

Effective Performance Coaching

How to manage your employees to
achieve disciplined performance execution

CULLEN
COATES
& ASSOCIATES

Strategy
360°
Execution

Effective Performance Coaching

One of the most difficult management tasks is developing an effective coaching process that drives employees to achieve top performance while ensuring that the process itself does not distract from crisp execution of business strategies and plans.

And yet creating such a process is one of the most important things you can do as a manager to reduce your overall business risk, deliver predictable results and ensure ongoing management alignment around strategy execution.

The Culture

The best-managed organizations have established a culture that emphasizes disciplined execution of plans and a systematic management tracking process to ensure that deadlines are achieved and that critical issues are escalated for decision before they become barriers to performance.

These systems focus on managing an agreed sequence of projects on an agreed timeline; with systematic progress reporting and management coaching to eliminate roadblocks and drive projects to the next scheduled steps on the timeline. These systems use what is called “exception-based management”, which is a reporting process that focuses management attention on just those things that are not tracking to plan.

This disciplined approach will enable you to align your management team to deliver predictable results and thereby reduce systemic business risk.

The requirements for an effective performance execution process are three-fold:

- The first requirement is to establish a focused and efficient **methodology for planning and tracking** project implementation so that information coming out of the performance tracking system is in a format that feeds directly into the coaching process.
- The second requirement is to create a timeline-based project **reporting system** that shows the sequence and progress of task completion against an agreed timeline – along with identified roadblocks.
- The third requirement is to have a **disciplined schedule of tracking meetings**; both one-on-one coaching and team meetings that use the tracking system and reporting to drive both the information discussed at the meetings as well as the meeting agendas.

So how does this work in practice? The basic steps are “plan the work” then “work to the plan”.

Planning the Process – “Plan the work”

This performance coaching process assumes that there is an agreed set of goals, programs or projects to which each employee is assigned. These assignments may be a part of each employee’s annual performance plan or may be driven by the requirements of strategic plan implementation.

The process is not intended to replace the more extensive, formal project management methodology that your teams may use for major projects; rather it is a “short form” of the essential elements that lead to effective work process coaching.

The first step in the process, therefore, is to put in place an approach to project planning that works within your organization’s environment. For many employees who are used to managing projects using informal “to do” lists this change can come as something of a culture shock. Although it may be a shock to your workplace culture, it is absolutely essential for success that top management play an active role in enforcing this project management discipline.

There are four essential steps in establishing your project plans:

1. **What are the issues?** - Identify and prioritize the top four or five key issues that drive the need for the project or that must be addressed to have a successful project.
2. **What are we doing?** - Create a short but clear “mission statement” for the project.
3. **Who benefits? What are their needs?** - Understand whom the project will impact and what their needs are. Who are the “constituents” and what are their needs?
4. **What do we do to make it happen?** – Create the project plan. Clearly identify the sequence and completion timing of projects and tasks that must be performed to achieve the “mission”.

Key issues

Most people do “idea-based” planning rather than “issue-based” planning. They decide what must be done and, based on instinct and experience, create a list of “ideas” that constitute the project plan. What they often end up with is a list of great ideas that do not deal with the critical issues that must be addressed. Or they address lower priority issues and not the highest priority issues.

By forcing a focus on identifying all the outstanding issues and then prioritizing them by relative importance, you ensure that the agreed work plan will in fact solve the actual problem and not the perceived problem.

Example – We are building a web site – what are all the issues that the website is intended to address? Customer signup, customer ordering, marketing support, sales support . . . This issue list will result in a long

list of things that can be done and will force prioritization to focus on the most important elements to support the rest of the business

Scope of work – the “mission statement”

All too often people plunge into projects without a clear – and shared – understanding of what is to be accomplished. It is essential that the project team write a clear statement of mission or objectives that sets forth the scope of the work – what will be done – and by exclusion determines what will not be done. The mission statement sets forth what will be done, who will benefit, how they will benefit and how it will be accomplished . . . “by doing this, and by doing that etc.”

Example – *We will develop a web site that will support marketing and customer service initially and operations fulfillment as a later priority.*

The marketing department will benefit from better brand awareness, improved new customer access and higher retention rates. The customer service department will benefit from improved customer satisfaction and more efficient and effective customer problem resolution.

We will accomplish this by designing a site that is driven by the new corporate branding and that has a database back-end that supports customer signup and issue tracking and that links to our internal database for sales and customer service.

Constituent Needs

Most projects are done to benefit people. These are the project’s “constituents” – and constituents have “needs”. In fact many of these “needs” may have driven your earlier definition of key “issues”.

Just as you determine your customer needs in designing and delivering products, you should determine the needs of the “customers” of your projects. And this means doing a reality check – not just guessing. All too often people are so sure of what others want that they fail to actually ask, and listen – and only after the work is done do they realize that they did a lot of work under a set of incorrect assumptions.

Example – *We have surveyed the marketing and customer service departments and they have suggested that they would like to have the following “look and feel” on the web site and the following functionality. They have determined this through focus groups with existing customers and by using online feedback forms with prospects.*

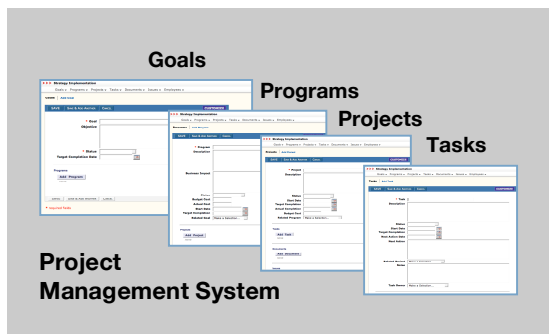
Project tracking – avoiding “hockey stick” management

The final step in the setup process is to identify the key projects and tasks that must be achieved along with the key milestones/deliverables in the sequence. The “project manager” should list the sequence of things that need to be accomplished and then set estimated completion dates for each task and key milestones as feasible. In some cases it may be sufficient to set the overall project completion date and the projected completion dates for the first few tasks in the sequence.

This is the point at which many employees have difficulty. The way most people manage their time and deliverables is by use of relatively

informal “to do” lists. Those who are relatively well organized will take these tasks and enter them into a calendar system like Outlook so that they have reminders of due dates. In many cases this can work well but it isn’t conducive to easy management tracking. Intuitive “to do” list management can work well if people are working in “silos”, but not if they are working on interconnected, interdependent workgroup projects.

The key to disciplined project management is to determine the intermediate tasks that lead to final completion. By setting the completion tasks and “milestones or deliverables” for intermediate tasks it becomes easier for managers to determine if projects will be completed on time.



The classic example of “hockey stick” management is the sales rep that is working through a sales process and keeps assuring management that deals will close by the end of the year. Management may take this on faith, but if the company has a defined series of steps in the strategic selling process the manager can meet with the rep on a regular basis and determine if all the intermediate steps – necessary for the sales to actually close on time – are being accomplished on a timetable that will lead to success.

Some companies use software solutions for project tracking but whatever is used it should easily enable regular reporting against the planned steps – which becomes part of the ongoing meeting and coaching process described below.

Example – *The projects we have identified for the website development are: 1. Requirements, 2. Copy, 3. Images, 4. Software functionality, 5. Page designs, 6. Application development. The first project will have six tasks, which have been sequenced with the following task completion dates and have been assigned to the following people. We will meet regularly to review the work against each deadline so that the people involved with the other parts of the project can “stage” their work.*

Effective meetings – “Work to the plan”

Inefficient and ineffective meetings are the bane of the workplace. We have all experienced sitting through apparently pointless meetings wishing that we could get back to our desks to deal with the really important matters at hand.

The flip side of this is that face-to-face team meetings remain an essential tool for managers to keep in touch directly with issues and monitor progress against plans. So the trick is to structure a meeting plan that results in focused, efficient and effective meetings for all involved. Your task as a manager is to show respect for your team’s time and still ensure that they achieve success.

The meeting plan should anticipate two types of meetings with your direct reports - one-on-one meetings and team meetings.

One-on one meetings

Most managers should meet one-on-one with each direct report at least once each week for about one hour. The purpose of these meetings is to review tasks that are overdue, to discuss issues that can be resolved by a manager's decision or through coaching, to review completed "milestone" work that is ready for management comment and to discuss "next action steps" for tasks coming due in the next week or so.

The objective is to dig into the work that is being done so that you can identify potential stumbling blocks and do a "reality check" on real progress against plan and the reality of achieving the next action step. The agenda for the next meeting is based on these action steps.

The agenda for the meeting should be a printout from whatever exception-based reporting system that you have put in place so discussion can focus on those priority issues and tasks that are off track rather than spending time reviewing everything that is going well.



Team Meetings

Managers should establish a predictable schedule for team meetings. The importance of the meetings in the minds of your team will be determined by how reliably you enforce the meeting schedule and the on-time start. Frequency may vary from once each week to once each month. There is no right or wrong approach but the frequency should follow from your overall "mission" and objectives for the meetings.

The purpose of team meetings differs from one-on-one meetings. Team meetings are held for communication and for obtaining team input on and alignment around the group's overall project plans. In one sense team

meetings are the next logical extension of the individual meetings.

Accordingly the team meeting agenda is similar as follows:

- **Exception-based review** and reporting by each member on overdue tasks or tasks that will be due prior to the next meeting.
- Discussion of **open issues** and bottlenecks that might benefit from team input or that require team input for resolution.
- Review and comment by the team on **completed milestone work** that requires team input or final approval or that should be reviewed by the team to achieve improved alignment. (These items should be submitted to the team members prior to the meeting so everyone can be prepared to comment.)
- **Other open items** – often this part of the meeting descends into long brainstorming sessions –which undermine the effectiveness of the meeting plan. Items or ideas that cannot be dealt with quickly or that require additional review should be "transferred" to an appropriate working group for review and submission to the team. In essence – this becomes a new task for the new task owner's project list.

This part of the meeting can be an important part of communication of new ideas, insights, informal feedback and so forth. It is the job of

the manager to ensure that communication is kept focused and efficient and that staff time is respected.

An Example – Boeing and Ford



A good example of a top manager who uses weekly, exception-based performance tracking is Alan Mulally, the current CEO of Ford Motor Company and former head of Boeing’s commercial aircraft division. Mulally was enormously successful at Boeing and has been making some good progress with the many intractable problems at Ford. The primary performance coaching methodology that he used at Boeing and that he has replicated at Ford is a large, weekly, obligatory, all-day, all-hands senior management team meeting.

When Mulally arrived at Ford he first established, with his team, the critical, prioritized issues that the team would tackle. They then agreed to a standard methodology for establishing deliverables and for tracking and reporting on results. Mulally established a “war room” at Ford similar to the one he had at Boeing.

Each week each team arrives with color-coded, standardized reports that identify the status of projects that are on track (green), those that have issues or are in danger of slippage (yellow) and those that are behind schedule (red). Key issues for team discussion are clearly identified and the team then begins with a focus on those projects most in need of management team assistance.

This is true exception-based management. It is also collaborative coaching. Each manager understands that at some point he will go into the room with “red” projects and will need the help of his teammates to find solutions. Among the “values” that this process establishes are the value of teamwork and team support; and the importance of open, honest, non-defensive and transparent communication.



Cullen Coates
415.945.9582
cwcoates@cullencoates.com