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no more blank stares: part one

A Naturally Engaging Planning Meeting

by Alex Wray

Is optimizing your team's performance and engagement one of your New Year's resolutions? There is no better time to start than with your planning process.

Here's a story about Sean, compiled based on feedback from graduates of our Open-Enrolment Workshops.

Sean is a relatively new manager. He made a resolution to approach his 2007 planning differently. Sean did not want to inflict the same old one-way communication and vague, endless meetings he suffered through in years past.

"I genuinely want to know how my team is thinking about our objectives and priorities, rather than assuming I know. I'm new. I don't know them that well. Many of them have been with the organization longer than I have. Also, a couple of them don't seem very motivated and I need to figure out how best to coach them. I can't afford to have someone slacking while the rest of us are working hard; it isn't good for the team!"

Overall, Sean wanted a planning process that would **involve** his team to...

- **Focus** their limited resources
- Confirm the relative **priority** of objectives
- Ensure **alignment** of objectives
- Establish **coaching and development** plans
- Build a stronger sense of **team**

Sean accomplished these goals through a thoughtful two-phased planning process. He later explained, "I made sure everyone had a reason to get involved. No one was just along for the ride."

By following these same steps over just ten days, you too can ensure everyone enters your planning meetings equally and adequately prepared, and everyone is engaged in a relevant conversation that affects them directly.

Phase One: The Preparation

Sean planted the seeds of engagement early on. He drew the direct link between the organization's direction and how each individual contributes. The best managers understand that this critical link raises the stakes and immediately boosts performance and engagement. This may seem like common sense, but it isn't always common practice.

During a team meeting, Sean presented his Top 5 objectives for the coming quarter*. This context and direction was valuable for everyone. Through a lively discussion, the entire team gained clarity on Sean's expectations and the key objectives they would all contribute to during the quarter.

*Sean chose the quarter, but we recommend that leaders choose the time horizon that is appropriate for their situation.

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After Sean presented his Top 5 objectives to his team, they had a few days to consider and draft their own individual Top 5 lists.

Next, Sean held one-on-one meetings with each of his team members. To ensure the effectiveness of these one-on-one meetings, he communicated the simple two-point agenda:

1. Build a shared understanding of what the team member believes to be his/her Top 5
2. Edit and refine Top 5 together to ensure alignment with the objectives of the unit and organization (i.e., *vertical alignment*)

The length of Sean's one-on-one meetings varied according to the scope, complexity and implications of each team member's priorities. The experience level of the direct report and manager also affected the length of these meetings.

The conversations sparked in this meeting can be illuminating for both the individual and the manager. Glossing over or simply not taking the time for these types of conversations is the root of many performance problems.

The value of the one-on-ones became very clear to Sean when he found himself struggling to re-align a particularly de-motivated employee. "Sam's Top 5 were so far off target that we revised all of them. It took a lot of careful questioning and listening on my part before he finally came around. I am so glad I did not attempt that with the rest of the team watching!"

Following these one-on-one meetings, each team member had a few days to consider and identify the type of support required to effectively achieve their Top 5.

All of Sean's team members brought their notes and documentation from this preparation to the planning meeting. Sean commented, "Everyone came prepared. The hardest work was already done. In hindsight, taking the time to complete the one-on-ones increased everyone's energy for the team planning meeting."

Phase Two: The Planning Meeting

Using the Wray Performance Window™ to frame their conversations, Sean gathered invaluable insights into the individuals on his team and learned how to best engage their hearts and minds to achieve outstanding results on the objectives that mattered most to the organization.

"People said it was the best meeting they've ever had. It was focused, productive and relevant to everyone. We definitely have momentum now!"

How to Create a Meaningful Top 5 List

1. First, **focus**. Narrow your overwhelming and unrealistic task list of 1735 items down to five key objectives – give or take one. While presenting in Toronto for one of Canada's Top 100 Companies in November, their CEO declared, "Identifying what you *won't* be doing is just as important as identifying what you *will* be doing." Taking time to thoughtfully narrow this list down is a vital first step.
2. Next, **prioritize**. Order your Top 5 objectives by their importance to you, your team, and your organization. If you could only accomplish one objective in this time period, what would it be?
3. Finally, **align**. Ensure alignment between the individual team member's objective and the objectives of the unit or organization. This crucial step is often missed, leading to underperformance and disappointment in performance reviews.

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Specifically, by the end of the 4-hour meeting, the team had...

- Established **coaching and development** plans
- Built a stronger sense of **team**

Read *No More Blank Stares: Part Two* in two weeks to learn how Sean created such a successful meeting. We'll explore how the Wray Performance Window™ can transform the level of engagement in your next planning meeting, too.

Alex Wray is the co-founder and principal of the Wray Group, an international management development and consulting firm located in Vancouver, Canada. Since 1993, they have supported clients, ranging from innovative niche players to members of the esteemed Fortune 20, to realize more of their potential. They achieve this through engaging people to the company priorities and objectives that matter most, and equipping each person to deliver results to the best of their abilities. Wray Group believes in focusing and optimizing the creative energy and spirit of people to achieve outstanding business results – transforming the “workplace” into a great place to work.

To learn more about our training programs, visit our website at www.wraygroup.com, call us at 604-990-1321, or email clientservices@wraygroup.com.

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