



nma
Nan McKay
AND ASSOCIATES, INC.

Together we make a difference

TOOLKIT



CORPORATE **LEARNING** INSTITUTE
Innovative Training | Coaching | Strategy Solutions

HELLO.

Get comfortable - grab a drink and some snacks, and get ready for a great session. Let's encourage your best thinking, share insights and build the future together today. Welcome.

The Gathering

- *This gathering can become an example of the future we want to create.*
- *Our small group is the unit of transformation and the container for the experience of belonging.*
- *Our future hinges on the accountability that we choose and our willingness to connect around the promises we make to each other.*

- Peter Block

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Agenda

NMA San Francisco Leadership Retreat

CORPORATE **LEARNING** INSTITUTE

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Agenda

NMA San Francisco Leadership Retreat *Together We Make a Difference*

Time	Topic
8:30 AM	Welcome, overview, introductions, artifacts
	Mingle, mingle: Six questions that matter
	How purpose-driven, aligned teams achieve results
	Team exercise: aligning for results
	Optimize your team culture with DISC
12:00 PM	Working lunch – personal action planning
1:00 PM	Energizer
	The Pareto Principle and change
	Tools for getting results
	Gwen on huddles , John on 5 clicks to success
	Discussion: Next steps for going forward
	Team Start. stop, continue plan
5:00 PM	Circle of appreciation

Check-in's and Artifacts

Name	About this team member

“To achieve results. This is the only true measure of a team.”

-Patrick Lencioni

Mingle, mingle

1. What is the crossroad that you find yourself at this stage of your work and what declaration of possibility can you make that has the power to transform and inspire you?

2. Each of you is the author of our own experience.

- *How valuable an experience is planning your future and how much risk are you willing to take?*

3. We want to make room for the doubts to be expressed openly, not left to quiet conversations in the hallways, among allies, or in the restrooms. Dissent is a form of caring, not one of resistance. Imaging three circles inside of each other. The smaller inside circle represents what you can directly control. The second circle represents what you can influence. The third circle represents situations outside of your control or influence.

- Thinking about what you can control or influence, what concerns do you have about the future?

4. Change happens when we let go of the familiar past and stop trying to fix it. Then we enter an uncomfortable transition zone, with no clear direction. This is where we want to turn back to the familiar past. Think about what lies beyond the transition zone, Let's call that: "new beginnings."

- How will you know that this group has arrived at new beginnings? What would you see, hear, or feel?

5. Commitment is a promise made without expectation of return and without an investment in the approval of other people's responses.

- What's the promise I'm willing to make that constitutes a risk or major shift for me?

6. Change and an alternative future occur by capitalizing on our gifts and capacities. Bringing the gifts of those on the margin into the center. This is a definition of community.

- What gifts need to be set free to use for your best imagined future?

The Power of Purpose-Driven, Aligned Teams

1. Understand that purpose is personal and emotional.

- The role of the leader is to inspire commitment to your purpose and keep purpose at the top of everyone's mind, every day.

2. Measure what you can and help others learn from what you measure.

- What data and evidence are critical to understanding your organization's social and financial impact? When was the last time you took action in response to a metric about your purpose?

3. Think about what would it take for employees to bring enthusiasm, creativity, and collaboration to work - in addition to discipline every day.

- Connecting your people's individual purpose with organizational purpose is the critical link.

*Excerpted from McKinsey & Company, "Shifting from Why to How."

Discussion

1. What is your purpose at NMA?
2. What measures have meaning to you and the people you work for?
3. What type of leadership would enable employees to bring enthusiasm, creativity and collaboration to work every day?

Optimize Team Culture with DISC

Hands on Buzzers!

DISC STYLE	VALUE TO NMA	DRAWBACK / CHALLENGE TO NMA	TEAM SUPPORT NEED TO OPTIMIZE	HOW MANY IN TEAM
 <p>DOMINANCE</p>				
 <p>INFLUENCE</p>				
 <p>STEADINESS</p>				
 <p>CONSCIENTIOUSNESS</p>				

Notes:

Team DISC Culture

Name	Primary and Back-Up Styles
Wong, Amy	D
Valdes, Angelica	D
Sanjaya, Cynthia	
Ramirez, Silvia	
Pike, Matthew	S
Murray, Dan	D
Lazdowsky, Michele	DC
Jusi, Kristin	S
Gilbert, August	CD
Fuller, Gwen	ID
Eldridge, Anthony	S
Beville, Branden	SC
Achuff, John	

Predict your team tendencies as you move toward change

- ✓ Team Strengths:
- ✓ Team Challenges:
- ✓ Team Support needs:

How DISC Styles Approach Change

D-Dominant: *Bring on the change*

Need	<i>Results...Getting it done! Movement...Action</i>
Change Approach.	<i>Now, if not sooner</i>
Change Support Needs	<i>Detail...Planning...Sensitivity... Standards...Caution...Beginnings... Slow them down, focus on steps and detail, don't forget to bring people along</i>

I-Influential: *Let's not upset anyone*

Need	<i>Harmony (keeping everyone happy)</i>
Change Approach	<i>Erratic. No bottom lines</i>
Change Support Needs	<i>Single focus...Task Steps...Standards... Help them tolerate conflict; follow-through to achieve real change</i>

S-Steady: *Wait, I need more information before I can move ahead*

Need	<i>Predictability...Status Quo...Knowing the steps</i>
Change Approach	<i>Methodical...Steady...Hesitant at first</i>
Change Support Needs	<i>Risk and innovation...Change...Timing... Provide information and urgency, help them to move from planning to action</i>

C-Conscientious: *Make sure the change is done correctly*

Need	<i>Conformity to their standard...Correctness</i>
Change Approach	<i>Endings...Critiques...Review of Standards</i>
Change Support Needs	<i>Align the change to their standards, offer time for questions, create deadlines</i>

Working Lunch Break-Out

Think about your own DISC style strength's, challenges and support needs as you head into 2022. Think about your opportunity to move from letting go of the past to entering the transition zone and onto new beginnings, or your best imagined future?

What DISC style strengths can you lend this group as you move ahead as a team?

What DISC style challenges will you need to be aware of as you move through change?

What support will you need from others as you move through change?

Working Smarter Brainstorm

The 80/20 rule, also known as the Pareto Principle after the Italian economist who discovered it, states that approximately 80% of results come from just 20% of efforts.

It means that you can (and should) spend more of your time on the tasks, projects, and customers that really matter. The 20% that account for roughly four-fifths of your outcome.

Table Discussion:

How can you apply this concept to your work and your department's work at NMA?

Ideas:

Tools for Getting Results

We have developed useful tools to make sure that the **Together We Make a Difference** program is success.

Here is a listing of tools we created for the **Together We Make a Difference Program**

- ✓ Huddle Editable Template
- ✓ Get it Done Editable Template
- ✓ 5 Clicks to Success How-To
- ✓ Editable Checklist

Huddle Template



Together we make a difference

Keys to success

- ✓ Have fun
- ✓ Be authentic
- ✓ Huddles should last 10 -15 minutes

Greeting

Gratitude remark: "I appreciate you"

Do a 1-10 check in

Share any current priorities

Does anyone have any questions?

Throw in another gratitude comment

Share the metrics from the 5 clicks to success

What did we accomplish? Where can we improve?
What limitations held us back? What can we do collectively to improve?

Acknowledge a top performer
(rotate people-give out a gift card of \$10.00 if desired)

Concerns (from management or others)

Get feedback on concerns and recommendations about
how to improve on concerns

End with a quick personal story or quote

Wrap up

The Get It Done Matrix

Eisenhower Matrix Template



Do It Now

Do First | Urgent & Important

Task Time Needed Due Date/Time



Schedule

Do Later | Important But Not Urgent

Task Time Needed Due Date/Time



Delegate

Outsource | Urgent But Not Important

Task Time Needed Due Date/Time



Avoid

Eliminate | Not Important & Not Urgent

Task Time Needed Due Date/Time

TOGETHER We Make a Difference

Motivating Metrics: Five Clicks to Success



Together we make a difference

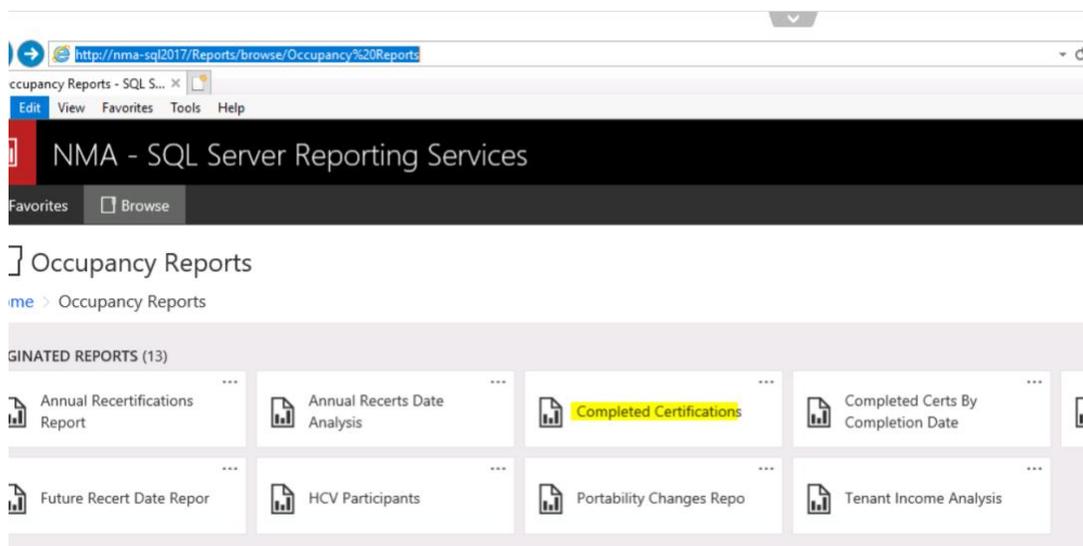
Example:

"How many certs were completed in Elite last week, and how can you improve?"

Note:

You must sign on to the SFHA network for the site to work.

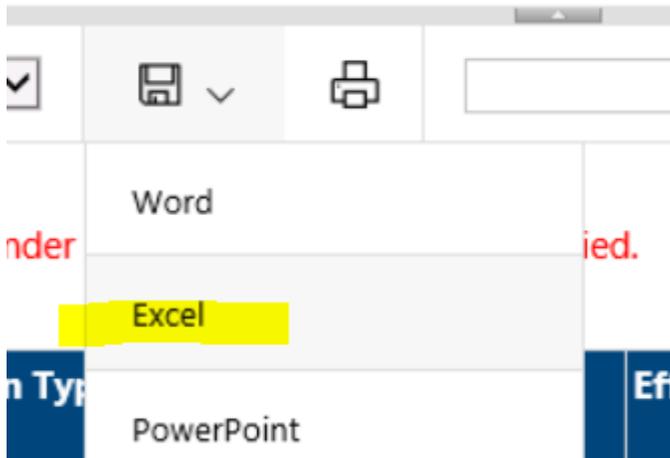
1. Go to <http://nma-sql2017/Reports/browse/Occupancy%20Reports> and click on "Completed Certs."



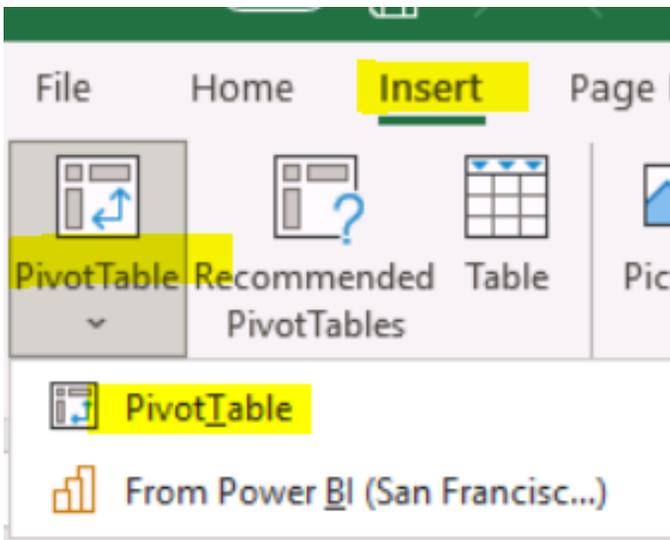
2. Select the timeframe you are assessing and click view report. See example below



3. Download into Excel by clicking on the "Save" button and selecting "Excel"



4. Click on Insert-Pivot Table



- From there you can filter by transaction and staff person. Use the overall numbers instead of individual performance numbers.

Say, “Look at our numbers here. Collectively we had a great week (highlight the big numbers) - what can we do to bring up the lower numbers? How can we work together to get these numbers up? Let’s make sure we are capturing the requests as they come in. Make sure you are updating SharePoint and ELITE.”

See examples:

- The number processed by transaction type:

The screenshot shows the PivotTable Fields task pane on the left and a PivotTable on the right. In the task pane, '58 Action Type' is selected for the Values area, and 'Count of 58 Action Ty...' is selected for the Values area. The PivotTable shows the following data:

Row Labels	Count of 58 Action Type
Annual HQS Inspection Only	152
Annual Reexamination	160
Annual Reexamination Searching	1
End Participation	2
Historical Adjustment	3
Interim Reexamination	430
Issuance of Voucher	21
New Admission	16
Other Change of Unit	9
Portability Move-in	5
Portability Move-out	1
Void	6
Grand Total	806

- The number processed by staff

The screenshot shows the PivotTable Fields task pane on the left and a PivotTable on the right. In the task pane, '58 Action Type' is selected for the Values area, and 'Completed By' is selected for the Filters area. The PivotTable shows the following data:

Count of 58 Action Type	Column Labels	Annual Reexamination	Interim Reexamination	Grand Total
Row Labels				
Adrianna Johson			1	1
Charles Claxton			25	25
Christy Fulfer		35		35
Gwendowlyn Fuller		1		1
Jason Jackson		16		16
John Achuff		9		9
Kathy Marquez			1	1
Kimberly Bautista			17	17
Laura Kubicki		5	117	122
Maria Rainwater		7	146	153
Mary M. Turner		35		35
Nathan Kayondo		28		28
Othello Bell		24	118	142
Yasmin Hamid			5	5
Grand Total		160	430	590

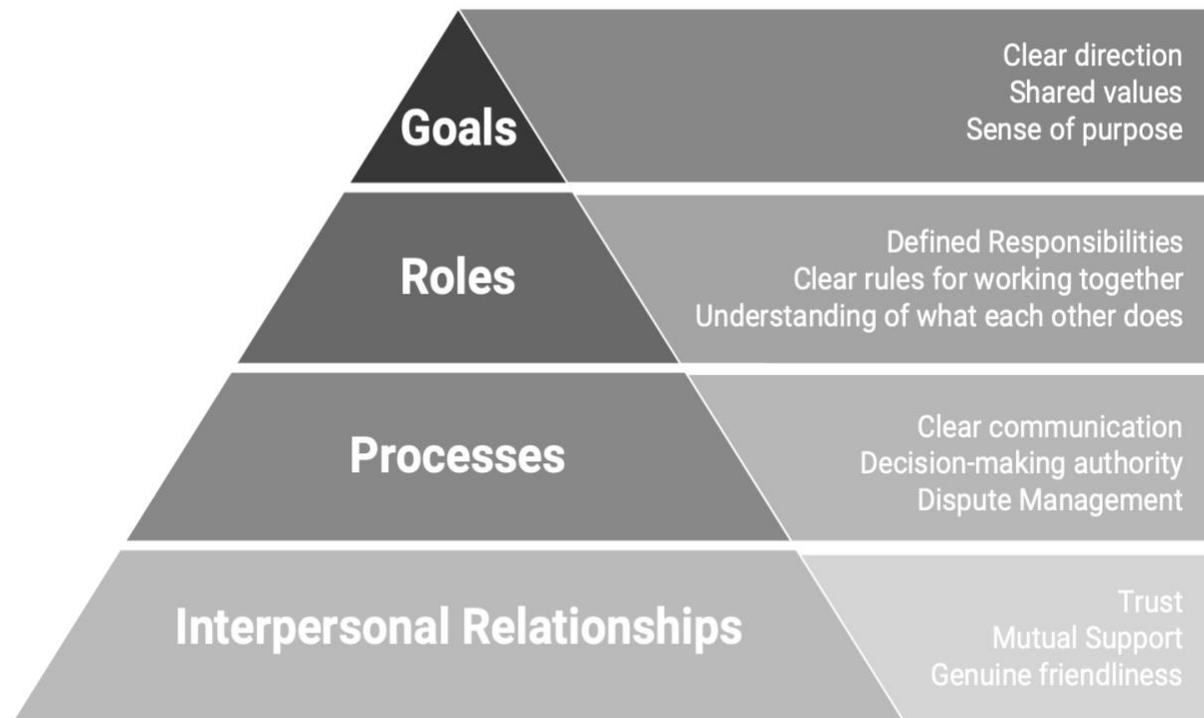
Learning Checklist

Topic:	Do it now	Do it soon	Do it later
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			
16.			
17.			
18.			
19.			
20.			

Use the GRPI Model

Ensure Clarity

The GRPI Model can clarify your team's purpose, set priorities, increase efficiency and identify and prevent potential problems



Ensure your team is...

- Clear on Goals
- Clear on Roles
- Clear on Workflow processes
- Clear on the Need for professional work relationships

Use the 1-10 Check-In Model for feedback

Ask everyone to think about how they are doing professionally from low (1) to 10 (high)

1

Allow each person to report the number and as appropriate, the reasons for their given numbers

2

If the number is low because of a personal reason, ask each what they would need to get a higher number. A simple supportive statement is appropriate.

3

If the number is low in the professional area, ask the team member and the team what could be done to raise the number and consider any changes that could be made to push the number higher.

4

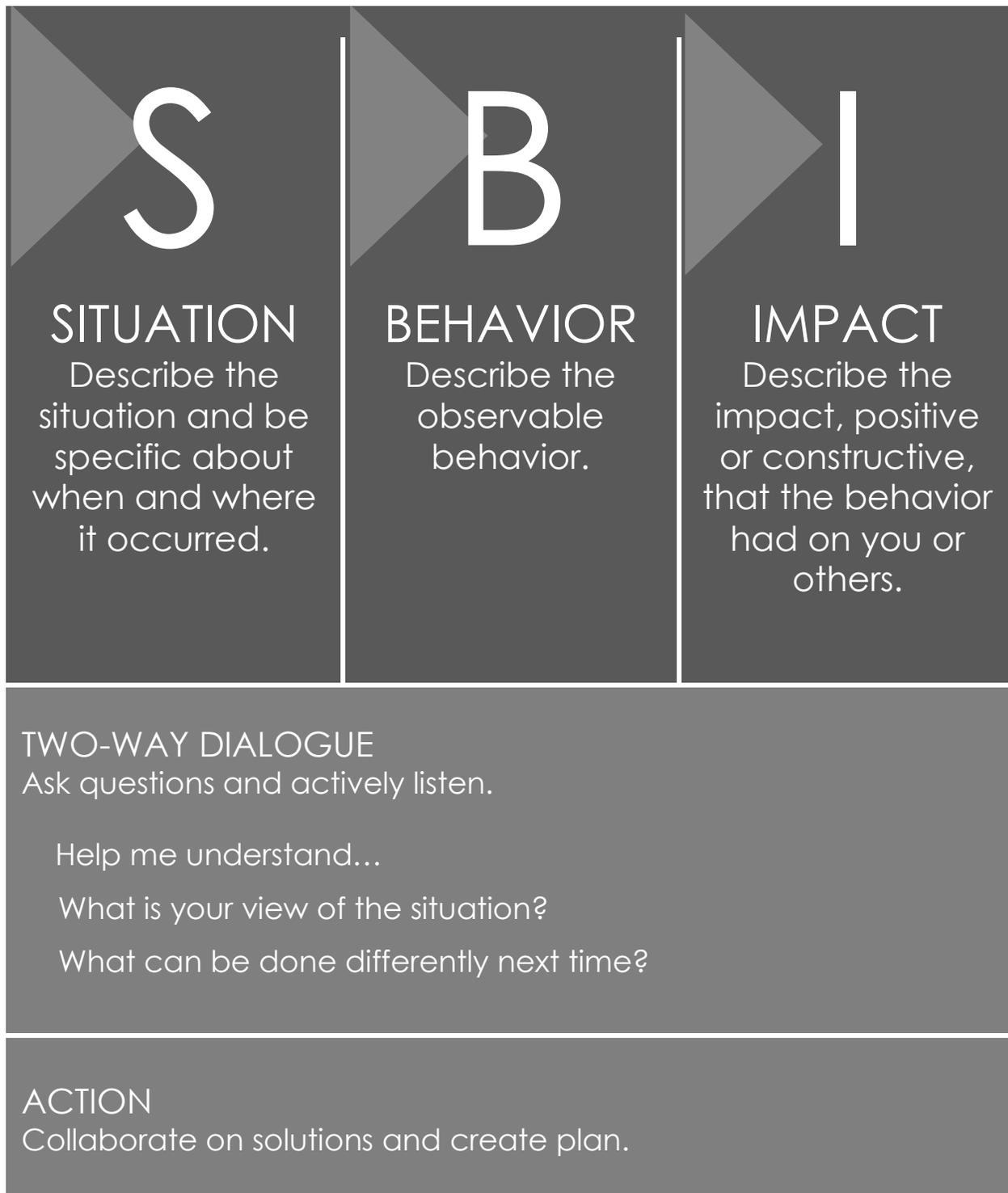
The Fail Forward Fast Model

Fail Forward Fast

When you think about it, there is only
Winning or Learning:

FAIL	FORWARD	FAST
Fall early and often!	Learn everything you can from the failed event.	Apply learning quickly!
Encourage, reward and support truthfulness and accurate assessments of events.	Demand as much a “what can we learn from this” attitude as you do a “what should we do about this” attitude.	Reward coming forward as quickly as possible when a failure occurs; discourage hiding or blaming.
Failure is a temporary condition.	Look for and correct any systems problems that contributed to failure.	Make sure rewards and recognition systems communicate that “failure is OK; not learning from failures is not.”
Encourage “good failures” which are best efforts, bad results.	Apply learning and try again.	
Discourage blaming.		

Use the SBI Model to Coach



Communicating Change Model

PURPOSE

Describe why you are making the change.

PICTURE

Describe what the future will look like.

PLAN

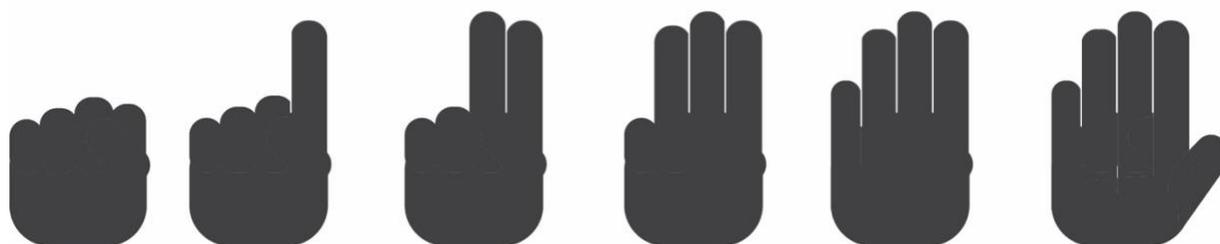
Describe the steps you need to take to get there.

PART

Describe the part you or others will play; specify your requests.

Team Decision-Making Model: Fist to Five

The Fist to Five is a technique for quickly getting feedback or gauging consensus during a meeting. The leader makes a statement, then asks everyone to show their level of agreement with the statement by holding up a number of fingers, from 5 for wild enthusiasm down to a clenched fist for vehement opposition.



LACK OF CONSENSUS

No way!
I'll block
this!

I see
MAJOR
issues we
need
to resolve.

I see
MINOR
issues
we
need
to
resolve
now.

I see
minor
issues we
can
resolve
later.

I am fine
with
this as it is.

I love this!
I will
champion
it!

CONSENSUS

Team Action Plan

We will **Start** doing these things that contribute to new beginnings:

We will **Stop** allowing or tolerating these things that [rovide a barrier to new beginnings:

We will **Continue** to do these things that contrinute to new beginnings: