# Leading the Multi-Generational Workforce

Course No: K08-004

Credit: 8 PDH

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# Leading the Multi-Generational Workforce

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# Course Overview

Recorded history shows us there has always been concern about generational differences. Excavations of Roman ruins dated hundreds of years B.C. provided translated statements of alarmed city officials talking about their problems with the younger generation and wondering what will become of their society when the "stabilizing influence" of their elders passes away.

Technological advances in medicine, nutrition, exercise, and communication have given us increased life expectancies while social and economic changes mean people may be working longer instead of retiring or coming back into the workforce after retiring.

The workforce is becoming more diverse in terms of generational makeup. Since each generation, the **Builders** (born 1925-1945), **Boomers** (1946-1960), **Generation X** (1961-1980 are the first wave of Boomer children), and **Generation Y**[1] **aka Millennials** (1981-present or the second wave of Boomer children), was formed during different social climates, their values and beliefs do not automatically mirror those of their parents.

In addition, we encounter people in the workplace with whom we work very easily regardless of generation while there are others with whom we have difficulty working. This is because of our 'working styles' and that has nothing to do with age.

I, the author of this course, am a Baby Boomer and much of my conversational content is written from that perspective. I think it will be evident where this is. I tell you this so you will understand the context of the material at that point.

This course will help participants identify the reasons why the generations and individual working styles are different, give them insight into seeing the workplace from a new perspective, and provide guidelines on what a leader can do to help members of each become as productive as possible within the multigenerational mix of today's workforce.

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[1] The generational literature contains many different terms for these distinct groups and these were chosen for no particular reason. The important aspect is their timeline, not their names.

# The Nature of the Challenge

The topic of a multigenerational workforce can open hours of discussion and a wide range of topics. For our purpose with this course, we will look at the potential for conflict therein, identify some reasons for it, and provide guidelines on how leaders can negate that potential effectively and develop a strong relationship with the workforce.

We must understand and address the reasons for this potential conflict if our organizations are to become as productive as possible and our employees are to develop to their full potential. (If you doubt this inherent cross-generational conflict potential, how many family gatherings for Thanksgiving Dinner have you seen go as smoothly as possible. In addition, Thanksgiving is usually when they get together for a short time annually. Imagine the conflict potential if they must work beside each other daily.)

The potential for conflict stems, at least as far as this course is concerned, from two distinct sources:

1. the *generation* (the colored vertical distinction below) within which the employee was born and,
2. The ***working style*** (the horizontal element with arrows) of that employee that does not depend on their date of birth but is an individual characteristic of how they approach work regardless of when they were born

We will identify these distinct sources individually first and then provide some guidelines for working effectively with them.

| **Working Styles** → | **Builders Generation** (Born 1925-1945) | **Boomers Generation** (Born 1946-1960) | **Gen X Generation** (Born 1961-1980) | **Gen Y Generation or Millennials** (Born 1981-) |
|---|---|---|---|---|
| **Drivers** | | | | |
| **Expressives** | | | | |
| **Amiables** | | | | |
| **Analyticals** | | | | |

# Analyzing the Generations

Here is a comparison that will help you understand how they contrast with each other.

| | Builders | Boomers | Gen X | Gen Y/Millennial |
|---|---|---|---|---|
| **Significant Events and Experiences in their Lives** | Great Depression, New Deal, World War II, Berlin airlift, Korean War, cure for polio found | Civil Rights Sexual Revolution Cold War, "Duck and Cover" drills in schools, Space travel, Political Assassinations | Fall of Berlin Wall Watergate & Nixon Women's Liberation Energy Crisis Regan's assassination attempt | School shootings, Oklahoma City bombing, booming Technology, Desert Storm Child focused world, 911, Rise of Terrorism, Financial collapse 2008 |
| **Values are based on…** | Hard work, Dedication & sacrifice, Respect for rules, Duty before pleasure, Honor | Optimism Team orientation Personal gratification Involvement Personal growth | Diversity, Techno literacy, Fun and informality, Self-reliance, Pragmatism | Optimistic, Feel civic duty Confident, Achievement oriented, Respect for diversity |
| **Getting Feedback** | "No news is good news" | "Feedback once a year and lots of documentation" | "Sorry to interrupt but how am I doing?" | "Instant feedback at the push of a button" |
| **General Work Characteristics** | Practical, Patient, loyal and hardworking Respectful of authority, Rule followers | Optimistic, Teamwork and cooperation, Ambitious Workaholic | Skeptical, Self-reliant Risk-taking, Balances work and personal life | Hopeful, Meaningful work Diversity and change are valued will seek mentors, professional development training, and non-scheduled bonus |
| **Work Assets** | Stable, detail oriented, thorough, loyal, hard working | Service oriented, driven, willing to go the extra mile, good at relationships and a team player | Adaptable, techno literate, independent, unintimidated by authority, creative | Collective action, optimism, tenacity, multitasking capabilities, very tech savvy |
| **Work Liabilities** | Inept with ambiguity and change, reluctant to resist the 'system', uncomfortable with conflict | Not naturally "budget minded", self-centered, may put process ahead of results, too sensitive to feedback | Impatient, poor people skills, inexperienced, cynical | Need for supervision and structure, inexperienced with handling people issues, not very creative-used to menu-driven tech choices |
| **What Others Say About Builders** | | They're rigid and dictatorial, not flexible, narrow minded tech dinosaurs | Too set in their ways, "learn how to use email, man", they have all the money | They're trustworthy, brave, and good leaders |
| **What Others Say About Boomers** | They talk about things that should be kept private, like details of personal lives, very self-absorbed | | They're self-righteous and clueless, workaholics and need to get a life, too politically correct | Very cool, up to date on the music we like. They work so much |
| **What Others Say About Gen X** | They are not educated, don't respect experience or follow procedures, don't know what hard work is | They are slackers, rude and lack social skills, doing things their own way and not following rules, they won't take their turn | | Cheer up! |

| | Builders | Boomers | Gen X | Gen Y/Millennial |
|---|---|---|---|---|
| **What Others Say About Gen Y - Millennials** | They have good manners, smart, need to toughen up, and watch too much TV with crude language and violence | They need more parental discipline, need to learn how to entertain themselves, can they build my web page for me? | Neo-boomers, another set of self-absorbed brats who got sports trophies just for playing, not only for winning | |
| **Motivating Them** | Personal touch is important (handwrite a note – not email), let them chat and socialize between tasks, recognize their experience with plaques or other tangible rewards | Lot's of public recognition, give them a chance to prove themselves, give them perks with status (an expenses account – fly first class), ell them how valued they are, reward their work ethic | Give them many projects and let them control and juggle them. Need constant constructive feedback, give them the latest technology, say, "Do it your way. You've got the latest software & hardware." | Learn about their personal goals and show how they mesh with the company. Forget traditional gender roles – make all opportunities truly equal, establish mentor programs, "You'll work with other bright, creative people, your boss is in his/her sixties, you can be a hero here." |
| **Generational Themes** | Hard Work | Personal Fulfillment | Uncertainty | "What's Next?" |
| | Duty | Optimism | Personal Focus | On My Terms |
| | Sacrifice | Crusading Causes | Live for Today | Just Show Up |
| | Thriftiness | Buy Now/Pay Later | Save, Save, Save | Earn to Spend |
| | Work Fast | Work Efficiently | Eliminate the Task | Do Exactly What's Asked |
| **Core Values** | Respect for authority "conformers" | Optimism and involvement | Skepticism, fun, informality | Realism, confidence, extreme fun and very social |
| **Family** | Traditional nuclear | Disintegrating | "Latch-key" kids | Merged families |
| **Education** | A dream | A birthright | A way to get there | An incredible expense |
| **Communication Media** | Rotary phones, one-on-one communication, write memos | Touchtone phones, "call me anytime" | Cell phones<br>Call me only at work | Internet<br>Picture phones<br>E-mail |
| **Financial Dealings** | Put it away & pay cash | Buy now and pay later with the advent of credit cards | Cautious, conservative, save, save, save | Earn to spend debit cards, on-line shopping, credit cards |
| **Work is…** | An obligation | An exciting adventure | A difficult challenge, a contract | A means to an end, fulfillment |
| **Leadership style** | Directive, command-and-control | Consensus, collegial | Everyone is the same, challenge others | To be determined – insufficient data at this time |
| **Motivating Messages** | Your experience is respected | You are valued and needed | Do it your way and forget the rules | You will work with other bright and creative people |
| **Work and Family Life** | They never meet | No balance – work to live | Balance | Balance |

# Generational Influence on Leadership

***Our youngest leaders matured in the glow of computer screens; our oldest in the shadow of the Depression and World War II.*** (Bennis & Thomas, 2002)[2]

For Generations X and Y, the old command and control leadership is passé. The top down leadership style that grew from a military model is not effective in today's world of rapid change. Today's young leaders act first and evaluate later, because a leader cannot afford to evaluate carefully first in the high-speed environment of today.

This rapid response decision-making is a characteristic of today's young people. They learn to act fast. Consider the video games young people have grown up playing. They have played with simulations since they were very small, and have learned to act fast, watch what happens, and adapt.

As a "Boomer", I remember a very early game my children played where a frog had to hop across the river without falling in the water or being eaten by the alligators. (Do you remember "Frogger"?)

I was never good at the game because I was cautious, watching, observing and waiting for the right moment to hop forward. My children, however, were proficient at this game, because they moved fast and did not worry about making the best move. They would lose the frog, but remember the lesson and adapt their moves during the next round. Young people have grown up with simulations we never imagined. SimCity lets you build and operate a city and war games let you experience combat and team work. We have trained this generation to make quick decisions.

This shift in leadership style started with Generation X and has continued to become more pronounced in Generation Y. I think it is sometimes hard for those of us of in an older generation to respect the quick, decisive leadership style we see in young people. I think we tend to question how much they really know, and we de-value their ability to make decisions based on limited experience.

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We grew up in a time when you worked your way up to leadership roles. Often we do not think of younger volunteers or colleagues as collaborators, ***because we assume they are inexperienced.*** However, young people today know more that we knew at their age.

> Course question for departmental discussion: *What is the relationship between knowledge, experience, and good decisions? What value can the various generations contribute to the decision-making process?)* The World Wide Web and instantaneous access to news and information has made knowledge much more available at an earlier age.

Allow me to highlight five differences between generations and indicate how these differences contribute to new patterns of leadership: ***career, speed, loyalty, balance, and heroes.***

1. The concept of *career* has changed. Young people today talk more about jobs and skills than they do about career paths. They do not see the need or the benefit of picking a single career. Increasingly young people talk about having parallel careers. Many say they expect ***nine different careers in their lifetime***. For them life is more like the video game SimLife, than the board game of Life. In video games roles are less defined and you learn through experimentation. In addition, if it doesn't work, you can reboot and start again.

   Course question for departmental discussion: *What value will they see in an employer's 401 (k) program? What value will they place on the concept of 'seniority?*

2. Life in the new millennium is all about **speed**. Young people not only live with speed and chaos, they thrive in it. In a climate of rapid change the young generations knows you have to act fast to win or stay in the game. If you proceed slowly and cautiously, you lose. The patient are glanced over, passed over and run over.

   The Great Depression of the 1930s taught people to make sacrifices and be patient, but the Information age has taught a generation that you never have to wait for anything. They are looking for opportunities to gain twenty years of experience in two years. Computer simulations allow them to formulate ideas, test them, retest, refine and move forward. They believe in *just doing it.* (The Nike slogan)

Course question for departmental discussion: *What can leaders of this group do to make the most of their ability to act fast but keep in mind their potential lack of experience or knowledge?*

3. **Loyalty** has new meaning among young people who saw their parents downsized, reengineered and layoff off. They know the days of corporate loyalty to employees are long gone. Young people look after themselves first. They exhibit little loyalty to anyone other than friends and family. Loyalty is highly valued, and given only to a few friends and colleagues after they have earned it. When they feel respected and valued, they will be loyal to the cause or organization and become great assets and advocates.

Course question for departmental discussion: *Why is it especially important for leaders of this group to make sure they have developed a good relationship with them? How do you define a 'good relationship'?*

4. **Balance** is a fundamental value in the younger generations. As children of workaholic baby boomers, they view time, commitments and career advances through the lens of balance. In the workplace young people have been termed slackers because they do not work late, or do not come in on the weekend or they refuse to attend those extra meeting.

They expect time off for family functions and do not understand why they have to stick around if they have finished all that was expected of them. However, it is not an aversion to work that prompts their actions. It is a commitment to family and friends – a commitment to having a balanced life in which work is only one segment of a full life.

Course question for departmental discussion: *What opportunities are there in your organization to help them achieve this balance and help you retain good employees If there are none, what can you do?*

5. For many of us in older generations, **heroes** contributed to our ideals and values.
I grew up with the words of President-elect John Kennedy in 1960: ***"Ask not what your country***

***can do for you, but rather what you can do for your county.***" Past generations had many heroes that shaped and influenced them. They were the icons, the people we looked to for inspiration and leadership.

When I talk with Xers and Y's about public heroes and figures they admire and look up to, they struggle to find a name and often tell me they do not have "public" heroes. They may consider parents, friends and coworkers as people they admire, but most often, they say they have no real models of leadership, no people they look up to outside of their immediate circle.

At first, I found this disturbing (being of the Boomer generation with lots of heroes) but have come to realize the whole concept of heroes has changed. Every time someone gets nominated to be a hero someone else comes along and reveals a dirty secret about them. Information makes heroes temporary or passing figures. Consider all the books that have been written about the Kennedy's, Martin Luther King or Princess Diana. (Or the political whistle blowers as I re-write this in December 2017.)

The young generation does not look for a Lone Ranger form of leadership. They do not believe that a larger-than-life individual can ride in, gives directions and leads the way to great accomplishments. They also do not view age, seniority and rank as measures of accomplishment or expertise. (This is not a new concept: Alexander the Great was only 19 when he had conquered the known world 300 years B.C.) Unlike an earlier time when people admired their elders and followed them to victory, this generation does not see age as a dominant characteristic for leadership.

In an era of complexity and change, young people look for leaders who work with followers as intimate allies. They want colleagues who will develop relationships that build intimacy and show trust and respect for them, their abilities and their ideas.

## Applying This to your Workplace

Here is an idea on bringing this topic into your department

1. Bring the members of your department together for a meeting (or include this in one of your regular meetings) and make enough copies of the chart ***Analyzing Generations*** beginning on page 6 before the meeting so everyone in your department has one.

2. Ask them to read it all with emphasis on their generation and the generation of anyone (whether in the workforce or outside) with whom they seem to have a lot of conflict.

3. Ask them to discuss:

    a. Their thoughts on how it describes their generation and the others.

    b. How members of different generations can have conflict

    c. The vices and virtues of each generation as they apply to their workplace

4. Mention the five components of ***career, speed, loyalty, balance, and heroes*** and ask for their thoughts on how they applied to each generation.

5. If you have enough people, randomly divide them into four groups. (It is best if you have mixed generations within each group.) Label each group as one of the four generations. Give them a few minutes to make a list of at least three challenges and benefits associated with working with members of the other three generations. Go around to each and ask them to share their lists with the whole group. Encourage dialogue between them because they are breaking down any barriers that may have existed before or surfacing any issues that lay hidden.

## Some Leadership Questions

How can you use your new knowledge about their generational traits to lead them more effectively?

1. List each individual's name and identify what you will start doing, stop doing, and continue from a leadership perspective with each.

2. Identify how you will use this generational traits knowledge to make future work assignments.

3. How will you use this generational traits knowledge to create work teams that contain mixed generations?

4. How will you use this generational traits knowledge to *create* a mentoring relationship between older and younger members of your group?

5. What do you think each generation's comments would be about you saying, *"I want a fair day's work for a fair day's wages?"* Try asking them and listen to what they say. You may get things like:

    a. "That's reasonable" from a Builder

    b. "Can I work longer if I have to?" (Boomer)

    c. "Are you paying me for my time or my productivity? If I do 8 hours of work in six, can I go home to see my family?" (Gen X)

    d. "How soon do I get paid? Is there overtime if I need it" (Gen Y)

# Working Styles & Communication

You probably have many team members with whom you get along very well regardless of their generation because they seem to be a lot like you! Maybe it is the way they present their problem or the way they respond to your answers that makes you think you have a lot in common.

Additionally, there are probably many with whom you feel absolutely no connection (again, the generation makes no difference) and it is difficult to deal with them successfully. The reason may be that your individual ***working style*** –the way you interact with the world – is similar to some of your team member's working styles and very different from some others.

Before we can help you deal effectively with the various working styles within your group, it is important that you know what your working style is so you can identify others. Once you are able to understand the clues and characteristics of the four major working styles, it will become easier for you to become flexible in your approach to team members of any generation who display a different style than yours.

## Self-Assessment Survey

We all are *combinations of the four various working styles.* No one is a 'pure' driver or analytical: that may just be their dominant characteristic. Depending on the situation, we may display different aspects of our individual style.

For example, at work we may allow the "take charge" aspect of our personality to lead while after work, with friends, we may pull back the take-charge element and bring out the "friendly and feelings" aspect of us.

<u>Please remember this – we are a blend of these styles and the one that we call upon most is our working style.</u>

Select the response in the following questions, which is most likely how you would respond. The answers are neither right nor wrong. Just base your responses on how you are today, not how you think you need to be or want to be in the future. Record your responses in Table 1 on Page 19 that follows.

**1. When talking to a customer or co-worker....**

a. I maintain eye contact the whole time.

b. I alternate between looking at the person and looking down.

c. I look around the room a good deal of the time.

d. I try to maintain eye contact but look away from time to time.

**2. If I have an important decision to make....**

a. I think it through completely before deciding.

b. I go with my gut instincts.

c. I consider the impact it will have on other people before deciding.

d. I run it by someone whose opinion I respect before deciding.

**3. My office or work area mostly has....**

a. Family photos and sentimental items displayed.

b. Inspirational posters, awards, and art displayed.

c. Graphs and charts displayed.

d. Calendars and project outlines displayed.

**4. If I am having a conflict with a co-worker or customer....**

a. I try to help the situation along by focusing on the positive.

b. I stay calm and try to understand the cause of the conflict.

c. I try to avoid discussing the issue causing the conflict.

d. I confront it right away so that it can get resolved as soon as possible.

**5. When I talk on the phone at work....**

a. I keep the conversation focused on the purpose of the call.

b. I spend a few minutes chatting before getting down to business.

c. I am in no hurry to get off the phone and don't mind chatting about personal things, the weather, and so on.

d. I try to keep the conversation as brief as possible.

**6. If a co-worker is upset....**

a. I ask if I can do anything to help.

b. I leave him alone because I don't want to intrude on his privacy.

c. I try to cheer him up and help him to see the bright side.

d. I feel uncomfortable and hope he gets over it soon.

7. **When** I **attend meetings at work....**

a. I sit back and think about what is being said before offering my opinion.

b. I put all my cards on the table so my opinion is well known.

c. I express my opinion enthusiastically, but listen to other's ideas as well.

d. I try to support the ideas of the other people in the meeting.

**8. When I make a presentation in front of a group....**

a. I am entertaining and often humorous.

b. I am clear and concise.

c. I speak relatively quietly.

d. I am direct, specific, and sometimes loud.

**9. When a co-worker or customer is explaining a problem to me....**

a. I try to understand and empathize with how he or she is feeling.

b. I look for the facts pertaining to the situation.

c. I listen carefully for the main issue so that I can find a solution.

d. I use my body language and tone of voice to show her that I understand.

**10. When I attend training programs or presentations....**

a. I get bored if the person moves too slowly.

b. I try to be supportive of the speaker, knowing how hard the job is.

c. I want it to be entertaining and informative.

d. I look for the logic behind what the speaker is saying.

**11. When I want to get my point across to customers or co-workers....**

a. I listen to their point of view first and then express my ideas gently.

b. I strongly state my opinion so that they know where I stand.

c. I try to persuade them without being too forceful.

d. I explain the thinking and logic behind what I am saying.

**12. When I am late for a meeting or appointment....**

a. I do not panic, and I call ahead to say that I will be a few minutes late.

b. I feel bad about keeping the other person waiting.

c. I get very upset and rush to get there as soon as possible.

d. I apologize profusely after I arrive.

**13. I set goals and objectives at work that....**

a. I think I can realistically attain.

b. I feel are challenging and would be exciting to achieve.

c. I need to achieve as part of a bigger objective.

d. Will make me feel good when I achieve them.

**14. When explaining a problem to a co-worker from whom I need help....**

a. I explain the problem in as much detail as possible.

b. I sometimes exaggerate to make my point.

c. I try to explain how the problem makes me feel.

d. I explain how I would like the problem to be solved.

15. **If customers or co-workers are late for a meeting with me in my office....**

a. I keep myself busy by making phone calls or working until they arrive.

b. I assume they were delayed a bit and don't get upset.

c. I call to make sure that I have the correct information (date, time, and so on).

d. I get upset that the person is wasting my time.

**16. When I am behind on a project and feel pressure to get it done....**

a. I make a list of everything I need to do, in what order, by when.

b. I block out everything else and focus 100 percent on the work I need to do.

c. I become anxious and have a hard time focusing on my work.

d. I set a date to get the project done by and go for it.

**17. When I feel verbally attacked by a customer or a co-worker....**

a. I tell her to stop it.

b. I feel hurt but usually don't say anything about it to her.

c. I ignore her anger and try to focus on the facts of the situation.

d. I let her know in strong terms that I don't like her behavior.

**18. When I see a co-worker or customer whom I like and have not seen recently....**

a. I give him a friendly hug.
b. I greet him but do not shake his hand.
c. I give him a firm but quick handshake.
d. I give him an enthusiastic handshake that lasts a few moments.

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 1 | | 4 | | 7 | | 10 | | 13 | 16 |
| **a** | Driver | **a** | Expressive | **a** | Analytical | **a** | Driver | **a** Analytical | **a** Analytical |
| **b** | Amiable | **b** | Amiable | **b** | Driver | **b** | Amiable | **b** Expressive | **b** Driver |
| **c** | Analytical | **c** | Analytical | **c** | Expressive | **c** | Expressive | **c** Driver | **c** Amiable |
| **d** | Expressive | **d** | Driver | **d** | Amiable | **d** | Analytical | **d** Amiable | **d** Expressive |
| 2 | | 5 | | 8 | | 11 | | 14 | 17 |
| **a** | Analytical | **a** | Driver | **a** | Expressive | **a** | Amiable | **a** Analytical | **a** Driver |
| **b** | Driver | **b** | Expressive | **b** | Analytical | **b** | Driver | **b** Expressive | **b** Amiable |
| **c** | Amiable | **c** | Amiable | **c** | Amiable | **c** | Expressive | **c** Amiable | **c** Analytical |
| **d** | Expressive | **d** | Analytical | **d** | Driver | **d** | Analytical | **d** Driver | **d** Expressive |
| 3 | | 6 | | 9 | | 12 | | 15 | 18 |
| **a** | Amiable | **a** | Amiable | **a** | Amiable | **a** | Analytical | **a** Expressive | **a** Amiable |
| **b** | Expressive | **b** | Analytical | **b** | Analytical | **b** | Amiable | **b** Amiable | **b** Analytical |
| **c** | Analytical | **c** | Expressive | **c** | Driver | **c** | Driver | **c** Analytical | **c** Driver |
| **d** | Driver | **d** | Driver | **d** | Expressive | **d** | Expressive | **d** Driver | **d** Expressive |

Write your score for each of the four types here:

**Driver** = _____ **Amiable** = ____ **Analytical** = _____ **Expressive** = _____

Working styles from *Personal Styles and Effective Performance: Make Your Style Work for You* by David Merrill and Roger Reid (Chilton, 1981)

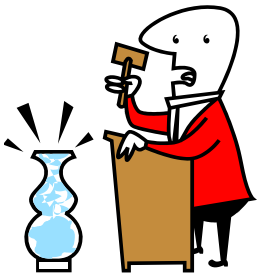
Although we mention four distinct Working Styles, don't think the odds are 1 in 4 that you'll encounter someone like you. Remember, we all are combinations and blends of these four styles and typically express one of the styles as our *dominant trait*, it does not me that's all of who we are.

# Demonstrating Our Working Style

Our everyday behaviors can go a long way to identifying our style. If you are observant, you can pick up clues from 1) **what people say, 2) how they say it, 3) how they act, 4. Observing their work environment**

**What People Say**: How do you express yourself? Do you use colorful phrases, "down home-isms", or larger-than-life expressions, or do you tend to say things in a more modest, low-key manner? The types of words you use and the way you use them is a direct reflection of your working style.

**How they Say It:** Do you speak quickly in your normal mode and speed up even more when you get angry? Or do you speak slowly and distinctly and grow quieter if you get angry? Does your voice have a lot of inflections and tonal changes or does it stay essentially the same regardless of the topic? Is there excitement in your voice or more calm and relaxed? The way you speak tells people as much about you as how you say it.



**How they Act:** Have people ever said to you, "If we hold your hands, you won't be able to talk!" Do you gesture broadly when you speak or do they rest quietly in your lap or at your side while you speak? Do people have to move quickly to keep up with you or do you stroll at a leisurely pace? Your body movements are a very natural aspect of your working style.

**The work environment:** Do you have reports, files, and papers strewn over your desk or is it neat and tidy? Are pictures of your family casual or formally posed? What about the wall decorations? Are they achievement oriented (#1 in the golf tournament) or (attention seeking) "here's the governor and me at a luncheon?" The office environment can tell a lot about the inhabitant to an alert observer.

## THE WORKING STYLES GRID

The concept of Working Styles is based on where people fall along two behavioral ranges. These ranges address:

- How (or the extent to which) people ***assert*** themselves to others (outgoing communication meaning whether they typically 'tell" or "ask") and,
- How (or the extent to which) they ***respond*** to others with focus more on people or task issues.

Here is a grid to help visualize what we're talking about.

**Responses to this side are directed toward TASKS, not people**

**Responses to this side are directed toward ASKING not telling**

| | |
|---|---|
| **ANALYTICAL STYLE**<br><br>People here are focused on tasks and asking questions for clarification to be sure they get it as close to perfect as possible.<br><br>Analysts, researchers, CPAs, IT professionals, engineers are examples | **DRIVER STYLE**<br><br>People here are focused on tasks and telling others what they want done. Relationships are secondary to task accomplishment.<br><br>Project managers, real estate developers, top executives |
| **AMIABLE STYLE**<br><br>People here are focused on people and asking questions for clarification to be sure they understand what is said.<br><br>Social workers, HR, clergy, medical professionals | **EXPRESSIVE STYLE**<br><br>People here are focused on people and telling them.<br><br>Entertainers, marketing, advertising executives, leaders. Work gets done through others via relationships. |

**Responses to this side are directed toward TELLING not asking**

**Responses to this side are directed toward PEOPLE, not tasks**

## THE ANALYTICAL STYLE

Although a fictional person, Mr. Spock of (Original) Star Trek fame is the classic example of an analytical (even to an extreme).

(Or Sheldon Cooper for "Big Bang Theory" TV fans.)

Their working style has a low degree of assertiveness as they listen more than they speak (in reality, not TV) and a low degree of emotional expression. People with this style *focus on facts more than feelings*. They evaluate situations objectively and gather plenty of data before making a decision. They prefer an organized work environment where they know exactly what is expected of them.

They are often perceived as deliberate, constrained, and logical. They tend to be good listeners who follow procedures, carefully weigh all alternatives, and remain steadfast in purpose. They are seen as disciplined, independent, and unaggressive, and as people who are likely to let others take the social initiative. They may be perceived as conservative (note: not a political label), businesslike, and persistent in their relationships with others. Strongly risk-averse and pursue their goals only after they have compiled plenty of data to support a project's purpose, practicality, and policy. For them, the *process* is as important as the outcome.

Here are some of the phrases often used to describe **Analyticals:**

- Seem technically oriented, often seeking structure, certainty, and evidence before making decisions (show them the warranty!)
- Appear quiet and unassuming; may show little emotion when dealing with others (they are listening much more closely than it appears)
- Tend to take little social initiative with others; may remain guarded until a strong relationship has been developed
- May push to extend existing ideas and procedures before going on to something new

- Will meticulously check every word and term in a contract or agreement before signing it

**Their office environment probably includes:**

- Minimal wall decorations. If there are some, they are probably off-the-shelf graphics, nothing frivolous, everything is utilitarian
- If there are documents on their desk, they are neatly stacked and everything looks orderly
- Family pictures, if any, are formal portrait settings, not candid shots of vacation, the dog, etc.
- There are probably charts, graphs, or other statistical measurements in their office.

**Strengths of this style include:**

- Seem able to approach problems on the basis of facts and logic and to create solid solutions
- Tend to make the most practical decision by being thorough and open to ideas
- Like to discover new ways of solving old problems
- Often productively competent in working out a problem and in getting a job done right

**Self-improvement opportunities for this style include:**

- Realize that their need to collect data it makes it difficult to meet a deadline
- Their need to have zero errors makes it difficult to provide an estimate or make an off-the-cuff suggestion
- Their need for orderliness makes it uncomfortable when someone with whom they are working jumps from one topic to another randomly

**Strategies for dealing with them**

- Meet their need for data by providing charts, graphs, warranties, or statistics. Always check your data first because they will.
- Give them some room for error when asking for an estimate or opinion. Otherwise, you will never get an answer because they are still collecting data. For example, ask for an estimate "with a 95% confidence level." If you give them an 'out' (95% instead of 100%) so they do not have to be perfect, you allow them to reduce their inner drive for error avoidance.

- Set some preliminary milestones so you can check on progress instead of an all-or-nothing final date. Their drive for perfection and analysis of data may cause them to get so bogged down in the details they lose track of the overall schedule.
- Support their principles and thinking; provide evidence and service; and answers that explain HOW as often as possible.
- When explaining something, proceed in a logical sequence and do not make any leaps of logic. Make sure they are with you to that point before assuming understanding or acceptance.

## The Amiable Style

Think of any successful talk show host and you will have a strong Amiable – at least as far as their public persona. (If they've risen to near the top of theor profession, there's a lot of Driver hidden inside, too!)

For example, Oprah Winfrey has been called, "America's Beloved Best Friend" on the Academy of Achievement's website. Although very successful as a business woman, she has built her fortune on being perceived as a caring and friendly person.

Her public persona as an Amiable is often seen as quiet, unassuming, and supportive. Perceived as a warm, friendly listener who seem easy to get along with, she attracts people who enjoy personal contact and shared responsibility ("teamwork" is something they enjoy.). They tend to pursue goals by first establishing strong personal ties (first the personal relationship then the business relationship.) They may be perceived as avoiding risks and decision making unless they have strong support or data to back them up for fear of disappointing someone.

They like time to build relationships and to seek support and feedback from others before they make decisions ("Where do you want to go to lunch? What about you?" they will ask everyone in the group but make no decision themselves for fear of offending someone.) They are very cooperative in their interaction with others because they want to be liked and "fit in'. They want everyone to get along.

Phrases frequently used by people to describe Amiables include:

- Seem to accept others, placing a high priority on getting along and fitting in
- Appear quiet, cooperative, and supportive as they seek approval
- Seem easy to get to know and work with
- Tend to minimize interpersonal conflict whenever possible

**Their office environment probably includes:**

- "Happy" decorations including candid pictures of family & friends
- "Have a Nice Day" slogan variations
- Probably some clutter giving it a comfortable and homey feel
- Some emphasis on teamwork in an award, a slogan, or books on the shelf dealing with relationships and or communication

**Strengths of this style include:**

- May help others and provide positive strokes for other people's work and accomplishments
- May have a deep sense of loyalty and dedication to those in their work and peer groups
- Seem able to communicate trust and confidence in other people
- Function very well on teams and other social settings
- Tend to make people feel comfortable about themselves

**Self-improvement opportunities for this style include**

- Amiables often have trouble asserting themselves and making decisions quickly.
- Generally, they don't like confronting disagreement with co-workers
- Must resist the temptation to base everything on feelings and more on results.
- Their reluctance to deal with conflict means that they don't always get what they really want.
- Their frustration about not resolving such issues can turn into resentment that is directed toward the same co-worker in later interactions.

**Strategies for dealing with them**

- Use a friendly tone of voice while making frequent eye contact and smiling
- They seek approval – provide it as much as you can.
- Use no aggressive or no dramatic gestures because this may be seen as unfriendly
- Speak slowly and in soft tones with moderate inflection (because that's how friends talk with each other)
- Use language that is supportive and encouraging with guarantees and assurances

## The Driver Style

The Driver is results-oriented, tending to initiate action and give clear direction. They seek control over their environment and want to know the estimated outcome of each option when making deals. They are willing to accept risks, but want to move quickly and have the final say. They love competition – especially when they win. In relationships, they may appear uncommunicative, independent and competitive and tend to focus on efficiency or productivity rather than devoting time and attention to casual relationships. They seldom see a need to share personal motives or feelings.

Drivers feel most comfortable pursuing their goals when they're in charge and taking the initiative. They are often seen as thriving in situations in which they can create plans and have others carry them out.

Drivers are frequently described as:

- Heartless, bottom-line oriented, will make direct eye contact as a way to intimidate to exert influence
- Able to move quickly and briskly with purpose while others hurry to catch up
- Speaking forcefully and fast-paced using terms such as will (not should), can (not try), and sounding very certain of themselves
- They seem to make things happen, take risks, and view problems as just another challenge.

**Their office environment probably includes**:

- Planning calendars and project outlines displayed in their offices
- Wall decorations include achievement awards ("#1 in the golf tournament)
- Furniture is "executive" style and of the best available (or best they can afford)
- Probably many communication methods available because they want to stay in touch, solve problems, and keep moving people ahead toward goals.

**Strengths of this style include**:

- The ability to take charge of situations and make quick decisions are what often make drivers high achievers.
- They put a single-minded focus on the goals they want and are not afraid to take risks to accomplish them.
- Often confident and strong-willed and like to initiate, control, and serve as own motivator
- Appear efficient, hardworking, results-oriented, and direct and to the point

**Self-improvement opportunities for this style include**:

- When feeling stressed, drivers can be so focused on getting things done quickly that they can overlook details and make mistakes.
- They may push aside their own and other's feelings to get the job done, which can create tense situations with co-workers.
- Because of their hard-driving, competitive nature, drivers can sometimes become workaholics.
- Their failure to consider the feelings of others can drive off a lot of good employees from their organization

**Strategies for dealing with them**:

- Don't waste their time – get to the point and be efficient
- Allow them to build their own structure when possible
- Give them choices between options and probabilities – allows them to be 'in charge'
- They measure value by results – show them how your product achieves results

## The Expressive Style

Expressives are motivated by recognition, approval and prestige. They are very communicative and approachable, while freely sharing their feelings and thoughts. They are a combination of Driver and Amiable who can get things done by getting people to follow them (willingly, not being coerced like a Driver would) as they share their inspirations and dreams.

They move quickly, are continually excited about the next big idea, but they often don't commit to specific plans or see things through to completion because that often requires dealing with boring details and schedules. They are better with strategy than the tactics needed for execution. Like drivers, they enjoy taking risks.

When making decisions, they tend to place more stock in the opinions of prominent or successful people than in logic or research. Though they consider relationships important, the Expressive's competitive nature leads them to seek quieter friends who are supportive of their dreams and ideas, often making relationships shallow or short-lived. (It's not that they "use people" and then discard them, they just don't want to invest the effort needed to maintain relationships like Amiables will.)

Phrases like these are often heard when describing Expressives:

- Appear to be risk-takers, competitive, and spirited
- Often futuristic, creative, and inspirational
- They are out-going, spontaneous, persuasive, gregarious, and humorous
- The see the "big picture" but don't care much for the details
- Their approach toward projects may be, "Ready, FIRE, aim!"
- They think quickly and  are more solution than process (like analyticals are) focused

**Their office environment probably includes**:

- Pictures that shout "look at me" such as with celebrities, unique locations (The Golden Gate Bridge), or exciting events such as skydiving. (The Driver's pictures would should competition or achievement like #1 in the golf tournament. The Expressive's would be *'Here are the Governor and I playing golf'*.)
- Bright colors
- Candid pictures of the family and their dog
- Many different projects or topics that they are working on

**Strengths of this style include**:

- Their lively nature allows them to motivate and generate excitement in others.
- They work at a fast pace and are good at building alliances and relationships to accomplish their goals.
- They are well suited for high-profile positions that require them to make public presentations, such as trainers, actors, salespeople, and so on.
- Like to share dreams and may stimulate creative exchange of ideas

**Self-improvement opportunities for this style include**:

- When upset, they can often communicate their feelings with considerable intensity, and if criticized, they may lash out with a verbal attack.
- They may seem overwhelming to less assertive styles, because when they're enthusiastic about an idea, they press for a decision and may overlook important details.
- They may need to stay with a project longer than just the initial start-up phase to make sure everyone understands the concept
- Rely less on intuition at times and dig for more facts

**Strategies for working with them**:

- Start by focusing on generalities rather than on details.
- They usually respond well to playful people who focus on the big picture.

- It's important to make direct eye contact, having energetic and fast-paced speech,
- Be sure to allow time in the meeting for socializing, talking about experiences, people, and opinions, in addition to the facts
- Ask about their intuitive sense of things will help
- Support your ideas with testimonials from people whom they know and like
- Paraphrase any agreements made and maintain a balance between fun and reaching objectives

If you had a large project, the four styles would broadly work like this:

- The *expressive dreamer* designs it and lays it all out
- The *take-charge driver* leads it and makes it happen
- The *amiable team builder* keeps the workforce together
- The *analytical data manager* maintains the records and documents

## BACKUP STYLE

Many people, when under stress, usually revert to their "backup style" of behavior.

For example, back on page 21, you learned that people fall into two broad categories of assertiveness: more or less assertive. The more assertive types are the **Drivers** and **Expressives**; the less assertive one are the **Amiables** and **Analyticals**.

Under stress, people will become more of whichever assertive styles they are.

- The **Drivers** become more demanding (their controlling trait);
- **Expressives** attack verbally (their verbal and quick thinking abilities);
- **Amiables** give in and put their personal feelings aside because maintaining the relationship is important;
- **Analyticals** withdraw into a shell avoiding the situation.

# Working Style Flexibility

Earlier, we indicated that four distinct styles means that 25% of the world's working styles is like ours (we do not include ethnic, religious, geographic, etc. factors but rather the basic working style as we have used in this course) and 75% is different.

This means if we can find a way to approach the other person *in a way most like their working style,* we increase the odds we can communicate effectively from 1-in-4 to perhaps 1-in-2 or 1-in-1 depending on our skills. *The greater our attempt to see the world through their eyes will make them like to work more with us.*

Suppose you were an **Analytical** having to deal with an **Expressive**. From our guidelines on dealing with the various working styles, here are some of the strategies to use when working with them.

**The Client as an Expressive**

- Start by focusing on generalities rather than on details.
- They usually respond well to playful people who focus on the big picture.
- It's important to make direct eye contact, having energetic and fast-paced speech,
- Support your ideas with testimonials from people whom they know and like

**You as an Analytical**

- When explaining something, proceed in a logical sequence and do not make any leaps of logic.
- Meet their need for data by providing charts, graphs, warranties, or statistics. Always check your data first because they will.
- Support their principles and thinking; provide evidence and service; and answers that explain HOW as often as possible.

Can you see what a disaster (the lightning bolt) it would be to use the **Analytical** approach of providing a lot of data and statistics first when an **Expressive** just wants generalities? Or when the Expressive just wants the "big picture" and the Analytical insists on the logical sequence without making any leaps of logic?

Flexibility means that "you temporarily adapt so you can be successful in the encounter"; *it does not mean becoming the other style.*

The most successful fishermen look at the world *from the perspective of the fish.*

They ask*, "What kind of water conditions, visibility, temperature, depth, and light is best?*

*What about time of day? Which is best, incoming, outgoing, slack, or flood tide? What is their favorite bait?"*

**The more they can "become the fish", the more they will catch.**

Think of someone with whom you work and identify their working style.

- What clues do you notice?
- Based on those clues, what is their probable working style?
- How should you approach them?
- What is your working style?
- What potential conflicts are there between your style and theirs?
- What will you do to avoid these conflicts?

# Using the Working Styles Knowledge

Here are some activities that will help you and your employees understand the Working Styles concept, apply that knowledge, and become as flexible as possible to encourage effective communications.

1. Call your department together for a meeting or include this in regular department meeting.

2. Make enough copies of the section on identifying our personal working style so each employee gets a chance to use the worksheet to identify theirs.

3. Ask each to name their working style as determined by the worksheet and whether they agree with it. Remind them no one is a pure driver, analytical, amiable or expressive: ***we are mixtures of all of them but express one style more often than the others.*** Ask the coworkers if they agree with the assessment and why.

4. Gather them into 4 groups by working style and have them list challenges and benefits of working with each of the other three groups.

5. Group your department into generations and ask them to identify fictional characters from books, television, or the movies that represent each of the four Working Styles. Ask them to share with the group their reasons for selecting that character.

**Some leadership questions:**

How can you use your new knowledge about their working styles to lead them more effectively?

1. List each individual's name and identify what you will start doing, stop doing, and continue from a leadership perspective with each.

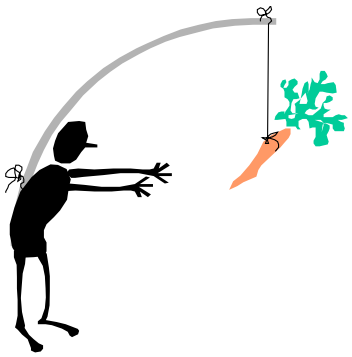
2. Identify how you will use this working style knowledge to make future work assignments.

3. How will you use this working styles knowledge to create work teams that contain mixed generations?

4. How will you use this working styles knowledge to *create* a mentoring relationship between older and younger members of your group? (Hint: You will be wise to match drivers and drivers, amiables and amiables, etc. across generations.)

# Motivational Overview

Ask yourself, "What incentive do I have to work for my organization?"



What incentive does each of your employees have to work for your organization? (These questions will help you begin to see the organization and your leadership through the eyes of your employees. Don't forget to consider the generational and working styles factors.)

What incentive does each of your employees have to work for you?

What incentive do you have to work for your supervisor or manager?

Why are we asking you these questions?

(Look at the text box below on this page. If you cannot think of a reason why someone would want to work for you, as opposed to another supervisor in the same company, then why would you expect your employees to be loyal to you and do their best for you? Remember, there is a BIG difference between doing their best and doing enough to get by!)

Why should you be asking yourself these questions?

(Reread the blue print in the question above.)

Many surveys have shown that most employees do not stay with (or leave) their employers; they stay with (or leave) their supervisors.

What do you think?

Complete these two sentences.

1. **"LIFE WOULD BE GREAT IF MY EMPLOYEES WOULD ONLY…"**

   (Most managers and supervisors say, "Think for themselves", "Show some initiative", "Get to work on time", "Get to work", "Worry more about their business instead of everyone else's", etc.)

2. **"WHEN THE BEST BOSS I EVER HAD DID THIS (specify), IT HAD THIS IMPACT ON ME AND MY WORK** (specify)"

TABLE 1

| When the best boss I ever had did this… | It had this impact on me… | It had this impact on my work… |
|---|---|---|
| (Told me what she wanted and left me alone to do it.) | (It made me feel she trusted me to do it right.) | (I took time to do it right to show her I could and so she would continue to leave me alone to do it.) |
| | | |
| | | |

What relationship do you see between how you want your employees to act and the impact on you and your work by the best boss you ever had? (A primary reason why you acted like you did was the influence of your leader. You must ask your employees that same question about the best boss they ever had. Then be sure to demonstrate the traits they listed and you will get the desired behavior.)

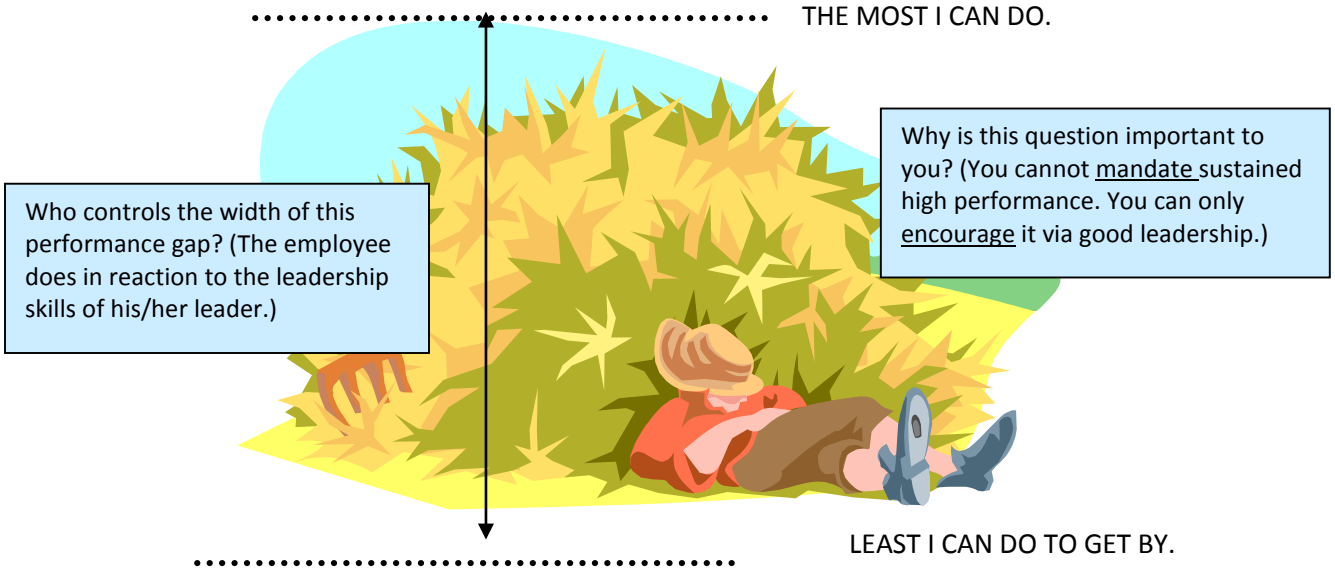
Why do we ask this question in a course about organizational diversity and productivity? (There is a direct connection between the quality of an organization's leadership, top-to-bottom, and its diversity and productivity. You cannot get the desired outcomes without a high quality of leadership first.)

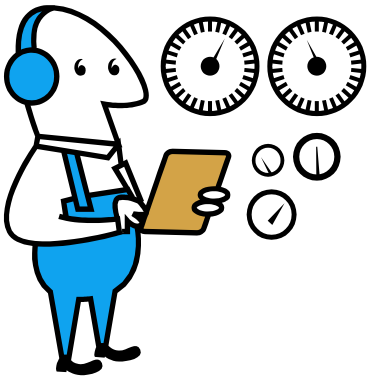
How much did it cost the best boss you ever had to act like that? (If you said, "Nothing, it was free!" you have discovered a truth about motivating people. It DOES NOT COST ANYTHING!)

What can YOU start doing differently RIGHT NOW that can help you get what you want from your employees' behavior?

**Question:** When you were in school, did you know the least you could do to get by and not get in trouble at home? How did you discover this?

Who determined whether you did the least or the most you could do?





**QUESTION:** If you were paid 10% more, would you consistently provide 10% more productivity day in and day out?

Why or why not?

What relationship do you think there is between what people in military service **are paid** and **what they do to earn that pay?**

(This demonstrates that money is not always the biggest motivator for employees. How many would risk their lives in military service if it were only for the paycheck?)

Complete this sentence, "Work life would be great if my boss would only….."

How could you get those items that you listed?

(Why not discuss this with your boss? Use the same example that we used on page 37 where you discovered that it doesn't cost anything to act in a way that motivates people.)

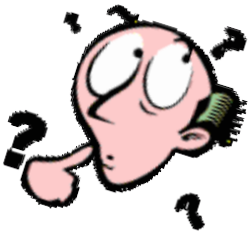
If you asked this same question to your employees, how do you think they would answer?

What is keeping you from asking them?

Based on the discussions we have had so far, what do you think is the PRIMARY FACTOR from an organizational standpoint in determining whether a workforce is productive?

(The primary factor is the quality of the leadership skills demonstrated by the organization's management team from top to bottom.)

# The Five Components of Employee Motivation

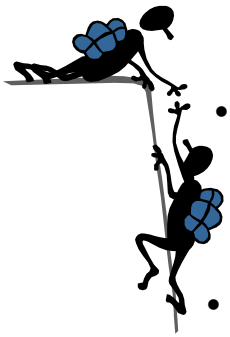


(How prevalent are these within your organization? What would line employees, the people who do the actual work, think? Do you think they would apply to any person regardless of the background?)

- **Tell me what you expect of me** in measurable terms (quality, quantity, time) that reduce the risk of my confusion. (For which generation(s) will this be most important?) Details on page 41

- **Give me a chance to perform** (and learn from my mistakes, too.). (For which generation(s) will this be most important?) Details on page 43

- **Let me know how I am doing as I go along**… Remember the report cards you got in school every 6 weeks? You did not have to wait until the end of the year to learn if you had passed or failed the grade. (For which generation(s) will this be most important?) Details on page 44



- **Give me help and guidance** when I need it. (For which generation(s) will this be most important?) Details on page 45

- **Reward me** with pay or praise when I succeed. (For which generation(s) will this be most important?) Details on page 46

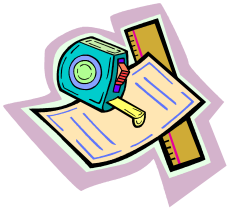
## #1 Tell Me What You Expect of me

What value do you think there is in having **measurable** performance goals? (For which generation(s) will this be most important?) (You cannot determine progress without measurable performance goals.)

An effective goal also requires at least these four elements:

1. Realistic (in the mind of the person doing the work) – The person must feel they have some chance of success or they will not bother trying.

2. Quantifiable – It must tell the person **HOW MUCH** (Quantity), **HOW WELL** (Quality), and **BY WHEN** (Time). This knowledge helps them gauge their own progress toward the ultimate goal. We will abbreviate this to "QQT" in this course.



3. Job Related – He/she must understand how his/her personal goals support the goals of the department, which support the goals of the division.

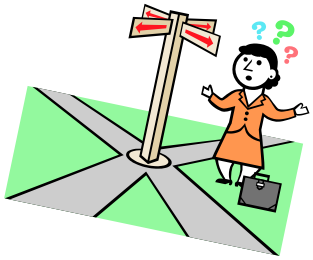
4. Do-able – They must involve his/her **doing something that they can observe and measure.** A goal that calls for "Understanding how work flows through the Highway Department" is useless because you cannot measure UNDERSTANDING.

It only becomes useful if he/she must do something that demonstrates his/her understanding such as, ***"explain in writing the complete workflow of a request from a citizen for a safety sign on his street until it is installed."***

What are some sources of stress in your work life? Would this vary with generations or working styles? How and why?

What are some measurable ("QQT") goals in your work life?

What are some sources of stress in your home life?



What are some measurable ("QQT") goals in your home life?

How can having measurable ("QQT") goals reduce stress in your life? (Specific measurable goals give us a way to measure progress toward them. Without the QQT measurable elements, the goals are vague. If the goals are vague, then progress will be vague leading to frustration and, ultimately, stress.)

List some activities associated with your job that you wish were defined more clearly regarding what your leader expects you to do. ***Also, ask your employees to list some activities they wish were defined more clearly.***

How does this lack of clarification affect you and your work? How do you think your employees feel with their needs for clarification?

How does that lack of clarification lead to stress?

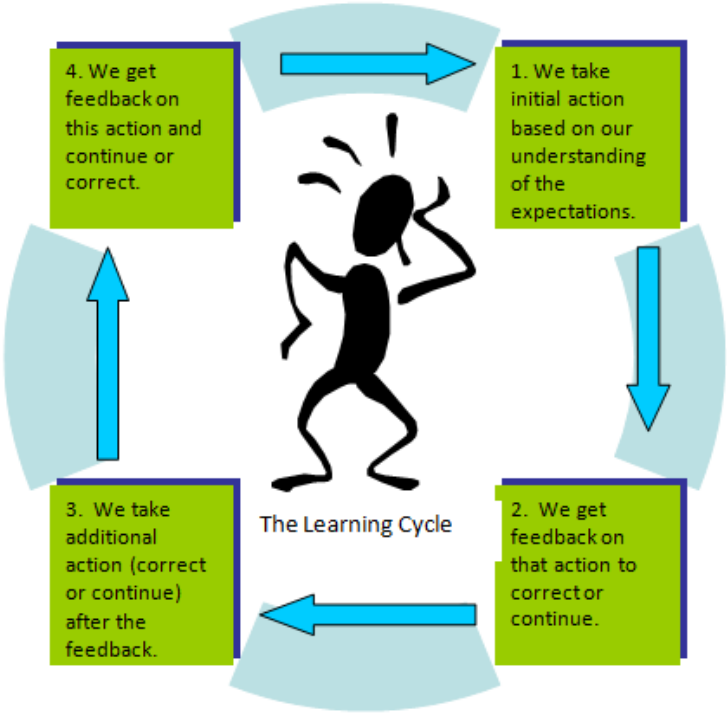
How does this lack of clarification affect your value to the organization?

Now that you have identified these issues, what will you do next?

What is the possibility that many other employees in your organization share these feelings, too?

How do those feelings impact organizational productivity?

## #2 Give me a Chance to Perform (and learn)




How does your organization practice these activities on a routine basis?

- Explain to employees at every level in the org chart what work performance and outcomes are expected in measurable terms of **quality, quantity,** and **time**.
- Give them a chance to perform using those measurables;
- Give them frequent feedback (written and verbal) on the performance focusing on behaviors ("*You spelled this wrong*."), not personalities ("*You are careless*.")
- Allow them to practice the corrected performance again by applying the feedback given

What generational or working style needs will be met if you do all of these things?

What opportunities are hidden within this page to improve your leadership skills?

How do you think your organization's approach to this topic impacts productivity?

## #3 Let Me Know How I Am Doing As I Go Along

Think back to your days in grade school. Did you have to wait until the end of the school year to find out whether you were going to pass?

What kind of "feedback" did you get from your teachers though the year that gave you an idea of how well you were doing? Do you think your grades were based on your performance on tests, homework, and class participation or whether you were black or white, male or female, athletic or non-athletic, etc?

What did the teacher need to do to create a situation where you could get that feedback?

(Set up a grading system so your scores on tests, homework, and class work, behavior, etc. would feed into the semester grade. You always knew how you were doing because she gave your work back with a grade. That was the feedback. Also, you were graded purely on your performance – not whether you were a boy or a girl, black or white, etc.)

How could that same model of feedback help you at work?

(If you can establish a graduated scoring system for work – like the teacher's graduated system of A, B, C, D, and F – the employees will be able to monitor themselves just as you did in grade school. Also, employees realize how they are graded for performance and nothing else. Which generations and working styles are most interested in this process and why?)

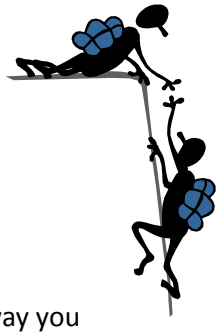
What would be necessary from an organizational position to make that happen?

(A requirement from executive management that work performance at all levels is identified with QQT elements on a graduated scale plus a determination. to make the workforce composition reflect the available talent pool as much as possible. Also that those results feed into an annual performance assessment system that is seen to be fair and equitable from an employee's perspective.)

How does the lack of a situation like that (the grade school scenario) impact organizational productivity?

(If people have to rely on their leaders to tell them how they are doing, it removes the opportunity for self-determination. Also, unless the employees and their leaders share a common understanding about how work performance will be evaluated, there is a strong potential for friction when an employee thinks he did a job worth an "A" and his leader says it's only worth a "C".)

## #4 Give Me Help and Guidance When I Need It



When you need help with something at work, what is your preferred way of **being helped?**

(How do you think it varies with generations and working styles?)

What difference is there (if any) between your preferred way of **being helped** and the way you actually receive it at work?

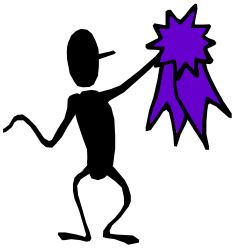
When you need guidance with something at work, what is your preferred way of **receiving guidance?** (How do you think it varies with generations and working styles?)

What difference is there (if any) between your preferred way of **receiving guidance** and the way you actually receive it at work? What do you think each of your employees will say about how you provide guidance to them?

Do you think many others in your organization experience your situation regarding their preferred methods of receiving help and guidance in relation to how they actually receive it? Could generations and Working Styles have anything to do with this? How?

What relationship do you think exists between how employees receive help and guidance and organizational productivity? (If they do not receive help and guidance as individuals in the manner most acceptable to them, resentment can build and reduce productivity.)

## #5 Reward Me with Pay or Praise When I Succeed



List some rewards that would have meaning for you at work.

Then put a "Y" for yes ("N" for no) in the "$" column if that reward would cost money. Finally, put a "Y" yes ("N" for no) in the 3rd column if a reward like that would be typical in your organization.

| **Rewards like this would have meaning for me when I succeed at work…** **(An example could be a chance to lead a department meeting. They aren't always financial.)** | **$** | **In your org?** |
|---|---|---|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

What impact on your productivity would there be if you received rewards like those?

Why would it have that impact on your productivity?

What percentage of the rest of the workforce in your organization do you think shares your views?

Now that you have answered these questions, how can you apply this knowledge to your organization?

What benefit is there to you if you ask your employees to fill this out so you can learn what rewards they would like?

What impact, if any, do you think generations and Working Styles will have on desirable rewards?

# MEASURING PERFORMANCE

Do you think a person can be very busy but not very productive?

How could this happen?

Tasks are not always productive. Sometimes people are just "busy". When you focus a task with the three critical performance standards that define "how much", "how well" and "by when" **(QQT),** you establish goals and become productive.

The light bulb in a lamp is physically the same as a laser beam.

However, the laser has all of its energy narrowly focused upon a particular point that gives it incredible power. How could you compare parts of your workday to the light bulb and the laser beam?

When do you feel more satisfied with your work: when you are acting like a light bulb or a laser beam?

Which condition ultimately makes your job more enjoyable and your work more productive?

Do you think this varies with generations or Working Styles?

How can you use the light bulb and laser beam example in a discussion with your employees?

Why would you want to do that?

## ARE THESE SITUATIONS PRODUCTIVE OR BUSY?

Read each situation and put a checkmark under the appropriate "Productive" or "Busy" column. Remember, we define "productive" as having all three elements of **how much (quantity)**, **how well (quality)**, and **by when (time)** present in a situation.

| The situation | Productive | Busy | If "busy," what is missing? |
|---|---|---|---|
| Grant has been pushing the cart loaded with statements up and down the hall for the past 45 minutes. | | | |
| Logan has processed 200 documents in the past 3 hours. | | | |
| Murphy has the machine running items at a speed of 375/hour and a reject rate of .82% | | | |
| Ben completed 3 hours of classes at night school this past quarter. | | | |
| Describe a typical activity of yours that is busy but not productive because you have not been told the three components of productivity; **quality, quantity, and time**.<br><br>Which of the three components is missing?<br><br>What will you do about it? | | | |

*Grant is just busy. Nothing has been accomplished. What is the "quality" measurement?*

*Logan has processed 200 documents but are they the correct ones? Where they processed accurately? There is no QUALITY component.*

*Murphy has been productive. The quality component is the "reject rate".*

*Ben completed the courses but what was his grade? If he failed, the productivity was at an unacceptable level. If he received an "A", he was more productive than if he received a "C". We don't have enough information to determine if he was productive or just busy.*

# Establishing Effective Performance Goals

Select one of your current employees and write two effective performance goals for them. Put the words "how much", "how well," and "by when" in parenthesis behind the proper element within your goal. Use this as a sample:

> **Sandy will complete the night school <u>Accounting 101 class</u> ("how much" = 1 class) within 6 months of today ("by when") with at least a grade of 'B' ("how well").**

My employee is _____

Their performance goal #1 is:

Their performance goal #2:

Three possible situations can happen when **setting performance goals**:

1. <u>You set them</u>; your employee takes them and tries to meet them.
2. <u>Your employee sets them</u>; you accept them and hope they can meet them.
3. <u>You and your employee set</u> them together and track progress together.

Which do you think is a better situation and why?

Do generations and working style issues change this question?

# MEASURING "HARD SKILLS"

Defining skills must always focus on the behaviors associated with the skills. We must define *what we expect them to do at difference performance levels* as part of the measurements.

Measurements, *to be effective*, must contain references to:

- **Quality** of performance (How well they perform.)
- **Quantity** of performance (How many they must produce.)
- **Time** of performance (The deadline when the production must be completed.)

We will abbreviate these three elements in this course as **QQT.**

For example, suppose we were defining the job functions of a filing clerk. Their job deals with accurately ("**accurately**" is a quality element) filing stacks ("**stacks**" is a quantity element) of documents by a specific deadline ("**deadline**" is a time element.)

In addition to describing the three elements (QQT) of effective measurements, we must also identify a performance range that allows the employee and supervisor to monitor the work progress and determine their appropriate compensation for the work performed. This is like the grading system used in schools where A, B, C, D, F provide measurements for academic productivity.

It is easy to develop a performance range if you will start in the middle – the "least they can do to get by" performance description. This is like the grade of "C" in school.

Then you can go up and down the scale easily to cover the range of performance that can occur.

The elements of quality, quantity, and time give us great flexibility in determining the performance range. We can define the fling clerk's duties in a variety of ways.

We will use a simple 1.0 – 5.0 scale to demonstrate this practice where 1.0 is "worst" and 5.0 is "best behavior".

The elements of quality, quantity, and time can be manipulated to place greater emphasis on which of the three is most important for a specific job.

| TABLE 1 - FILING CLERK PERFORMANCE RANGE – FOCUS ON QUALITY | |
|---|---|
| **5.0** | File >30 documents per hour with no mistakes |
| **4.0** | File >20 - 30 documents per hour with no mistakes. |
| **3.0** | File at least 20 documents per hour with no mistakes. |
| **2.0** | File <20 but more than 15 documents per hour with no mistakes or any amount with 1 mistake. |
| **1.0** | File < 15 documents per hour with 1 mistake or any amount with 2 or more mistakes. |

Table 1 shows that greater scores ("better work") are directly tied to increased filing of documents if there are no mistakes. The 2.0 score (like a "D" grade in school) can be either fewer documents with NO mistakes or even more than 30 documents with just one mistake. The time element remains the same.

| TABLE 2 - FILING CLERK PERFORMANCE RANGE – FOCUS ON QUANTITY | |
|---|---|
| **5.0** | File >40 documents per hour with no mistakes. |
| **4.0** | File >40 documents per hour with <2 mistakes. |
| **3.0** | File at least 30 documents per hour with <=3 mistakes. |
| **2.0** | File at least 30 documents per hour with 3-4 mistakes or <30 with any mistakes. |
| **1.0** | File < 25 documents per hour with any amount of mistakes. |

*Author's Note: Table #2 with a focus on quantity is purely designed to show how you can manipulate the three components of productivity. We cannot image a real situation where getting them filed is more important than filing them correctly.*

| TABLE 3 - FILING CLERK PERFORMANCE RANGE – FOCUS ON TIME | |
|---|---|
| **5.0** | File >40 documents with no mistakes in less than 1 hour. |
| **4.0** | File >40 documents with no mistakes within 60-75 minutes. . |
| **3.0** | File at least 30 documents with no mistakes in 75-90 minutes. |
| **2.0** | File at least 30 documents in 75-90 minutes with <3 mistakes |
| **1.0** | File < 30 documents or take longer than 90 minutes or make 3 or more mistakes. |

*Author's Note: Like the example of Table #2, this is a hypothetical example of manipulating the third component of productivity. Once again, we cannot imagine a situation where working faster is more important than working correctly: i.e., where close is good enough.*

Some tasks do not allow much manipulation of the three elements because of the nature of the job.

Suppose government regulations required we process **all** the loan documents we received **accurately** within **72 hours**. We cannot control how many we receive: we must simply process them "all". Every document must be accurate because people's money and property is involved and we have a "$1,000 error-free guarantee" in our advertising that gives us a marketing edge and drives a lot of business our way.

We will divide the inbound work into equal piles for the clerks available. Since the government requires accurate processing within 72 hours, we can use that as our grade of "C". We know we cannot process less than all that came in nor can we drop the quality level. Therefore, the only variable we can use as an incentive for employees is **time.**

**We can manipulate the time it takes to finish their share of the work as the incentive to finish early.** That also gives us a chance to have some early finishers available to help slower ones if needed (after we document the files of the early finishers –and they know we did - as a reward) so we do not break the departmental deadline to finish all the work that came in.

If they can finish their share of the work accurately sooner than 60 hours since it came in, we will give them the highest score of 5.0 (an "A" for their work). Then, as an example, we can make 60-65 hours as a 4.0 (a "B") and 66-72 hours as the 3.0 (a "C").

Here are examples of how more technical skills could be developed into a performance range.

## This is for an on call software-programming technician.

**Client Problem Resolution**

*On-call Responsiveness* is based on problems being resolved within the established time frames set by the On-Call Policy, barring any obstacles encountered due to problems or other circumstances outside of the control of the person responding to the problem.

**Note:** Expectations should be evaluated based on the individual's job description and special considerations may need to be made for new employees or employees that are assigned applications that they do not support on a daily basis; such as groups that have combined on-call personnel for multiple applications or when an employee transfers to another application.

| | **ABLE TO RESOLVE PROBLEMS ON YOUR OWN** |
|---|---|
| 5 | Consistently (98 - 100%) able to resolve problems on your own and all problems resolved within the established time frames. |
| 4 | Most of the time (90% - 97%) able to resolve problems on your own; however some assistance is needed from other team members on difficult or complex problems. All problems are resolved within the established time frames. |
| 3 | Occasionally (80% - 89%) needs assistance to resolve problems that are unfamiliar; you are able to resolve most problems on your own; most all problems are resolved within the established time frames. |
| 2 | Needs to improve; assistance is needed from other team members to resolve problems which are not complex. |
| 1 | Needs to develop; assistance is needed from other team members to resolve most problems; problems are not resolved within the established time frames. |
| | **ABLE TO RESOLVE PROBLEMS WITHIN THE ESTABLISHED TIME FRAME SET BY THE ON-CALL POLICY** |
| 5 | Consistently (98-100%) problems are fixed the first time; solutions do not cause additional or new problems; no business unit, application, or system performance impact and no customer impact. |
| 4 | Most of the time (90-97%) problems are fixed the first time; solutions do not cause additional or new problems; no business unit, application, or system performance impact and no customer impact. |
| 3 | Occasionally (80 -89%) problems are not fixed the first time; solutions did not cause additional or new problems; minor business unit, application or system performance impact occurred; no customer impact |
| 2 | Needs to improve; problems are not fixed the first time or solutions have caused additional problems; customer, an occasional business unit, application or system performance impact occurred |
| 1 | Needs to develop; problems are not fixed the first time or solutions have caused additional problems; customer, business unit, application or system performance impact occurs frequently. |

## Section Review

Use a 1.0 (worst) to a 5.0 (best) scale to define a performance range for any task associated with one these of these technical functions. Be sure to include considerations of quality, quantity, and time.

- A technician at a fast oil-change business
- A customer service representative in a phone center
- An emergency medical technician
- A hair cutter in a barber/stylist shop
- A bank teller

Compare and contrast the needs of the generations and working styles for more or less specific performance criteria. This is a great discussion question for your workgroup.

Which would you consider more when putting together a work group to help your department devise measurable performance ranges for all the tasks within your department: working style or generation? Why?

List by name the individual(s) you would want to work on a task force to devise those measurables. Beside each name, list 2 advantages they bring to the group and list 2 personal challenges they may have to overcome to work effectively with the group. (For example, *Logan is an Expressive which means she will be able to see the big picture and keep all energized in the task. Her personal challenges may be that, as an Expressive, she tends to overlook details and lose sight of reality.)*

# MEASURING "SOFT SKILLS"

Unlike the "hard skills" we discussed earlier on page 50 that are unique to a specific job function, "soft skills" are more universal and expected of all team members regardless of their specific job functions.

**It is easy to measure if you will do this:**

How can you put a measurement on these topics?

Written
Communication

1. Work with your employees to define jointly the **behavioral traits** that demonstrate the topic. (It is critical to the success of this measurement process that you include those whose behavior you expect to measure. Their "buy in" is essential for this process.)

   For example, if you wanted to measure "PRIDE IN WORK", you first identify **behavioral traits** that indicate *they have pride in their work*. You and your employees may come up with a list like this:

- There are no spelling errors.
- It is always on time or before.
- She always uses the proper format for the report.
- There are no smudges or "white outs" on the form.
- Her data is always accurate.

2. Establish a scale with a range of values for use with each trait. [This is a *Likert Scale.*]

   1 = I never see this (Do not get overly concerned with the definition of "Never". The scale will work as long as you and the employees agree closely on what frequency it means,)

   2 = I occasionally see this (Do not get overly concerned with the definition of "occasionally" .The scale will work as long as you and the employees agree closely on what frequency it means,)

   3 = I always see this (Do not get overly concerned with the definition of "Always". The scale will work as long as you and the employees agree closely on what frequency it means,)

   X = Does not apply

**CAUTION:** PROFESSIONALS SUCH AS ENGINEERS, SURVEYORS, AND ACCOUNTANTS (WHO ARE TYPICALLY DRIVERS AND ANALYTICALS) ARE USED TO WORKING WITH SPECIFIC DATA AND MAY BE UNCOMFORTABLE WITH THIS CONCEPT. THEY SHOULD REMEMBER WE ARE MEASURING IMPRESSIONS AND ATTITUDES THAT MAY BE VAGUE AT BEST.

ASKING A CUSTOMER TO RANK SATISFACTION ALONG A SCALE FROM "NOT SATISFIED," "SOME SATISFACTION", VERY SATISFIED," OR "DOES NOT APPLY" IS MORE USEFUL THAN ASKING THEM "ARE YOU 43% OR 52% SATISFIED?"

3. Then create a scale that converts the average of the trait scale (#2 above) to your performance assessment system.

| Joan Smith's ***Pride in Work*** ("Pride in Work" is the behavior we are evaluating) Evaluation | Scores |
|---|---|
| There are no spelling errors. | **3** |
| It is always on time or before. | 2* |
| She always uses the proper format for the report | 2* |
| There are no smudges or "white outs" on the form. | 3 |
| Her data is always accurate | 2* |
| **Average score for the observation period** | 12/5= **2.4** |

**A wise leader will have documentation of the times when the employee did anything that would result in a less than perfect score. You can expect them to ask for proof they did not earn the top score.*

*Also, their morale is improved if you put the burden of proving they did not get the max score on you instead of putting the burden of proof on them they did earn it. This would be like a teacher in school telling you at the start of the year "Everyone has an "A" in this class until your scores show otherwise." The result from a grade standpoint is probably the same but the attitude of the students is much more optimistic and they may score better!*

These five "behavioral traits" from part #1 define the behavior "Pride in Work".

*You can ask your work team how they want to be measured on their "teamwork" skills.*

Some **"TEAM WORK"** traits that they may suggest:

- Demonstrates willingness to help others when finished with own work without being asked.
- Demonstrates willingness to help others with less experience or confidence
- Demonstrates willingness to give credit to others when praise is given
- Demonstrates willingness to carry his/her fair share of the workload (and more at times if asked)
- They are reliable and can be counted on to carry their share of the workload

You should consider accepting any traits that satisfy them and still fall within your general bounds of what the topic should cover. They feel more bound by their community standards than your outsider standards.

This is how the XYZ Project may set up a simple, yet effective because it is easily understood by employees, performance assessment scale of 1.0-3.0.

| Joan Smith's *Pride in Work* Evaluation | Scores |
|---|---|
| There are no spelling errors. | 3 |
| It is always on time or before. | 2* |
| She always uses the proper format for the report | 2* |
| There are no smudges or "white outs" on the form. | 3 |
| Her data is always accurate | 2* |
| Average score for the observation period | 12/5= **2.4** |
| *** A wise leader will have documentation of the times when the employee did anything that would result in a less than perfect score because they will** certainly ask about it. | |

The XYZ Corporation's Employee Performance Scale

Performance scale ranges from 1.0 – 3.0:

1. < 2.0 requires probation
2. 2.0 – 2.3 = Satisfactory performance with lowest merit increase
3. >2.3 – 2.5 = Above satisfactory performance with medium merit increase
4. >2.5 = Outstanding performance and maximum merit increase

## Section Review

Pretend that your community service organization or church is planning a fundraiser. Select one of the activities below and:

- Define the criteria for participation
- Define the parameters of the contest
- Define how you will judge contestants so there is minimal chance that the judges selections will be challenged by those who did not win

Use a 1.0 (worst) to a 5.0 (best) scale to define a performance range for one of these activities. Be sure to include as many objective observations or measurements as possible.

- Baking brownies
- An art contest
- A crafts contest
- A music contest

# Employees Rating Each Other: Good or Bad Idea?

If TEAMWORK is one of the topics on your performance assessment, you may want to consider allowing the team members to assess how each other support the goals of the team. Obviously, they are in the best position to know who actually works while the boss is not around and who only works when the boss is present.

*"Employees rating each other: good or bad idea?"* Ask that question among a group of supervisors and managers and you will get many reasons for and against it.

We believe that it is a good idea only when *the group doing the rating has the maturity to understand the benefits it offers.*

Here are some issues for consideration about the argument for those who have not attempted it before.

- Teamwork is important to the success of our group. (No one will argue that fact.)
- There are only two ways to evaluate individual performance contributions by members of the team: the *leader can do the evaluation* or the *fellow team members can*.
- The leader is not always present while the team is working. Frequently there are duties unique to leadership that requires him or her to be elsewhere such as attending meetings, working in the office planning, scheduling, budgeting, reporting, etc.
- There may be team members who work more diligently while the leader is present than they do when the leader is absent.
- Other team members frequently have to pick up that slack to meet the group's production goals.

- Since the leader was periodically absent and not able to observe performance at all times, there is a distinct possibility the slacker will get a performance rating that is higher than deserved when the leader does individual performance assessments on group members. This is unfair to those who had to pick up the slack to meet the group's goals.

- The group's members can solve this problem by doing anonymous assessments of each other if they choose to act objectively. The leader can use these for the individual's performance scores under the "teamwork" category.

- Some group members will object saying that assessments are the job of the leader. While that is true, it is also true that the frequently absent leader cannot evaluate individual performance within the group as often as other members can.

- The group can choose to score itself anonymously and be very accurate or insist the leader do the scoring and admit there may be undeserved scores. They cannot have it both ways unless the leader gives up some leadership duties. However, if the leader stopped doing those leadership duties, he or she would not remain a leader very long.

- The possibility of groups of team members giving those they do not like lower scores (or friends higher scores) than they deserve can be defeated if you will use the Olympic judge technique of discarding the highest and lowest scores. Or, you can require specific examples be included for the highest or lowest scores to count.

- If a project team is willing to self-score, work production will increase because the slackers can no longer "get away" with their games: ***they know it and the team members know it***.

What generational and working styles obstacles may you encounter with this concept? How will you overcome them?

## PERFORMANCE ASSESSMENT SAMPLE USING A LIKERT SCALE

(A Likert Scale is one that surveys a range of opinion from one extreme to another such as 'Agree very strongly' to 'disagree very strongly.)

Send a survey with a cover memo like this to group members.

> *"John Smith is due for a performance assessment of his last 12 months of work. Part of* ***our company's annual*** *Performance Assessment form requires an assessment of* ***TEAMWORK****.*
>
> *We value the Teamwork traits listed below in our group. Please rate John based on your experience with him during this past assessment period and send it to me by (date). If you want to include the highest or lowest scores, you must include specific examples for those scores to count.*
>
> *Your name will be helpful if I have questions about your response BUT IT IS NOT REQUIRED. If you will feel more comfortable returning it anonymously, you may do that."*

| Please rate these situations from a 1-10 using this rating:<br>1 = I never see that trait 3 = I rarely see it 5 = I see it occasionally 8 = I see it frequently 10 = I always see that trait X = I do not know well enough for an opinion. | |
|---|---|
| **The trait we are looking for…** | **Your rating** |
| Willingness to help others when finished with own work <u>without being asked</u>. | |
| Willingness to help others with less experience or confidence | |
| Willingness to give credit to others when praise is given | |
| Is reliable by always being here on time and doing what they promise | |
| Willingness to carry his/her fair share of the workload (and more at times if asked) | |

When you get the replies, average the scores and assign a value according to the system you have developed ***with your employees.***

# Applying This to Your Organization

"All of this is very interesting," you may think, "but how do I apply it to my organization?"

There are many ways to apply this information but, in any method used, it must have a *personal connection* with the participants. By "personal connection", we mean they must see traits we describe of generational or working styles in themselves or in someone they recognize for these concepts to register. The more personalization that occurs means it is less of an abstract concept and becomes something that can benefit them.

For example, if you were helping them discover their personal working styles, do not be surprised to hear someone say something like, "Those Expressive traits describe Ben Grant exactly. He MUST be an expressive!" Or perhaps, "Now I realize why Logan always seems to be in charge of things, she's a Driver and it's just her nature."

We have provided some guidelines to help you get a dialogue going between the various components of your work group. Remember, you have not only vertical generational components but also the horizontal working styles variables to make a very interesting matrix. (Look back on page 5 for the graphic.)

Use our ideas to get started, and then as you become more familiar with these generational and working styles concepts, you will be able to free-lance activities for your own group. Trust your instincts! You did not get to be a leader in your organization without some well-developed instincts!