USING YOUR CULTURE TO HIRE, ONBOARD, LEAD & OFFBOARD

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WHO MAKES JOINT PIVOT WORK

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President & Co-founder

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Vice President & Co-founder
About JointPivot

Partnering with business leaders to dig down to the root cause of their issues, solving problems and creating opportunity right at the pivot point.

Using our training and experience we deliver creative plans and solutions, utilizing our talent or training yours.
What We Do

Doing
- Strategic Planning Sessions
- Continuous Improvement Projects
- Full Service Project Management
- Change Management Planning
- Individual and Executive Coaching
- Employee and Leader Development

Teaching
- Customized Curriculum Development
- Onsite or Online Training Options
- Lean and Six Sigma Programs
- Project Management
- Employee and Leader Development
- Change Management at all Levels

Speaking
- Keynote Presentations
- Workshops
- Conference Sessions
- Employee and Customer Events
- Professional Meet Ups
Topics and Expectations

Role of Culture in:

- Job Descriptions
- Interviews
- Selection Process

- Setting your new hire up for success
  - Pre day 1
  - Day 1
  - Post day 1

- Performance feedback & 1:1’s

- $115K Out the door
3 Part Series – Part III

Goal: Well rounded understanding and application

#1 The Value of Creating Culture in Your Company and Using It to Build Success

#2 Leadership is Exhausting: How to Overcome the Hurdle and Enjoy It

#3 Using Your Culture to Hire, Onboard, Lead and Offboard
Part I Recap

Creating Culture with Values, Principles and Behaviors
## The Value in Values

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
</table>
| Help With Consistent Decision Making | • Align to company goals and vision  
• Provide moral direction |
| Improve Employee Communication | • Ensure consistent, meaningful and clear communication |
| Direct Impact On Employee Motivation And Engagement | • Improved understanding helps motivate the team to work harder to demonstrate and achieve them  
• They know what is expected of them |
| Customer And Clients Understand What Your Company Stands For | • Improve alignment and create relationships  
• Competitive advantage |
| Attract And Retain Top Talent | • Useful in entire employee lifecycle |
| Consistent Communication, Rewards And Recognition | • Common values and beliefs support messaging and motivation |
Principles

Help clarify company values and objectives in relation to working towards your company mission, purpose and strategy

- Extension Of Values
- Describe The How
- Operational Activity
- Tag line Or Saying
Behaviors and Expectations

Adding more description to ensure understanding and support predictive results.

- Clear Expectations
- Removes Ambiguity
- Adjusts Past Experience
- Tie Into Everyday Activity
- Used For Motivation And Recognition
What Does It Feel Like?

Leaders who serve, develop, practice, learn, listen

Accountability

Challenging Goals

Learning Centered

Trust and Respect

Workplace Involvement

Diversity
Leadership Definitions

Noun, Adjective OR Verb?

1. The **action** of leading a group of people or an organization\(^1\).

2. **Art of motivating** a group of people to act toward achieving a **common goal**\(^2\).

3. A **process** whereby an individual influences a group of individuals to accomplish a common goal\(^3\).

4. A person **influences others through social influence**, **not power**, to get something accomplished (bosses use power to get things done)\(^4\).
What Good Looks Like

Not Limited to the below

- Serves The Needs Of The Team
- Listening
- Developing
- Coaching & Motivating
- Always Learning
- Admits Fault
- Accepts Mistakes
- Teaching & Challenging
- Confronts Issues
- Engaged
- Guides without answers
- Confident
- Emotionally Stable
- Accountable & Responsible
- Authentic
- Genuine
- Clear Goals
- Honest/Integrity
- Inspirational
- Influencer
- Self Aware
- Hires Talent
When It’s Bad...........

The list is endless

- Instills Fear vs inspiration
- Task Oriented
- Micro-Manager
- Boastful
- Places Blame
- Surrounded By Yes people
- Run From Conflict
- Command And control
- Hypocrisy
- No Development
- Slow To Adapt
- Take Credit
- No Empathy
- Quick To Judge
Truth

Leadership is a 24/7, 365 days a year job

EXHAUSTING  REWARDING  EXCITING  PRIVILEGE

HUMBLING  DEVELOPING  CONSTANT  LEARNING
Strategies to Make It Less Stressful

**Understand Your Goals**
- Work backwards to confirm inputs (activity & manpower), plant recognition, consistent communication

**Daily, Weekly, Monthly**
- Remove ambiguity, focus your time on what’s valuable, be ready for the unknown

**Do It, Delegate it, Defer It, Delete It**
- It’s applicable to more than your inbox

**Roles, Responsibilities, Competencies, Behavior**
- How can you coach, motivate or develop when you don’t know what you expect?

**Prep for Almost Any Situation**
- Ensure professionalism, confidence and positive outcome
Why Spend The Time?

Creates *alignment* of efforts towards the critical business drivers

Identifies *unique roles* and responsibilities for all levels

Ensures people *spend more of their time on the most effective strategies*

Outlines *shaping plans* and focuses attention on progress and improvement

Set employees up for success, so everyone wins
Even More Important!

- A business’ success depends on its capacity to build a workforce in which everyone has the skills and behaviors they need to succeed amidst a shifting landscape.\(^2\)
Position/Role/Employee Life Cycle

We care about the individual's experience before, during and after their time with our organization.
What does this role do?

- Impact on functions or customer
- Key Deliverables
- Accountabilities
- Metrics
How will they be successful?

What they should know vs What we can teach

Skill: Specific technical knowledge and abilities required for success in a job

- Degree and/or experience
- Years of application
- Certifications and/or experience
- Software knowledge
- Analytics and data mining
- Marketing
- Specific to the function: Marketing, IT, Accounting, Legal, etc.

Competency = Knowledge + Skill + Ability

Interpersonal attributes for success in this role

- Communication
- Storytelling
- Drive for results
- Leading without authority
- Public speaking
- Motivating
- Delegation
- Business acumen
Competencies: What & Why

- Takes the skills and incorporates them into on-the-job behaviors.
- Creates consistency across an organization regarding talent practices.
- 3 Groups: Behavioral, Technical, Leadership.
- Valuable for long-term planning.

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Development Journey

Create expectations

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Priority</th>
<th>I</th>
<th>II</th>
<th>III</th>
<th>IV</th>
</tr>
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<tbody>
<tr>
<td>S 1440/Vision/Mission</td>
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<td>C Action Oriented (Creates Urgency)</td>
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<td>C Being Resilient</td>
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<td>S Blue Sheet/Blue Sheet Lite</td>
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<td>C Builds Effective Teams</td>
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<td>C Builds Networks</td>
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</tbody>
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Legend:
- Not Needed
- Nice to Have, Received Training
- Needed, but Not proficient, Can Apply
- Required, Advanced Application
- Can teach/coach
Job Description
One Document, Many Uses

• Used for any of the following:
  – Recruitment
  – Salary leveling
  – Conducting performance reviews
  – Establishing titles and pay grades
• High level overview of company, mission, culture, goals, benefits
• Job responsibility/ Essential job functions
• Experience
• Qualifications
• Travel
• Physical demands
• Work environment
JD: Better Practices

To apply or not to apply……..

What you’ll need to succeed....

Be a part of something big!

Why you’ll be great.......

What you’ll do on a typical day.......

3 Reasons you should apply.......

About the job......
Interview: What’s Your Standard?

Formats

• Informational
• Phone screen
  • Individual
  • Group
  • Panel
• Technical
• Multiple-round

Question Style

• Open-ended
  • Situational
  • Behavioral

Before you do anything......What is your companies intake process? Has the recruiter listened to the customer (you)?
Competencies & Behavioral Questions

Assess the soft skill accurately - STAR

<table>
<thead>
<tr>
<th>Situation</th>
<th>Task</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>• What was the problem or scenario</td>
<td>• Their responsibility in the situation</td>
<td>• They specific steps they took to address the situation</td>
<td>• The outcomes – good or bad</td>
</tr>
</tbody>
</table>
## Candidate Selection

More than just what they said........

### SAMPLE FORM: Candidate Evaluation

<table>
<thead>
<tr>
<th>Items To Ask about, Look for:</th>
<th>1 - Unsatisfactory</th>
<th>2 - Below Expectation</th>
<th>3 - Above Expectation</th>
<th>4 - Exceeds Expectation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educational Background: Does the candidate have the appropriate educational qualifications or training for this position? Comments:</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Prior Work Experience: Has the candidate acquired similar skills or qualifications through past work experiences? Comments</td>
<td></td>
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<tr>
<td>Technical Qualifications/Experience: Does the candidate have the technical skills necessary for this position? Comments</td>
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<tr>
<td>Verbal Communication: Did the candidate demonstrate effective communication skills during the interview? Comments</td>
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<tr>
<td>Candidate Enthusiasm: Did the candidate show enthusiasm for the position and the company? Comments</td>
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</tbody>
</table>

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# Onboarding Plan

**Plan for success!**

<table>
<thead>
<tr>
<th>Item</th>
<th>Who</th>
<th>When</th>
<th>Status</th>
<th>Self Evaluation</th>
<th>'Trainer' Evaluation</th>
<th>Comments &amp; Follow up</th>
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</thead>
<tbody>
<tr>
<td>Welcome email</td>
<td>Hiring leader</td>
<td>Immediately after offer acceptance</td>
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<tr>
<td>1st day expectations - Email/Call</td>
<td>Hiring Leader</td>
<td>D-7</td>
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<tr>
<td>Desk prep</td>
<td></td>
<td>D-7</td>
<td></td>
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<tr>
<td>IT/Software prep</td>
<td></td>
<td>D-7</td>
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<td></td>
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<tr>
<td>Welcome lunch scheduled</td>
<td></td>
<td>D-7</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meet &amp; greets scheduled</td>
<td></td>
<td>D-7</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tour</td>
<td></td>
<td>D1</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Role Expectations</td>
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<td>D1</td>
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</tr>
<tr>
<td>Company overview</td>
<td></td>
<td>D1</td>
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<tr>
<td>Email/Voicemail</td>
<td></td>
<td>D1</td>
<td></td>
<td></td>
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<tr>
<td>Social media do's/don'ts</td>
<td></td>
<td>D1</td>
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<td></td>
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<tr>
<td>Culture and values</td>
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<tr>
<td>Shadow role 1</td>
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<td>D2</td>
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<tr>
<td>Shadow role 2</td>
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<td>D3</td>
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<tr>
<td>Shadow role 3</td>
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<td>D4</td>
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<tr>
<td>Tools/Templates</td>
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<td>D5</td>
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</tbody>
</table>
Feedback Cadence

Everyone should know where they stand, always.
Behavioral Based Motivation
Linking Behaviors to Results

**Motivation**
Our drive or willingness to do something. In the workplace, things like achievement, power, social status, growth and even fear motivate employees to perform.\(^5\)

**Behavior-based theory of motivation**
Contends that by manipulating certain behaviors in employees, they are more or less likely to perform.\(^5\)
Discretionary Effort

"Discretionary effort is the level of effort people could give if they wanted to, but above and beyond the minimum required." — Aubrey C. Daniels, Ph.D.

Figure 1. The Discretionary Effort Model. From Aubrey Daniels International. Retrieved from https://www.aubreydaniels.com/discretionary-effort#:~:text=%22Discretionary%20effort%20is%20the%20level,in%20trouble%20(negative%20reinforcement).
Increase The Desired Behavior

Decrease/Extinguish The Rest

Positive Reinforcement

Negative Reinforcement

Punishment

Penalty
Intention vs Impact

Intention: a thing intended; an aim or plan

Impact: have a strong effect on someone or something
Shaping Behavior

Positively reinforcing successive activities toward a goal

How?

Look for small improvements
Positively reinforce any improvement
Set goals just above where someone is performing
Never stop reinforcing
Better Suited For Another Opportunity

- Did we hire well? Were they a good fit from the beginning?
- Did we onboard them and provide them the training and tools to be successful?
- Did I communicate when I saw warning signals?
- Did I create ways to help them improve?

What do your values say? Did you demonstrate them?
Offboarding

Reflection

Responsibilities/Knowledge Transfer

Internal Communication

Company Assets And Digital Access

Gather Insight/Exit Interview

Say A Proper Goodbye / End On A Good Note
Next Steps

It’s On You

**Culture**
- Values
- Principles
- Behaviors and expectations

**Behavioral Based Motivation**
- Link behaviors to results, for all positions
- Implement touchpoints
- Plan for challenging and winning situations

**Role Specifics**
- Skills and competencies
- Development journey
- Job description
- Interview format
- Selection methods
- Onboarding plan

**Feedback / Touchpoints**
- Types, goals and cadence
- Set the standard for the organization
- Implement leading indicators

**Offboarding / Continuous Improvement**
- Standard process
- Ongoing respect for all parties
- Share lessons learned
Like What You Heard?

Want more? Imagine what your company would look and feel like if you had:

- Increased motivation
- Alignment and consistency
- Challenging goals
- Outperforming results
- Excitement
Pivot With Us - Suggested Solutions

Process Approach Or A La Cart

- Company Values Goals Expectations
  - Visualize and define how your company values translate to everyday roles for all employees

- Functional Impact On Value Stream
  - Document and interpret each function's influence on the company value

- Skills Knowledge Abilities
  - Articulate role responsibilities, hard skills, and competencies, including their developmental roadmap

- Understand And Align
  - Survey skills and competencies to level set all parties

- Develop and Coach
  - Implement coaching and development techniques to support everyone's success

Deep Dives:

- Culture Strategy
- Behavioral Based Interviewing
- Behavioral Based Motivation
- Skills, Competencies, Development Journey
- Hiring, Onboarding & Offboarding Strategy
References

1. Oxford Dictionary


