

ADViSA

Creating Confident Organizations



Creating Confident Organizations





Agenda

- Introductions
- Sharpen Strategy
 - Creating Organizational Alignment
- Strengthen Leadership
 - Creating an Engaged Workforce
 - Creating A Balance with PI®
 - Communicating in Crisis to Create Confidence
- Accelerate Sales
 - Creating Sales Force Confidence in a Recession
- Q&A Panel Discussion



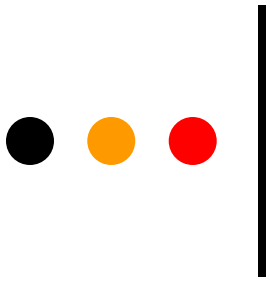
Sharpen Your Strategy

Creating Organizational Alignment

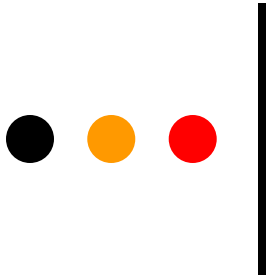
By Todd Gross



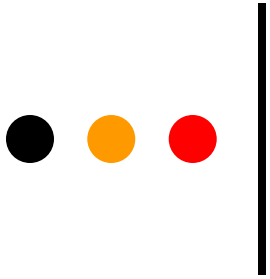
They Changed The Rules



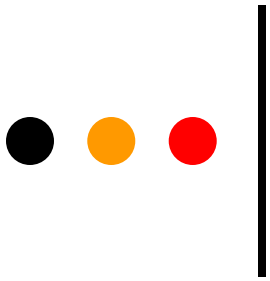
What worked last year
might be irrelevant now



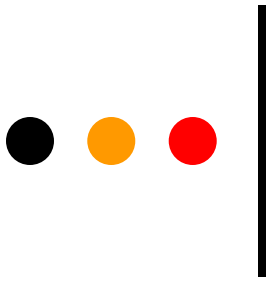
Is your strategic plan
still valid?



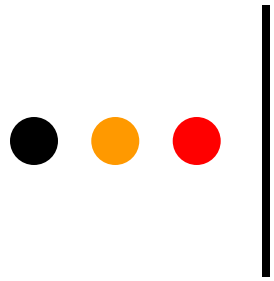
Hunker Down or Bold Moves



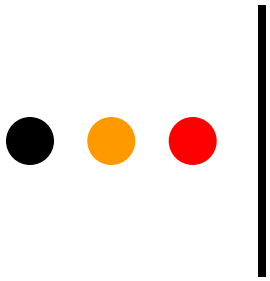
Strategic Plans must be fluid



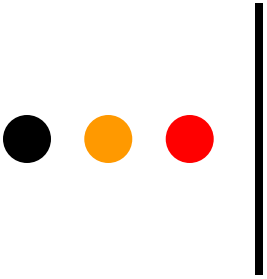
Are you measuring and
incenting the right stuff?



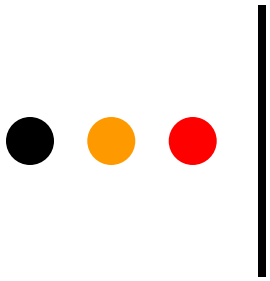
Are you properly aligned?



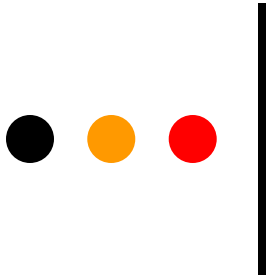
Is decision-making in the
appropriate place?



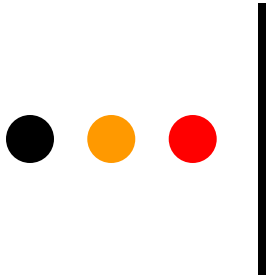
Did any of these questions
give you pause?



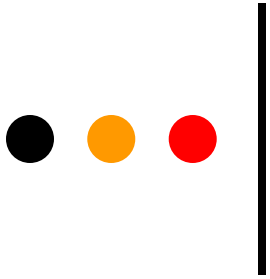
Components of the planning process



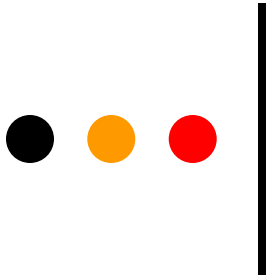
Situation Analysis



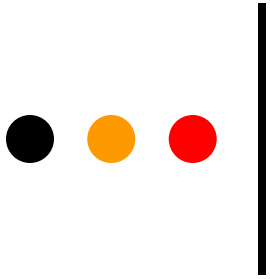
Unique, Sustainable Competitive Advantage



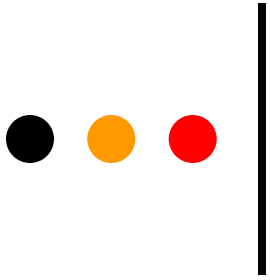
Mission Statement



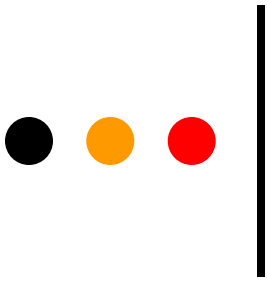
Values Statement



5 Year Vision Statement



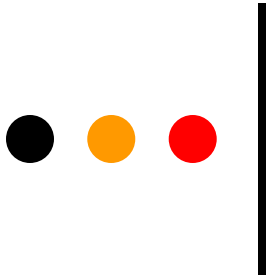
Organizational Analysis



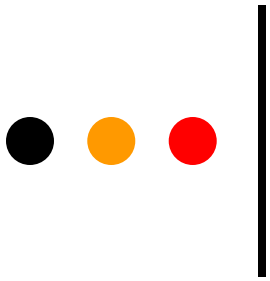
1 Year Objectives

Management Score Card

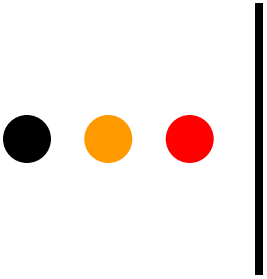
Tactical Plan



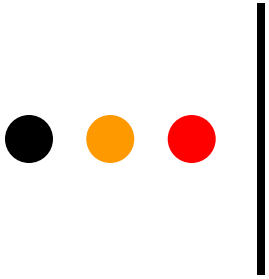
Individual Performance Metrics



Regularly scheduled follow-up and review of the plan



Components need to be in alignment



Questions?



Strengthening Leadership

Creating An Engaged Workforce

By Peggy Gaylord



Employee Engagement Topics

- Why Engage?
- Risks of the Status Quo Approach
- What is an Engaged Employee?
- How Do You Engage Employees?



Why Engage?

A study from the Gallup Organization stated, “actively disengaged workers cost American companies from \$292 to \$355 billion per year.”

That's billion!



Why Engage?

71% of Americans who go to work everyday are not engaged in their job. This equates to businesses operating at one third of their capacity.

Gallup Group



Why Engage?

Engaged employees perform 20% better and are 87% less likely to leave an organization. **Only 6% of today's employees are highly engaged.**

Maritz Market Research



Why Engage?

High–commitment organizations (ones with loyal and dedicated employees) out perform those with low commitment by up to 200%.

Watson Wyatt Worldwide



Why Engage?

Measuring over 6 million employee surveys in 4,500 companies nationwide, the top 10% of the Best Places to Work™ respondents report:

- 86% increased market share
- 87% increased revenue in the following three years
- 57% lower employee turnover
- Higher stock prices for 90% of publicly traded participants



Why Engage?

“Companies with high levels of engagement increased operating margins by almost four percent of a three year period”

Towers Perrin/ISR



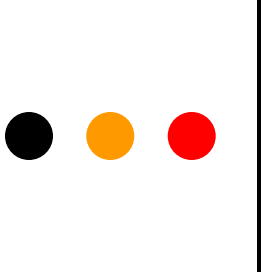
Risks of the Status Quo Approach

- Low Morale
- Non-Productive Time Spent Worrying
- Non-Productive Time Spent With Distractions
- Time Spent in Retaliatory Mode
- Increased Fear Mongering/Rumor Mill Activity
- Increased Voluntary Turnover



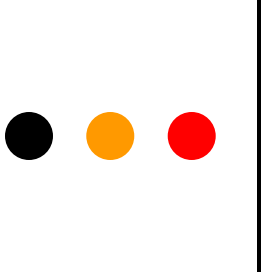
Risks of the Status Quo Approach

- Increased Cost
- Decreased Capacity to Pick Up Slack
- Decreased Customer Service Levels
- Decreased Operating Margins



What Is An Engaged Employee?

- An engaged employee is fully involved in and enthusiastic about work.
 - Contrast a “satisfied” employee, who feels that *their* expectations for work have been met.



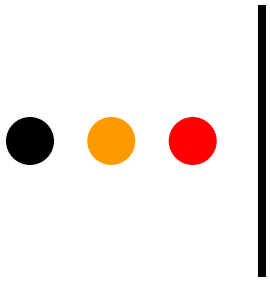
What Is An Engaged Employee?

- Engaged employees drive business results by:
 - Advocacy
 - Discretionary Effort
 - Retention

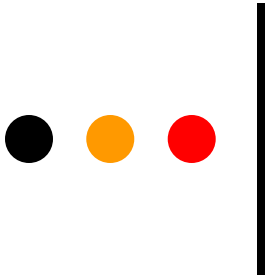


Creating An Environment Where Employees Are Actively Engaged

- Develop a Clear Strategy
- Match People With Jobs
- Develop Performance Metrics
- Manage People to Fulfill Their Needs



Engaged employees
will drive your success
in any times.



Questions?



Strengthen Leadership

Creating A Balance with PI[®]

By Aszure Grimes



Why is change so difficult to manage?

- Business Issues
 - Vision, Aligning Resources, Restructuring
- People Issues
 - Concerns, Feelings, Day-to-Day Ramifications



Why is change so difficult to manage?

- Business Issues
 - Vision, Aligning Resources, Restructuring



Why is change so difficult to manage?

- People Issues
 - Concerns, Feelings, Day-to-Day Ramifications

YOU HAVE PI®



Your Advantages...

YOU already have the keys to

- Motivating employees
- Creating an engaged employee
- Maximizing human capital



Balance: Required to Lead Change

Leadership creates paradox

Business-Driven Results

VS.

People-Focused Priorities



The Six Tensions of Leading Change **

Can we manage our behavior to
achieve balance?

***Leading with Authenticity in Times of Transition,
by Kerry A. Bunker and Michael Wakefield*



Tension #1:

- **Catalyze Change** – Manage an initiative; analyze progress and execution of the action plan.
- **Cope with Transition** – Communicate the new vision; generate enthusiasm and grant permission to express doubt.



Tension #2:

- **Show Sense of Urgency** – Demonstrate the need to take action and when to accelerate the pace of change.
- **Demonstrate Realistic Patience** – Know when and how to slow the pace so that people can cope and adapt.



Tension #3:

- **Be Tough** – Make difficult decisions without hesitation or second-guessing.
- **Be Empathetic** – Take others' perspectives into account; understand the impact of your actions and decisions.



Tension #4:

- **Show Optimism** – See the positive side of any challenge; convey that optimism to others.
- **Be Realistic & Open** – Speak candidly about the situation and don't shy away from difficulties; admit personal mistakes.



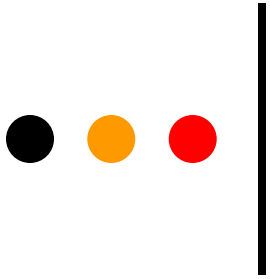
Tension #5:

- **Be Self Reliant** – Be confident in your ability to handle new challenges.
- **Trust Others** – Be open to others' input and support; allow them to do their part.



Tension #6:

- **Capitalize on Strengths** – Know your personal and organizational strengths; confidently apply them to new situations and circumstances.
- **Go Against the Grain** – Show willingness to learn and try new things – even when the process is difficult or painful.



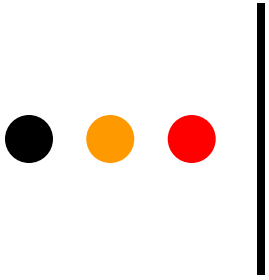
Balance is the solution to the leadership paradox.



Balance: Solution to Leadership Paradox

“The test of a first-rate intelligence is the ability to hold two opposed ideas in mind at the same time and still retain the ability to function.”

– *F. Scott Fitzgerald*



Questions?



Strengthen Leadership

*Communicating in Crisis to
Create Confidence*

By John Ranalletta



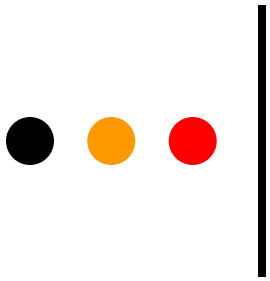
The Importance of Creating and Maintaining Relational Trust

- Is the stress of the economy being felt in your workplace?
- What may be taking place with the employees that are not likely to express their opinions/feelings?
- Which profiles are these?



The Importance of Creating and Maintaining Relational Trust

- How do major changes in the workplace adversely affect certain profiles?
- What can you do to help minimize negative impact for these employees?



Defeatism



The Importance of Creating and Maintaining Relational Trust

People who trust each other work better on their mission than those who don't.

Who doesn't know that?



The Importance of Creating and Maintaining Relational Trust

- Exploring one's own capacity to love and forgive
- Exercising patience
- Being a good listener instead of just listening for a chance to talk

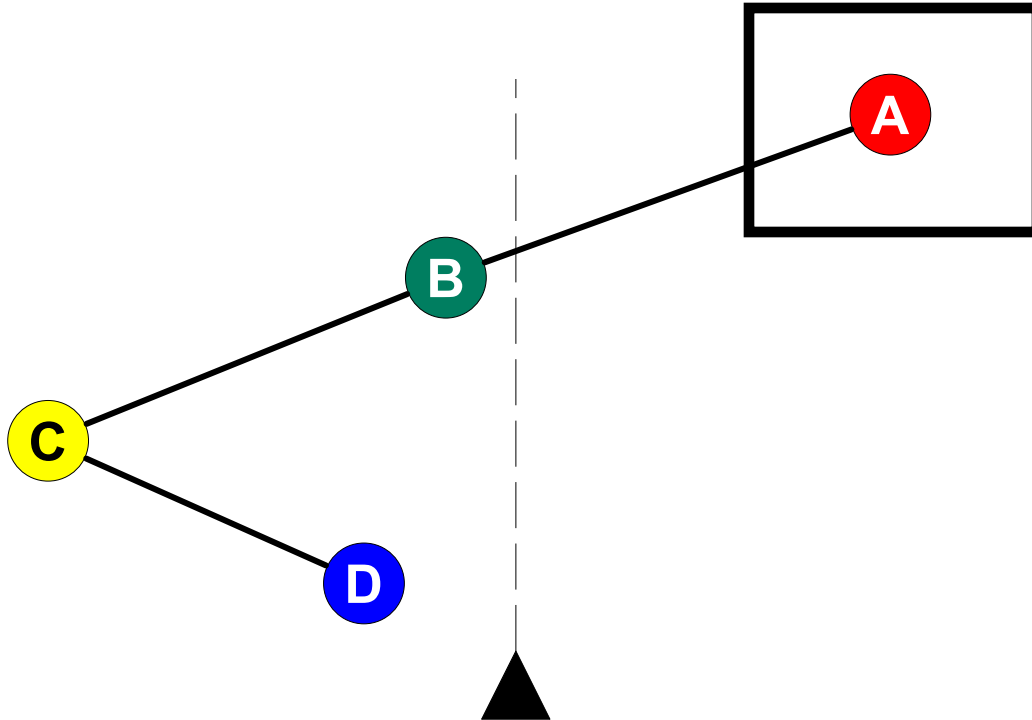


The Importance of Creating and Maintaining Relational Trust

- Asking honest, open questions that are not perceived as personal attacks or arguments
- Crossing lines of difference to help people learn rather than create adversaries



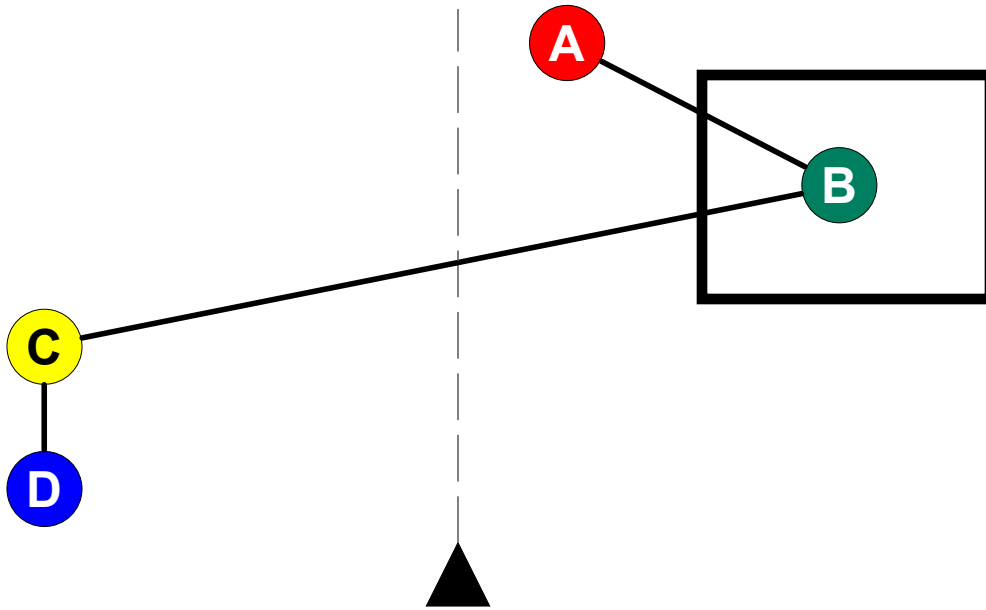
DOMINANCE



Communication Needs

- Direct
- Factual
- Engage their curiosity and inquisitive nature
- Ask them to suggest solutions and approaches to problems

EXTROVERSION

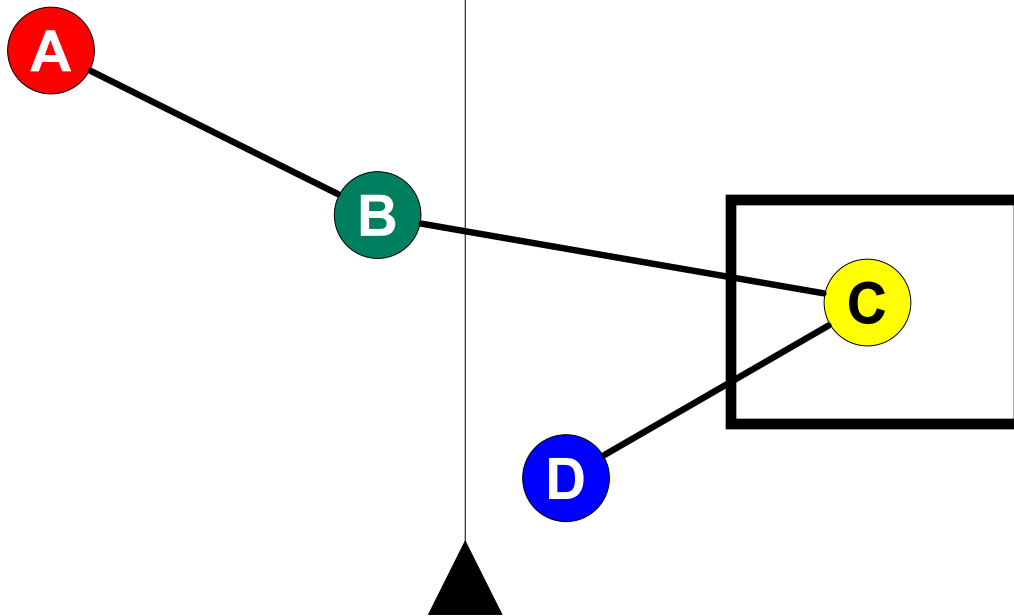


Communication Needs

- Ask them to help you communicate
- Be positive. Gloom infects high Bs.
- Engage them face-to-face, not via email or vmail



PATIENCE

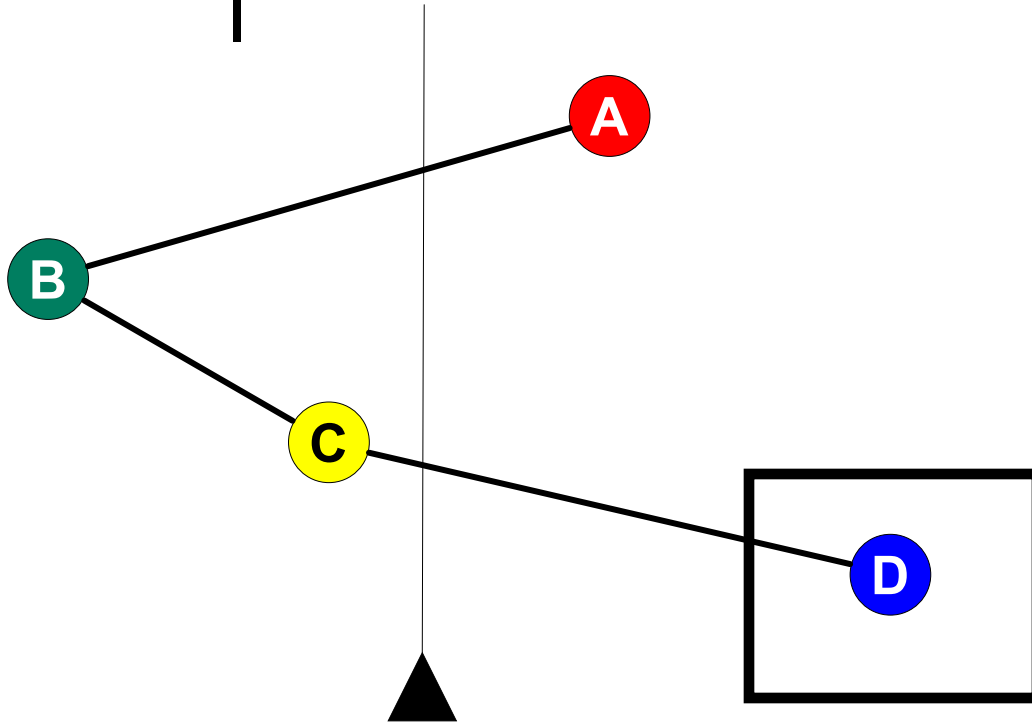


Communication Needs

- Spend face-to-face time with them
- Reassure
- Communicate changes early and with a clear process

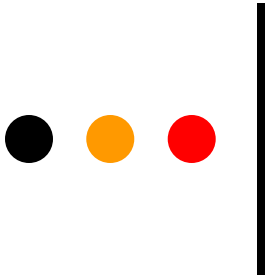


FORMALITY



Communication Needs

- Be factual
- Keep channels open and maintain a “no surprises” workplace
- Trust is the key. Walk the talk.



Questions?



Accelerate Sales

*Creating Sales Force Confidence in
a Recession*

By Paul Dumouchelle



Accelerate Sales

- Why is sales revenue important to your organization?
- How do you support your organization's sales effort?



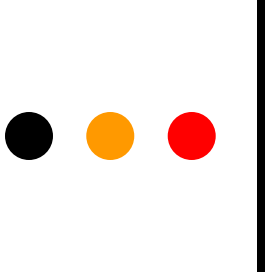
Accelerate Sales – 10 Key Strategies in a Recession

1. Sell Harder
2. Sell Smarter
3. Leverage Emotion
4. Redouble Focus on Existing Customers
5. Referrals – Referrals – Referrals

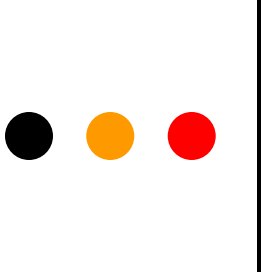


Accelerate Sales – 10 Key Strategies in a Recession

6. Provide Extra Service
7. Expand sales resources without spending more
8. Acquire Your Competition
9. Improve Your Internal Systems
10. Upgrade Your Staff – Selection, Motivation & Training



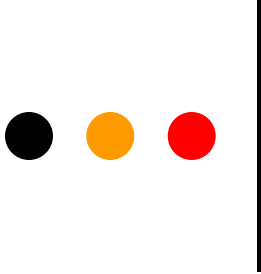
Maximizing Sales Results by Integrating Knowledge, Skills, Process & Motivation



Maximizing Sales Results by Integrating Knowledge, Skills, Process & Motivation



**Product Knowledge
& Positioning**



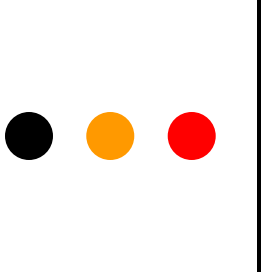
Maximizing Sales Results by Integrating Knowledge, Skills, Process & Motivation



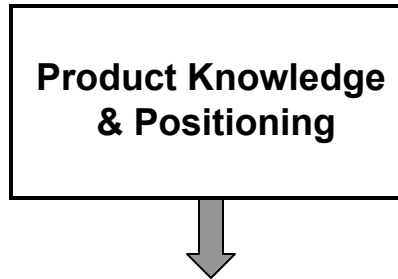
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graph TD; A[Product Knowledge & Positioning] --> B[Sales Skills Mastery]; B --> C[Sales Skills Mastery];
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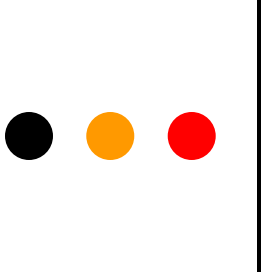
**Product Knowledge
& Positioning**

**Sales Skills
Mastery**

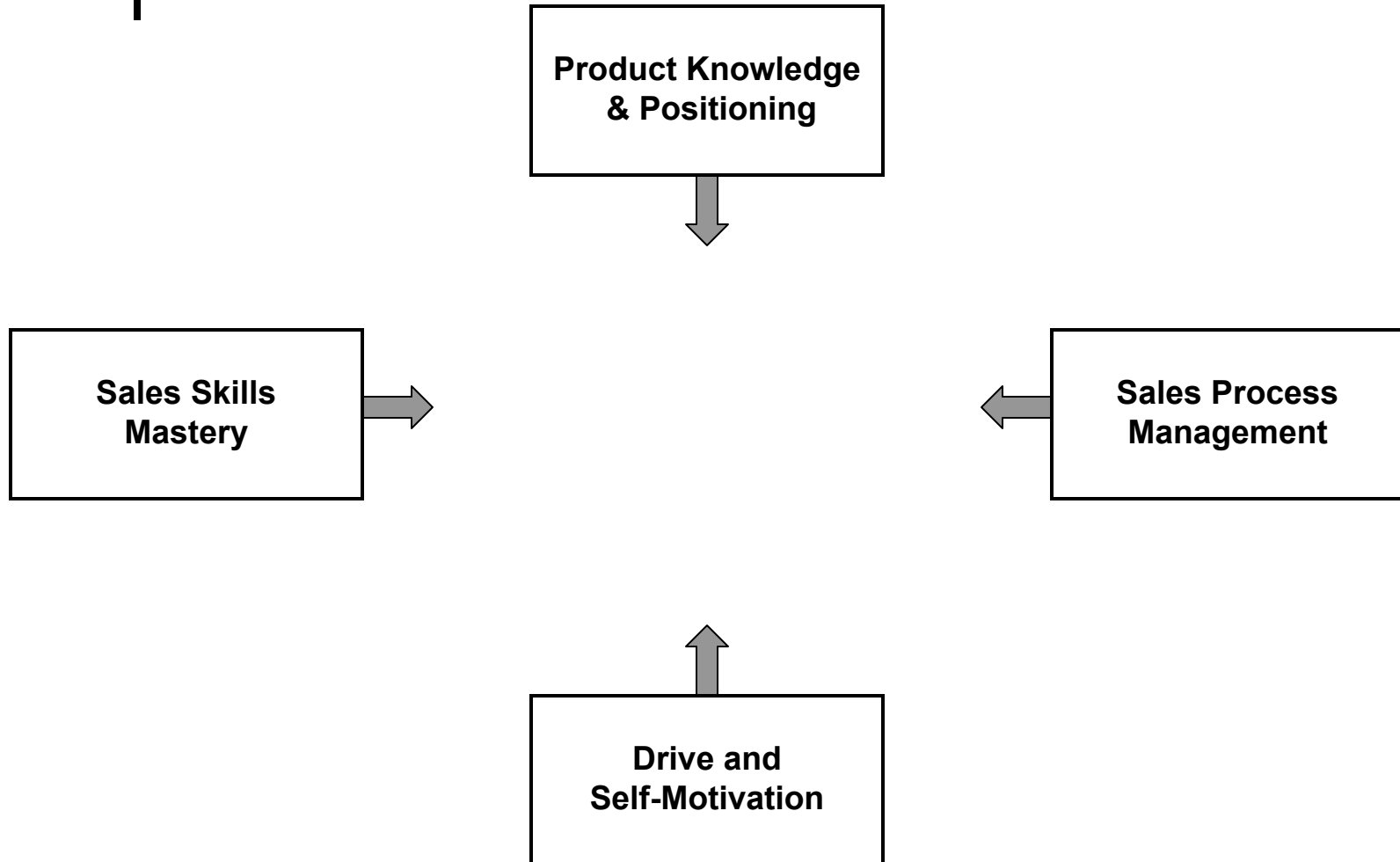


Maximizing Sales Results by Integrating Knowledge, Skills, Process & Motivation

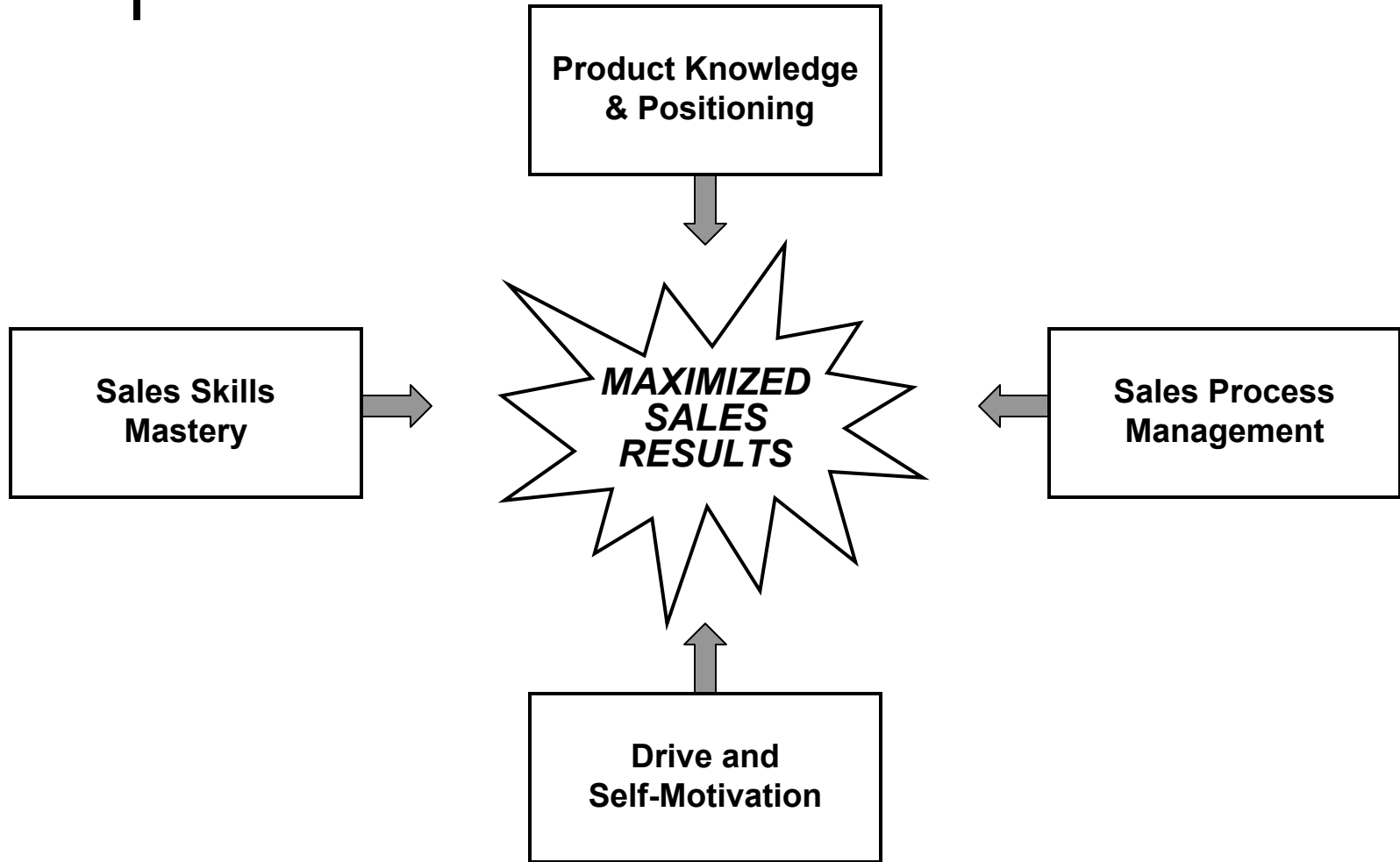




Maximizing Sales Results by Integrating Knowledge, Skills, Process & Motivation



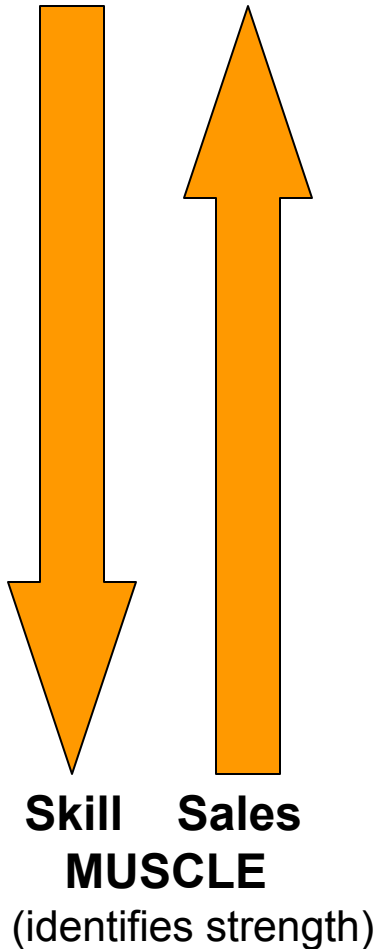
Maximizing Sales Results by Integrating Knowledge, Skills, Process & Motivation



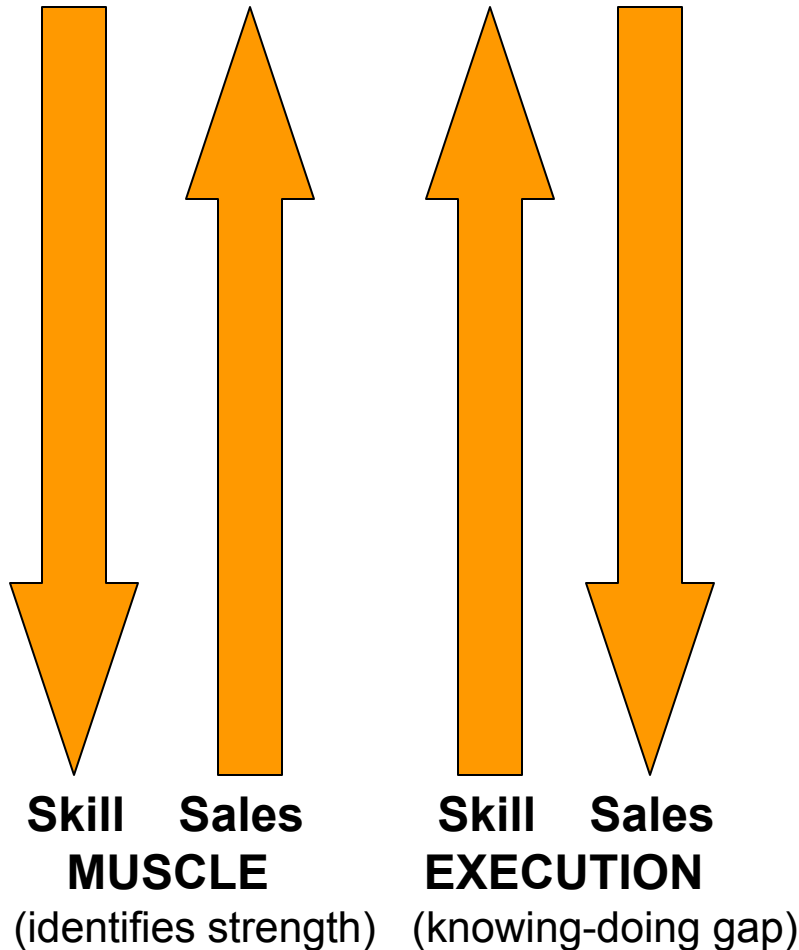


Sales Skill Level & Coaching for the Sales Person

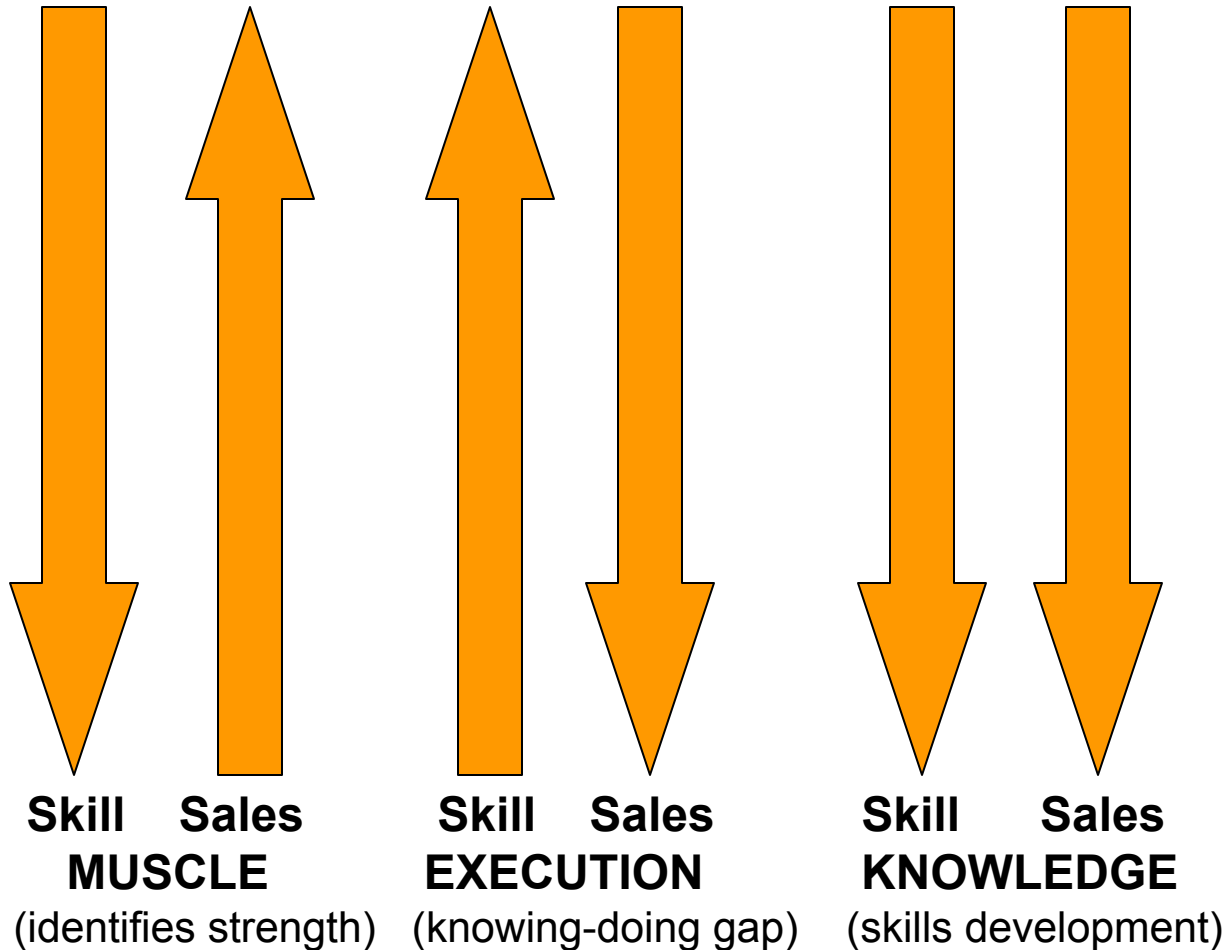
Sales Skill Level & Coaching for the Sales Person



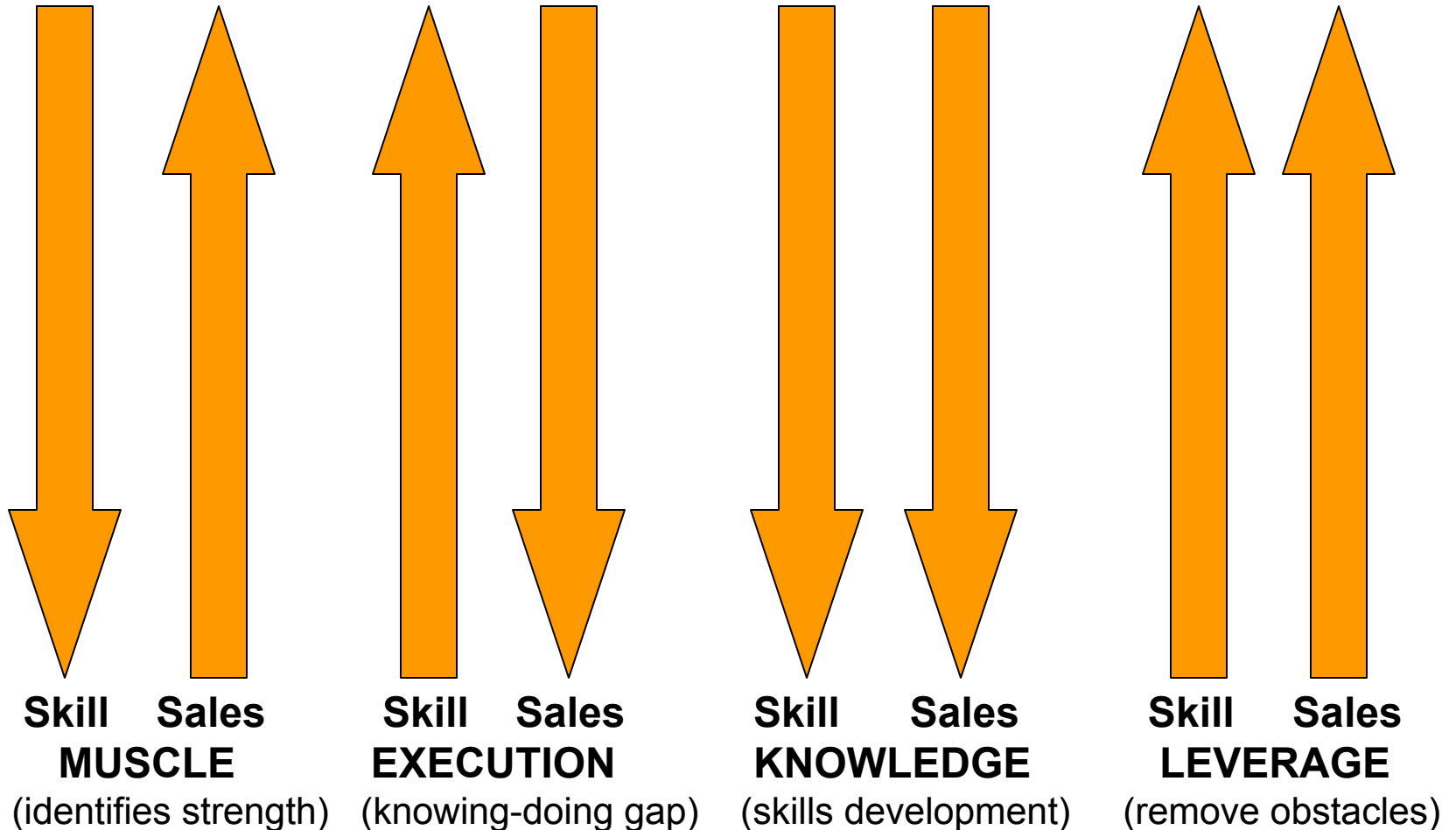
Sales Skill Level & Coaching for the Sales Person



Sales Skill Level & Coaching for the Sales Person



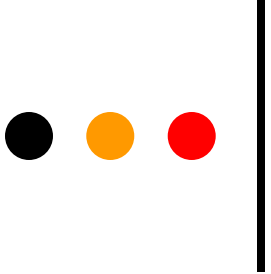
Sales Skill Level & Coaching for the Sales Person





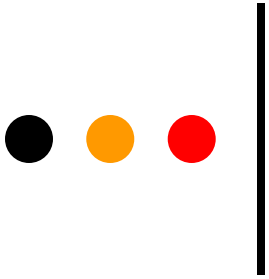
Motivating “On the Cheap”

- “Fast, Good or Cheap – Pick Two.”
- Predictive Index[®] allows you to do all three - fast, good and cheap.
- ***RECOGNIZING YOUR SALESPEOPLE’S CONTRIBUTION***



Fast, Good and Cheap – Pick All Three!

- Recognition is fast
- Recognition is good
- Recognition is cheap



Questions?



Q&A Panel Discussion

Paul Dumouchelle

Peggy Gaylord

Aszure Grimes

Todd Gross

John Ranalletta

Bob Wilson



Question 1

When reviewing a manager's effectiveness with their team, do you recommend pulling a comparison of the entire team to understand the various perceptions that could be taking place?



Question 2

What are other companies doing to reinforce the learning from the PI[®] Analyst training? Our organization has implemented that program, plus the modular programs that ADVISA has created for reinforcement. However, I'm also interested in learning about the non instructor-led interventions that others are using to keep PI[®] alive.



Question 3

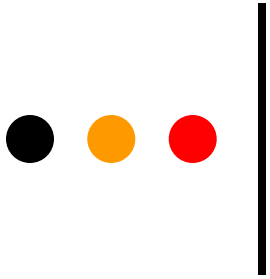
Our trainer prepares for the class by listing all attendees and reviewing their profiles for their highest/lowest drives so that she better understands their communication styles, level of attention to detail, need for a process, etc. Do other trainers have suggestions of other beneficial ways to use the profiles?



Question 4

We have 2 programmers that are both high D's. Both truly believe that the work that do has properly been done. Normally it is, however, this past week we had a client complain 3 times on the same subject. The programmers took on the attitude of this client is just a complainer. The reality was there was a programming error. It took another person to finally figure out that we did have an error – and 5 minutes later it was fixed.

My question is: How do I inspire the programmers to review their work when a complaint comes in? It all seems so very obvious to me that this is what should be done, but somehow I'm failing to get my point across.



Thank you for attending!

***Please remember to complete
your PI[®] User Group survey
before you leave today.***