

Unity of Effort **in a Positive Direction**

Performance Development Manual

Excerpt

Introduction and Part 1, Section One



Organizational *ESP* ***Excellence on the Same Page***

A T.A.L.K. Associates Project

by

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Using the Power
of Direction



Concentrating on front line
performance and delivery



Unifying toward
a shared vision



Positioning Relationships,
Performance and Morale in a
Consistent Positive Direction



Sustaining
A Climate of Interaction
for customer-focused success



Exercising
Complete Respect
in a positive direction



Multi-level
Leadership Consistency



Accelerating Progress



Forward Movement &
Continuous Improvement



Managing Excellence
in a positive direction



Synchronizing Everyone's
Direction of Excellence



Data-Based
Decision Making

Unity of Effort in a Positive Direction

Performance Development Manual

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Organizational ESP (Excellence on the Same Page)

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SECTION I

FUNCTIONAL KNOWLEDGE

Unity of Effort in a Positive Direction

Performance Development Manual

Organizational ESP (Excellence on the Same Page)

The entire organization concentrates on supporting front line performance and delivery

Introduction

Jan Carlzon (1987), former president of SAS Airlines, referred to every interaction with a customer as a “moment of truth”. He said SAS Airlines has “50,000 moments of truth a day”. The power of those statements resonates with me today, reinforcing the importance of meeting or exceeding customer requirements and expectations, everyday. Those of us who work for organizations that provide products or services to others have one thing in common: customers experience our efforts, either directly or through others. Therefore we are a part of every moment of truth, even if the customer is out of our sight. The primary direction of the organization is customer satisfaction. Our primary role is to unify our efforts in that direction. Our customers require accurate and successful performance and delivery.

The success of an entire organization can be impacted by how well relationships, performance and morale work together. In the early 1990’s, in a conversation with a colleague, I remember saying that performance is most important in an organization, even in life. My friend said, “Performance is only part of it. People need to be recognized. They also need to have opportunities”. That conversation expanded my thinking to understand that those who work in the same place have working relationships that may impact performance. Then I thought that when I like my job or I like my working conditions, my morale can also affect my performance. After categorizing relationships, performance and morale, I learned that our **human activity** at work is in one of those three categories. I call them the RPM’s of the workplace – the realities of human activity (functioning and interaction). Relationships, Performance and Morale work together best when they are the bi-product of the workplace. Rather than doing them, we experience them. They are the result of what happens. What needs to happen in the workplace for the RPM’s to receive consistently high marks from everyone?

Relationships, performance and morale (RPM’s) are often and appropriately thought of separately in matters of the workplace. There is any number of times on any given day when one requires more attention than the other. Imagine taking on the roles of making relationships, performance and morale work together in a way that we can have the very best performance and delivery so that we can meet or exceed the requirements and expectations of those we serve. Here are simple workplace descriptions of each:

Relationships – The ways that two or more people or groups interact together

Performance – Efforts of participation; the measures of outcomes or efforts

Morale – The degree of motivation to perform, participate and interact due to willingness, liking, enthusiasm or dedication

The best way for the RPM’s of an organization to work together is for each of them to have the same focus: meeting or exceeding the requirements and expectations of the customer. As you categorize the *human activity* of your organization under relationships, performance or morale, make sure that the focus is on the customer. Always make the customer a part of the ‘reason why’.

Imagine that you have cups in your organization that are filled with servings of relationships, performance and morale. CUPS in an RPM context is an acronym for **C**oncentrate, **U**nify, **P**osition and **S**ustain – the

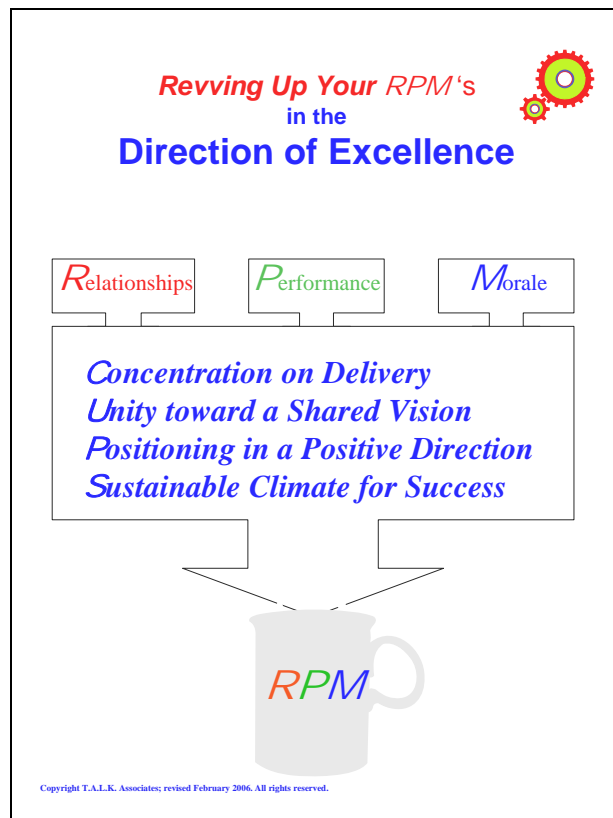
formula that keeps Relationships, Performance and Morale working together. The effectiveness of your organization depends on how well the RPM's are stirred together. To fill the CUPS, below are the actions that everyone in your organization can take to cause the RPM's to work together in the direction of the customer. They are the topics of this four part course which prepare you to use skills and approaches to 'rev' up the RPM's of your organization.

Part 1 – Concentrate RPM's on customer-focused delivery (Page 7)

Part 2 – Unify RPM's toward a shared customer-focused vision (Page 17)

Part 3 – Position RPM's in a Consistent Positive Direction – the direction of the required or desired successes (Page 43)

Part 4 – Sustain an RPM Climate of Interaction for customer-focused success (Page 56)



Relationships, Performance and Morale work together

The framework for this human activity is called “Unity of Effort in a Positive Direction”. It is designed for Relationships, Performance and Morale to work together to concentrate on supporting front line performance and delivery in a way that the front line can have the very best performance and delivery so that customers can have the very best products, service and experiences.

The Unity of Effort in a Positive Direction framework (Unity of Effort framework) can be applied to any organizational structure or strategy as long as there is a customer, client or student that is served by that organization. It is best applied to organizations of 15 or more employees. It can be initiated and implemented at any management level in which there is a titular leader, from front line supervisor to CEO.

In a Unity of Effort framework, ‘excellence’ is the accurate and successful effectiveness, efficiency and execution of tasks, always in the direction of the customer. Many organizations possess a high degree of excellence among their employees. Often the excellence of many goes in different directions. There are also different levels of excellence – some employees are better than others. When the organization endeavors to correct or protect the excellence of a person or task, the direction may still exist. Getting all of the excellence in the same direction makes it easier to make the correction - *first the direction; then the correction.* That increases the assurance that the correction will be made in the direction of the customer.

The Unity of Effort framework is best managed by “Synchronizing the Direction of Excellence”. The Direction of Excellence includes three components:

- The Direction of Concentration – Everyone knows where to concentrate his or her efforts
- The Direction of Support – Delivery of services and products to meet or exceed internal support requirements and expectations so that the front line can meet or exceed customer requirements and expectations
- The Direction of Focus – The customer always being a part of the ‘reason why’

Such excellence involves everyone: leadership, finance, HR, logistics, quality, front line, food service, technology and more. Imagine the entire organization with excellence in the same direction.

Section I of this workbook includes four parts that introduce you to your participation in a journey that connects your entire organization to what it can do best: deliver superb service and/or products to your customers. It adds the dimension that logically and affectively unifies everyone toward the satisfaction, success or growth that your customers deserve – **DIRECTION**.

Section II provides connections to the organization’s identity in a Unity of Effort framework. The Points of Concentration, the Critical Areas for Success, the Direction of Excellence and Data-Based Decision Making help everyone to know where to pinpoint targets of improvement, innovation and intervention.

Section III provides the major skills and approaches of a Unity of Effort framework in detail. In your Learning Checks you may be referred to them for clarification, understanding or answers.

- Using the Core Questions
- How to Synchronize the Direction of Excellence
- Internal Partnering for the External Customer
- How to Conduct a Meeting-before-the-Meeting
- Addressing the System First
- Using the Positive Direction Power Principle
- Using the FITS 4 Success
- Using the Decision-Making Round Table

Section IV addresses team excellence and leadership excellence in a Unity of Effort framework.

Appendix 1 provides forms called Report Supplements that can be used to accompany reports and summaries with useful information concerning impact on front line performance and delivery.

Appendix 2 shows sample Direction Check Performance Level outcomes (See Direction of Excellence).

Appendix 3 provides the core skills and approaches of Consistent Positive Direction for anyone who still needs to learn them. Consistent Positive Direction is an integral part of the Unity of Effort framework.

Appendix 4 helps leaders to access their abilities to influence even higher levels of performance, success and virtue.

Appendix 5 provides the answers and solutions to all of the Learning Check exercises in Sections I, II and IV. In most instances there are correct answers. In some instances, your answers and solutions may be

as good, or better than those in Appendix 5. Your answers are expected to be correct according to the Unity of Effort framework or to show direct connections to the Unity of Effort framework.

Appendix 6 provides reproducible note pages and response forms to use with Learning Check exercises.

The repetition in this manual is intentional. It helps the reader to use and manage the language and consistency of the 'Unity of Effort in a Positive Direction' framework with increasing excellence.

Learning Check-Introduction: Answer the questions below

1. What does RPM stand for in a Unity of Effort framework?
 - a. Revolutions Per Minute
 - b. Relationships, Performance And Morale
 - c. Random Performance and Morale
 - d. Reliable Pack Mule
 - e. Rotating Program Methods

2. Unity of Effort in a Positive Direction is a framework in which RPM refers to:
 - a. The building structure of an organization
 - b. The human activity of an organization or team
 - c. The rotation of an automatic pulley
 - d. The rotation of an information technology cycle

3. In a Unity of Effort in a Positive Direction framework it is important to synchronize the direction of excellence. Excellence is the accurate and successful:

4. The Direction of Excellence includes three components. What are they?

5. In a Unity of Effort in a Positive Direction framework, what does everyone concentrate on supporting? Be specific.

Organizational ESP

presented by T.A.L.K. Associates

Part 1

Everyone *Concentrates* on Customer-Focused Delivery

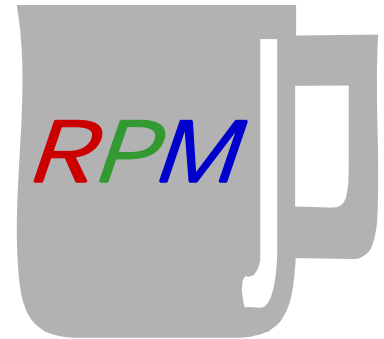
From the introduction, you learned that ‘CUPS’ in the RPM (Relationship, Performance and Morale) context is an acronym for **C**oncentrate, **U**nify, **P**osition and **S**ustain – the formula that keeps the RPM’s working together. Remember we said that the effectiveness of your organization depends on how well the RPM’s are *stirred* together.

Concentrate RPM’s on supporting front line performance and deliver – Part 1

Unify RPM’s toward a shared customer-focused vision – Part 2

Position RPMs in a *Consistent Positive Direction* – Part 3

Sustain an RPM climate of customer-focused success. – Part 4



To fill the CUPS, we begin with Part 1: Everyone *Concentrates* RPM’s on customer-focused delivery. This means that *everyone* in the entire organization concentrates on supporting the performance and delivery of the front line – those who have the direct tasks of delivery of products and services to the customer. For example, in a restaurant it would be the waitress or waiter; in a manufacturing organization it would be a finished product machine operator and a sales representative; in public transportation it would be the cab, bus or train driver and the customer sales representatives; in human services it might be the case manager; in education it would be the classroom teacher. Imagine every person in the organization knowing that one of the most important parts of his or her job is to concentrate everything he does on supporting front line performance and delivery, in a way that the front line will have the very best performance, so that customers can have the very best products, service and experiences.

The organization is divided into two main categories, the ‘front line’ and ‘everyone else’. We call ‘everyone else’ the organization’s Smooth Operating System, abbreviated Smooth OpS. The Smooth OpS includes leadership, maintenance, food service, quality, medical, internal transportation, human resources, finance and other support services. The biggest part of their job is to make front line people great. **The front line is the organization’s ‘Point of Concentration’.**

The NUCLEUS
The entire organization
concentrates on
supporting
front line performance
and delivery



After attending an RPM session, an employee of one of my clients said, “If it weren’t for us, the front line wouldn’t be able to do their jobs...” She understood that the support employees were just as important as the front line. It is what the Smooth Operating System does that makes the front line employees most effective – increasing front line capability for high performance delivery. Therefore, it is important to know what helps to make a Smooth Operating System most effective. For example, how should organizational changes be handled?

When significant changes are planned or made in policy, practice, standard or procedure, two questions can always be asked. They are called **Organizational Core Questions**:

- “How does this impact our front line performance and delivery?”
- “What support does the front line need for successful performance and delivery?”

There is a third optional question that can be asked, “What support does our Smooth OpS need to best concentrate on supporting front line performance and delivery?”

Most important, after these questions are asked, *get the answer!* Then you will have sufficient information to process the answer and take appropriate action(s).

There are two concerns that many organizations have above all others: effective communication and effective supervisory leadership. Asking the Organizational Core Questions and getting the answers improves both.

Many times, front line employees are the last to learn about organizational changes. Yet, the working day of the front line is most critical to delivery and customer satisfaction. Therefore, learning the impact on

front line performance before a change is made, can help to make adjustments that can save thousands, even millions of dollars. Asking the core questions first and getting the answers is one of the most cost effective RPM enhancing habits that an organization can develop. This should be a part of every leader's standard. Best of all, it will help the organization's customer-focused delivery to be increasingly accurate and successful.

In counseling, directing and personal or professional development situations, the **Direct Core Question** is asked: "What support do you need to...?"

- "What support do you need to be on time from now on?"
- "What support do you need to continue your outstanding performance?"
- "What support does the team need to finish on time?"

Remember, after you ask the question, *get the answer*, analyze (process) the answer and then act on it!

Unity of Effort in a Positive Direction
Core Questions

Organizational Core Questions

- What is the impact on front line performance and delivery?
Get the Answer!
- What support does the front line need for successful performance and delivery?
Get the Answer!

Direct Core Question

- What support do you need to...?
(to an employee or group)
Get the Answer!

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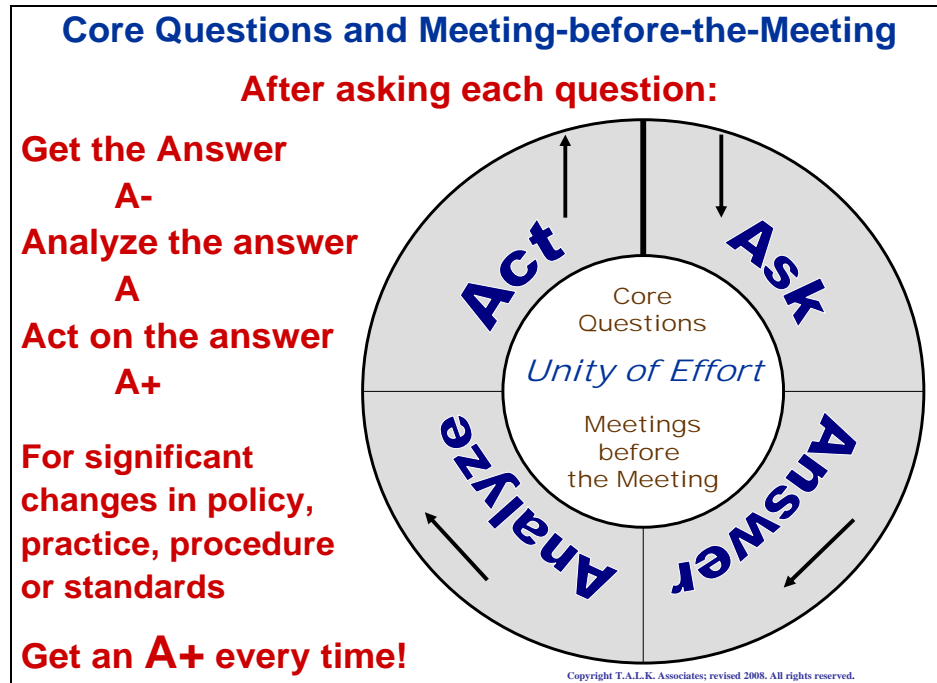
When getting the answers to a Core Question, it is essential to just listen instead of responding right away. That will give you time to get all of the answers instead of spending time on any one of them. You must also prepare yourself to hear whatever answers you get, whether you like them or otherwise. If an answer makes a lot of sense, it may be easy to process and act on it. If an answer makes little sense, it may be an indication that the respondents need more clarification, training or other remedial action. In either case, take the time to process the answer(s) before taking action, whether you have one month, one day or one hour.

When an organizational or team change or directive is mandatory and *must* be implemented by a certain time, three questions can be asked in a process called the **Meeting-before-the-Meeting**. For example, an organizational directive may be that "all organizational branches must conduct a fire drill at least once a month". The primary purpose of the 'Meeting-before-the-Meeting' is to ask *ONLY* three questions in a way that the organization can best support front line performance and delivery when the mandatory change is implemented and thereafter:

- "How does this impact our front line performance and delivery?"
- "What support does our front line need for continued successful performance and delivery?"
- "What support does our Smooth Operating System (Smooth OpS) need in a way that it can best concentrate on supporting front line performance and delivery?"

A Meeting-before-the-Meeting is *ONLY* conducted in response to a mandatory directive or change. It can be conducted by anyone at any level in the organization. For example, a safety compliance directive may

be promulgated. A member of the organization's safety team can convene a Meeting-before-the-Meeting. That person and designated meeting participants would exercise the initiative to act on the answers by making authorized adjustments or by advising appropriate leaders on the best actions or adjustments. It works best when it is conducted by a leadership team or a leader and those who report to him. Every leader should be adept at conducting a Meeting-before-the-Meeting. Even though the change will be implemented anyway, the answers will help to make accurate workplace adjustments. Like the Core Questions, after you ask the questions, *get the answers*, analyze the answers and then act on them!



The Core Questions and the Meeting-before-the-Meeting contribute to establishing effective and accurate communication throughout an organization. They also help an organization to *consistently* concentrate on supporting front line performance and delivery.

In a Unity of Effort framework the Concentration of Effort involves the completion of tasks. **The TEAM NINE Approach** increases the assurance of accurate and successful completion of tasks. It includes:

- Establishing Clear Goals, Objectives and Tasks
 - Time Period
 - Customer-focused
 - S.M.A.R.T. (Specific, Measurable, Achievable, Reality-based, Time bound)
- Communication and Information to accelerate progress
- Support for individuals and teams to perform and deliver
- Accurate & Successful Delivery (meeting/exceeding customer requirements & support requirements)
 - Accuracy (Getting it done right)
 - Success (Getting it done)
 - The Power of **AS** (Accuracy and Success)

In a Unity of Effort framework the Core Questions, Meeting-before-the-Meeting and TEAM NINE Approach are leadership practices. For leaders, it is suggested that conducting Meetings-before-the-Meeting be included in organizational policies.

Conclusion Part 1

The phrase ‘customer-focused’ simply means that the reason for relationships, performance and morale to work together is the customer – customer satisfaction, customer success, student success, meeting customer requirements and expectations. Having the customer as the ‘reason why’, should be at the core of every workplace interaction. Therefore, everyone *focuses* relationships, performance and morale on the customer while they *concentrate* their efforts on supporting front line performance and delivery. Remember the *front line is the organization’s Point of Concentration*.

Part 1 introduced the Concentration of Relationships, Performance and Morale (RPM’s) on front line performance and delivery. It also showed practices that we all can use to keep that concentration in the direction of the customer. Remember the emphasis is on *direction*. Part 2 addresses organizational unity. You will learn what is most essential to unify the RPM’s of your organization.

LEARNING CHECK – Section I, Part 1

1. In a Unity of Effort framework the organization is divided into two parts. What are they?

2. In a Unity of Effort framework, internal support employees are a part of the organization's (best answer):

- a. Smooth Operating System
- b. Front Line
- c. Customer base
- d. Points of Concentration
- e. All of the above

3. In a Unity of Effort framework, what is the abbreviation for 'Smooth Operating System'?

4. In a Unity of Effort framework, managers and supervisors are considered to be front line. True or False; circle one. **T F**

5. Generally speaking, which of the following positions would be considered front line and which would be considered Smooth OpS?

HR Manager _____

School Teacher _____

Sales Person _____

CEO _____

Maintenance Technician _____

Custodian _____

Customer Service Rep. _____

6. In your current employment, what is your job or assignment?

In a Unity of Effort framework, would you be front line or Smooth Ops?

7. In a Meeting-before-the-Meeting, how many questions are asked? Circle one.

- a. Four
- b. Three
- c. As many as you want
- d. Two
- e. One