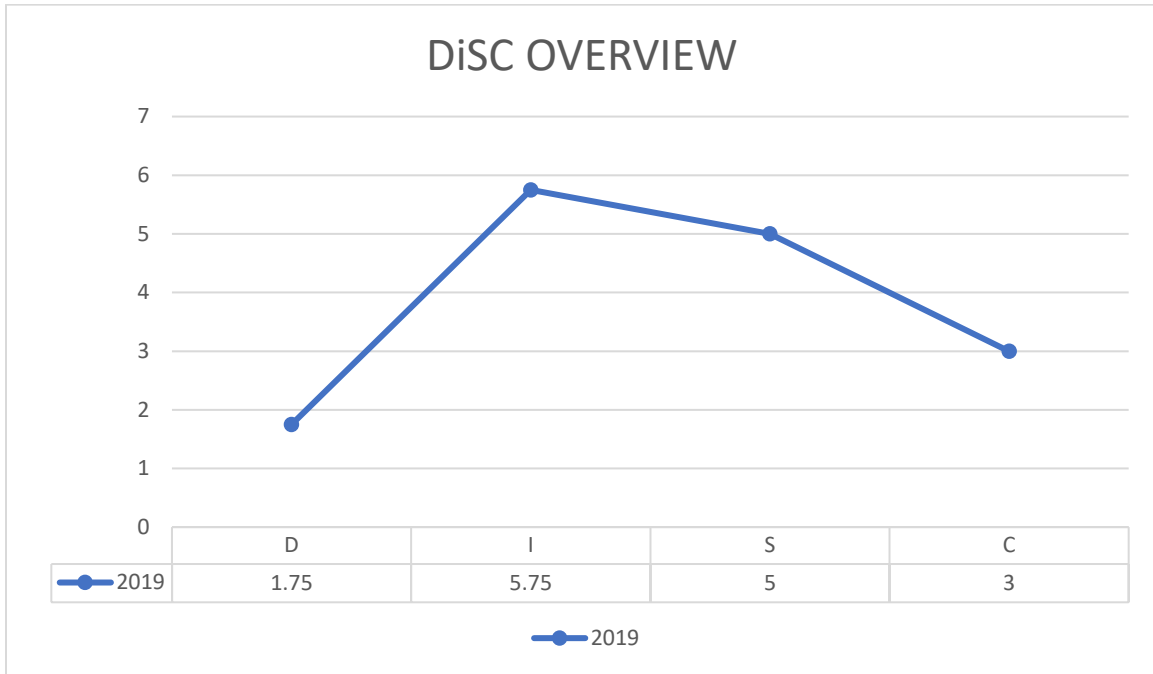
Upon completion of the profiles, we encourage you to record and review your results in the Self-Awareness Inventory Worksheet with your Leader Manager as part of the on-going 1-1 coaching process.

Based on your inventory, you and your Leader Manager can identify goals and connect them to the objectives in your Annual Development Plan.

For example, you might initiate a Crucial Conversation with a Team Member or proactively engage in a project or meet with someone that "makes your stomach hurt."

Developing ourselves and our self-awareness is a choice and as we say in *Managing From The Inside Out*: Choice is an event, change is a process and the commitment to that is a discipline!

DiSC (Example)



Feeling Based Responder	
I – 5.75	
S – 5	
C – 3	
D – 1.75	
Fact (D & C)	4.75
Feeling (I & S)	10.75
Initiator (D & I)	7.5
Responder (S & C)	8

Change Ready Profile (Example)

<i>OPTIMAL RANGE: 22-26</i>	2019	+/- from Optimal Range	Regional Average
RESOURCEFULNESS	20	-2	23
OPTIMISM	27	+1	22
ADVENTUROUSNESS	13	-9	17
DRIVE	17	-5	21
ADAPTABILITY	19	-3	19
CONFIDENCE	15	-7	22
AMBIGUITY	13	-9	14

StrengthsFinder (Example)

Most Energy	Most Energy	Least Energy	Least Energy
1	Positivity	25	Focus
2	Belief	26	Strategic
3	Woo	27	Achiever
4	Includer	28	Discipline
5	Connectedness	29	Ideation
6	Empathy	30	Maximizer
7	Developer	31	Command
8	Individualization	32	Analytical
9	Input	33	Significance
10	Relator	34	Deliberative



Associate Development Worksheet

Associate Development Worksheet

Purpose and process of completing Associate Development Worksheets

Once a year, as a Leader Manager, take the opportunity to complete an Associate Development Worksheet on each Direct Report. Review your profiles (DiSC, Change Ready, Strengths, etc.) and your Direct Report's Profiles side by side. Record the information using the worksheet and answer the questions.

This worksheet is primarily for a Leader Manager and is not intended to be reviewed or shared with a Direct Report.

Upon completing the Associate Development Worksheet, use your observations and insights from this document to provide additional guidance to your Direct Report during 1-1s around specific objectives both developmentally and performance based.

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Associate Development Worksheet Template

Date _____
 Team Member Name _____
 Team Member Role _____
 Leader/Manager Name _____
 Leader/Manager Role _____
 Period Covered From ___/___/___ To ___/___/___
 Team Member Date of Hire _____

DiSC Communication Profile Overview

DiSC Graph Value (in order of highest to lowest)

<i>Team Member</i>	<i>Leader Manager</i>	<i>Example</i>
		S = 6.2
		D = 5.7
		I = 2.9
		C = 1.5

DiSC Communication Profile Fact versus Feeling & Initiator versus Responder Values

<i>Team Member</i>			<i>Leader Manager</i>		
<i>Total Fact</i>	D + C =		<i>Total Fact</i>	D + C =	
<i>Total Feeling</i>	I + S =		<i>Total Feeling</i>	I + S =	
<i>Total Initiator</i>	D + I =		<i>Total Initiator</i>	D + I =	
<i>Total Responder</i>	S + C =		<i>Total Responder</i>	S + C =	

Change Ready Profile Overview (Optimal Range 22-26)

	<i>RESOURCEFULNESS</i>	<i>OPTIMISM</i>	<i>ADVENTUROUSNESS</i>	<i>DRIVE</i>	<i>ADAPTABILITY</i>	<i>CONFIDENCE</i>	<i>AMBIGUITY</i>
<i>Team Member</i>							
<i>Leader Manager</i>							
<i>Regional Average</i>	23	22	17	21	19	22	14
<i>Team Average</i>							

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Associate Development Worksheet Template Continued...

StrengthsFinder Overview

<i>MOST ENERGY</i>		<i>LEAST ENERGY</i>	
<i>Team Member</i>	<i>Leader Manager</i>	<i>Team Member</i>	<i>Leader Manager</i>
1.	1.	30.	30.
2.	2.	31.	31.
3.	3.	32.	32.
4.	4.	33.	33.
5.	5.	34.	34.

List 1-3 points for each category if appropriate.

1. *Strengths*

- a. _____
- b. _____
- c. _____

2. *Workplace Challenges*

- a. _____
- b. _____
- c. _____

3. *Personal Challenges*

- a. _____
- b. _____
- c. _____

4. *Coaching Emphasis*

- a. _____
- b. _____
- c. _____

5. *Development Steps*

- a. _____
- b. _____
- c. _____

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Associate Development Worksheet Example

Date _____
 Team Member Name _____
 Team Member Role _____
 Leader/Manager Name _____ Joe Ramirez
 Leader/Manager Role _____ Senior Manager of Business Development
 Period Covered _____ From ___/___/___ To ___/___/___
 Team Member Date of Hire _____

DiSC Communication Profile Overview

DiSC Graph Value (in order of highest to lowest)

<i>Team Member</i>	<i>Leader Manager</i>	<i>Example</i>
S = 6.1	I – 5.75	S = 6.2
C = 4.9	S – 5	D = 5.7
D = 4.4	C – 3	I – 2.9
I = 3.7	D – 1.75	C = 1.5

DiSC Communication Profile Fact versus Feeling & Initiator versus Responder Values

<i>Team Member</i>			<i>Leader Manager</i>		
<i>Total Fact</i>	D + C =	9.3	<i>Total Fact</i>	D + C =	4.75
<i>Total Feeling</i>	I + S =	9.8	<i>Total Feeling</i>	I + S =	10.75
<i>Total Initiator</i>	D + I =	8.1	<i>Total Initiator</i>	D + I =	7.5
<i>Total Responder</i>	S + C =	11.0	<i>Total Responder</i>	S + C =	8

Change Ready Profile Overview (Optimal Range 22-26)

	<i>RESOURCEFULNESS</i>	<i>OPTIMISM</i>	<i>ADVENTUROUSNESS</i>	<i>DRIVE</i>	<i>ADAPTABILITY</i>	<i>CONFIDENCE</i>	<i>AMBIGUITY</i>
<i>Team Member</i>	21	20	15	20	16	22	11
<i>Leader Manager</i>	22	27	13	17	19	23	13
<i>Regional Average</i>	23	22	17	21	19	22	14
<i>Team Average</i>	22	24	14	19	18	23	12

THE DEVELOPMENT GUIDE

Associate Development Worksheet Example Continued...

StrengthsFinder Overview

<i>MOST ENERGY</i>		<i>LEAST ENERGY</i>	
<i>Team Member</i>	<i>Leader Manager</i>	<i>Team Member</i>	<i>Leader Manager</i>
1. Empathy	1. Input	30. Futuristic	30. Futuristic
2. Individualization	2. Consistency	31. Adaptability	31. Strategic
3. Harmony	3. Intellection	32. Woo	32. Focus
4. Input	4. Harmony	33. Communication	33. Command
5. Analytical	5. Developer	34. Includer	34. Competition

List 1-3 points for each category if appropriate.

1. STRENGTHS

- a. Sam thoroughly examines each project
- b. Diligent in his work
- c. Does not miss any communicated detail

2. WORKPLACE CHALLENGES

- a. If a detail is not communicated, Sam does not think outside of what has been communicated
- b. Not a great sense of urgency and may not reach out with questions or concerns around a project or subject
- c. Sam tends to speak up when it is most difficult for me to respond or take time to answer his questions

3. PERSONAL CHALLENGES

- a. Recently divorced
- b. Adjusting to co-parenting

4. COACHING EMPHASIS

- a. Work with Sam to schedule regular project meetings to address any concerns or questions
- b. Have a list of questions to ask Sam

5. DEVELOPMENT STEPS

- a. Develop Sam's sense of urgency by helping him to prioritize
- b. Clearly state in writing expectations and time frame



Development Plan

Development Plans

Where do you start with making a Development Plan?

Each year create a Development + Performance Plan in alignment with your Team Member Profile. This plan will include objectives and goals tied to a role's Characteristics, Skills, Experience, Role, Responsibilities and Expectations. See plan for details.

Where do you start?

On the first page, identify three to five Development Objectives for 2020 and align them with one characteristic you want to develop and one skill you'd like to acquire. Keep in mind that Objectives are the end result you want to achieve.

Then what?

Flip the worksheet over and identify the Quarterly Goals you will set in place to achieve your objectives (i.e., what life, vocational and educational actions and experiences will positively contribute to your objectives?)

Who do I share this with?

We encourage you to meet monthly 1-1 with their Leader Manager to review progress, provide support + encouragement and share mutual feedback.

EXAMPLE

2020 DEVELOPMENT PLAN

DAVID GARCIA
Director of Operations

OBJECTIVES

List three to five Objectives for 2020:

1. Pursue completion of College Degree
* This is a Professional Objective *
2. Create + contribute to opportunities that move our community forward
* This is a Leadership Objective *
3. With humility + confidence, make a positive impact on the futures of others + organizations
* This is a Leadership Objective *
4. Continue to grow + expand my perspective of others + the world around me with grace + humility
* This is a Leadership Objective *
5. Provide consistent coaching to Assistant Operations Director in order to achieve highest level of effectiveness
* This is a Management Objective *

CHARACTERISTICS

Identify a behavior you want to develop:

- Emotional Maturity, Humility + Confidence

SKILL

Identify an ability you want to acquire:

- Effective + Engaging Presentation/Communication Skills

CREATING OBJECTIVES
Objectives are the outcomes an individual is trying to achieve. Ask yourself, what is the end result? Consider the following as you develop three to five 2020 Objectives:

- Professional Development (a degree or certificate completion)
- Leadership Development (a enhance strategic thinking and application)
- Management Development (a delegation skills)

DEVELOPING CHARACTERISTICS
Examples:

- Willingness
- Humility
- Optimism
- Empathy
- Initiative

ACQUIRING SKILLS
Examples:

- Presentation
- Conflict Management
- Delegation
- Problem Solving
- Adaptability

ENGAGE IN EXPERIENCES
Consider what life, vocational or educational experiences would contribute to or enhance your objectives:

- **Life:** Go somewhere you've never gone before or spend time with someone who "makes your stomach hurt"
- **Vocational:** Join a professional association, mentor a new team member or lead a team project
- **Educational:** Consider completing a class, obtaining a certificate in your field or finishing a college degree

RECOMMENDED READING
We recommend all Leader Managers read (or listen to) at least one book per quarter of a minimum, for an Executive or Director of a department, we suggest one book per month.

- The Advantage
- Crucial Conversations
- The One Minute Manager
- Developing the Leader Within You
- Emotional Intelligence 2.0

QUARTER 1 GOALS (Q1/8 3/31/20)

Life	Vocational	Educational	Reading or listening	Date of Completion
Life: Complete "48 Day Gym Challenge"	Vocational: Weekly intensive training of Assistant Operations Director	Educational: Complete four college credits	Reading or listening: The Ideal Team Player + Good to Great (Team Read)	

QUARTER 2 GOALS (Q2/8 4/30/20)

Life	Vocational	Educational	Reading or listening	Date of Completion
Life: Volunteer to lead and oversee the local Site Program's Summer "Rides & Sides" (lead from each month)	Vocational: Identify 3-5 Associations to potentially join + meet with one person from each organization	Educational: Complete three college credits	Reading or listening: "Whoa!" + 3 Duplications of a Team (Team Read)	

QUARTER 3 GOALS (Q3/8 9/30/20)

Life	Vocational	Educational	Reading or listening	Date of Completion
Life: Identify an after school program to volunteer with by the beginning of the school year (one hour weekly)	Vocational: Join Association and present at one Association Meeting	Educational: Complete three college credits	Reading or listening: Good to Great + Crucial Conversations (Team Read)	

QUARTER 4 GOALS (Q4/8 12/31/20)

Life	Vocational	Educational	Reading or listening	Date of Completion
Life: Meet with two people who make my stomach hurt for coffee (one hour with each person)	Vocational: Lead and oversee 2021 Business Personal Projects	Educational: Complete three college credits	Reading or listening: Built to Last + 17 Invaluable Lessons of Leadership (Team Read)	

"The road to success is always under construction"
- Lily Tomlin

Development Plan Template Continued...



ENGAGE IN EXPERIENCES

Consider what **life**, **vocational** or **educational** experiences would contribute to or enhance your objectives.

- **Life:** Go somewhere you've never gone before or spend time with someone who "makes your stomach hurt!"
- **Vocational:** Join a professional association, mentor a new team member or lead a team project
- **Educational:** Consider completing a class, obtaining a certificate in your field or finishing a college degree

RECOMMENDED READING

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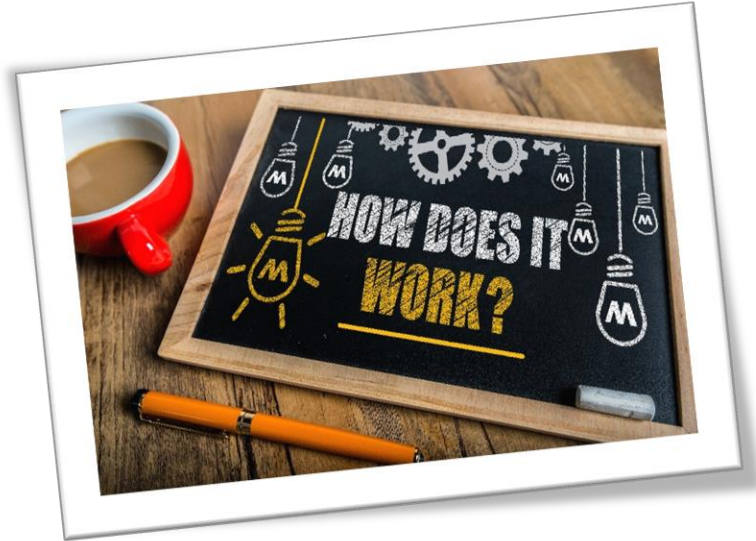
2020 QUARTERLY GOALS

QUARTER 1 GOALS (O/B 3/31/20)	Date of Completion
Life:	
Vocational:	
Educational:	
Reading or Listening:	

QUARTER 2 GOALS (O/B 6/30/20)	Date of Completion
Life:	
Vocational:	
Educational:	
Reading or Listening:	

QUARTER 3 GOALS (O/B 9/30/20)	Date of Completion
Life:	
Vocational:	
Educational:	
Reading or Listening:	

QUARTER 4 GOALS (O/B 12/31/20)	Date of Completion
Life:	
Vocational:	
Educational:	
Reading or Listening:	



The ABCs of Compensation

The ABCs of Compensation

Annual Compensation & Benefits Worksheet

Performance Assessment is an opportunity for the 1-1 Monthly Coaching Process to be coordinated and administered in conjunction with your organization's existing annual performance assessment process.

We recognize most organizations have ingrained the annual evaluation process into their culture and annual compensation process, creating an expectation of an annual compensation increase. Most annual performance assessment processes include two characteristics: 1) a numerical metric ranking of a team member and 2) a predefined percent of pay increase – usually 3-5%.

We believe this system can effectively be replaced by creating and implementing a quarterly goal setting process, aligned with coaching/development goals as well as performance/results goals. Permanent increases to base compensation can be awarded when a role and/or responsibility is expanded and/or an educational or professional milestone is achieved.

During the annual Performance Assessment process we've found it is helpful to provide each Team Member with a comprehensive review detailing the value of the compensation they receive.

With that in mind, we've outlined The ABCs of Compensation as a framework for developing the Annual Compensation + Benefits Worksheet. We've found this tool extremely helpful in providing a leader manager with a platform to reset and re-frame the compensation discussion with Team Members and orient the focus to development and performance.

In Managing From The Inside Out, our training program, we define compensation as the following equation:

- A.** The VALUE a Team Member brings determining their BASE compensation (Education + Experience + Expertise)
- +
- B.** The CONTRIBUTION a Team Member makes to the Organization which results in ADDITIONAL compensation (Daily, Weekly, Monthly, Quarterly, Annual Goal Achievement)
- +
- C.** The BENEFITS a Team Member receives in alignment with all Team Members and customized to their role (Health, Dental, Vision, 401k, Pension, Profit Sharing, Education, etc.)

Annual Compensation & Benefits Worksheet Continued...

Potential increases in a Team Members compensation can then be tied to one of the three areas above by asking questions such as:

- Have they completed a training, program or class which enhances the VALUE they bring to their role?
- Have they expanded their responsibilities or stepped into a leadership position where their CONTRIBUTION has increased long term in their role? (This could be a trigger for a permanent increase in compensation)
- Have they accepted or requested assignments for a special project where their CONTRIBUTION has increased short term results?
- Have they enrolled in a training or learning opportunity to bring value to their role and the organization following their completion? (This training is a monetary BENEFIT to the Team Member)

THE DEVELOPMENT GUIDE

The ABC's of Compensation Template

Date _____

Department/Team + Leader Manager _____

Team Member Name + Role _____

Period Covered From ___/___/___ To ___/___/___

Date of Hire or Effective Date of Adjustment _____

	TYPE OF BENEFIT	EMPLOYER	EMPLOYEE COST	REMARKS
A	Annual Base Salary	\$		
+ B	Performance Incentive(s)	\$		
+ C	Health	\$	\$	
	Vision	\$	\$	
	Dental	\$	\$	
	Life Insurance	\$	\$	
	Short Term Disability	\$		
	Long Term Disability	\$		
	Profit Sharing / Pension	\$		
	401K	\$		
	Cell Phone	\$		
	Vehicle + Maintenance	\$		
	Vacation	\$	\$	
	Holidays/Other	\$	\$	
	Education / conferences / professional development (including coaching)	\$	\$	
	SSI Contribution	\$	\$	
	Sub-Total-Benefits Only	\$		
= TOTAL	TOTAL ANNUAL COMPENSATION & EMPLOYER COST	\$	\$	



Glossary of Terms, Notes + Miscellaneous

Glossary of Terms

4 Cs	Caring / Clarity / Communication / Consistency	The 4 Cs of Leadership
4 Ps	People / Process / Productivity / Profit (3 Rs)	The 4 Ps of Management
ADW	Associate Development Worksheet	Completed by Leader Manager for 1-1 with a Direct Report. Contains DiSC & Change Ready Scores, Leader Manager Notes and Insights around Direct Report's Professional and Personal Behavior and Performance.
BSS	Business, Strategic & Succession Planning	
CSE	Characteristics, Skills & Experience	Primarily referred to when discussing Team Member Profiles (TMPs)
DR	Direct Report	
ICP	Ideal Client Profile	
LM	Leader Manager	
NNTR	No Need To Reply	
O/B	On or Before	Used to establish a deadline or "need by" date
QL & QW	Quality of Life & Quality of Work	
R/A/D	Resource Allocation Decisions	Used in connection with TEM (Time, Energy, Money) in reference to Planning, Responsibilities, Goals & Objectives
RRE	Role, Responsibility and Expectations	Primarily referred to when discussing Team Member Profiles (TMPs)
RRR	Revenue, Reputation & Relationships	The three "Rs" of profit
S.W.O.T.	Strengths, Weaknesses, Opportunities, Threats	Analysis utilized during planning processes
SME	Subject Matter Expert	
T/E/M	Time, Energy, Money	Used in connection with RAD (Resource Allocation Decisions) in reference to Planning, Responsibilities, Goals & Objectives
TMP	Team Member Profile	A Team Member's "Job Description" containing Characteristics/Skills/Experience (CSE), and Role/Responsibility/Expectations (RRE) to define the position
VDSOM	Values Driven Solutions Organizational Model	A Framework for Organizations to create Decision Making and Behavioral Boundaries at the Individual, Team and Company Level
VP	Value Proposition	The business that you're "IN"
VVM	Values, Vision & Mission	VVM: What a business is "BEING" & "DOING" Values: Mind (What we BELIEVE) Vision: Heart & Soul (What we are PASSIONATE about) Mission: Body (What we DO)
W/A/D	Welfare, Accountability & Development	Relates to 1-1 Coaching Purpose

What We Do

Consulting

- Values, Vision, Mission Creation & Refinement
- Individual, Team & Organizational Assessment
- Organizational Development & Change Management Implementation
- Business, Strategic & Succession Planning Creation & Facilitation
- Hiring & Interviewing Facilitation & Support

Coaching

- Executives, Entrepreneurs
- Leaders, Managers
- Sales Professionals
- Emerging Leaders

Course Facilitation

- Employee Satisfaction & Employee Engagement Survey Administration
- Managing From The Inside Out™ Training & Licensing
- Selling From The Inside Out™ Training & Licensing
- Communication Academy Training
- Assessment Tool Administration

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Our D-N-A

Our Decisions

What Principles Direct Our Thoughts

Willingness

Initiative

Integrity

Faith

Focus on Others

Our energy

What We Are Passionate About

To Encourage, Influence, and Inspire

Our Actions

What We “Do Unto Others”

We Will:

Act with Integrity

Serve with Grace and Humility

Live with Passion and Gratitude

Create Energy and Fun

Seek and Embrace Diversity

Our **Value Proposition**

We Help People Grow *and* Organizations Grow

Who We Are



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