Manager playbook

PEOPLE LEADER ESSENTIALS

HATCH

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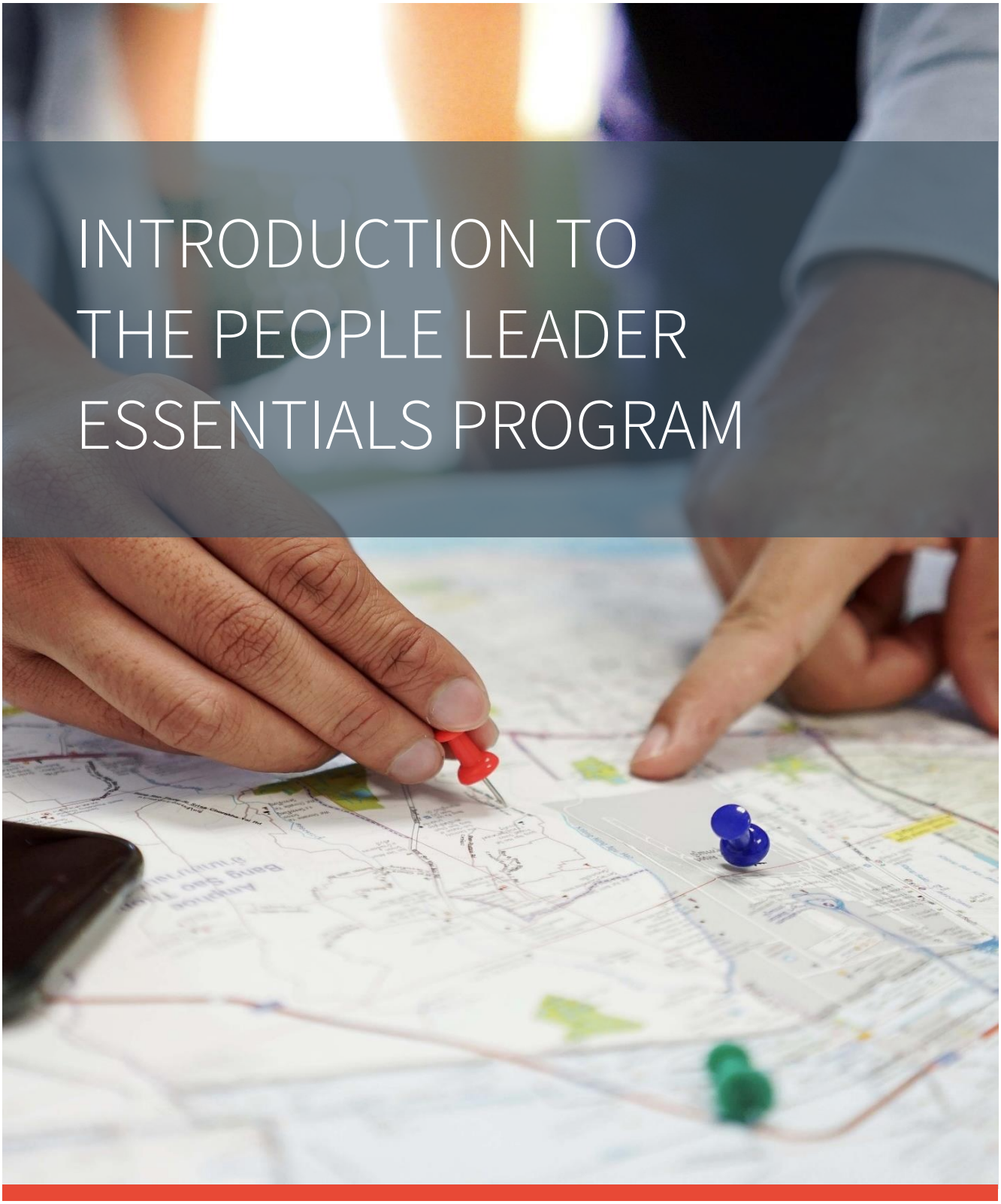


INTRODUCTION TO THE PEOPLE LEADER ESSENTIALS PROGRAM

Introduction

WELCOME TO PEOPLE LEADER ESSENTIALS

The People Leader Essentials program has been developed to help existing and aspiring leaders grow the skills required to be empathetic, caring, motivating and competent people leaders who role-model our Manifesto and engage others to make a difference. The program has been created by collecting best practices from experienced Hatch leaders and complemented by research-based leadership concepts.

This Manager playbook has been created to help you understand your role throughout your team member's learning journey in the Leading self module.

In this Manager playbook, you will find:

- An overview of the Leading self module
- Your role in supporting your team member(s)
- Tools and resources for your support
- Overview of key tools and concepts from the Leading self module

Please make sure that you have reviewed your Manager playbook in advance of engaging in conversations with your team member(s). This will be a valuable resource to guide productive conversations with your team member(s).

LEADING SELF OVERVIEW

The Leading self module includes a variety of topics related to personal leadership competencies that are first introduced in a series of courses, then reinforced in a live session and other learning activities. Below is a summary of what your team member(s) will learn about as they start the module and complete the online courses.

Course	Learning outcomes
Developing as a Hatch leader	• Define personal leadership style, considering personal strengths and development opportunities • Recognize how to further develop as a leader using the Manifesto and the Manifesto Driven Leadership Emotional Quotient (MDL EQ) model
Leading with confidence and decisiveness	• Use Hatch Values to weigh factors and guide decisions • Incorporate others' input into decisions and act decisively • Remain composed during stressful situations by focusing on, "What's the problem we're trying to solve?"
Managing stress and emotions	• Manage emotions in stressful situations using the MDL EQ model (e.g., stressful conditions such as dealing with negative feedback) • Identify and communicate personal boundaries
Planning time and goal setting	• Identify priorities and set goals • Plan time according to Manifesto, Leadership-framework, and business objectives • Solicit feedback from the team to develop plans and determine where flexibility is required
Living your commitments	• Assess requests and address them according to priority (rather than treating all requests as urgent) • Approach situations honestly and replan when necessary • Push back on requests when required to maintain focus on priorities • Raise hand to ask for help early

These online courses will be followed by a **live session** (three-hour virtual or in-person workshop) where your team member(s) will get an opportunity to practice what they have learned with the colleagues in their cohort.

Soon after the **Live session,** they will participate in a **Learning café** (one hour). The Learning café will be a facilitated coaching session where your team member(s) will join in a small-group discussion sharing wins and receiving coaching on tough challenges they have identified, or which their colleagues have shared.

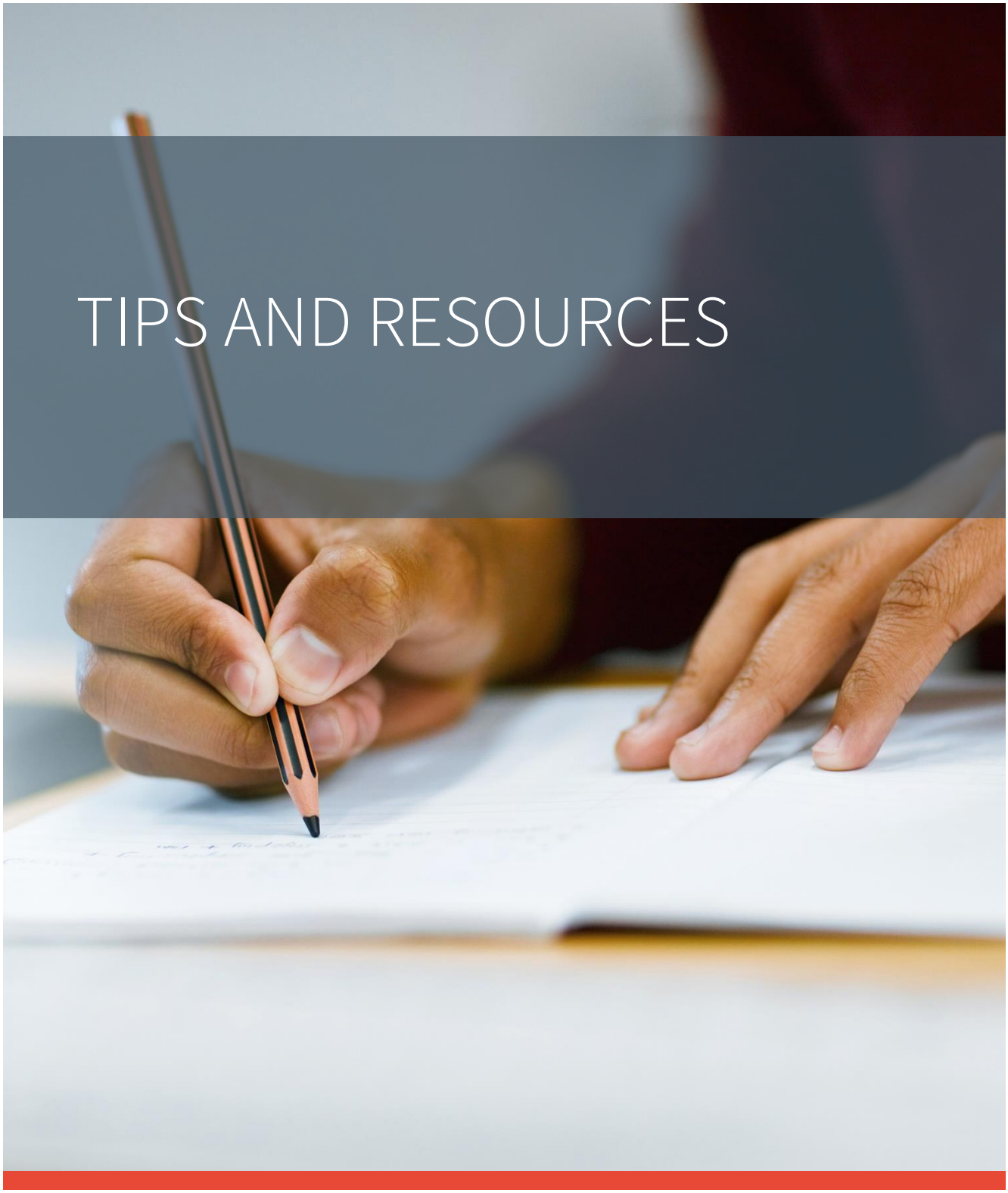
YOUR ROLE IN SUPPORTING YOUR TEAM MEMBER(S)

HOW TO SUPPORT YOUR TEAM MEMBER(S)

Your team member(s) will be leveraging a variety of resources to support them as they progress through the Leading self module. You will be one of those resources, and they have been encouraged to set up regular check-in meetings with you.

Below are some examples of what you can do to support and help your team member(s) make the most of their experience.

Before/as they start their Leading self learning journey	During the Leading self module	After they complete the formal Leading self learning activities
☐ Review your team member(s) Learning commitment document ☐ Communicate that you support their involvement in the program and investment in themselves ☐ Make effort to remove obstacles that may get in the way of being able to fully engage in the program ☐ Encourage curiosity by asking about their intentions and expectations ☐ Discuss their insights from their 360° assessment report *(Note: team member(s) is not required to share 360° assessment report)*	☐ Encourage team member(s) to block time in their calendar to allow uninterrupted time to participate in the program ☐ Review the key tools and concepts in this document to familiarize yourself with what your team member(s) is learning ☐ Coach and provide advice (review the GROW coaching model) ☐ Share your personal experiences to support their development or connect them with others who demonstrate desired behaviors ☐ Discuss their 360° assessment report discuss their wins and lessons learned *(Note: team member(s) is not required to share 360° assessment report)*	☐ Continue providing coaching and support for your team member(s) development by holding regular check-ins ☐ Support their efforts in applying their learning on the job (practice and stretch opportunities) ☐ Hold your team member(s) accountable for applying what they have learned and their personal learning commitments ☐ Collaborate with your team member(s) on their development action plan ☐ Discuss their 360° assessment report discuss their wins and lessons learned *(Note: team member(s) is not required to share 360° assessment report)*



TIPS AND RESOURCES

TIPS FOR SUCCESS

As much of the People Leader Essentials program is self-directed, managers play a critical role in overall learning success.

To be a supportive manager, please:

1. Live your commitments with integrity – do not cancel meetings
2. Do your homework – monitor your own self-awareness, arrive to each meeting prepared and ready to ask questions and coach
3. Deliver positive change – ensure that in every interaction with your team member(s), you provide one idea or experience that will help your team member(s) improve or achieve better results
4. Be unconditionally honest – don't be afraid to provide unconditionally honest feedback or have difficult conversations if you think your team member(s) is off track or at risk of becoming off track; hold your team member(s) accountable to their development commitments

Making the most of check-ins

You are encouraged to meet regularly with your team member(s). Here are some tips for success:

1. Agree on a cadence – in your first meeting agree how frequently they would like to meet
2. Pre-schedule meetings – encourage your team member(s) to schedule meetings for all requested check-ins, instead of waiting until the last minute or agree to scheduling touchpoints in an ad-hoc manner
3. Agree on your check-in agenda– encourage your team member(s) to send an agenda prior to the meeting. Agree on your agenda topics before meeting
4. Leverage the GROW coaching model – when your team member(s) needs help, apply the GROW model to ensure the best outcome (review the GROW model on page 11
5. Ask insightful questions – A list of insightful questions have been outlined for each of the online courses and their key tools and concepts (starting on page 13)

General guidelines for conducting check-in meetings

Prior to the meeting	• Encourage your employee to take the lead by encouraging them to schedule the meeting and send agenda items in advance • Review the Manager playbook (e.g., key tools and concepts starting on page 13)
Potential discussion questions:	Potential discussion questions: *Note: Discussion will depend on your team member(s)' goal for the meeting.* • Where are you in the learning journey (i.e., what have your completed so far)? • What are your main key takeaways? • What were your biggest surprises? • What are some wins you've had in applying your learning on the job? • What will you find most challenging to do or change? *Lean on GROW coaching model for support.* • What are some of your development commitments (i.e., goals from program)? • How can you share this learning with others? Note: Specific questions pertaining to the key tools and concepts from the program and the 360° assessment report, are under each tool/concept starting on page 13. Wrap-up • What is next in your learning journey? • Given what you learned about leading self / personal leadership, what can I do to support your continued growth as a leader? • How can I support building your network?

THE GROW COACHING MODEL

The coaching you provide your team member(s) will play a key role in helping them get the most out of the People Leader Essentials experience. The GROW coaching model is an easy-to-follow process that will help to maximize the outcomes of your coaching conversations. Below are example questions to use in each stage of the process.

G	Goal – What is the goal? • What is your goal? • When do you want to achieve this goal? What does success look like? • How challenging will this be? • What is the benefit of achieving this goal (personally, professionally)? • How will you know when you've achieved it?
R	Reality – What is going on right now? • What is going well (with regards to the goal/situation)? • What challenges are you facing? How big of a challenge is it? How often is it happening?
O	Options – What are the possibilities? What could you do? • What options do you have? What else could you do? • What's the upside/downside of each option?
W	Will – What are the next steps? What will you do? • What will you do and by when? • What could get in the way? How will you overcome it? • How will you motivate yourself? • What support do you need? • How committed are you to achieving this goal (scale of 1 to 10)?

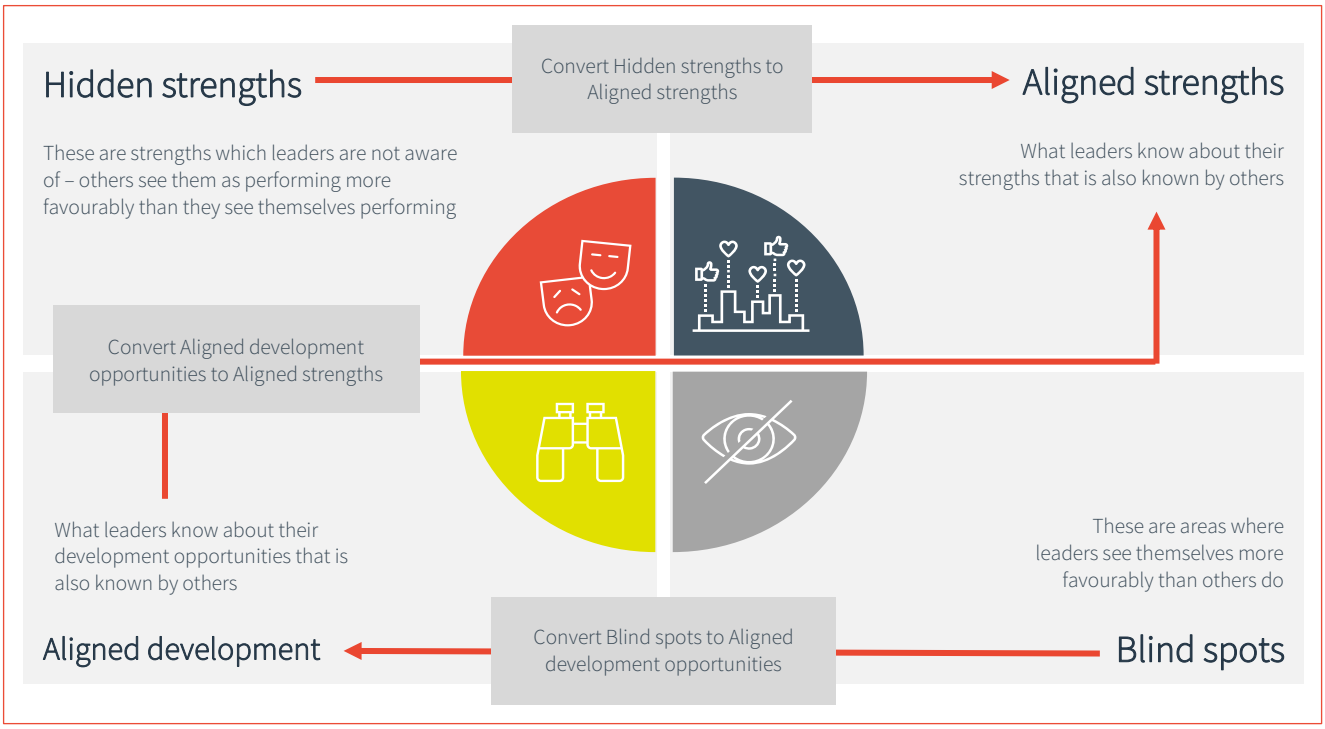
KEY TOOLS AND CONCEPTS

1: INCREASING SELF-AWARENESS

Leadership challenge

Self-aware leaders tend to be more confident, creative, make better decisions, communicate more effectively, and build stronger relationships. Many leaders however have misalignment between how they see themselves and how others see them.

Key concept: Leader self-awareness



- **Convert Hidden strengths to Aligned strengths:** Asking others for specific feedback about what they think you do well
- **Convert Aligned development opportunities to Aligned strengths:** Continue your self-development journey including setting goals, practicing new skills, and seeking feedback for continuous improvement
- **Convert Blind spots to Aligned development opportunities:** Seek out feedback to better understand the gap between what you think you are doing and what others are experiencing

Discussion items and/or sample questions to ask

The first online course, **Developing as a Hatch leader,** explores:

- The importance of being self-aware and ways to increase self-awareness
- Articulating your leadership style
- Being flexible and adapting your leadership style

Here are some questions to help you discuss the course's key tools and concepts with your team member(s):

- What were your key insights from the Developing as a Hatch leader online course?
- Reflecting on your 360° assessment results:
  - What were your top aligned strengths? How will you continue to leverage them? How can you help support or mentor other leaders who need to develop in that area?
  - What were your aligned development opportunities? How have you translated those insights into their learning commitments and development commitments?
  - What were your blind spots? How will you further investigate them to increase their self-awareness?
  - What were your hidden strengths? What are ways to uncover additional hidden strengths?
- What are your top strengths and two or three things you would like to improve?
- What did you learn about your leadership style?
- What situations have you been in that required you to adapt your leadership style?
- What insights or concepts can you share with your team or colleagues to achieve better outcomes? What steps will you take to do that?

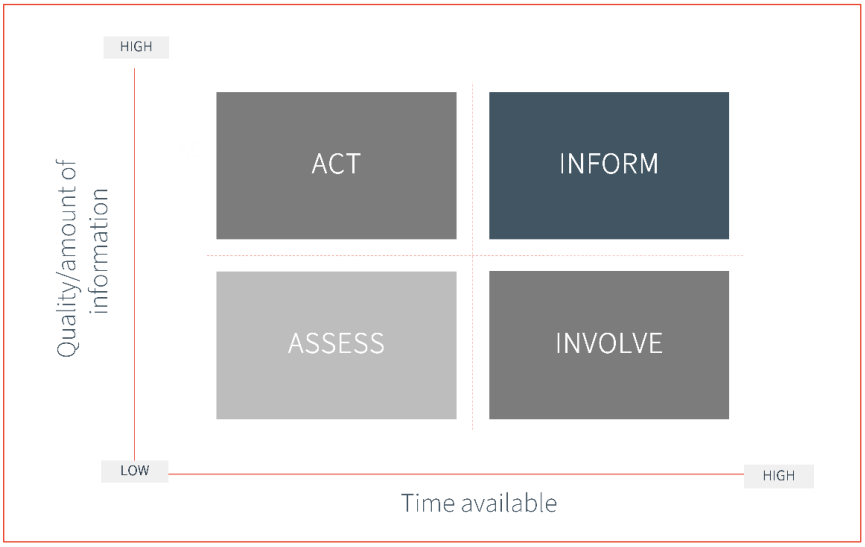
2: THE DECISION-STYLES MATRIX

Leadership challenge

Everyday leaders make multiple decisions. Decision making is situational, and no one should adopt one style in all situations; instead, your decision-making style should be adapted to the situation and the desired outcomes.

Key tool: The decision-styles matrix

The decision-styles matrix guides decision making based on a) the quality/amount of information available concerning the decision, and b) the time available to make it.



- ACT – When the amount/quality of information is good, but there is little time, go ahead and act.
- INFORM – When there is enough quality information and lots of time, instead of acting, inform people of the intended decision to allow for their input.
- ASSESS – When there is limited or poor-quality information and not much time, assess options and consider the implications of acting or choosing to defer the decision. Determine if any decision is better than no decision, and if so, go ahead and act. If making the wrong decision would have significant negative consequences, defer the decision, pushing the timeframe for making it and involving others to gain more information.
- INVOLVE – When there is not enough information or it's of low quality, but there is sufficient time, involve others with information or interest in the decision making.

Discussion topics/sample questions to ask

The second online course, **Leading with confidence and decisiveness**, explores:

- Behaviors of a confident and composed leader
- Communicating to build trust and engage and motivate others
- Making difficult decisions based on how much time and information you have

Here are some questions to help you discuss the course's key tools and concepts with your team member(s):

- What were your key insights from the Leading with confidence and decisiveness online course?
- What did you learn about characteristics of a confident, Manifesto-driven leader? What resonated most with you?
- What challenges are you facing that could be an opportunity to engage others / ask for help to achieve better outcomes?
- What opportunity can you see with your team or on a project to speak up and offer input that may provide a different perspective, or provide constructive feedback? What steps will you take to do that?
- Which of the decision styles are you least comfortable using? What can you do to increase your comfort or capability?
- Reflecting on current projects, is there a pending decision where we can apply the decision-styles matrix?

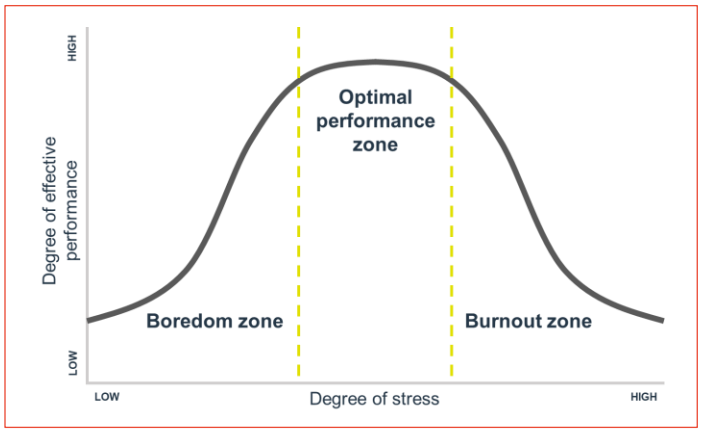
3: STAYING IN THE OPTIMAL PERFORMANCE ZONE

Leadership challenge

Leaders deal with situations that result in a range of emotions and stress everyday. Having the right skills and mindset to stay productive and make purposeful choices about how to respond when emotions or stress are involved is critical to leading effectively.

Key concept: The optimal performance zone

There are three zones that leaders may find themselves in based on the amount of stress they are experiencing.



Boredom zone – In the boredom zone leaders are dealing with little or no stress. While this might sound ideal, this occurs because leaders are in a state of low motivation, disengaged from work and feeling bored. Team member(s) can pick up on this and can become similarly disengaged.

Optimal performance zone – In this zone, leaders are dealing with healthy amounts of stress. They feel energized, positively challenged, and focused; work may feel effortless. This is the zone leaders want to be in.

Burnout zone – In this zone leaders are dealing with too much stress, and it can negatively impact interactions with colleagues and clients. It can also negatively impact mental or physical health. Leaders may struggle to prioritize work or make decisions in this zone. Productivity typically drops.

To stay in the optimal performance zone, leaders should set personal boundaries, and apply other best practices like getting enough sleep, eating well, exercising, building a strong support system, and identifying and using supports and tools available to help.

Discussion topics/questions to ask

The third online course, **Managing emotions and stress**, explores:

- How to productively manage emotions using the MDL EQ and S.O.S. models
- The pros and cons of stress and techniques to buffer stress
- Establishing personal boundaries to prevent burnout
- How to identify and manage signs of stress and burnout

Here are some questions to help you discuss the course's key tools and concepts with your team member(s):

- What were your key insights from the Managing emotions and stress course?
- How have either the MDL EQ or S.O.S. models helped you manage your emotions in the past?
- How do you plan on using the MDL EQ or S.O.S. models in the future?
- Have you experienced burnout in the past? What could you have done differently to avoid that? How can I help so that going forward you don’t experience that?
- What techniques do you use to buffer stress and remain in the optimal zone?
- What boundaries do you need to set?
    - Why are these boundaries important to you?
    - To whom will you communicate your boundaries?
    - How will others respect or support your boundaries?

4: ASSESSING AND MITIGATING GOAL RISK

Leadership challenge

Some goals are relatively straightforward and easy to execute on. Other goals are complex, having more tasks (i.e., more interdependencies) and more risk involved. Identifying goal risks and making plans to avoid or mitigate them will improve success.

Key tool: Risk assessment chart

Completing a risk assessment is a prudent step to take for more complex goals. To complete a risk assessment, follow these simple steps:

1. List all the risks or barriers that could get in the way of attaining the goal
2. For each of the risks, consider the likelihood the risk or barrier will occur and assign it a high- (more than seventy percent chance), medium- (between forty to sixty-nine percent chance), or low-likelihood (thirty-nine percent or lower) score
3. For each of the risks, consider the severity of the impact to the goal if the risk were to be realized, and assign it a high-, medium-, or low-impact score

The risk assessment chart provides guidance for how to deal with goal risks. For risks with low likelihood or severity of impact, leaders may choose to accept the risk and take no further action. For risks where the likelihood and severity of impact are both high, leaders should put some additional plans in place to try to either eliminate the risk or minimize its impact.

Severity of impact	LOW	MEDIUM	HIGH
HIGH	Some formal monitoring and regular measurement is required	More formal monitoring and frequent measuring is required	Extensive monitoring and measurement is required
MEDIUM	Risks worth accepting	Some formal monitoring and regular measurement is required	More formal monitoring and frequent measuring is required
LOW	Acceptable levels of risk – ask if the idea is worth doing	Acceptable levels of risk	Some formal monitoring and regular measurement is required
	LOW	MEDIUM	HIGH
	Likelihood		

Discussion topics/sample questions to ask

The fourth online course, **Planning time and goal setting**, explores:

- The importance of time management and goal setting
- How to prioritize and align goals
- Assessing and mitigating goal risk
- Creating action plans to implement goals

Here are some questions to help you discuss the course's key tools and concepts with your team member(s):

- What were your key insights from the Planning time and goal setting course?
- Considering your professional and personal goals, what is working well and what's not working well for you? What would you like to change?
- Reflecting on the past six to twelve months:
  - What is working well?
  - What are you or your team accomplishing today?
- What are you hoping to achieve/accomplish in the future and how do you plan to do that?
  - What risks do you foresee in achieving your goals?
  - What is your strategy for achieving your goals?
  - How will you validate those goals or get input from key stakeholders?
- What are the biggest risks to achieving your existing goals? How are you monitoring for the risks? How have you adapted your implementation plan to try to mitigate the risk?

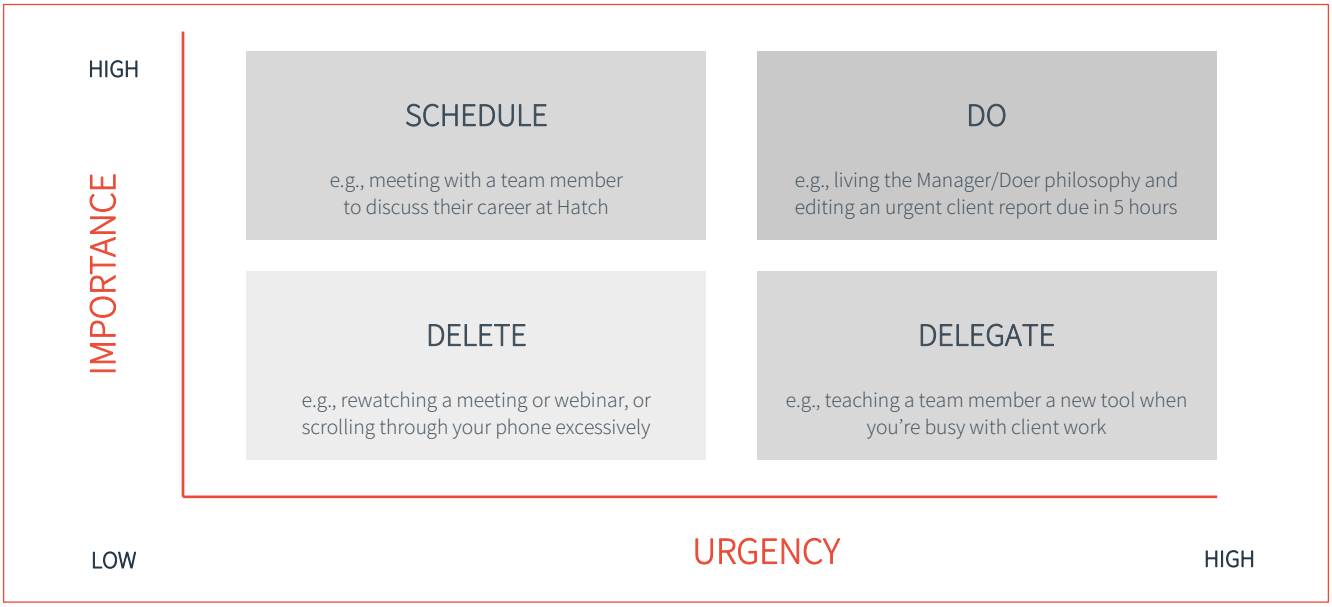
5: THE EISENHOWER MATRIX

Leadership Challenge

There can be a tendency for leaders to underestimate the time needed to achieve all their planned goals, activities, or tasks. Proper prioritization will help leaders focus and put effort into the highest priorities.

Key tool: The Eisenhower matrix

The Eisenhower matrix helps a leader prioritize activities and tasks associated with goals according to the urgency and importance. It also helps leaders reprioritize their work as new tasks come up.



- Important but not urgent—SCHEDULE
  These are the tasks that leaders should make time for in their calendar to make sure that they get done, as the lack of time pressure may lead to procrastination.
- Not important but urgent—DELEGATE
  These need to get done, but because they are less critical leaders can use the task as an opportunity to delegate and engage great people who make a difference.
- Not important and not urgent—DELETE
  These tasks are distractions from a leader's goals. They should deprioritize or delete them.
- Important and urgent—DO
  These are the tasks that leaders should prioritize and add to their to-do list.

Discussion topics/sample questions to ask

The Eisenhower matrix is used in the fourth online course, **Planning time and goal setting** (see pg. 21), and in the fifth online course, **Living your commitments**, which explores:

- Assessing and prioritizing requests
- Monitoring progress on tasks and course-correcting
- Pushing back on requests when necessary

Here are some questions that you can use to explore the concept with your team member(s):

- How do you assess the urgency and importance level of a task?
- Which of your goals are you most concerned about achieving? How can you better prioritize tasks to stay on track? Is there something of lesser value that is taking your time that could be prioritized?
- How do you plan to use the Eisenhower matrix to push back on lower priority requests for support from colleagues or clients that may interfere with achieving your goals? How can the MDL EQ model help you have the conversation?

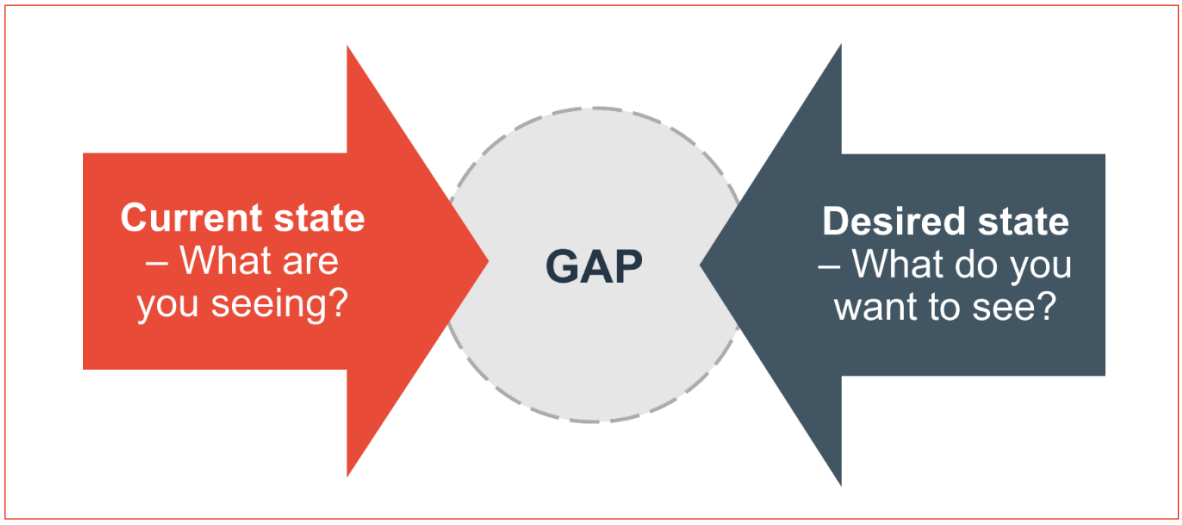
6: GAP ANALYSIS

Leadership challenge

There is always a chance that something will come up that gets in the way of even the best plans. To make the right decisions about what to do if they do get off track, leaders need to truly understand what has gotten in the way.

Key tool: Gap analysis

A gap analysis tool will help leaders analyze the situation and identify why they are not reaching their goals. A gap analysis identifies the gap between current state, which is what is currently happening, versus desired state, which is what was expected to happen in the future.



To understand the problem, first start by defining:

What is the leader seeing? (e.g., running over budget and behind timelines, quality suffering, overworked team, unhappy client, low team performance)

What did the leader want to see? (e.g., high-quality, on-time delivery; on-budget, innovative solutions; team collaboration; strong client-Hatch partnerships)

If the gap analysis identifies a gap between the current performance levels and expected performance levels, identify the cause of the gap by conducting a root cause analysis using a tool like the 5 whys (see page 25).

Discussion topics/sample questions to ask

The gap analysis tool is covered in the fifth online course, **Living your commitments**, and is aligned to the topic in bold below:

- Assessing and prioritizing requests
- **Monitoring progress on tasks and course-correcting**
- Pushing back on requests when necessary

Here are some questions to help you discuss the course's key tools and concepts with your team member(s):

- How frequently do you measure your progress on goals? What do you monitor or measure for?
- Which of your goals (if any) are off track? What had you expected to achieve? What have you actually achieved? What is the actual gap?

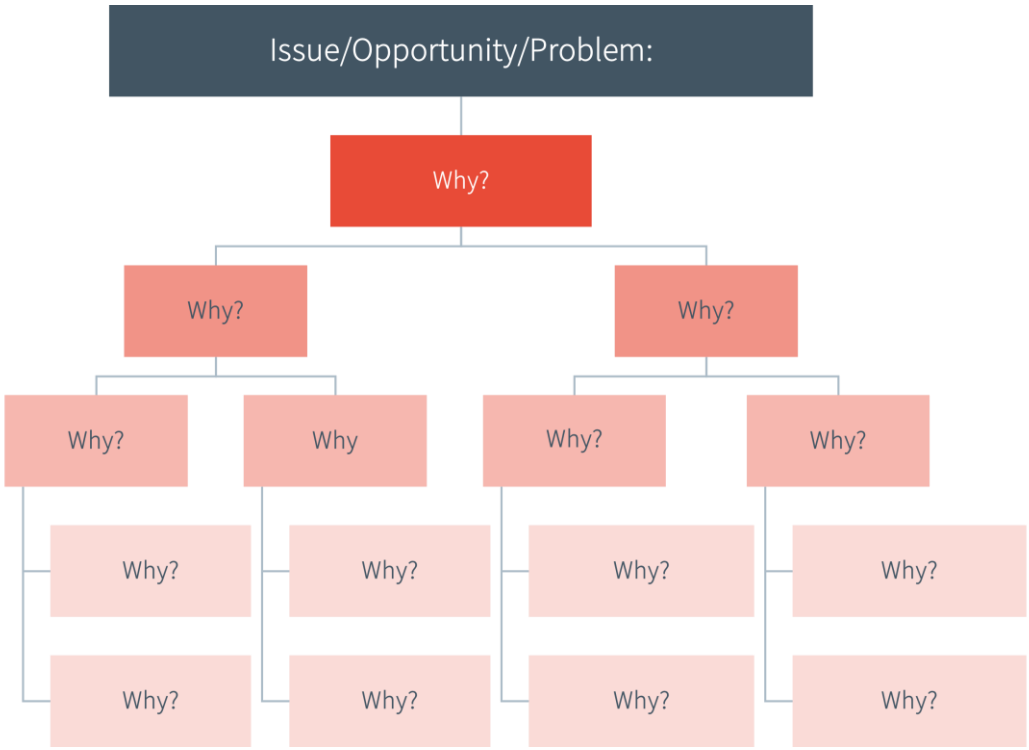
7: 5 WHYS ROOT CAUSE ANALYSIS

Leadership challenge

If a leader is not achieving their goals, getting to the root cause is critical, as they can only make the right decision about how to get back on track if they have correctly identified the cause of the problem.

Key tool: The 5 whys

The 5 whys tool will help a leader get the root cause of what is getting in the way of achieving their goal. Once the gap has been defined, the leader simply explores different potential root causes by asking why the gap is occurring. They continue the dialogue of asking why until the question can no longer be answered and they strongly believe the root cause has been uncovered.



Discussion topics/sample questions to ask

The 5 whys tool is also covered in the fifth online course, **Living your commitments**, and is aligned to the topic in bold below:

- Assessing and prioritizing requests
- **Monitoring progress on tasks and course-correcting**
- Pushing back on requests when necessary

Here are some questions to help you discuss the course's key tools and concepts with your team member(s):

- What were your key insights about getting to the root cause of what is preventing goal achievement?
- What gaps have you defined that you want to explore further? How can the 5 whys help?