

Team Member Career Pathing Workshop


Facilitator Guide
2021

Agenda


Section	Time
Welcome & Session Kick-Off	20 mins.
Starting the Development Journey	55 mins.
Charting a Career Path	65 mins.
Tool Application Workshop	30 mins.
From Development Plan to Development Action	45 mins.
Workshop Wrap-Up	5 mins.
Total	220 mins. (3 hrs. 40 mins.)

Welcome & Session Kick-off

Introduction

Time	Slides	Notes and Instructions
3 mins	Show Slide #1 	Instructions: <ul style="list-style-type: none"> • Facilitator introductions • Basic housekeeping <ul style="list-style-type: none"> ○ Define what we mean by “workshop” <ul style="list-style-type: none"> ▪ More discussion and hands-on sections than lectures ▪ Expectations for increased participation ▪ Time to work on the tools we present within the session ○ This session will be about 3.5 hours long ○ Share the location of the restroom, break areas, exits, etc. for participants unfamiliar with this part of the building

Activity: The Case for Team Member Development

Time	Slides	Notes and Instructions
15 mins	Show Slide #2 	Note: <ul style="list-style-type: none"> • This activity is only intended for leader sessions (supervisors and above). If your session is not a leader session, hide slides #2 and 3 and lead a brief discussion around the below questions instead: <ul style="list-style-type: none"> ○ Who has taken part in career pathing or professional development conversations? ○ For those who have, what value did you find in those conversations? ○ What was most difficult about being a part of those conversations? Activity Preparation: <ul style="list-style-type: none"> • Setup 3 flipchart stations (with markers) relatively close to each other (participants will need to move from one to the other safely and quickly) • Title the flipcharts <ul style="list-style-type: none"> ○ Benefits to the Team Member ○ Benefits to Leaders and their Teams ○ Benefits to the Enterprise Instructions: <ul style="list-style-type: none"> • <i>We’re going to kick off this workshop with a discussion about the importance of developing your team members. But first we want you to think about how each of these subjects benefit from developing our professional and front-line workers: the Team Member being developed (if it</i>

Show Slide #9

DISCUSSION: "GREEN FLAGS"

What is a "technical skill"?
What is a "soft skill"?

Brainstorm the indicators and behaviors that signal to a Leader that a Team Member is ready for career pathing

SAN MANUEL
HUMAN RESOURCES

- *Due to the job-specific nature of technical skills, I'd like to stay away from them. I think we'll get more out of examining the behaviors around soft skills and emotional intelligence instead.*
 - *Just so we're all on the same page, who can define what we mean by "technical skill"?*
 - *Generally, it's the job-specific knowledge necessary to get the work done.*
 - *For an accountant it can be things like knowing how to efficiently use specialized bookkeeping software, having memorized common tax codes and IRS protocol, understanding what's needed to prepare things like payroll or budgets or taxes, and accurately doing the math calculations for them.*
 - *Also, let's take it as a given that team members need to be meeting expectations in their current role and not currently working on a PIP.*
- *We're going to brainstorm for these Green Flags in groups. That is, think of as many soft skills or emotional intelligence indicators as possible that your group believes would signal to a leader that a team member is building their leadership potential*
- *Again, due to the job specific nature of technical skills, I'd like to stay away from those for this activity*
- Split the participants into groups of 3-4; if the participants are sitting at tables in groups of 3 or 4, they can work in their table group
- Instruct groups to take 8 minutes to brainstorm and write down their brainstormed indicators on [page 4 of their participant's guide](#)
- At the end of 8 minutes have each group shout-out their list of indicators while the facilitator (or co-facilitator) takes them down at the front of the room. Add tally marks to indicate repeated items.
- After the facilitator has tallied up all the groups' responses and indicators, write the top 5 on a fresh flipchart paper. If there are a small number of responses (like 6 or 7), you can take the top 3 instead of top 5.

Show Slide #10

DEBRIEF: "GREEN FLAGS"

1. What item from our top 5 triggered a personal "ah-ha" moment for you?
2. Is there a behavior that didn't make our top 5 that you want to point out to the group?
3. Is this list an accurate representation of what it takes to be successful in the enterprise?
4. Does our list align with the tribe's values?

SAN MANUEL
HUMAN RESOURCES

Debrief / Discussion:

- Is there anything on our top 5 or another group's list that you didn't originally consider and triggered a personal "ah-ha" moment for you?
- Is there a behavior that didn't make our top 5 that you're especially passionate about and want to share?
- Who feels this list is an accurate representation of what it takes to be successful in the enterprise?
- What alignment is there between our list of top 5 behaviors and the tribe's values?
 - Culture?
 - Sovereignty?

		<ul style="list-style-type: none"> ○ Unity? ○ Education? ○ Spirituality? ● Note: please save the flipchart with the tallied indicators and give them to Heather J. or Daniel C. in HR
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Uncovering Who to Develop

Time	Slides	Notes and Instructions
5 mins	<p>Show Slide #11</p> <p>• Look for "green flag" behavior from your Team Members</p> <p>• Be receptive to Team Members' desire for advancement</p> <p>• Reach out to high performing Team Members who have not formally reached out about advancement</p> <p>SAN MANUEL HELPMAN RESOURCES</p>	<p>Instructions:</p> <ul style="list-style-type: none"> ● <i>Now that we have an idea of the traits and behaviors to look for from team members ready to have their development taken to the next level, it's important to not ignore those behaviors. Think of them as signs that you have a high potential team member that we want to retain.</i> ● <i>In an ideal situation, team members will take ownership of their professional development and reach out to their leader for initial conversations around what's out there, create an IDP, or for some general guidance on what you or the enterprise look for in leaders. What kind of consequences could there be for not acting on your team member's desire to be developed?</i> ● <i>If a team member appears to have the prerequisites for the next step in their career but haven't reached out to you, it might mean they are uninterested but assume that they need a little push and recognition. While not ideal because we want our team members to take control of their own development, it's still worth reaching out to them so we don't miss an opportunity to develop a team member with high potential.</i> ● <i>Sometimes it can be difficult to identify team members that are ready for development or can be considered high potential, so I'm going to share a tool that can be used to help make these sort of decisions.</i>

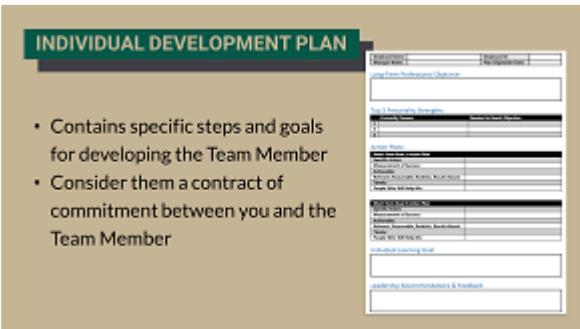
Activity: Using the 9-Box Tool

Time	Slides	Notes and Instructions									
20 mins	<p>Show Slide #12</p> <p>Where do your Team Members fit on the 9-box?</p> <p>POTENTIAL</p> <p>PERFORMANCE</p> <p>9 BOX GRID</p> <table border="1"> <tr> <td>EVOLVING LEADERS</td> <td>HIGH POTENTIAL</td> <td>STARS</td> </tr> <tr> <td>SP OR OUT DILEMMA</td> <td>CORE PLAYERS</td> <td>HIGH PERFORMERS</td> </tr> <tr> <td>SAB RIBBS</td> <td>SP OR OUT CHALLENGERS</td> <td>WORKHORSES</td> </tr> </table> <p>SAN MANUEL HELPMAN RESOURCES</p>	EVOLVING LEADERS	HIGH POTENTIAL	STARS	SP OR OUT DILEMMA	CORE PLAYERS	HIGH PERFORMERS	SAB RIBBS	SP OR OUT CHALLENGERS	WORKHORSES	<p>Activity Preparation:</p> <ul style="list-style-type: none"> ● The worksheet for this activity is in the Participant Guide on page 6 ● One 9-Box Team Member Profiles handout per pair <p>Instructions:</p> <ul style="list-style-type: none"> ● <i>The tool is called the 9-Box, and it places team members on a 3-by-3 grid based on a leader's assessment of their technical skills and perception of their potential success in a leadership role.</i>
EVOLVING LEADERS	HIGH POTENTIAL	STARS									
SP OR OUT DILEMMA	CORE PLAYERS	HIGH PERFORMERS									
SAB RIBBS	SP OR OUT CHALLENGERS	WORKHORSES									

Reflect on Your Path


Time	Slides	Notes and Instructions
10 mins	<p style="text-align: center;">Stay on Slide #15</p> 	<p>Activity Preparation:</p> <ul style="list-style-type: none"> The Ladder and Lattice worksheets for this activity are in the Participant Guide on page 8 and page 9, respectively <p>Instructions:</p> <ul style="list-style-type: none"> While the Ladder and Lattice diagrams are fresh in our minds, we're going to practice using them I want you to think of your own career path trajectory so far: is it more directly upward like a Ladder or have you changed positions and teams vertically like a Lattice? Use whichever diagram makes most sense for your path, and fill out your career path so far, putting your roles in the proper boxes. To be most complete, you can add career steps from before you were at San Manuel. After you have all your previous roles and position on your diagram, put the next step or two you would like to be on your career path. <p>Debrief / Discussion:</p> <ul style="list-style-type: none"> What difficulties did you have making your diagram? Any questions I can answer on building a Ladder or Lattice diagram?

Introducing Individual Development Plans (IDPs)

Time	Slides	Notes and Instructions
2 mins	<p style="text-align: center;">Show Slide #16</p>  <ul style="list-style-type: none"> Contains specific steps and goals for developing the Team Member Consider them a contract of commitment between you and the Team Member 	<p>Instructions:</p> <ul style="list-style-type: none"> IDPs bring these missing pieces of goals and direction. Like I mentioned a bit earlier, the IDP is the action plan that outlines the specific steps to move the team member to the desired position or to achieve the desired skills. Before we continue, can someone remind me of the difference between an IDP and a PIP? <ul style="list-style-type: none"> IDPs are used to prepare a team member for the next step in their career path PIPs are used to remedy any deficiencies so a team member can meet expectations in their current role Share the IDP template on a slide or open the Word document and step through each section for the participants. Emphasize how much accountability and structure the IDP would add to a development plan. Since IDPs are so specific, they are great for holding leaders and team members accountable to completing the plan. There should be very little ambiguity of expectations and when they need to be completed.



Tool Application Workshop

Tool Application Workshop


Time	Slides	Notes and Instructions
30 mins	<p data-bbox="435 275 610 300">Show Slide #24</p> 	<p data-bbox="841 275 987 300">Instructions:</p> <ul data-bbox="878 317 1555 1948" style="list-style-type: none"> • Recap the tools introduced in the session: <ul style="list-style-type: none"> ○ IDP ○ Ladder ○ Lattice ○ Difficult conversations framework • The goal of this part of the workshop is to practice using these tools they can assist their team members when they begin having development conversations • Directions for the workshop portion of the session: <ul style="list-style-type: none"> ○ Each participant is expected to begin a draft of a development plan for one of their team members. <ul style="list-style-type: none"> ▪ This should include a Ladder <u>or</u> Lattice diagram for their career path to their desired role, and an IDP ▪ If they have a team member that they're casually working on a development plan or career path for, they can use that team member ▪ If they don't have a team member with a development plan, they can choose a high potential team member they plan to approach about development and share this as a suggested plan ○ Also think about the difficult conversations you may need to have with the team member; think not only about the generic types of situations that might come up (like the earlier scenarios), but also considerations related to the team member's personality <ul style="list-style-type: none"> ▪ If your team member is on a plan, then plan out your conversation around your suggested Ladder/Lattice and IDP from the last section ▪ If your team member isn't currently on a development plan, then plan out your initial conversation with them ○ The IDP, Ladder, and Lattice templates are on pages 14–18 of the Participant Guide ○ Use the facilitator and guest(s) as resources to ask questions and better understand the tools • If necessary, participants can take just a few minutes for a restroom break • <i>Please do not check emails or make phone calls during the workshop portion of the session; our facilitators, guests, and session supporters have blocked this time off to help you, please return the courtesy by focusing on learning about the development plan tools</i>

From Development Plan to Development Action


Activity: Your Action Plan

Time	Slides	Notes and Instructions
25 mins	<p>Show Slide #25</p> 	<p>Activity Preparation:</p> <ul style="list-style-type: none"> The worksheet for this activity is in the Participant Guide on page 19 <p>Instructions:</p> <ul style="list-style-type: none"> With the team member whose career path you just started in mind, use the worksheet on page 19 of your Participant Guide to plan what you expect the next 3 steps for their professional development to be. Be sure to include details around the tools and resources you'll attempt to utilize and conversations you'll likely have with each step. The second person you'll need to make an action plan for is yourself. Creating an IDP can be part of your action plan, but the intention is to zoom out a little and think outside the IDP: think of conversations, planning training, research, etc. After 5 minutes, pair up with another participant. Take 10 mins to share your plans with each other and provide feedback (suggest tools, check that the path makes sense, etc.). After 10 mins, give the participants 3-5 mins to make modifications to their plan based on their partner's feedback.
	<p>Show Slide #26</p> 	<p>Debrief / Discussion:</p> <ul style="list-style-type: none"> What was something you found difficult about putting the plan together for your team member? How will you approach your team member about their development? What was a piece of helpful feedback you received from your partner?

Discussion: The Important of Feedback and Check-ins

Time	Slides	Notes and Instructions
5 mins	<p style="text-align: center;">Show Slide #27</p> 	<p>Instructions:</p> <ul style="list-style-type: none"> • <i>We've lightly touched on it here and there throughout the session so far, but developing yourself and your team members is not about checking boxes or setting goals and leaving it at that.</i> • <i>What are some of the reasons we need to rely on feedback and check-ins in professional development?</i> • Below are some sample responses the facilitator can use in case of low participation: <ul style="list-style-type: none"> ○ Just like most of our processes and goals, it's important to check our progress and course correct as needed ○ Many times, the underlying reason for development (refer to the ones we talked about earlier) connect back to a MBO or some sort of business objective ○ Need to hold ourselves and our team members accountable to completing their development plan • <i>What are a couple ways we can do this? There's really only one best answer: have regularly scheduled meeting with our team members specifically about their progress on their development plan. Give feedback, ask for feedback, and use good judgement to course correct as needed.</i>

Development Resources Overview & Brainstorm

Time	Slides	Notes and Instructions
15 mins	<p style="text-align: center;">Show Slide #28</p> 	<p>Activity Preparation:</p> <ul style="list-style-type: none"> • A prepared List of Leader Resources is available on page 20 of the Participant Guide for the first part of this activity • A worksheet is available on page 20 of the Participant Guide for participants to take notes during the second part of this activity • One flipchart page and marker for the facilitator to use during the second part of this activity <p>Instructions:</p> <ul style="list-style-type: none"> • <i>I think that if you took the time to make action plans for one of your team members, you'll realize the benefits to thinking through their professional development and making a plan when it comes time to kick-off their development plan. Knowing how to put the ideas and tools we shared with you today into action will be important for developing yourself and others in the</i>