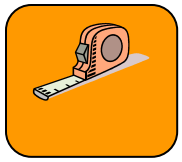
SASKATCHEWAN CONSTRUCTION ASSOCIATION

HUMAN RESOURCE TOOLKIT

A GUIDE TO LEADERSHIP IN THE CONSTRUCTION INDUSTRY



HUMAN RESOURCE TOOL KIT

Module #1:

Executive Summary

Workforce Planning

SASKATCHEWAN CONSTRUCTION ASSOCIATION

Table of Contents

1. Workforce Planning

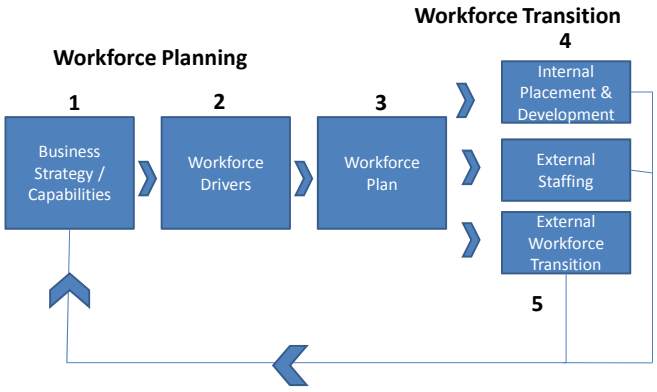
GOAL OF THIS DOCUMENT: TO ASSIST YOU IN ANTICIPATING AND PLANNING TO MEET YOUR WORKFORCE NEEDS!

People are the engines for growth, productivity and profitability in your company. It is very important that you, as a business owner, have an understanding of the composition of your current workforce AND an understanding of your near and long term workforce needs. This is what a workforce plan is all about.

The process of workforce planning includes clarifying your businesses strategy. Once your strategy is clear, you can identify the workforce drivers. These are factors resulting from your strategy that will drive a change in the composition of your workforce and allow you to identify the businesses required capabilities.

Staffing levels encompass the strategies and actions that result from an analysis of your workforce plan. It's your answer to the question "given what I know about my current workforce and my anticipated workforce needs, what do I need to do?" Your workforce plan may identify a surplus or a deficit position (what I have today, versus movement I anticipate in my workforce, relative to what I anticipate I need in the future). Therefore, all staffing strategies and actions should concentrate on reducing your surplus or closing the gap on your deficit.

[1]



Roadmap to Strategic HR: pg 122

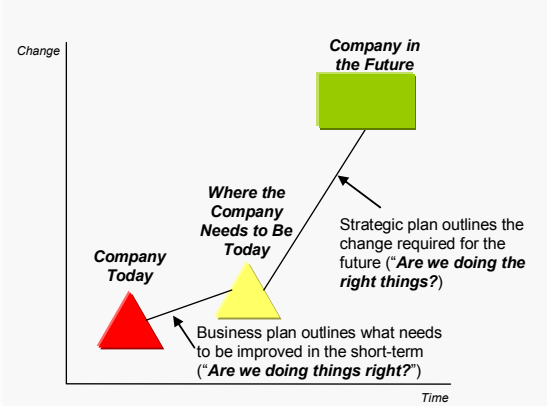
[1] Roadmap to Strategic HR by Ralph Christensen, pg.123

1. Business Strategy / Capabilities

All your people practices must be grounded in the context of your business strategy.

A good strategic plan outlines the choices and tradeoffs a company has made to create value for its owners and remain relevant in the future

Strategic Planning Vs. Business Planning



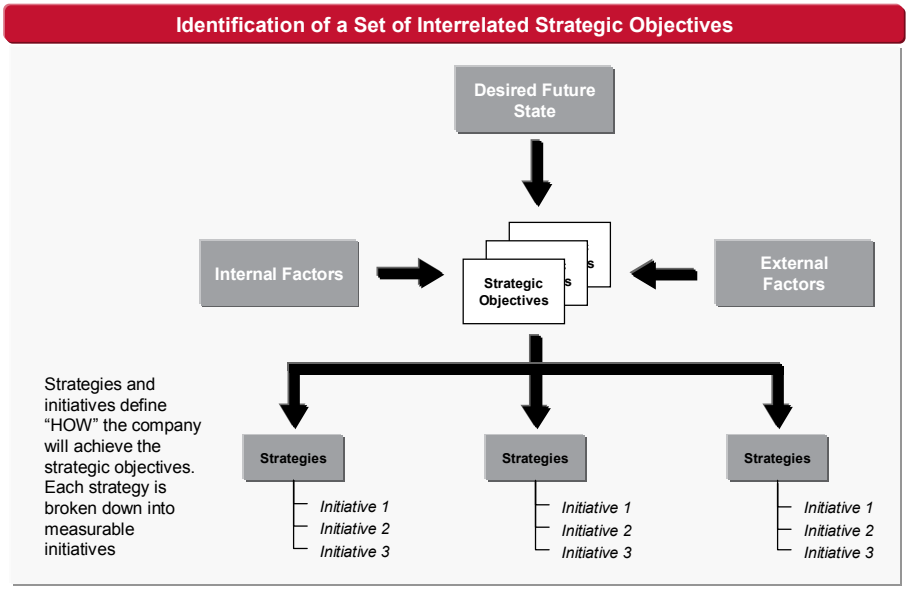
- The purpose of a strategic plan is to outline the decisions (choices/tradeoffs) and actions that a company is going to undertake to create value for its owners and to remain relevant in the future
- The strategic plan should challenge "***Are we doing the right things***?"
- This is difficult as there is uncertainty of what the future holds, but If the future was certain there wouldn't be a need for strategic plans, as the emphasis would be on operational efficiency
- This is typically why a company's business plan and budget is oriented around optimization and marginal improvement because the focus is on the short-term and challenges "***Are we doing things right***?"

This section provides a very high level overview of some key strategic planning concepts and questions for you to consider for your business.

Here are some basic strategy development and implementation questions for you to consider:

▪ What has occurred either externally or internally that we should focus on? (External factors can include: economic, demographic, markets (clients), competitors)
▪ What external or internal factors are the most important? (Internal factors can include: ability to sell work, ability to deliver quality work profitably, people talent, leadership, alignment around vision for your company, financial strength, brand / image)
▪ Based on the situation we face is our desired future state for our Company still valid? ▪ What aspects of our current strategy remain valid?
• What should our strategic objectives for this next period of time (e.g., 3 years) be?
▪ How will we achieve our strategic objectives? (e.g., what initiatives must we plan for and execute)
▪ What will we do this year? Next year? What will we not do?
▪ Who is accountable for results?
▪ How well are we managing the change?
▪ How are we going to monitor our progress towards achieving our objectives and desired future state? How will we know if our strategy should change?

Thinking these questions through and discussing them with your key stakeholders leads you to develop an integrated set of strategic objectives, strategies and initiatives…

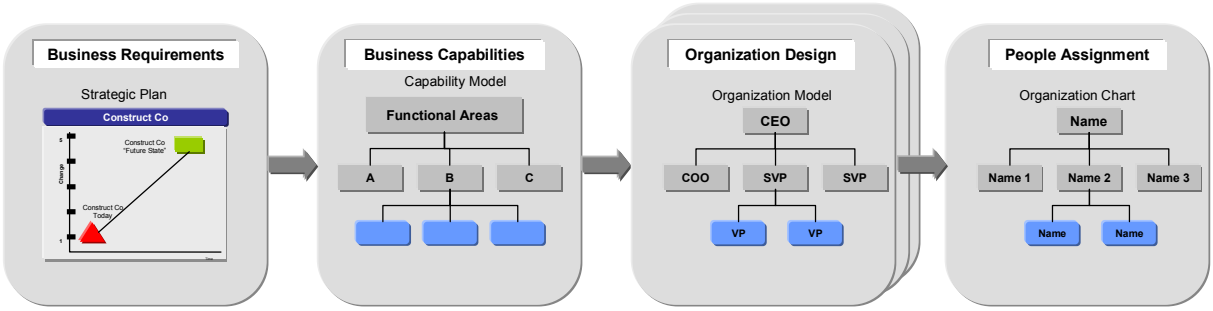


Note: The strategic objectives are interdependent based on the way they are constructed and if the company fails to fully execute on one of them, it may impact the ability to successfully execute the other objectives

Once your leadership team has determined appropriate strategic objectives with associated strategies and initiatives you will be armed with the proper context to consider your organizational and workforce requirements to achieve your strategic objectives.

Industry best practice dictates that you ensure that your organization is aligned with business strategy…

Our high level approach to organization re-alignment:



The strategic plan indicates where the organization intends to go and therefore, defines the requirements of what needs to be supported from a structure and organizational design perspective

The business strategy should provide guidance on what capabilities are required for the business to succeed and indicate where changes are expected

Organizational options are created and evaluated to determine what is the most feasible structure to meet all of the capability requirements to support the strategy and other design criteria

An assessment of the individual talent available relative to the skill sets required is conducted, with assignments made considering career plans, succession and retention factors

2. Workforce Drivers

With clarification of your business strategy you have a starting point for your workforce plan. You can now identify your workforce drivers. Workforce drivers are implications from your strategy (both internal and external) that will 'drive' a change in your workforce. Outlined below are a series of questions that might assist you in understanding the factors that will drive a change in your workforce.[2] [3]:

Workforce Considerations	Assumption / Conclusion	Workforce Impact Year 1…	Workforce Impact Year 2…
What are your Company's core capabilities? Will these be changing? If so, what are the implications for the type of worker you are going to need?			
What is the anticipated demand for your products / services? Will you need to deliver more projects? Fewer projects? Different types of projects?			
What technology is available to support the work ('tools of the trade' as well as business information)? Will this be changing? If so, how will the change affect the type and amount of workers you will need?			
What size is the labour marketplace, or the people available to your			

[2] RoadMap To Strategic HR, pg 123
[3] Content in this section adapted from Roadmap to Strategic HR by Ralph Christensen

Workforce Considerations	Assumption / Conclusion	Workforce Impact Year 1…	Workforce Impact Year 2…
Company? If you are facing a scarcity of skills, then how will those skill sets will be acquired, developed or retained?			
Do you anticipate broad skill set changes required within your current workforce?			
What work or organization design changes do you anticipate? Will the changes influence the make-up of jobs? What impact will this have on the number of people required and the skills demanded from your people?			
What are your productivity improvement goals? Will these improvement goals reduce the number of people required or demand new skills from your people?			
Are your financial budgets constraining, additions or changes you can afford?			
Other???			

Summarize your key learning from thinking through implications of our workforce drivers:

3. Workforce Plan

Current Workforce

A foundational step in planning for your future workforce requirements is understanding the number, characteristics and performance of your current workforce. Profiles International has identified the following data set as a minimum you should strive to compile and have available to work with in developing your Company's work force plan.[4]

Current Workforce Composition

Name	Job Title	Length of Service	Current Age	Mission Critical Position (Y/N)	Department (Office Location)	Performance (Top, Good, NI, Poor)	Additional Comments
A	Project Manager	5 years	32 yrs	Y	Saskatoon	Needs Improvement	Intends to stay
B	Project Manager	2 years	40 yrs	N	Regina	TOP	Management Potential
C	Project Manager	12 years	49 yrs	N	Yorkton	Good	May move from town

1. Assemble this information for each role within your organization. Role could mean Management, Supervisory, Journeyperson, Apprentice, Laborer etc.

2. Some companies have a human resource information system that will contain much of this (and more) information about your current workforce. For those that do not, you can build this table in a spreadsheet you can sort by age, performance, location, criticality, length of service, or job title. A spreadsheet (like MicroSoft Excel) enables you to analyze the information in a way that will support your planning for the future.

[4] Strategic Workforce Planning For Organization Effectiveness; Profiles International White Paper August 2008

3. For each individual give a very general rating as to each employee's job performance. (Top Performer, Good on the Job, Needs Improvement (NI) or Very Marginal (Poor)) Careful consideration and discussion is needed. This is NOT simply a list to identify 'very marginal performance' and determine that termination is the only option. Marginal performance is often related to job fit or compatibility with a supervisor or fellow employee. Seek out opportunities to improve performance! However, it is important to be honest with yourself about the performance of your people. Ideally your people are all high performers, yet seldom that is the case!

Anticipated Workforce Requirements

You now understand the composition of your current workforce. The next challenge is to anticipate the workforce requirements to support your strategic objectives. Below is an example of a Workforce Plan Worksheet provided by Christensen[5]. In order to complete this worksheet a thorough analysis of future workforce needs by position must be undertaken. You can see that this spreadsheet provides a head count by position type for each quarter in the planning year. It is important to keep it as simple as possible given your company's needs.

ILLUSTRATIVE ONLY-

Position Type / Family Level	Year Begin	Attri-tion	Net	YR 1 End	Req'd Hires	Budget Y/N	Q1 End	Q2 End	Q3 End	Q4 End
Engineer	100	9	91	110	19	Y	101	107	110	110
Civil	50	4	46	50	4		46	49	50	50
Electrical	35	3	32	40	8		37	39	40	40
Computer	15	2	13	20	7		17	19	20	20
Position B	Etc	Etc	Etc	Etc	Etc	Etc	Etc	Etc	Etc	Etc

Key questions that would guide your completion of this worksheet may include:

- Position Type / Family Level – Use your job titles / role descriptions to guide how you would set-up this left hand column

[5] Figure 9-3, page 126 RoadMap to Strategic HR, Ralph Christensen

- Year Begin – this column is used to document the actual number you have at the beginning of the year (for instance, today as you head into Year 1 of your strategic plan period). The top number (Engineers) is the sum of the numbers below it (Civil, Electrical, Computer).
- Attrition – this column is used to document the number you anticipate leaving the Company (because they do voluntarily or because you ask them to)
- Net – is the difference between YEAR BEGIN and ATTRITION
- Year 1 End – this represents the numbers you anticipate needing based upon your strategic plan and the implications from your workforce driver analysis. It is a target that will guide your hiring plan.
- Required Hires – this number is the difference between YEAR 1 END and NET columns. We will need to hire this number by the end of the fiscal year, in this role to ensure we can successfully implement our strategy and achieve our goals.
- Q1 – Q4 End guides how many we are targeting to have by that point in the fiscal year. This will be influenced by customer demand, number and timing of projects, availability of funds to finance hiring etc (many of the implications you would have identified as you considered workforce drivers).

If you find this format useful you can extend the table for an additional year (i.e., Year 2 of strategic plan). However, recognize that this is as much art as science and the further out you extend your thinking the more 'approximate' it becomes. Longer range thinking can be very powerful leading to identification of strategies you need to begin today to support your business success in the future (e.g., internal development emphasized over external hiring). Quarterly updates to this spreadsheet would be advisable to ensure it remains valid and a useful management information tool.

4. Workforce Transition - Internal Placement, Staff Development and External Staffing

Once a workforce plan identifying surplus and / or deficit resources is complete, you can move to the next step, creating a staffing plan. A staffing plan includes strategies and actions needed to achieve the projected workforce levels required at the end of the planning period. This framework illustrates that you can:

- Promote from within
- Develop internal resources
- Hire externally as required.

Here are a few examples of 'ILLUSTRATIVE' staffing strategies with associated actions.

Strategy 1. Source journeyperson from regions with higher unemployment rates anticipated in next 2 years

ACTIONS:

1a. Research regions with excess of trades

1b. Develop relationship with placement firm in these regions; establish fee for service arrangement for recruitment and placement of journey

1c. Research and gain support for a competitive relocation package for journeymen

1d. Develop orientation and on-boarding process to ensure journeyperson integrated into ABC company effectively

1e. Engage realtor to cater to the family needs of relocating journeyperson

Strategy 2. Keep apprenticeship class years full through regional recruitment efforts

ACTIONS:

2a. Continue job fair and 'trades' promotion through SCA

2b. Sponsor scholarship for 1st year apprentice at SIAST

2c. Encourage and support senior journeyperson, foremen and project managers to speak to apprenticeship classes

2d. Create 2 summer hire positions to engage pre-apprenticeship high school grads to learn about our Company

Strategy 3. Offer an alternative career path for a few journeyperson to estimating

ACTIONS:

3a. As part of annual goal setting & performance management discussions solicit interest

3b. Provide mentorship for up to 2 journeyperson who express interest

3c. Assess fit and interest after 6 months of mentorship

3d. Develop transition plan for 1 candidate by end of 2008

5. External Workforce Transition

When you identify an employee with skills that are no longer needed you will be challenged to develop a transition plan. This is often an emotion laden realization and process. There are several options that can be considered, each with different pros and cons. Here are the types of questions that should be explored:

- Can we deploy this person to another job within our Company where they can be successful? Is there a job we can offer that may be a better fit for their passions and talents?
- Can we provide skill training with on-the-job coaching to support this individual in order for him/her to be successful? At what cost and what time frame are we willing to do so? How will we measure progress?
- If we must act and terminate this person, what transition support package will we provide: job search support, financial severance pay, other?

Transition planning is always sensitive and requires consideration of what is best for your business while at the same time determining how these actions can be implemented in a way that minimizes the disruption to the individual employee. (Of course you must understand the legal implications of each decision as well! Consult your lawyer and/or HR department for advice when anticipating these types of decisions on the horizon.)

There are a variety of other deployment and staffing strategies that may be considered in the context of workforce planning. For instance:

- Job sharing
- Reduced work weeks
- Introducing new shifts
- Part – year work to coincide with peak demand from your customers
- Overtime hours
- Flex time
- Unpaid leave of absences
- Paid leave while serving your local community in charitable capacity
- Moving from full time to part-time

Conclusion

Organizations using a comprehensive human resource workforce planning strategy that is tied to the corporate strategy will realize benefits that can be both direct and indirect such as cost reductions, alignment to organization's future goals and strategies and provides more flexibility in planning.

D.I.Y.

1. Do you have an understanding of the Companies vision and strategy for the next 3 years? Are there clearly articulated strategic priorities and objectives for the Company?

2. Based on a good understanding of the Companies Strategic direction and priorities what are the workforce drivers or implications (both internally and externally) that will drive a change in your workforce?

3. Do you understand the composition of your current workforce? If yes, what key workforce challenges do you see ahead of you given your strategic direction and priorities?

Reflections On: Workforce Planning & Staffing…

4. Do you understand the composition of your current workforce? If yes, what key workforce challenges do you see ahead of you given your strategic intentions for change?

5. To clarify your workforce composition, anticipated requirements and possible challenges please complete the analysis of your work-force as outlined in this section.

6. What staffing strategies emerge as most important from your analysis?

Reflections On: Workforce Planning & Staffing…

7. For each priority staffing strategy identify the key actions that must be completed (what, by whom, by when) to achieve the strategy. List these below:

Strategy:

Actions:_____

_____

_____

_____

_____

Strategy:

Actions:_____

_____

_____

_____

_____

Strategy:

Actions:_____

_____

_____

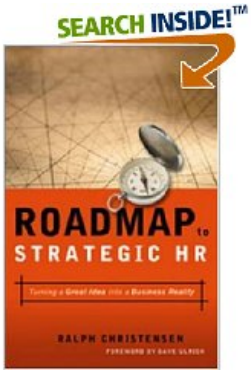
_____

_____

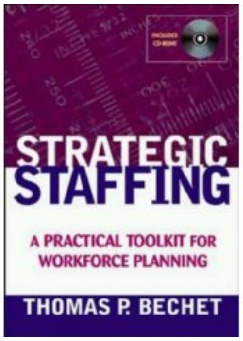
Reflections On: Workforce Planning & Staffing…

8. Do you know who your high performers are? Think of at least one way you can improve your workforce so that you have more high performers. (e.g., job-fit, training, team effectiveness etc.)

Resources



This book by Ralph Christensen has provided the overall strategic framework for this HR Tool-Kit. We like how he has organized the work of human resources. If you are interested in purchasing a copy of his book you can do so at: http://www.amazon.com/Roadmap-Strategic-Hr-Turning-Business/dp/0814408672 .



Thomas P. Bechet's book was a key resource for this section on workforce planning & staffing. It can be purchased on-line from Amazon.com. Bechet Consulting's web-site is:
Strategic Workforce Planning: Forecasting Human Capital Needs to Execute Business Strategy

Published: August 2006
Document Type: Report, 71 pages
Source: The Conference Board New York
Author(s): Mary B. Young

The work of additional authors is also included in each section of this HR Tool-Kit. Our team has attempted to review up to date, appropriate methods and approaches for summary and inclusion for your use. Of course in doing so we are diligent in ensuring proper reference citations and providing appropriate credit to the authors.

This report is the culmination of presentations by workforce planning thought leaders and best practice organizations, a literature review, and company interviews of 20 companies, from which nine were chosen for detailed case studies.

Document Highlights

Once limited to calculating the gap between talent supply and demand, workforce planning is now a far more sophisticated process, akin to risk management or supply chain management. It enables an organization to adjust and respond quickly to immediate and future changes to its business requirements.

In response to this emerging business need, The Conference Board convened the yearlong Strategic Workforce Planning Research Working Group in March 2005. This report is the culmination of presentations by thought leaders and best practice organizations, a literature review, and company interviews of 20 companies, from which nine were chosen for detailed case studies. Using these sources, the report seeks to answer:

What is Strategic Workforce Planning?

What have organizations learned from their experience about its implementation?

How should Strategic Workforce Planning be adapted to fit specific organizational contexts?

What impact has Strategic Workforce Planning had? What challenges limit its impact?

http://www.conferenceboard.ca/documents.asp?rnext=1749

A Google search for the following key words will also lead you to dozens of web-sites to explore with relevant information.

- Key words:
  - workforce planning;
  - strategic staffing;
  - workforce plan;
- Some free internet resources as of August 2008 include:
  - http://www.managementhelp.org/staffing/staffing.htm
  - http://www.hr.state.tx.us/workforce/guide.html

A short white paper from Profiles International is available free of charge by contacting:
Mr. Greg Fieger, Conroy Ross Partners
Regina, Saskatchewan
306-949-8875
gfieger@conroyross.com

For More Information

This material has been designed to provide you with practical tools and examples to assist you in the effective management of your most important asset, your people. It has been developed in accordance with best practices, but tailored to meet the unique needs and requirements of the Saskatchewan Construction Association. The four Human Resource Modules are:

Module #1 *Workforce Planning*
Module #2 *Recruitment & Selection*
Module #3 *Workforce Engagement & Performance*
Module #4 *A Prescription for Leading in Changing Times*

If you require additional information, consultation, coaching and/or a workshop regarding any element contained within the modules, we request that you contact either the Saskatchewan Construction Association or Conroy Ross Partners. Specific contact information for these groups is:

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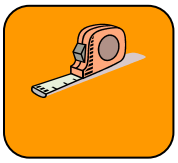
April 28, 2009



HUMAN RESOURCE TOOL KIT

Module #2:

Recruitment & Selection

SASKATCHEWAN CONSTRUCTION ASSOCIATION

Table of Contents

2. Recruitment & Selection

KEY CONCEPTS

Hiring Great People Who Fit Your Needs and Will Perform![1]

Lou Adler's approach is captured in the acronym **P.O.W.E.R.** Each letter stands for a principle that he advocates serves as an underpinning to hiring right!

Performance Profiles…if you want to hire superior people, first define superior performance
Objective Evaluations…past performance is a best predictor of future performance
Wide-Ranging Sourcing…sourcing is marketing, not advertising
Emotional Control…measure personality and performance, but measure performance first
Recruiting Right…recruiting is career counseling, not selling. Candidates then sell you.

Performance Profiles

Performance Profiles are the most important of all the principles as they impact all the others. This principle is a call for companies to move away from job descriptions that are lists of skills, duties, responsibilities and required experiences. According to Adler, practices such as these, are not getting at what job performance is required in order for business success. Instead, he challenges us to define superior performance for the job, and in doing so will ensure prospective candidates are being measured against their proven ability (from past performance) to deliver the results needed in the Company. Additionally, he advocates that a description of superior performance required on the job will be attractive to 'superior performers' as they will see themselves being challenged by the role.

[1] Content in this section largely adapted from Hire With Your Head: Using POWER Hiring to Build Great Companies 2nd edition; by Lou Adler

Objective Evaluation

Once performance expectations are defined, the interviewer must use an objective, performance-based approach to determine if the candidate is both competent and motivated to do the work.[2] Adler suggests the assessment should include one-on-one interviews, reference checks, testing, panel interviews and even take home tests / case studies. While he advocates a comprehensive, objective assessment approach, Adler also believes it can be efficiently performed in a fast-paced business context.

Wide-Ranging Sourcing

Adler is adamant that the quality of the hiring decision depends next on the quality of the sourcing program.[3] You need to be sure that you are soliciting the interest of top-performers not just the lower third of the prospects available. If you are able to weight the list of prospective candidates to the top 10% or 15% of those available, you are sure to land one or more even if you or your team are not excellent interviewers. It is important to move beyond 'need driven' advertising and be more proactive, taking a marketing approach to finding prospective candidates. If we have done a good job of strategic staffing (see Workforce Planning section) we will have good information to guide proactive sourcing efforts. Focus on marketing 'careers', not just advertising 'jobs'.

Emotional Control

Adler's research has led him to the conclusion that a lack of emotional control is the root of most hiring mistakes. Hiring mistakes are often a result of emotional reactions and gut feelings.[4] First impressions and friendliness are often more influential on hiring managers than actual competence as a basis for inviting prospects back for a second interview. This emotional link must be broken. If we see a candidate in a positive light, we tend to lower our standards. If we

[2] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 17
[3] Adler, Page 18
[4] Adler, Page 18

see a candidate in a negative light, we tend to tighten or raise our standards. Neither of these helps land the 'right candidate' based upon their ability to perform to the standards that we have defined our performance profile.

Recruiting Right

Recruiting is the process of persuading a candidate to take a job and then closing and finalizing the details.[5] At this stage we are encouraged to not 'oversell' the opportunity – Adler believes that overselling 'cheapens' the job and high performing prospects may walk away. By creating a compelling career opportunity, the candidate is more likely to sell you, rather than the other way around. Adler reinforces that recruiting is an essential aspect of a well-developed hiring program. It's the final piece toward building a great team.

Let's take a more complete look at each of these concepts espoused by Adler.

[5] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 19

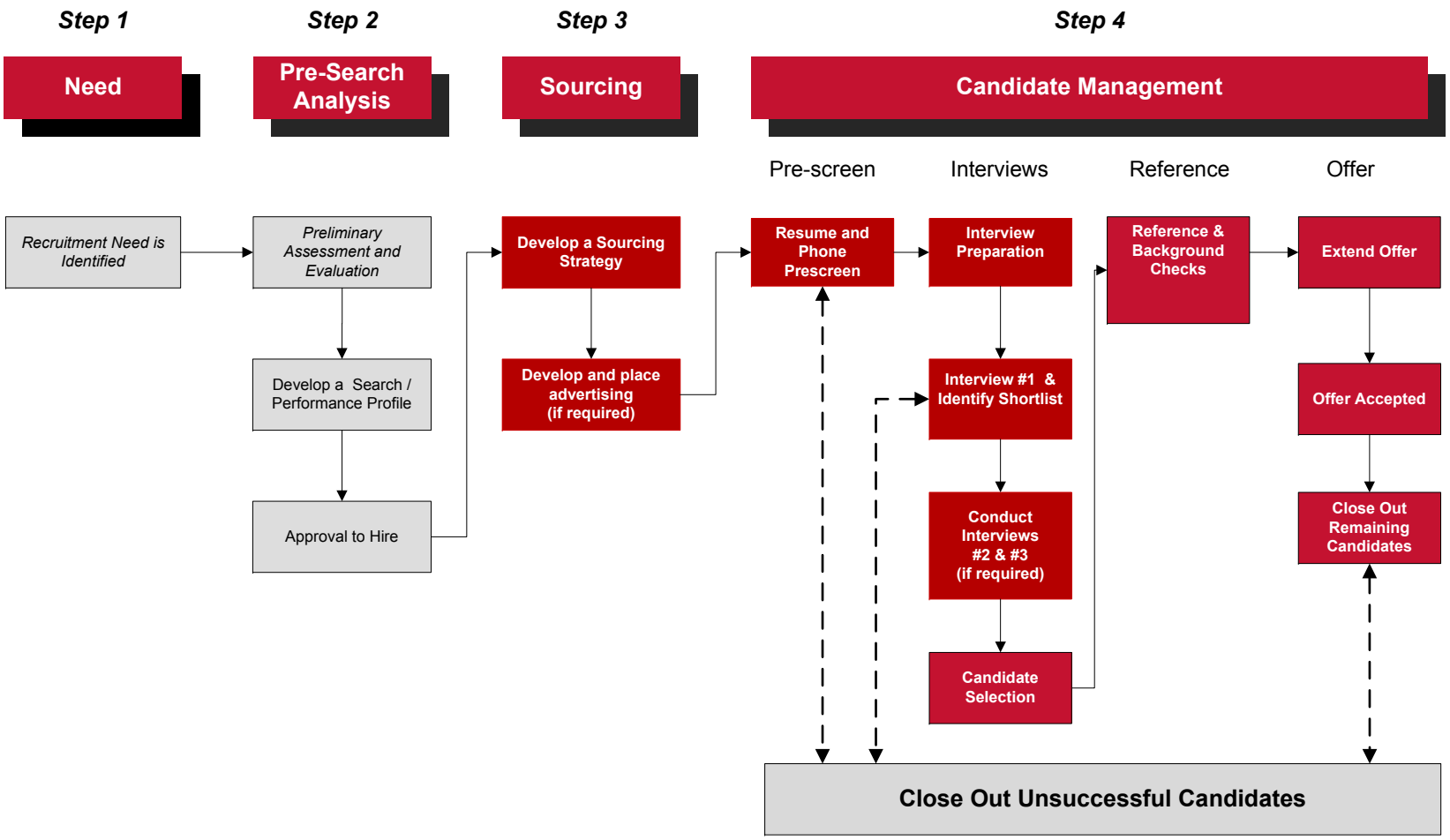
Hiring Process

Success of organizations is largely contingent on the strength of the people. Understanding all steps in the hiring and the reasoning behind them will help to equip you to hire the right people for a productive, strong workplace. As the hiring manager, you will want to be aware of the following steps which have been identified as key steps to hiring success.

Hiring Steps – Overview

1. Recruitment Need Identified
2. Pre-search Analysis
    a. Preliminary Assessment and Evaluation
    b. Develop Performance Profile
    c. Final Approval to Hire
3. Sourcing
4. Candidate Management
    a. Pre-Screening
    b. Interviewing
    c. Reference and Background Checks
    d. Extending an Offer
    e. Closing Out Unsuccessful Candidates

A road map to a successful hire



1. Recruitment Need Identified

Workforce planning is critical because it helps the organization understand the trends in its workplace and allows for the organization to plan for the future. Simply reacting to a hiring need without analyzing all the options can be costly. Vacancies provide an important opportunity to determine if a position is required within the organization.

To determine if the position is required, hiring managers should consider the following before:

- Plan ahead – make sure the time is right and that filling a vacancy or hiring for a new role matches the organization's future needs. For example, it might be busy season today but there will be a slow down in the market in a few months.

- Assess internal supply – are there some creative ways to manage the work demand with the existing internal resources?:
  Has your organization thought about:
  - Internal promotions and/or potential interest
  - Are the right people in the right roles?
  - Temporary project work
  - Redefining current roles to support existing and future needs
  - Outsourcing
  - Offering overtime

Taking the time to assess the need will help employers to plan effectively in alignment with the overall corporate strategy and objectives.

2. Pre-Search Analysis

Once a need has been identified, it is vital that the employer take the time to analyze the role and define the performance requirements needed for future success. In today's changing economy and workforce, it is important to remember that roles and responsibilities are also shifting. Taking your time at the outset in determining critical success factors for the role for the current and future state of the position will ensure success in your hire.

Preliminary Assessment and Evaluation

Below are some key questions that should be considered in defining / revising the position:

How will the organizations strategic priorities and goals impact the position?
Will the role, accountabilities and responsibilities change? Have they changed?
Has the position status changed (from full time to part time or temporary)?
Will the reporting structure change?
What is the budget required for this position?
How much money is available?

Once you have answered the above questions and evaluated the need of what you are hiring for, you will need to obtain authorization from the appropriate people to move forward and develop the Performance Profile.

Develop Performance Profile

This starts by defining what top talent looks like! Your Performance Profile should reflect top performance. If it does, this is a great start to creating a talent driven culture. If you haven't defined it accurately and don't have agreement with your top managers on what it is, how can you seek it out? By using a Performance Profile AND measuring a candidates ability to do the job, then you are building a good foundation for sourcing. Adler says, "Good hiring is about hiring candidates who can achieve comparable results and are motivated to do it…"[6]

[6] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 241

> Sourcing problems are cut in half when you focus on the performance needs of the job instead of the skills and experience… (Adler)

Performance Profiles are the tool Adler advocates for us to use in order to clarify outcomes or outputs from 'high performance' in each role. The table below[7] provides a glimpse at the difference Adler makes between traditional job descriptions and what he refers to as a Performance Profile. This demonstrates the need to shift focus to desired results and deliverables.

Experience & Skills	Desired Results, Deliverables
BS degree, MBA a plus	**Evaluate** the product marketing function and upgrade the team and capability.
5 years consumer products	**Establish** a strong focus group and research programs to identify key buying needs
Strong market research	**Prepare** a market research report in the first month
Strong PC skills, statistics	**Upgrade** the internal product management status reports and lead progress reviews
Good team skills	**Coordinate** the product launch plan with engineering and operations

Adler's research has led him to the conclusion that we all want to hire someone who can deliver the results we need. Therefore, it is imperative that we define the deliverables and results we require when we are seeking candidates to fill each role. Only then, by learning about and

[7] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 24

assessing their past performance to deliver similar results, can we have increased confidence the candidate can meet our definition of high performance!

Adler has observed that we tend to use a 'results based approach' when making internal moves of our team members. For example, in Greg's Contracting, Joe is ready to take on more complex projects as Project Manager now that he has proven a high level of performance and success on medium size projects with moderate complexity. Our strategies and actions outlined, along with mentoring and training support should allow Joe to be successful in his new role which increases his probability of success. When we are assessing external candidates, we should be gathering the same information and using it to make hiring decisions.

In a nutshell, Adler is advocating that we "focus on the doing, not the having".[8] His research has led him to the conclusion that internal decisions are more accurate as they are typically based on DOING activities. Joe's (in Greg's Contacting) actual past performance dominates the decision to move him to larger, more complex projects. Typically, Adler has observed, our decisions regarding external candidates are too HAVING oriented, based largely on a candidate's experience, level of skill and academic background. He argues that there is misguided hope that enough experience, skill, academic achievement and personality will be sufficient enough to meet the performance requirements of the job. "A candidate can HAVE all of this and not be able to DO the job. Conversely, there are many people who can do the job without having all of these skills, especially if they are highly motivated."[9] It is what a person does with his or her skills, experiences and abilities that determine success, not the absolute level. By changing our focus to DOING rather than HAVING, our approach to hiring will become more accurate!

Identifying Critical Performance Objectives

Adler advocates that job descriptions must be redefined to reflect what needs to get done rather than what a candidate needs to have. The outcomes are more important than the inputs. This logic underlies the structure of a Performance Profile.

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[8] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 26
[9] Adler, Page 26

Each job has six to eight critical performance objectives that ultimately determine success. This range holds true for all levels within a company, from entry level clerical roles to high level management positions including the CEO. Although the Performance Objectives are different for every job, Adler has concluded that they will emerge from similar categories which include:

- effectively dealing with people,
- achieving objectives,
- organizing teams,
- solving problems,
- using technology and
- implementing changes.

Creating Performance Objectives start by asking what the potential candidate needs to do in order to be successful, not what the person needs to have. Prepare objectives for each of the categories noted and prioritize them so that the top six to eight become apparent[10]:

Performance Objectives for a Sales Representative	
Category	Desired Result
Major objectives, projects and key deliverables	Achieve quota within 60 days after training; Add six new accounts per quarter
Management and organization issues	Maintain complete status of each open account, new accounts, and progress of open orders
Changes and improvements needed	Upgrade the new contact report to reflect order size and timing
Problems to solve	Insure 100 percent customer satisfaction despite potential delivery delays
Technical objectives	Learn to use PC sales management and order entry software to insure 100 percent accurate order processing
Team, people issues	Develop quick-response program for order delays with shipping department
Long-range, creative, or strategic issues	Develop new territory management techniques to improve identification of major new accounts

[10] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 28

Create SMARTe Objectives

Adler reinforces the importance of developing what he refers to as 'SMARTe' Objectives. These are outline below:[11]

Specific: Include the details of what needs to be done, so that others will understand it
Measurable: It's best if the objective is easy to measure by including amounts or percent changes
Action Oriented: Action verbs are essential, like build, improve, change…
Results defined: This complements the measurable piece by clearly indicating what needs to be done
Time based: Include how long it will take to start and complete
Environment described: Describe the company culture, pace, pressure, resources available, and politics.

Adler argues that you must be specific so that when you are assessing the relative fit of multiple candidates you have a clear reference point to work with. When you clarify expectations this way, the Performance Profile becomes a statement of work for hiring a person and later it becomes a tool that can be used to manage performance.

HIRING TIP

REMEMBER—DEFINE THE JOB RESULTS / DELIVERABLES, NOT THE PERSON!

[11] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 29

POWER HIRING HOT TIP: PERFORMANCE PROFILES[12]

- ✓ If you want to hire superior people, first define superior performance.
- ✓ A performance profile describes the required results, the process used to achieve the results, and the environment in which this all happens.
- ✓ Define the job, not the person, Define success, not the skills, It's best to separate the job from the person. This allows for a more objective appraisal of true competency.
- ✓ Focus on the DOING, not the HAVING, to improve hiring accuracy. It's what people do with their skill that determines success, not the skills alone.
- ✓ Experience and personality are poor predictors of subsequent performance. It's better to define and use the real performance needs of the job to screen and interview candidates.
- ✓ Every job has six to eight performance objectives that define real on-the-job success. Once developed, they form the basis of the recruiting and selection decision. These range from dealing with people, meeting technical and business objectives, organizing teams, solving problems and making changes.
- ✓ Prioritize six to eight SMARTe performance objectives (Specific, Measurable, Action Oriented, Result and Time-based, with the Environment described) to clarify expectations.
- ✓ The performance profile establishes the framework for better hiring and better management by clarifying the expectations for the job. This helps in selection and subsequent management. Everyone involved is on the same page.

See the CASE IN POINT section for a sample Project Manager performance profile!

Final Approval to Hire

Now that you have analyzed the need and developed a performance profile (including role details, responsibilities, salary range, benefits, etc.) it is important that the proper approvals are granted as the next step in the hiring process involves creating a recruitment sourcing strategy and going to market to find your best candidates.

[12] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 59

3. Sourcing

Your sourcing challenge is to find enough people that fit your 'high performer' pattern for the vacate position. You MUST develop your Performance Profile as a basis from which to begin your sourcing.

The objective of your sourcing program should be to "get the best talent to openly explore your company and the career opportunities available."[13] This is captured in these three statements[14]:

1. You can't use the same techniques to find ordinary people as you do to find the best people
2. Candidates will only explore career opportunities that meet their personal needs
3. The best people want careers, not jobs!

Adler argues you don't want to attract people that 'need' another job; you should focus your efforts on finding candidates that 'want' a better job! Creating a description of the 'challenges' of your position instead of the 'skills' required for your position will help attract more high performing candidates (by the way, some of these candidates may not have all the skills you would list using the other approach so you may eliminate them before you meet them!). Painting a word picture of the challenges and opportunities your position and Company offer will engage high performers seeking a 'next step' in their career because it taps into their motivation.

Top performers will have other options to consider and compare with so they will tend to consider challenges and opportunities over compensation, skills required or location. Adler states that if your job is great, top performers may consider relocation or a lesser salary, so make sure you continually reinforce the opportunity in the position – don't screen them out on criteria that may in fact be irrelevant to their potential and fit for your position (e.g., salary expectations, geographic location etc.)

To hire the best people you need to first find them. Then you need to attract their attention with the right offer. Below you will find a table that contains Adler's view of the merits of different

[13] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 235
[14] Adler, Page 236

sourcing methods: it compares the cost per hire of common sourcing programs to their effectiveness in hiring top people.[15]

Sourcing Program	Effectiveness	Biggest Problem
Advertising – job boards	Inexpensive, but marginal results	Too many unqualified, not enough top candidates, process problems
Advertising – Media	Modest cost, but better for entry level. Good as part of employer branding program	Long time delay.
Resume databases	Low cost up front, but marginal results	Too much time-to-call. The best get jobs quickly.
Referral and Networking programs	Moderate cost, targets the right audience, and very good potential	Very effective if managed properly
Career Fairs, events	Moderate cost with fairly good results	Lots of competition, so differentiation is required
Internal contract recruiters	Moderate cost, quality is inconsistent	If untrained, then you're overpaying for performance
Third party recruiters – contingency	High cost, but fair if getting good candidates	Unprofessional, random results, weak control
Third party recruiters – retained	Very expensive, but well worth it if you're hiring great candidates	Time to hire is long

Adler argues that cost per hire and time per hire are not the best measures of sourcing effectiveness because both ignore quality. An 'A' candidate, he states, is easily worth a 33 percent search fee from a return on investment (ROI) standpoint because this fee will be paid back many times in cost savings in the first year, productivity improvements, new products, increased revenue and improved leadership (some combination of these factors contribute to your ROI).

Adler cites the McKinsey consulting group's book, The War for Talent, and their call for you as owner managers to develop a 'talent mind-set' as the required first step to hiring great people

[15] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Pages 239-240

and "creating a talent driven culture". Quality should always be the first measure of effectiveness; cost per hire and time per hire distant seconds.

Multi-Sourcing[16]

The key to effective sourcing is to simultaneously try as many channels as possible to ensure you 'touch' top-performer prospects. This should include consideration of:

- Employee Referral Programs - this is based on the premise that our current workforce has individuals in their sphere of influence that may fit your top performer profile. Programs typically incent employees for a referral that results in a hire that remains with the company for a specified period of time (e.g., six months to a year)

- Networking – this involves reaching out and 'direct sourcing' prospective candidates. Start with names of high quality candidates by networking, when you are ready to close the conversation ask them: "do you know of someone else that has the credentials to perform this job?" Ask this of people within your business, community, associations as well as industry related organizations. Also ask it of prospective candidates that you talk to about the job. It is a method used by top performing internal and external recruiters to broaden their base of prospects and it works well.

- Backtracking - is an approach to 'get to know' a prime candidate that you don't currently know, but are aware of. By approaching people that know this person in a non-work, community setting and arranging to be introduced to this targeted candidate. Individuals are typically willing to assist you in getting to know a person especially since it is a non-competitive situation for them. They gain the benefit of helping you and possibly the prospect you are asking to be introduced to.

- Internet Data Mining and Resume Databanks - once you know which position you are looking for you may want to assign an individual with daily review of key job web-sites (monster.ca; reginajobshop.ca etc.) for resume postings that appear to fit your needs.

[16] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Pages 248-257

However, be cautious in how much time you or someone else spends searching for potential candidates on the internet, it can be labor intensive. The internet can also be a great tool to help you learn more about someone who has been referred to you in your networking efforts.

- Career Fairs and other industry events - these events can help fill the top of your funnel quickly, if managed well. Adler provides these tips for managing career fairs[17]:
    - Put your desk in the back and the people in the front. You must mingle. Don't put up barriers. Talk to everyone that comes by.
    - Have an attention-getting devise. You want people to flock to your booth. Try singing, dancing and even juggling!
    - Advertise ahead of time. Invite all of those people who have contacted you in the past to visit you at the fair. Send an e-mail to resume databases describing your exciting jobs.
    - Have a few hiring managers staff the booth. This is a great way to quickly screen and attract top performers.

- External Recruiters - typically an external recruiter expertise is leveraged for top leadership talent in business. It is worth the investment for the right talent in high impact roles within your Company. There are different business models in this industry. Those that work on retainer usually charge a percentage of annual salary for their services. Contingency recruiters are paid with a successful placement. You can see that the motivation from the two fee structures can be different, however, in the right circumstances both can work for you.

- Company Web-sites - Adler has advice if we are going to use our Company web-sites for posting open positions within our Company[18]:
    - Basic requirements:
        - Make it easy to find. Candidates should be able to go directly from the home page to the career section

[17] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 255
[18] Adler, Page 260

- Give direct access to the specific job of interest with very few clicks. The best candidates opt out if they can't quickly read about the position
- Write the job description in a compelling manner (as discussed above)
- Make the application process quick and easy.
- Provide reasons to come back to your site. Provide games, quizzes, newsletters, and other important information
- Include an easy to use job search agent. This allows candidates to learn about future opportunities as they become available without having to return to our site.

- There are other software systems that can be used to support your sourcing efforts if your volume is high. These include applicant tracking systems, and filtering systems to better manage resumes.[19] The internet is a very powerful tool to support sourcing if the right tools are in place, the content of the ads is compelling and the information flow is managed properly.

Good Sourcing Starts with a Compelling Profile

A compelling profile is the foundation of every good sourcing program, since it is the first time a prospective candidate will hear about the job; therefore you want it to appeal to the right audience – the top candidates!

Here are the criteria that Adler uses to define 'great ads'[20]:

1. Use a compelling title that's quickly seen on the list of open opportunities: "HR Wizard Required" is much more effective than "HR Director".
2. Focus the copy on what the candidate will learn, do and become. "Use your HR magic to rebuild a department which has just endured six years of neglect, in six months" appeals to the candidates underlying motivating needs.
3. Describe the most critical skills in the context of how they are used. For example, don't say that 5 to 10 years of training and employment are essential. A much better approach would

[19] Contact Greg Fieger at Conroy Ross Partners if you would like to learn more about these technologies: gfieger@conroyross.com
[20] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 245

be: "One of the biggest challenges you'll face is to use your training and employment expertise to set up a company wide effort to reduce turnover and improve customer service at our 350 locations".

Your job and the profile must be different, interesting and compelling. The top performers are looking for: challenge and opportunity, better working conditions, an opportunity to excel and be recognized for outstanding work. Do your ads address these motivational needs of high performers?

Adler states that when you use performance criteria (from the position Performance Profile) to write ads and you use it as a basis for your other HR processes it is then consistent with how you will assess competency, transition the successful candidate into your organization, monitor progress, write reviews and reward and promote. Performance Profiles incorporated in compelling ways to the job ads is an important step in building your team by communicating what is most exciting about the job to the 'top performer' segment of the job-seeking market!

Be Proactive – Not Reactive

Sourcing is too often typically a 'reaction' to an event that occurs within the workplace such as a retirement, a key person leaving to join the competition or to follow their spouse to a new job in a different city, and so on… Can you get ahead of the curve in nurturing top-performing prospects?

Adler talks about companies differentiating themselves as 'employer of choice' and attempting to entice top-performers to learn more about them through various media on a regular basis (not waiting for the 'crisis' to emerge). The notion of investing in your workplace, your workforce, and work environment to make it as attractive as possible a place to work requires an understanding of your workforces needs, the role work plays in their lives, the future they aspire to, their experience of your Company as a place to work including their perception of the health of the relationship they have with their direct supervisor and their workgroup peers. Engagement surveys are gaining in popularity as a means to learn more about what the key

drivers are for the people in your workplace so that you can develop action plans to enhance the employee experience with the objective of strengthening their sense of engagement with your Company, its purpose and its goals.[21]

Couple this with Workforce Planning and Strategic Staffing we discussed in the Saskatchewan Construction Association HR Tool Kit Module #1 – having a picture of anticipated needs and setting your mind to get on with plan and tactics to proactively source for these needs – will help you get as far ahead of the curve as possible.

[21] Profiles International Workforce Analysis Profile is designed to help business owners learn about their people's engagement and satisfaction levels and assist you to put a plan of action in motion to enhance their engagement and satisfaction. Contact Greg Fieger of Conroy Ross Partners to learn more about this tool and services to support you in your effort to be 'employer of choice': gfieger@conroyross.com.

4. Candidate Management

Once you have developed and implemented your sourcing strategy, applications and resumes will start to come in and the candidates will need to be managed.

Common candidate management activities can include:

- Pre-screening
- Interviewing
- Reference Checks and Background Checks
- Extending an Offer
- Closing out Unsuccessful Candidates

Pre-screening

Pre-screening provides the hiring manager an opportunity to evaluate and quickly filter out applicants that do not fit the requirements outlined in the performance profile and identify those that require further assessment.

A simple method of pre-screening involves reviewing the applicant's submitted resume and cover letter.

Steps in Resume Review[22]

- Complete a detailed review of the cover letter and resume. Look for a flawless presentation, correct spelling and grammar, and the applicant's attention to detail.

- Assess the resume to determine if the applicant meets the minimum qualification requirements. For example, a Project Manager role to oversee large Capital Projects might require a PMP (Project Management Professional) designation coupled with a LEED certification.

[22] Content adapted from Gone in Thirty Seconds – How to Review a Resume http://humanresources.about.com/od/selectemployees/a/resume_review_2.htm.

- Look for a summary statement of qualifications and experience. If the candidate has taken the time and customized their summary for your job, this enables you to quickly find the characteristics you seek from your role profile.

- Review the most recent employers and the applicant's stated experience, accomplishments, and contributions. At this point, you must have found significant cross-over between the applicant's resume and your requirements. Place the resume in your "to be reviewed further" folder unless you have encountered problems. Red flags at this point in your resume review, that are unexplained on the resume or in the cover letter, include:

    - employment gaps,
    - evidence of decreasing responsibility,
    - evidence of a career that has reached a plateau or gone backwards,
    - short term employment at several jobs, and
    - multiple shifts in career path.

Review your selected resumes against your criteria and each other.

As you become more comfortable reviewing resumes you will find that the initial screening can become very simple and quick. For new roles, consider sorting your resumes into no, maybe and yes. Depending on the number of applicants, this process can help prioritize your efforts and help you manage your time.

For all unsuccessful candidates that will not be advancing for further pre-screening, they will need to be notified that they are no longer being considered. This will be addressed in more detail later in this tool kit under Closing Out Unsuccessful Candidates.

Phone Screen

Once an initial set of candidates has been identified, a phone screen assessment may be used as a useful prescreening exercise. Should you choose to conduct a phone screen, it allows you to determine if the candidate's qualifications, experience, workplace preferences, salary needs and availability are congruent with the position and organization. It also provides an opportunity to probe into any red flags that you might have identified, as outlined in the Steps in Resume Review. The phone screen saves managerial time and eliminates unlikely candidates.

You want to ask enough questions to determine if the person is a viable candidate. Remember, you have already screened many resumes and applications to come up with your short list of phone screening candidates. These should be your best prospects at this point in your recruiting process. For a sample phone screen questionnaire, refer to the 'TOOLS' section of this toolkit.

The hiring manager or recruiter typically conducts the phone screen and the following tips apply:

- Prepare a customized list of questions that are specific to the role you are hiring for;
- Ensure that the questions are fair, clear and legal. Avoid questions about age, gender, religion, sex, disabilities, marital and family status.
- Introduce yourself and the purpose of your call.
- Obtain consent from the applicant before commencing the phone screen.

The purpose of the phone screen is to pre-qualify the applicant and advance them to the next stage of the hiring process – interviews. The phone screen does not replace the interview and as such, should not be lengthy. When preparing your questions for the phone screen, determine which questions can wait to be asked during the interview.

For tips on how to ask questions, please refer to the next section on Interviews.

For the unsuccessful candidates who were filtered out at this stage, the applicants will need to be notified that they are no longer being considered for the position. This will be addressed in more detail later in this tool kit under Closing Out Unsuccessful Candidates.

Interviewing

Interviews are considered a traditional step in the hiring process. The face-to-face contact can provide an in-depth perception of how the candidate will perform in your organization. Getting the most out of interviewing is a combination of preparation, suitable questioning and listening.

Purpose of an interview:

- To collect and further assess candidate information that has not previously been collected from in the pre-screening stage;
- Assess the candidate's competencies and attributes by identifying the performance objectives and critical performance categories and probe further;
- Market the job to the candidate! The candidate is not the only one being assessed during the interview. Interviewees form impressions on the potential job opportunity, the organization and the environment in which they might work.

Several steps are required to complete an objective assessment of each candidate against the performance required in the job. These steps have been positioned to increase accuracy of assessment and quality of hire decision-making. One of the keys to hiring success is to keep 'emotion' from short-cutting an objective assessment of each candidate's performance. Adler talks extensively about the role first impressions make; whether positive or negative, first impressions can impede us from listening for objective facts to support the candidate's performance. For instance, if I have a positive first impression I may 'hear' only those things that reinforce it. On the other hand, if I have a negative first impression, I may discount facts I hear that run counter to this first impression. DO NOT MAKE ANY JUDGEMENTS IN THE FIRST ½ HOUR OF THE FIRST INTERVIEW!

There are several interview techniques and approaches that Adler advocates. Each of these are designed to ensure the interview approach leverages the Performance Profile and inquires into specific facts about the candidates' past performance in relation to each of the SMARTe objectives defined in the Performance Profile.

Interview Styles[23]

Understanding our own style when interviewing is an important first step to ensuring an objective assessment. With an **Emotional** style, Adler argues that you need to work hard to delay any instant judgment. Be tougher on those you like. Obtain lots of examples, facts and details to validate your first impression. If you don't like the candidate, give them the benefit of the doubt! Become a more technical fact finder to validate or prove wrong your first impression.

With an **Intuitive** style, according to Adler, the 'hire in your own image' problem may come into play. While the traits you see as important may in fact be important, he argues that you need to strive for a more balanced and complete perspective. The key is not to overvalue traits such as intelligence or assertiveness at the expense of others. Neutralize your biases and conduct a complete assessment. Be more analytical in collecting relevant data. Using a technical fact-finding approach might find some weaknesses not initially considered or some offsetting strengths.

If you are more the **Technical** style interviewer, Adler says you may be too conservative and 'tick too many boxes', taking too long to come to a decision. You may tend to overvalue years of specific experience, degrees held, specific areas of technical competence and thinking skills. There is a risk you could be excluding some very high potential individuals who don't possess these 'minimum standards' you have ingrained in your mind. Your technical style is good for data gathering in the interview process however, you need to reframe your focus on questions that elicit specific examples of job related accomplishments and comparable results. Find out what he or she accomplished without much experience in order to determine the candidate's motivation and ability to learn.

[23] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Pages 66-70

Interviewing Style	Description	"Yes" Criteria	"No" Criteria
Emotional	Makes decisions based largely on first impressions, personality, appearance, emotional reactions and feeling about the candidate. Other factors might include: academics, personal biases, stereotypes, and racial or gender issues.	Time: less than 5 minutes ✓ Poise and social confidence ✓ Affable ✓ Articulate ✓ Positive appearance ✓ Extroverted ✓ Good chemistry	Time: less than 5 minutes × Poor eye contact × Weak hand-shake × Poor appearance × Nervous – distant × Short answers × Introverted × Bad chemistry
Intuitive	Decision based on gut feelings and having a few critical traits. Decision is then globalized – with them the candidate can do everything and without them, nothing. More general factors include character, religion, values, appropriate style, and location where raised.	Time: 5 to 15 minutes ✓ Intelligence ✓ 1 or 2 great talents / skills ✓ Verbal communications ✓ Assertive ✓ Initiative	Time: 5 to 15 minutes × Not enough intelligence / talent × Not enough confidence × Shallow answers × Lack of energy
Technical	Decision based on possession of strong skills, experiences and methodologies. The yes is long but the no is quick.	Time: over one hour ✓ Lots of relevant experience ✓ Similar process thinking ✓ Strong skills ✓ Great technical capability	Time: 5 to 15 minutes × Not enough experience × Not enough education × Not enough skills × Difference in approach

Now that we have a Performance Profile and have considered our own frame of reference as interviewer, we want to visit Adler's POWER Hiring Formula and focus on the interviewing process.[24]

The POWER Hiring Formula

A Great Hire = Performance + Character + Personality

While performance, character and personality are all critical to an accurate assessment, measure performance first!

Adler acknowledges that personality and character are critical for on-the-job success but reinforces that they are very difficult to measure or assess during an interview. Attempting to do so opens the door to being "fooled" by a smooth conversationalist that does not have specific examples of job relevant accomplishments to prove their worth. Consequently, he advocates focusing on performance as the basis of conversation through the interview process.

To guard against the vulnerabilities of a 'quick judgment' using an emotional or intuitive style and rounding out the dominating "fact finding" questioning of a technical interviewing style, Adler recommends a series of steps he refers to as 're-programming' techniques. These steps are highlighted in the table on the following page.

[24] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 571

Reprogramming Technique[25]	Comments & Description
Recognize Your Emotional State	If you are uptight or relaxed you look for facts to support this feeling. Fight it. Stay neutral. Ask every candidate the same questions. This way all information has equal value.
Conduct a 20 minute phone interview	When you talk to someone on the phone first, you automatically minimize the impact of personality and first impressions.
Don't start the interview right away	Go on a tour, see a demo, but get in to a give-and-take discussion. This will help minimize emotions and set-up the framework for a good dialogue.
Use preplanned structured questions	Write down a few performance-oriented questions to ask right away, whether you like the candidate or not.
Measure first impressions again after 30 minutes	After 30 minutes, revisit first impressions. Compare to the original and evaluate your reaction. This will help restore balance.
Change your frame of reference	If you like the candidate, be skeptical and ask tougher questions. Be more interested in, and more open with, those you don't particularly like.
Listen 4 times more than you talk	The interview is not casual conversation. It needs to be a fact-finding expedition. Keep notes for each accomplishment.
Treat the candidate like a consultant	We always listen more to those who are experts or have a superior position. Treat candidates the same way to elicit more open responses.
Talk about real work	Discuss problems and related business issues. Accuracy will increase if the interview is more like a problem-solving session rather than an inquisition.
Use panel interviews	You'll save time and minimize emotional reactions, since there's less of a one-on-one relationship.

So the question becomes what you need to do well in order to identify performance first. Doing your homework, evaluating and being honest about your interview style and focusing on performance as the basis of conversation in interviews will ensure your hiring decision accuracy can be improved. This is addressed further in the next section.

[25] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 83

Identifying the Top Performer in the Interview

Adler's experience clarified four common characteristics that were observable in top performers in an initial interview:[26]

1. They were self motivated – everyone who achieved any level of success worked hard.
2. They showed an ability to motivate others, inspiring peers, superiors, and their own team to work hard.
3. They achieved results comparable to what needed to be achieved.
4. They solved realistic problems in real time.

These common characteristics comprise Adler's 'formula for predicting performance'…[27]

The POWER Hiring Formula

For Predicting Performance

Future Performance = Talent x Energy^2 + Team Leadership + Comparable Past Performance + Job-Specific Problem-Solving

Top performers *"consistently deliver more results than expected, and they do it on-time, all the time…"* Adler identifies energy (self-motivation) as the most important variable because it is a 'catalyst' to talent. This is demonstrated in his formula with 'Energy^2 (squared)'. A low-energy, high talent individual may not be as productive as a less talented but high energy individual. He recounts examples of individuals who do not have the greatest raw talent, however, achieve very high standards due to their self-motivation; they make an impact (Talent x Energy^2 =

[26] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 89
[27] Adler, Page 89

Impact). Consequently it is important to ask questions that will allow the prospective candidate an opportunity to elaborate on their accomplishments relevant to the position you are hiring for.

Preparing for an Interview

Preparation is very important to a successful interviewing process. You need to have created the Performance Profile for the position, familiarized yourself with the priority SMARTe objectives, reviewed the candidate's resume and noted questions for clarification. This must be done walking into the interview room! You need to maintain control of the interview process to support the candidate's impressions of you, the company and the value of the position to the company.

- Know your requirements for the role and create your questions so that the answers will guide your decision;
- Be familiar with the candidate's resume and background. Are there areas that need probing?
- Be prepared to answer specific questions about the performance profile as well as about the organization. What are the key selling features of the role? What is unique about the role and/or company?
- Consider the facilities and layout of the interview room. To get the most out of the applicants, it is important that they are put at ease. Choose a room where you will not be disturbed, there is privacy and the seating is conducive to an open dialogue exchange.
- Avoid scheduling back to back interviews to protect the confidentiality of the applicants. Consider using a 15 – 30 minute buffer zone in between interviews to allow for run over time, washroom, water / coffee and to set up the interview room.
- Prepare an agenda ahead of time. Reviewing the planned agenda with the candidate at the beginning of the interview will not only help both of you to keep focused and on time but will also aid the candidate in feeling at ease. The candidate will have an idea of the expectations of the meeting and how much time has been allotted for each category. A sample agenda has been outlined in Opening & Closing the Interview section below.

Opening & Closing the Interview

Adler emphasizes the importance of putting the candidate at ease so they can perform well in the interview. This can be done by reviewing the agenda, providing office or site tours or providing additional context of your organization for a few minutes before easing into questions that have been outlined in this section.

A typical 30-minute interview may follow a format / agenda similar to this. Refer to the 'TOOLS' section for a Sample 30-minute interview including the agenda, questions and tips on what to look for in the answers..

1. Greeting and Introduction (2 minutes)
   a. The first couple minutes of an interview usually consists of a handshake, quick and professional introduction, some small talk to develop rapport and high level detail about the position.

      An example of an opening shared by Adler is captured below[28]:

   As you know, we're looking for a (position), let me give you a quick overview of the importance of this position. (give two-minute overview of position and company)

2. Overview of the Agenda and Interview Structure – Review of steps #3 – 7 below (1 minute)
3. Candidate Questions (0 - 3 minutes)
   b. Information the candidate feels is important to have prior to getting into the detailed interview questions.
4. Candidate Career Overview (5 minutes)
   c. Ask that the candidate articulate their career "story" including highlights of education and their career summary as it relates to the role they are interviewing for. Note, depending on the level of detail, the candidate may answer some of your interview questions in this summary, listen carefully and take notes! Be sure to watch the time in this section, as it

[28] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 113

can be easy for the candidate to run over the allotted time talking about themselves. Be respectful but keep the interview on track.

5. Interview Questions from Interviewer (15 - 20 minutes)
   d. Refer to the 'TOOLS' section for sample questions.
6. Candidate Questions (0 – 3 minutes)
7. Closing the Interview (1 minute)
   e. Outline next steps and timelines. Shake hands and thank the candidate for their time.

How you close the initial interview can be the beginning of recruiting of an individual candidate. Adler provides an example he refers to as a 'classic ending' for consideration when you have concluded the individual may be worthy of further consideration[29]:

Although we're seeing some other candidates, I personally think you have a very fine background. We will get back to you in a few days, but what are your thoughts now about this position?

Adler itemizes three essential things about this closing statement. It creates supply (seeing other candidates), you create demand (complimenting their background / fit) and you gauge their true interest in your position (what are your thoughts now…).

[29] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 117

Interview Techniques

If the purpose of the interview is to collect information, assess the candidate's fit relative to the role and to sell the opportunity to the candidate, then the key is to figuring out which questions will provide the most value to you. For a measurable indication of how your candidates stacked up, post interviews, a structured interview with set, job related questions is advised.

There are three main types of structured interview methods:

1. Behavioural – this method of interview focuses on the candidate's past experience following the premise that the best indicator of future performance is past performance. Questions often start with "Tell me about…" or "Give me an example…".

   For Example: Tell me about a situation where you had a tight deadline to get a job done. What did you have to do to ensure that the project was completed in a timely manner?

2. Situational – this method of interview requires the candidate to provide an opinion and prediction of how they would respond to a hypothetical, "future" event. Questions often start with "Suppose you had…" or "What would you do if…". Note: Situational questions are designed to determine how the candidate thinks he or she might respond but they will not tell you how the candidate would actually perform.

   For example: What would you do if the priorities on a project you were working on changed suddenly?

3. Fact Based – this method is designed to gather information about the candidate's career history, education, credentials and skills.

   For Example: What courses/continuing education have you participated in since graduating that might assist you in this role?

Now that you have heard the candidate's answers, you may find that you will need to probe further to learn more based on the answer received. There are two general types of probes: open probes and closed probes.

Open probes are common in both behavioural and situational interviews. They encourage candidates to response freely and typically start with question words such as: how, why, tell me, what (and to a lesser extent where and when). The general rule is to keep probing as open as possible to encourage your candidates to open up and share information that they think will be useful to you.

For example:

- *What are you looking for in your career?*
- *Tell me about work experiences you have had in the past that make you a strong candidate for this position.*
- *Tell me how you do that.*
- *Why is that?*
- *What led to the change?*
- *Why is that important?*

You can encourage your candidates to speak freely by using words "why" and "what" to start questions.

For example:

- *You mentioned that your department has experienced high turnover lately. Why do you think this is occurring? What have you done about it?*

Closed probes are common in fact-based interviews as they limit a candidate's response and can be very effective when trying to verify information, credentials and education. Closed questions are short answers, with a one word or one phrase and typically start with question words such as: have, are, how many.

For example:

- *Are you willing to travel?*
- *How many direct reports did you have in your last job?*
- *Have you ever worked for a public company before? When?*

Closed probes are effective to bring focus to the interview or closure to a discussion and are particularly helpful when the candidate gets off topic or loses their point relative to the question you asked.

For example:

- *So, you feel that your past experiences at XYZ Company has provided you with the tools and knowledge that you need for this position…Correct?*

Interviewing to Assess - Accomplishments

Adler states that the question below, followed by appropriate inquiry and probing is the MOST IMPORTANT interview question of all time…[30]

Please think of your most significant accomplishment in your career. Now could you tell me about it?

Further inquiry and probing might include questions such as:

- What impact did the accomplishment have on the company's bottom-line or business?
- When did it occur?
- What was your specific role on the team and what was your specific contribution to the accomplishment?
- What were the major steps and deliverables involved in accomplishing the task?
- How were you able to use your initiative beyond tasks/duties not required in your actual role?
- What were some of the biggest challenges faced in the accomplishments and how did you overcome these challenges?
- Why do you consider this a significant accomplishment?
- What was your greatest learning from this accomplishment? Why do they see this learning as most important?
- What support will help you achieve success in the position you are interviewing for?

Asking about additional accomplishments specific to the SMARTe objectives of the position you are hiring for may create opportunities for additional probing critical investigation related to:

- The pace of and decision-making methods / preferences
- Examples of how the candidate had to change the opinion of others and how they dealt with conflict
- Whether the accomplishment actually met the business objectives; was completed on-time and how they performed against plan and budget

[30] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 91

- Timing, the candidate's specific role, specific team structure to clarify role of others (individual contributor, team leader etc.)
- The biggest people challenges, with specific examples, and how these were overcome
- Technical skills used to accomplish the task and skills learned
- Ranking of the overall success of the task and why
- Ranking of the candidate's performance on this accomplishment and why.
- Identifying the most important aspect the candidate would do differently to move it up the scale (1-10) and improve their performance

Using probes or critical questioning such as these (and ones you develop) will help elaborate on a candidate's accomplishments providing specific examples and building a fact base of results relevant to the position being filled. This methodology will support a more effective assessment of the candidate's potential to be a high performer in your Company. A conversation about one accomplishment can easily become a 10 minute conversation.

Ask for accomplishments and probe the response for 3 to 4 of the most important SMARTe objectives for the position. When investigating performance accomplishments, Adler states it is important to "understand the accomplishment, the process used to achieve the accomplishment, and the environment in which the accomplishment took place…[31]" By focusing on SMARTe objectives, probing individual and team leadership abilities and impact on the business, you are 'anchoring' the information obtained from the candidate as it related to the specific position performance profile.

Accurate interviewing is about getting detailed answers about accomplishments, not about asking a bunch of clever questions. If you have detailed information about these accomplishments, understand the time sequence in which they occurred and how the candidate's impact on the companies they have worked for has grown over the years, you are building a strong fact-base to support effective decisions.

[31] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 104

Interviewing to Assess - Job Specific Problem-Solving

Adler states the second most important interview question invites the candidate to 'visualize' how they would solve specific problems that occur in the conduct of your specific position. Here are two standard questions Adler advocates[32]:

1. *If you were to get this job, how would you go about solving this typical problem (describe the problem)?*
2. *As we have discussed, (SMARTe Objective) is an important aspect of this position. If you were to get the job, what additional information would you need to know, and how would you go about accomplishing this objective?*

Frame these questions by using the SMARTe performance objectives in the Performance Profile. By getting into the specifics of the work and performance required of the candidate, you enter into a more of a give-and-take conversation with the candidate. You gain insights into how they approach a problem, how they think, disciplines / methods they exhibit, and how they might interact with others on a team. Probe for clarity and more detail to ensure you have a good understanding of what the candidate is saying.

Team Leadership can be assessed by asking for specifics related to their previous roles or job positions; what the team structure was, what part they played in the team and what specific role they had in each accomplishment in each job position or company. If the candidate was in a team leadership position, probe how they built and developed their team, again, gathering as much specific detail as possible. If this information is gathered from several of their past positions, you will have a clearer picture of their career progression including development into roles of greater responsibility and authority, as well as their relative success in these moves.

Adler states that character and personality are always revealed through conversations about performance. One character question he recommends is[33]: "*Tell me about a time you were*

[32] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Pages 104-105
[33] Adler, Page 114

totally committed to a task…" He believes that the ability to persevere under difficult conditions is an essential trait of a top performer, the character trait underlying energy.

For personality and cultural fit, use a question like the following to confirm insights already gathered through discussion of performance[34]:

- *What three or four adjectives best describe your personality? Give me actual examples of when these traits have aided you in the performance of your job and when they have hurt.*

Assessment tools such as the Profile XT developed by Profiles International[35] can provide scientific rigor to validating thinking style, behavior traits and occupational interests of the finalist candidates (usually administered to the final 3 to 5 individuals in consideration for a position). By using this tool to 'benchmark' attributes that differentiate your top performances from average and low performers in your role, you can develop a job-match pattern which can be used to assess short-list candidates 'fit' with the high performer PXT patterns. Add this knowledge to the learning from the interviews helps increase the richness of information you have to make a great hiring decision.

[34] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 115
[35] More information about using these tools you can contact Greg Fieger by email at: gfieger@conroyross.com

Avoid Inappropriate and Illegal Lines of Questioning

Adler supports an objective, fact-based interview approach that is highly relevant to the available position. Probing accomplishments, specific job-related problem-solving skills, and general fact-finding directly related to the SMARTe objectives ensures you are focused on job criteria. Always be diligent to avoid asking questions related to variables prohibited by the Canadian and Saskatchewan Human Rights Commissions. Updated documents outlining these prohibited topics are available on their respective web-sites.

In 2008 in Saskatchewan, merit and skill specific to the job are legitimate basis for employment decisions. Likewise it is against the law to discriminate against anyone for employment in private companies based on:

- Ancestry, colour, race and perceived race
- Religion or religious creed
- Sex
- Marital status
- Disability
- Nationality or place of origin
- Age (18 or more)
- Sexual orientation
- Family status
- Receipt of public assistance

In respecting individual specific needs, employers may be required to assist candidates with special adjustments – this is referred to as 'accommodation'. Accommodation is required unless it would cause undue hardship to the Company. Examples provided by the Saskatchewan Human Rights Commission include:

- As an employer, you may have to provide technical aids so people with disabilities can participate in your workplace

- You might have to temporarily rearrange work duties for a pregnant woman. For example, and outside worker may switch to a desk job in the later stages of her pregnancy.

As a general rule, for all of your hiring processes, ensure that you are keeping within the Saskatchewan Human Rights Code and the Canadian Human Rights Act.

For current information, please visit http://www.shrc.gov.sk.ca and http://www.chrc-ccdp.ca/default-en.asp, respectively.

See the 'CASE IN POINT' section for an interview approach to sorting candidates for Greg's Contracting Senior Project Manager position. Adler's 10-Factor Candidate Assessment has been recreated in the TOOLS section.

Reference Checks

Reference checks are a further step in the assessment process and act as a verification of the information that you have already collected, as well, they act as a follow up to any inconsistencies found from the candidate's cover letter, resume, phone screen (if applicable) and interview(s). Hiring managers will typically conduct reference checks with their first choice candidate in an effort to move the process along to the point of eventually extending an offer. In order to get a well rounded view of the candidate, hiring managers should ask that the candidate provide references from a peer, direct report (if applicable) and their most recent supervisor. Note, due to the confidential nature of most candidate's job searches, providing a reference for a current supervisor may prove to be difficult as the candidate would have to announce that he or she is looking for another job and this may put his or her current job in jeopardy. When a scenario like this happens, the employer could ask that the candidate provide a former supervisor as an immediate reference.

How to conduct a reference check:

1. Introduce yourself, your title, organization name and the purpose of your call.
2. Ask if you are calling at a good time or whether they would rather schedule the call for a time that works better for them.
3. Confirm that you received consent from the candidate and that all responses provided during the reference interview will remain confidential.
4. Provide a high level overview of the description of the role and performance requirements you are considering for the candidate. This will help them to answer their questions in the context of the role in question.
5. Start with the basics:
    a) Verify the context in which the referee worked with the candidate (peer, direct report, supervisor).
    b) Verify the candidate's starting and ending dates of employment,
    c) Confirm their title and job duties;
6. Probe further (if referee is receptive)
    a) Ask about the candidate's strengths and areas of improvement,
    b) What is the referee's overall impression of fit relative to the requirements of the role?

c) How effective was the candidate with leading and managing others? (if applicable to the role).

d) Assess problem solving, interpersonal and communication skills, etc.

7. Your closing should include:

a) Would the referee work with or rehire the candidate,

b) Provide an opportunity for the reference to provide any additional comments they would like to make regarding the candidate that has not been covered in the interview.

c) Close the interview by thanking them for their time.

Please refer to the 'TOOLS' section of this toolkit for a sample reference check.

Background Checks

Adler reinforces the importance of background checks and resume verification. He states that from his experience most resumes tell the basic truth, but many also do a great job of camouflaging the sand traps. Background verification will help sort this out.[36]

Adler advocates that rigorous background checks are completed for each finalist candidate. Resumes are marketing tools! Clever, creative format is encouraged – but fraud is not!

Here are two tips that Adler includes in his book[37]:

1. On your application form state that you will be conducting a background check and ask the candidate to validate the truthfulness of the information, affirmed by his or her signature;

2. Use the background check as part of your 'close' to test both interest and truthfulness. Before the final interview, tell the candidate you'll be conducting a rigorous background check. Ask the candidate to reconfirm that everything on the resume and application is 100 percent consistent with the facts.

Adler states that if the candidate says yes and agrees to come in for another interview, he or she is demonstrating sincere interest and honesty.

Pre-employment background screening is common today for employees at all levels and in all industries. And many employers are more cautious and thorough than ever when hiring. Typically, a background check reviews[38]:

- Criminal records
- Driving records

[36] Contact Greg Fieger to learn about background verification services offered through Profiles International or Conroy Ross Partners: gfieger@conroyross.com.
[37] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 168
[38] Based on Conroy Ross Partners best practices

- Vehicle registrations
- Sex offender databases
- Credit checks
- Education, certifications and degrees

Other types of checks / tests can include:

- Psychological assessments
- Computer skills tests
- Typing assessments
- Drug Tests
- Physical Ability Tests
- Medical Tests
- HIV Tests

[39]Not all companies conduct background checks in the same way. An employer will decide how far back into your history to check. They'll also determine which offenses might make the candidate "unhireable." Background checks can help companies reduce costs arising from employee thefts, embezzlement, violence, absenteeism, and turnover; minimize their exposure to negligent hiring claims; and encourage honesty among employees and applicants, Background checks can also help employers determine whether applicants are qualified for employment, and identify job-seekers who provide incorrect personal and work histories.

Many employers choose third-party vendors to conduct background checks due to their cost-effective expertise in pre-employment screening, and their ability to conduct a nationwide search to obtain an applicant's most accurate and complete data and records. Vendors are better able to detect attempts to use false identities, and to sort out cases of mistaken identities.

39 More Frequent Background Checks of Employees & Applicants, www.HR.com

Background checks also should be conducted on temporary or outsourced workers by the corresponding staffing agencies. "Employers who fail to screen temporary workers are exposed to liability, which may offset any economic benefits they may realize from the use of temporary or outsourced workers.

Included among the legal cautions employers should consider are:

- Actions must be job-related: Employers who use background checks during the hiring process must, when faced with a challenge, be able to establish that the practice is job-related and consistent with the needs of the business.
- Special situations apply to criminal records: Employers who make decisions based on an employee's or applicant's criminal record must examine the circumstances surrounding the conviction; provide an opportunity for the individual to explain it; and then conduct an additional investigation to assess the person's credibility,
- Proper disclosure required for credit checks**:** Employers performing credit checks on employees or applicants must obtain their written authorization before seeking a report, as well as provide a clear and conspicuous disclosure stating that the employer may obtain a report for employment purposes.

Employers must receive the written consent from the candidate or employee (if retroactive) before submitting the consent. And the employer must share the results with the candidate upon their request.

Extending an Offer[40]

Assuming the reference and background checks have been completed or in the process of completion, the final step is to extend an offer to your first choice candidate.

A job offer may be made verbally, in person, over the phone, or in writing. It is recommended that a verbal offer be extended as soon as your first choice is decided on and the terms of the offer are known to ensure that your top candidate is aware of your decision and has not accepted a job elsewhere. Be aware that it is common for an offer to be extended and for the candidate to need some time to review the terms and possibly counter-offer.

Basic Elements of a Job Offer:

- the position offered
- location and working hours
- salary
- benefits
- short and long term incentives (if applicable)
- vacation
- other benefits (flex days, vehicle allowance, parking, blackberry, etc.)
- start date
- probationary period
- any papers or information that should be brought on the first day of work
- a date by which the applicant must respond to your job offer.

Ask the candidate to send you a signed copy of the offer letter which establishes the terms on which the offer was made, in case of any disputes.

[40] Based on Conroy Ross Partners best practices

Offers can be subject to candidates meeting certain conditions based on your pre-screening checks, such as:

- Passing a medical examination - this must apply to all prospective employees, not disabled people only
- Passing a background / criminal record check
- Satisfactory references
- Completing a probationary period

Please refer to the 'TOOLS' section of this toolkit for a sample offer letter format.

Closing Out Unsuccessful Candidates[41]

Throughout the hiring process there will be candidates who you no longer wish to pursue. Unsuccessful candidates should be notified in a timely manner and at each critical stage in the candidate management process (pre-screen, interview, reference checks and offer stage) they are no longer being considered for the position.

Tips for notifying unsuccessful candidates:

- Include a line at the bottom of the employment advertisement that only successful applicants will be contacted. This eliminates the requirement to notify unsuccessful applicants who did not pass the initial pre-screening stage and is extremely helpful for high volume interest.
- It is recommended that the notification be in writing to eliminate misunderstandings. Keep the wording positive and ensure that no part of the letter or email is offensive in any way.
- Customize your templates so that a candidate who got to the interview stage receives a more personalized letter than a general letter for an applicant who had limited or not contact with the organization and has been deemed unfit for the role.
- Keep your short-listed candidates (second and third choices) engaged right through until an offer has been accepted. Doing so will ensure that you have options, should your first choice withdraw their name from the competition or decline your offer.
- Track your short-listed candidates, as there may be future opportunities within the organization where they would be considered again. Consider verbally notifying these candidates that they were unsuccessful to leave a positive, professional impression. Choose your wording carefully to demonstrate your interest in keeping their information on file should a future opportunity present itself.

[41] Based on Conroy Ross Partners best practices

TOOLS

Instructions for Creating the Performance Criteria for Any Position[42]:

1. Consider the six to eight major things that need to get done (performance objectives) for the new employee to be successful.

2. Make all objectives SMART: Specific, Measurable, Action-Oriented, Result-Based, and Time-Based and describe the Environment within which they need to be achieved.

3. Macro approach considers performance objectives for these categories:
    a. Major Functional Objectives (e.g., significant outcomes for your business required from the position)
    b. Sub-ordinate objectives (e.g., key deliverables to achieve major functional objectives)
    c. Management & Organizational Issues
    d. Changes & Improvements Necessary
    e. Problems To Be Solved
    f. Technical Skills in Actual Situation
    g. Team Skills in Actual Situation
    h. Long Range, Planning & Creativity required

4. Use micro approach (convert traditional job specification, e.g., skill, to performance criteria, e.g., outcome from applying the skill)

5. Benchmark against 'top-performers' in the position (e.g. what attributes and capabilities differentiate them from others in the position?)

[42] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 37

6. Review all performance objectives you developed from Steps 1 – 5 and prioritize them to include in the performance based job description (i.e., Performance Profile). In prioritizing consider:
    a. Impact on Company success
    b. Are there alternatives, if so maybe it's not that important
    c. Don't duplicate. Be broad. Make sure list covers all important job criteria
    d. Get appropriate balance between management and individual contributor
    e. Ensure technical objectives are properly placed in priority list
    f. Ensure interpersonal and cultural objectives have been covered off
    g. Make sure there is a balance on technical, tactical and conceptual (strategic) aspects of the position
    h. Include thinking and intellectual skills in one of the objectives

An example Performance Profile for a Senior Project Manager in Greg's contracting is included in the 'CASE IN POINT' section of this report. Adler provides a useful table that illustrates how to move from HAVING requirements to DOING requirements. This table has been recreated on below:[43]

The HAVING	The DOING	
Classic HAVING requirements:	Partial SMARTe Objective Action Verb and Specific Task	Complete SMARTe Objective
Responsible for financial reporting	*Upgrade* the monthly financial reporting package	Within 120 days upgrade the monthly financial reporting package to include product line profitability analysis, and obtain approval from reluctant department heads
Have 3 to 4 years' manufacturing experience controlling expenses	*Reduce* operating overhead by $30,000 per month	Reduce operating overhead by $30,000 per month within six months
Have 10 years telemarketing experience	*Improve* the performance of all telemarketing sales personnel	During the first quarter, improve the performance of all telemarketing sales personnel by 6 percent through new training and tracking tools
Have a BS Engineering and 5 to 8 years in plastic molding industry	*Lead* the design effort on a new high-volume injection molding line	Immediately hire three new designers and lead and complete the design effort on a new injection molding line within a very tight six-month schedule

[43] Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 33

Below is a blank template[44] that can be used as a starting point in developing your own performance profiles in your Company.

Position Name	*Performance Profile (Template Structure)*
Position Summary	
Organization Structure & Interfaces	
Performance Objectives (SMARTe)	
Basic Requirements – Essentials Only	

[44] Based upon Lou Adler's Hire With Your Head: Using POWER Hiring to Build Great Companies

Lou Adler's 10 Factor Performance-Based Assessment Template[45]

This template includes key variables Adler uses to assess relative quality of finalist candidates for a position.

Scale: Weak (1) to Strong (5)					
Trait / Factor	1	2	3	4	5
Energy, Drive, Initiative					
Trend of Performance Over Time					
Comparability of past accomplishments					
Experience, education and industry background					
Problem-solving and Thinking Skills					
Overall talent, Technical competencies and potential					
Management and Organizational Ability					
Team leadership – persuade ,motivate others					
Character – values, commitment, goals					
Personality and culture fit					
NOTE:	Rank each factor using the scale. Complete fact-finding / re-interview if more information is required. Multiply total X 2 to compare with 100.				

[45] Adler, Hire with Your Head Pages 182-183, see his book for descriptions of each cell in the matrix

Assess Your Company's Hiring Process[46]:

Use this tool to assess how your company is doing relative to the lead practices Adler advocates!

Category	Description of the Best	Rate Yourself (1 weak – 5 great)
Management commitment	Management is totally committed to hiring the best, including whatever time and resources it takes to make it happen	1 2 3 4 5
Long-term and forward looking (not short-term and reactive)	A workforce plan is in place describing all the hiring needs for at least the next six months. This is matched with an updated talent pool of current employees to determine external needs.	1 2 3 4 5
Focus on performance, not skills and experience	All new positions are described using a performance profile. Managers use performance measures to manage, motivate, and reward existing team.	1 2 3 4 5
Offer careers, not jobs	New jobs clearly define challenging career opportunities, with an emphasis on performance, not skills and experience	1 2 3 4 5
Target the best – those that want a better job, not just those looking for another job	Sourcing plans are designed for hiring top people, not just filling positions. The emphasis is on long-term programs like employee referrals, networking and nurturing potential candidates, rather than just job boards. Employer branding and employer-of-choice programs are in place.	1 2 3 4 5
Professional interviewing and recruiting practices	All managers are thoroughly trained in interviewing, assessing competency, and consultative career-management recruiting techniques. They listen more than talk and make objective assessments, minimizing first impressions	1 2 3 4 5
Solid systems and processes	A great career Web-site that allows candidates to quickly find great challenging jobs, not lists of skills and requirements. Data management systems need to make the lives of recruiters and hiring managers easier.	1 2 3 4 5
Continuous rehiring	A formal process is in place, whereby all managers are constantly re-building their teams to ensure it's comprised of 'A' and 'B' players only. Hiring and restructuring is a continuous top-down-driven process at every phase of the economy	1 2 3 4 5

[46] From Adler, Hire with Your Head Pages 279-280; Adler states that 40 is a perfect score! 32 or more with no holes (i.e., managers who are incompetent interviewers) is what it takes to build a talent-driven culture. 24 or more with no big holes would put your Company in top third!

Lou Adler's Power Hiring 20 Step Implementation Plan[47]

Here is a To-Do list suggested by Adler to implement the hiring practices Adler advocates. The first eight he says are BASICS, or MUST-Do's…

Implementation Step:	Quick Tip:
1. Use Performance Profiles for all new job openings	- Define the deliverables for every new job
2. Conduct structured interviews	- Use Adler's basic eight question interview; check 1st impressions after 30 minutes
3. Write compelling ads	- Focus copy on learning, doing, becoming; reduce skills to minimum; post everywhere
4. Build and use a career web-site	- For more than 10 hires per year make sure candidates can find it easily and use it simply; keep it current and compelling
5. Always conduct testing and background checking	- Whole person assessments and reference checking should be your norm
6. Provide interview and recruiting training for all managers and recruiters	- You don't need training if you're hiring average candidates and without training that is all you will be hiring!
7. Assess competency using the Ten-Factor Candidate Assessment Form	- Formalize the assessment; balance strengths and weaknesses across all job measures; team hiring strengthens objectivity
8. Establish the standards of excellence with formal written guidelines	- Make hiring a formal business process with high standards; senior leaders must be fully supportive
9. Develop a six month workforce plan	- Be proactive, not reactive (see workforce planning section of this tool-kit)
10. Set up an employee talent database for internal moves	- First source for top people should be internal; know your people's skills, abilities, and performance record; tap it before going external
11. Conduct employee engagement / satisfaction surveys	- Disengaged / dissatisfied employees may not be keen to refer others to your organization

[47] Lou Adler, Hire with Your Head, Pages 284-285; the shaded first 8 steps Adler calls the BASICS…

12. Formalize employee referral program	- Target 30 to 40 percent of your outside hires to be from employee referrals; formalize it, market it to your people, reward them for results
13. Establish direct sourcing and networking programs	- Build your own network of contacts; spend time on the phone working your network for potential candidates; speak at events, get involved in community, get to know people
14. Develop an enhanced company career web-site	- Make it easy to find, have great content, keep it simple to engage with your opportunities; get more information later as appropriate
15. Create a great recruiting capacity	- Put your 'A' players to work on recruiting more 'A' players; give them resources to do it well; hiring managers should be directly involved
16. Implement applicant tracking	- Upgrade systems if you are spending too much time on tracking data
17. Use advanced interviewing techniques including panel interviews and take-home projects	- For second round interviews add some pizzazz!
18. Implement an employer branding program	- Market your company not just the job; promote your Company value-proposition for people who are part of it
19. Establish a continuous hiring program	- See staffing as a process, not an event; bring people in to upgrade your talent; don't wait for an urgent situation to emerge
20. Institute a company-wide performance management system	- Performance profiles are the foundation; keep employees focused on the expectation for results; revisit during on-boarding, in setting goals, reviewing performance, providing feedback

Sample Basic Phone Screen[48]

Candidate's Name: _____

Today's Date: _____ Resume Attached: YES ___ NO ___

Position Title/Location: _____

Good morning/afternoon may I speak to [Applicant's Name] please? Hello [Applicant's Name], this is [you name]. I am the [your title] at [company] and was hoping to spend 10 - 20 minutes in follow up to the resume/application you submitted. Is now a good time or would you prefer that we schedule another time that works better for you? I would like to ask you some questions and also give you an opportunity to ask any questions you might have about the position. Doing so will allow us to get to know each other and determine whether it makes sense to meet in-person for an interview. Do you have any questions about the objectives of this call?
Okay, Let's proceed.

You have had the chance to review the Performance Profile for this position (pause and let the candidate confirm they have, if they seem reluctant provide a brief overview of the role and responsibilities).

Experience (develop 2 – 3 questions specific to the role and probe where necessary):

- *Tell me about your most recent work experiences that would make you a strong candidate for this role.*

- *How many years of project management (insert specific skill required) experience do you have?*

48 Content adapted from Introduction to Telephone Screening by Susan M. Heathfield, About.com

- *What has been your experience in building a (choose) department / program / organization?*

- *What courses/continuing education have you participated in that might assist you in this role? Confirm formal education credentials as well. Ask candidates to provide dates if they are not listed in the resume.*

Fit:

- *Not to limit you or commit you to a certain dollar figure, but what's the minimum salary you'd consider right now to accept another position?*

- *Should you be the chosen candidate, what is your availability (any trips coming up?) and when would you be available to start?*

- *Why and when did you leave your most recent position? (If the candidate is currently unemployed)*

- *Are you willing to agree to have a drug test (if applicable), a criminal background check, references checks, educational background checks and others as appropriate for this position?*

- *What concerns if any do you have about this role? What support will you require? What elements of the role are you least prepared for?*

- *Do you have any additional questions?*

Closing:

Based on the outcome of the phone screen, the next step could go in one of three ways:

1. Candidate moves forward:

Thank you for your time today. Based on what we have discussed, I would like to schedule some time for an in-person interview. Can we set an interview time for [time} on [day, date]. (Confirm address and who to ask for) Great! I look forward to seeing you then.

2. Candidate is unsuccessful:

Thank you for your time today. Based on what we have discussed, it appears that we have other candidates who more closely match the credential and experience that we are looking for. Thanks for your interest and time, all the best.

3. Further assessment required:

Thank you for your time today. I will need a few days to review what we discussed and to assess your fit relative to the other applicants. I will get back to you in [xx days] to let you know next steps, if any. Thanks again and talk to you soon.

Sample 30-minute Interview *with Tips*

Candidate Name:

Position Applied For:

Date:

Interview Agenda:

1. Greeting and Introduction (2 minutes)
2. Overview of the Agenda and Interview Structure – Review of steps #3 – 7 below (1 minute)
3. Candidate Questions (0 - 3 minutes)
4. Candidate Career Overview (5 minutes)
5. Interview Questions from Interviewer (15 - 20 minutes)
6. Additional Candidate Questions (0 – 3 minutes)
7. Closing the Interview (1 minute)

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1. Although there will be time for your questions at the end, are there any questions that you have now that cannot wait until then?

2. Please take the next 5 minutes and review your education and employment history, relating how your past experiences would provide a foundation for success in this role.

   - *Ensure candidate speaks to all reasons for leaving/transitioning positions/gaps in resume.*

Interview Questions:

3. Give me an example of a time when you demonstrated your customer service ethic to assist a client.

   - *Ability to go above and beyond the call of duty*
   - *Ability to manage client expectations without compromising the company*

4. Tell me about a situation where your work was criticized.

   - *Ability to communicate effectively with a personal situation in a professional manner*
   - *Tolerance for criticism*

5. Tell me about a situation where you had to meet a tight timeline to get a job done. What did you have to do to ensure the project was completed in a timely manner?
   - *Time management*
   - *Ability to mulit-task*

6. Tell me about the best work group that you ever worked with. What was good about it? What role did you play?

   - *How they interact in a team*
   - *Why type of environment they need to be successful*

7. What areas do you need to get better at? How will you do that?

   - *Self-awareness*
   - *Willingness to learn and take on challenges*

8. What concerns, if any, do you have about this role? What support would you require? What elements/components of the role are you least prepared for?

   - *Tells you how they have assessed their own fit for the role*
   - *Identifies areas of development*

9. Why do you believe you are the best candidate for this position?
   - *They get the last word*

10. Do you have any additional questions for me?

Closing the Interview

That concludes our interview for today. Thank you for your time (stand up and shake hands). We expect to be in a position to determine our short-list of candidates in the next week or two. You will be notified one way or the other of your candidacy for this role. (Walk the candidate out.)

Sample Reference Check

Good morning/afternoon may I speak to [Reference's Name] please? Hello [Reference's Name], this is [your name, title, company]. I was given your name by [Candidate's name] as a potential, confidential reference for their application with our company. Is now a good time or would you prefer that we schedule another time that works better for you? We will need about 20 minutes of your time. Okay, let's proceed.

Sample Reference Check Questions (choose only those that apply):

1. In what context did you work with [Candidate Name]? How many years?

2. Approximately when did the candidate start working for your employer and when (if applicable) did they end their employment?

3. What was their title?

4. What were their main job duties?

5. Are you aware why [Candidate Name] is currently looking to make a change in their employment/interested in the role with [company name]?

6. What are his / her key strengths?

7. What areas of the role might [Candidate Name[struggle with the most or require the most guidance from others on?

8. What is your overall impression of fit relative to the requirements of the role?

9. How effective was the candidate with leading and managing others? (if applicable to the role).

10. Describe their problem solving approach and skills.

11. Describe [Candidate Name's] interpersonal and relationship building skills.

12. How would you rate [Candidate Name's] written and verbal communication skills?

13. How does [Candidate Name] handle multiple competing priorities?

14. Would you re-hire [CANDIDATE NAME] and/or want to work with him again?

15. Do you have any additional comments that you would like noted?

Thanks so much for taking the time to talk with us today.

Sample Offer Letter[49]

[FULL NAME]
[Address]

Dear [FIRST NAME];

I am pleased to extend to you the offer for the position of [POSITION], based on satisfactory references, with [Company]. This is a permanent position that will start on [DATE and TIME]. This position will have a probationary period of [three (3) months]. You will be based in our Regina office and will report to [NAME, TITLE].

The remuneration for this position is as follows:

Salary	*[$ xx,xxx] per annum*
Benefits	*you will be provided with a comprehensive benefits plan including [medical, dental, prescription medications and life insurance.] These benefits will be effective [IMMEDIATELY OR X MONTHS]] after commencement of employment with [Company].*
Bonus	*after three (3) months employment you will be eligible for our target bonus plan of up to [20%] to be paid out on a monthly basis*
Other benefits	*you will be provided with a company vehicle and a gas card.*
Vacation	*you are entitled to an annual vacation of [3 weeks].*
Hours of work	*8:00am to 5:00 pm Monday to Friday*

As [POSITION], you will play a key role in the [briefly list key performance indicators] as well as other duties as that may be assigned.

As [COMPANY] associates are paid through electronic banking, please bring a void cheque on your first day of work so that your pay can be deposited directly in to your bank account.

Please indicate your acceptance of this offer by signing this copy and retuning it to my attention before [date]. I encourage you to keep a copy for your own file. [NAME], I would like to take this opportunity to welcome you to [COMPANY] and to wish you success in your new role.

Sincerely,

Name, Title
I have read and fully understand the above. I affix my signature as acceptance of the above stated terms and conditions.

Accepted: _____ Date: _____

[49] Based on Conroy Ross Partners best practices – NOTE: this is a sample only; should be reviewed with legal counsel prior to use in your business

CASE IN POINT

Case Study: Greg's Contracting

In this section we present a complete draft of a Performance Profile for Greg's Contracting Company Project Manager role. This Performance Profile will be required to support both internal placement and external recruiting of Project Managers so the Company will be positioned to deliver on its anticipated 2010 project opportunities.

Greg's Contracting Project Manager Performance Profile

Senior Project Manager	Performance Profile (DRAFT FOR REVIEW & REVISION)
Position Summary	A senior project manager for our growing electrical contracting company is required in the first year of employment to lead the documentation of internal and external project management lead practices, develop and implement training for all our project team members in these lead practice methods, and establish a system for monitoring adoption of the lead practices in the field. Upon completion of this initial scope, the project manager will lead project teams for our Commercial / Industrial projects while also leading an annual update / refresh of project management lead practices company wide.
Organization Structure & Interfaces	This position reports to the owner / general manager of our Company. This position is a peer position with our other 5 project managers currently in place. This position has lead responsibility and delegated authority for the definition, implementation and adoption of project management lead practices across our entire company. Execution of this significant project will have full sponsorship from our general manager and will require appropriate engagement of all project managers and project team members. When project management lead for Commercial / Industrial projects this role will have full responsibility and authority for planning, resourcing, organizing, delivery and close-out of their project, including being the primary customer interface on the project.
Performance Objectives (SMARTe)	Our company's competitive advantage requires that we are excellent at structuring, managing and delivering high quality projects on time and on budget. We have a window of opportunity to leap ahead of the competition in the next 12 months.

	1. Research, document, and roll-out internal and external project management lead practices across our Company's project teams. This will require a facilitative approach to engaging all project managers, foremen, tradesperson and laborers as well as company functions including purchasing, estimating, HR and Finance. Training of our project teams in lead practice methods must be initiated prior to March of next year. 2. Lead large complex commercial / industrial projects ensuring lead practice methods are applied and focus the multi-discipline team to achieve excellence in all outcomes including: safety, service, quality, profitability and team engagement. Ensure interface with all company support functions are highly effective and that our Company values are embraced by the project team. Success will mean your projects are delivered to highest standards in each outcome, are on-time and are on-budget. 3. Facilitate annual maintenance of our project management lead practice program so that new methods are introduced in a timely and effective manner to all project teams. Orient and train all new team members into our lead practice project management methodology within 3 months of their start date. 4. Build high performing, highly engaged project teams. Our success demands that we create a culture of high performance and high engagement. This role must be seen to be living our values and emphasizing achievement orientation, individual excellence, encouragement and support for team member's success and contributing to a safe, enjoyable work experience. Feedback from employees will be used to assess success in this objective. 5. Constructively contribute to the effective functioning of the Company leadership team which includes our owner / general manager and all project managers. Model open, honest, respectful communication with all Company staff, customers and suppliers. 6. Participate effectively, eagerly engaging with others in company strategic planning, business planning, budgetary and other management processes.

	Provide project management lead practice through leadership into these conversations. Exhibit visible ownership of the roll-out of resulting initiatives in this role's areas of accountability (commercial project leadership and project management lead practice program implementation). 7. Represent our Company in Industry as well as community associations, conferences and meetings enhancing our Company reputation. Promote the services of our Company through the identification and qualifying of leads, then engaging our General Manager and our sales team in follow-through to develop a proposal and close the sale.
Basic Requirements – Essentials Only	This senior project management role will require strong fact-base providing evidence of effective project leadership to successful initiation, delivery and completion of at least 4 large complex commercial / industrial electrical contracting projects. These projects must provide clear evidence of adoption and implementation of industry lead practices for project management. As a foundation this role will require the individual is: a journeyperson electrician in good standing and that they have broadened and deepened their business and project management competency with course work and solid evidence of the application of their learning on at least 4 complex commercial / industrial projects .

Having scoped out the requirements of the Senior Project Management role we have determined that we will be going outside of our company to hire for the role. Adler's guidance to our external hiring effort is covered in the Key Concepts section. Below you will find the interview approach we developed by applying Adler's key concepts to the interviewing of candidates for our Senior Project Manager role.

Greg's Contracting Company: Plan for Project Management Interviewing

For our purposes here we are assuming we have sourced a number of prospective candidates for our Senior Project Manager role. To do some preliminary screening we have decided to implement the short telephone interview with each of them. We have to decide what the 'filter' is to select candidates for the in-person interview will be. I returned to the Performance Profile

and reviewed the SMARTe objectives that our team had established. Upon review I decided that the most important year 1 deliverable is our project management lead practice initiative. We see this as the key to transforming how we serve our customers, accelerate our productivity, increase our profitability and challenge as well as develop our team members. Without the implementation of these project management lead practices we will not achieve our envisioned transformation, and fail to leap-frog our competitors. So, in the telephone interview I have decided to seek an 'anchor' accomplishment from each prospective candidate framed around this objective as well as ask them to 'visualize' the steps required to ensure successful adoption among our existing project teams. We know that implementation is 70% of the challenge of change!

Advanced Telephone Interview tactics:

Opening:

Thank-you for your interest in Greg's Electrical Contracting Senior Project Manager position. I have asked for 20 minutes of your time to get to know each other better and help us both determine if it makes sense to invest in a person-to-person in-depth interview. Do you have any questions about the objectives of this call?

Ok, let's proceed. You have had a chance to review our Performance Profile for this position (pause and let candidate confirm they have). The top objective relates to a strategic initiative we see as necessary to transform how we serve our customers, accelerate our productivity and increase our profitability – this is our project management lead practice initiative that is described in that objective. You will note it requires initial implementation across all our project teams in the first 12 months on the job. Please provide me with specific examples of previous jobs where you have researched and implemented lead practices into work processes successfully?

- ✓ PROBES:
  - Describe the sense of urgency.
  - What business impact resulted?
  - Be clear about the specific role you played in your example.
  - Knowing what you now know about your example and the results you achieved, what one thing you would do differently that would result in even greater impact.

- What learning did you gain from this experience that will support your success in providing leadership to our strategic initiative?

Now let me ask you to consider the lead practice initiative we have outlined in our performance profile for our Senior Project Manager role. Let's assume that you identify several lead practices that can make a different in our pursuit to differentiate ourselves from the competition. These lead practices are validated with our internal teams and our leadership and given the green light for implementation. Describe clearly, step by step, the steps you would take to ensure successful adoption of these approved lead practices by all our project teams by the end of the first year on the job.

✓ PROBES:

- Why would you do this?
- What evidence do you have that this will work in a situation like ours?
- Where have you been successful taking this tact in the past?
- What are the key leadership attributes you possess that will allow you to be successful in this pursuit?
- Tell me why leading a strategic initiative like this, one of tremendous strategic importance to our company, motivates you?

Thank you for your time today. We will finalize our decision about the in-person interview participants within the next week. At this point I would be interested in how you feel about your fit with this strategic aspect of our Senior Project Manager position, knowing that it will be the primary focus of this role for the first year?

Case Example: Advanced In-Person Interview Plan

Given the strategic importance of successful implementation of the year 1 lead practice initiative we have decided to organize a panel of three senior leaders to participate in the short-list interview. We have a list of five candidates. The approach to our interview will be guided by the following sequence of questions and probes. Our hope is that participation by one Senior Project manager, one Senior Purchasing officer and I (owner / general manager) will help us keep our emotions in check and gather as strong a fact base as possible to assess the candidates on their merits.

In advance of the panel interview we have sent each short-list candidate a package of promotional information about our Company. We have also asked them to provide a short narrative to us, one week in advance, of key accomplishments that they feel provide strong evidence of their past performance in areas comparable to our SMARTe Performance Objectives.

Our panel has reviewed each resume, made notations and reviewed the achievement submission prior to the start of each panel meeting. Each meeting has been scheduled for one and one-half hour duration in our offices. Candidate meetings have been set for two per day, one each morning and one each afternoon. They have been asked to invest two hours each since we wanted to start by giving them a tour of our corporate offices and some visuals and descriptions of major commercial / industrial projects we currently have on the go. As owner / general manager, I have agreed to conduct the tours and chair the panel interviews. Here is our question tactics for the panel interview…

Question	Lead	Probes (all as appropriate)
As you know, we're looking for a Senior Project Manager, let me give you a quick overview to reinforce the importance of this position. (Restate some background to ensure understanding…) We have had a chance to review the information you sent to us, thank-you. Please sum up, for our panel how you feel background has prepared you for this type of important position.	Owner / Manager	✓ Probe for specific examples of leading strategic initiatives to successful impact on businesses
You have provided us a written submission that outlines your most significant accomplishment in your career. Can you take a few minutes now and elaborate on why you feel it provides strong evidence of your ability to achieve the results we require of our Senior Project Manager?	Owner / Manager	✓ *The bottom-line or business impact of the accomplishment.* ✓ *When it occurred.* ✓ *The specific role on the team you had and your specific contribution to the accomplishment.* ✓ *The major steps and deliverables involved in accomplishing the task.* ✓ *Some of the biggest challenges faced in the accomplishment and what the you did to overcome these challenges* ✓ *What was their greatest learning from this accomplishment that will support their success in the position you are hiring for. Why do they see this learning as most important*
Review each SMART e Objective… "For this objective, please provide concrete examples of in as much detail as possible about accomplishments from your past roles that would be comparable?		See probes from 1st accomplishment question <use as appropriate>
Please provide examples of where you took the initiative and did things not required in your actual role?	Senior Project Manager	What motivates you to take an initiative like this? How did you manage role boundary issues that arose?

		What did you do to influence others that this direction made sense to the business? What steps did you take to ensure people around you were also successful?
Now please tell us about a time you were totally committed to a task…	Purchasing Manager	What factors led to you having such a strong commitment to this task? Who stood to gain the most from your commitment to this task? What was the impact on your business? What was the impact for you professionally? How did you rally others to your cause? Are there other examples that come to mind where you have been so totally committed to a task such as this one you just described? If so, please elaborate…
What three or four adjectives best describe your personality? Give me actual examples of when these traits have aided you in the performance of your job and when they have hurt.	Owner / General Manager	How do you relate to others who do not possess these same personality traits? Example of adjusting communication to increase effectiveness with peer? With boss? With team member? With customer? What is an ideal organization culture look and feel like to you?
Ok, you know how important our lead practice initiative is to our company's competitive advantage. Help us understand what you anticipate to be the 3 most significant challenges to the success of this initiative and what you would do to overcome these challenges if you are awarded this job?	Owner /manager	Please be more specific. What in your previous employment qualifies you to suggest this would work? Where has this tactic worked for you before? What organizational factors are most important to successful implementation?
If appropriate and candidate is good fit for final interview: Although we're seeing some other candidates, I personally think you have a very fine background. We'll get back to you in a few days, but what are your thoughts now about this position? ***If unsure: Thank-you for your time today. That concludes our interview panel time.***	Owner / Manager	

Following the panel interview the members' notes need to be consolidated. Specific data that informs that previous accomplishments for each candidate map to the SMARTe objectives needs to be summarized to support decision-making. A simple matrix can be organized to support this summary.

SMARTe Objective	Specific data from comments in panel interview derived from specific accomplishments (anchors) and / or problem-solving skills (visualization)….	Fit of accomplishments with that required to successfully achieve performance objective (1 is very weak fit, 5 is very strong fit)
Lead practice initiative	✓ Data point 1 ✓ Data point 2 etc.	1 2 3 4 5
Leading large complex projects	✓ Data point 1 ✓ Data point 2 etc.	1 2 3 4 5
Lead practice annual refresh	✓ Data point 1 ✓ Data point 2 etc.	1 2 3 4 5
Build high performing teams	✓ Data point 1 ✓ Data point 2 etc.	1 2 3 4 5
Leadership team contribution	✓ Data point 1 ✓ Data point 2 etc.	1 2 3 4 5
Management processes contribution	✓ Data point 1 ✓ Data point 2 etc.	1 2 3 4 5
Represent company	✓ Data point 1 ✓ Data point 2 etc.	1 2 3 4 5

In addition to completing this summary and discussing our panel's assessments based on objective data, we have asked each finalist to complete the PROFILE XT (PXT). Each finalist candidate's fit with the job match pattern our team has developed, will round out our perceptions of thinking style, personality and occupational interests and compare it against our 'job match pattern' we have devised using the benchmark patterns available and adjusting it with the actual PXT data from our high performers (scales that distinguish them from our lower performers is focused in the profiles of our candidates). These job match patterns will be basis for a brief follow-up interview with our top 2 candidates by the owner / manager. At this follow-up meeting we will also be discussing in more detail the Total Compensation arrangements for this Senior Project manager role. This approach retains competitive environment while allowing us to further confirm information gaps that remain and validate their agreement with the compensation package we are offering.

D.I.Y.

1. Find a job description that you currently have in your Company (Maybe start with your own). Use concepts and tools provided to change it from a description focused on 'having' to one focused on 'performing'. If you think it makes sense, use the Performance Profile template structure to create performance profiles for all the key positions in your Company.

2. What are your emotional triggers? Reflect on and jot down triggers that 'pre-dispose' you to preferring or eliminating a candidate on 1st impressions. Review this list prior to any interview and commit to not forming judgment for the 1st 30 minutes of your interviews.

3. Consider how the 10 factor assessment can support your sort 'fit' of finalist candidates for your next job competition. Take notes so you have 'facts and observations' to support the ranking you provide each candidate when using the 10 factor assessment grid.

Reflections On: Staffing (Hiring)…

4. Use a structured interview approach like Adler's to prepare for consistent, objective fact-finding during your interviews. Review the key lines of questioning that are outlined in this section. Read the 'Case In Point' to see an adaptation of Adler's insights into Greg's Contracting interview approach for a Senior Project Manager.

5. Remember to market your Company to the candidates all the way through the staffing cycle. Don't oversell, however, tell a compelling, accurate picture of what opportunities for the individual to grow their career with you. Reflect on an capture key points for why your Company IS attractive for high performing people to work in:

6. Take time now to create performance profiles that capture 'high performance' for each key position in your Company. Consider using the Profile XT to support building job match patterns for these critical roles so that you can administer the assessment as part of your finalist selection process when hiring for these key positions.

Reflections On: Staffing (Hiring)…

7. Consider where your best people have come from in your organization. Can you expect that future 'best' will also come from these sources? Or do you need to seek out new sources of 'great talent' to help you sustain your Company's current success and grow it to the next level?

Strategy:

Actions:_____

_____

_____

_____

_____

Strategy:

Actions:_____

_____

_____

_____

_____

Strategy:

Actions:_____

_____

_____

_____

Reflections On: Staffing (Hiring)…

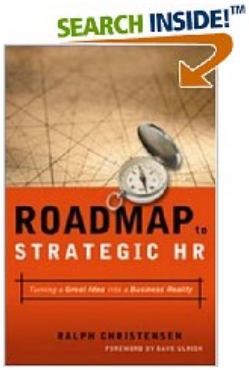
8. Do you always conduct background and reference checks? Don't let time be an excuse, outsource it if necessary but ALWAYS do them before hiring finalist candidates!

9. What other ideas do you have about improving your Company's approach to staffing?

TELL ME MORE

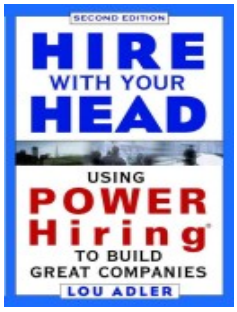
Resources

The following resources were referenced in development of this Human Resource Tool Kit:



This book by Ralph Christensen has provided the overall strategic framework for this HR Tool-Kit. We like how he has organized the work of human resources.

If you are interested in purchasing a copy of his book you can do so at: http://www.amazon.com/Roadmap-Strategic-Hr-Turning-Business/dp/0814408672 .



Find the right candidate for the job every time. Adler's insightful new POWER hiring methods enable managers to attract, assess, and recruit the best candidates through the integration of online tools and offline behavior modifications. New information on hiring and the Internet, diversity, and legal compliance issues is included. Hire With Your Head: Using POWER Hiring to Build Great Companies, By Lou Adler

Footnote Summary

1 Content in this section largely adapted from Hire With Your Head: Using POWER Hiring to Build Great Companies 2nd edition; by Lou Adler

2 Payne, Doug. "Staffing can cost you in more ways than one" in Medical Post, (September 9, 2003), vol. 39, issue 32, p.21

2 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 17

3 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 18

4 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 18

5 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 19

6 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 241

7 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 24

8 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 26

9 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 26

10 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler, Page 28

11 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 29

12 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 59

13 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler page 235

14 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 236

15 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Pages 239-240

16 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 248-257

17 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler 255

18 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler 260

19 Contact Greg Fieger at Conroy Ross Partners if you would like to learn more about these technologies: gfieger@conroyross.com

20 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 245

21 Profiles International Workforce Analysis Profile is designed to help business owners learn about their people's engagement and satisfaction levels and assist you to put a plan of action in motion to enhance their engagement and satisfaction. Contact Greg Fieger of Conroy Ross Partners to learn more about this tool and services to support you in your effort to be 'employer of choice': gfieger@conroyross.com.

22 Content adapted from Gone in Thirty Seconds – How to Review a Resume http://humanresources.about.com/od/selectemployees/a/resume_review_2.htm.

23 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Pages 66-70

24 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 571

25 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 83

26 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 89

27 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 89

28 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 113

29 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 117

30 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 91

31 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 104

32 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 104-105

33 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 114

34 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 115

35 More information about using these tools you can contact Greg Fieger by email at: gfieger@conroyross.com

36 Contact Greg Fieger to learn about background verification services offered through Profiles International: gfieger@conroyross.com.

37 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 168

38 Based on Conroy Ross Partners best practices

39 More Frequent Background Checks of Employees & Applicants, www.HR.com

40 Based on Conroy Ross Partners best practices

41 Based on Conroy Ross Partners best practices

42 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 37

43 Hire With Your Head: Using POWER Hiring to Build Great Companies; Lou Adler Page 33

44 Based upon Lou Adler's Hire With Your Head: Using POWER Hiring to Build Great Companies

45 Adler, Hire with Your Head Pages 182-183, see his book for descriptions of each cell in the matrix.

46 From Adler, Hire with Your Head Pages 279-280; Adler states that 40 is a perfect score! 32 or more with no holes (i.e., managers who are incompetent interviewers) is what it takes to build a talent-driven culture. 24 or more with no big holes would put your Company in top third!

47 Lou Adler, Hire with Your Head, Pages 284-285; the shaded first 8 steps Adler calls the BASICS…

48 Content adapted from Introduction to Telephone Screening by Susan M. Heathfield, About.com

49 Based on Conroy Ross Partners best practices – sample only

Information regarding job match patterns, the Profile XT assessment and how to integrate these tools into your hiring process can be received by calling:

Mr. Greg Fieger, Conroy Ross Partners
Regina, Saskatchewan
306-584-0628
gfieger@conroyross.com

A Google search for the following key words will also lead you to dozens of web-sites to explore with relevant information.

- Key words:
    - employee selection
    - employment interviewing

For More Information

This material has been designed to provide you with practical tools and examples to assist you in the effective management of your most important asset, your people. It has been developed in accordance with best practices, but tailored to meet the unique needs and requirements of the Saskatchewan Construction Association. The four Human Resource Modules are:

Module #1 *Workforce Planning*
Module #2 *Recruitment & Selection*
Module #3 *Workforce Engagement & Performance*
Module #4 *A Prescription for Leading in Changing Times*

If you require additional information, consultation, coaching and/or a workshop regarding any element contained within the modules, we request that you contact either the Saskatchewan Construction Association or Conroy Ross Partners. Specific contact information for these groups is:

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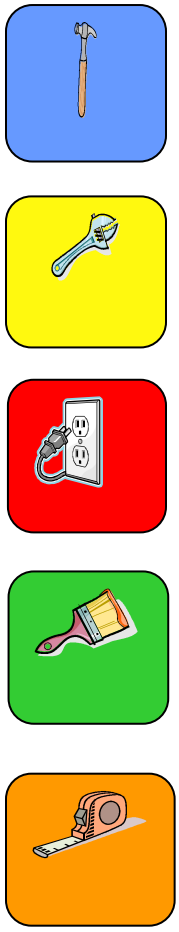
April 29, 2009



HUMAN RESOURCE TOOL KIT

Module #3:

Workforce Engagement & Performance

SASKATCHEWAN CONSTRUCTION ASSOCIATION

Table of Contents

3. Workforce Engagement and Performance

KEY CONCEPTS

Creating an Extraordinary Organization [1]

25 lessons from Jack Welsh, former CEO of General Electric:

- Lead More, Manage Less
- Build a Winning Organization
- Harness Your People for Competitive Advantage
- Build the Market-Leading Company

By applying the knowledge from modules one and two, you've already taken proactive steps for planning and assembling your workforce. The third module of this HR tool kit, Workforce Engagement and Performance, will outline the importance and best practice approaches for retaining engaged employees and ensuring that their performance is aligned to the overall business strategy of the organization. An organization's level of workforce engagement and performance is tied to the customer's overall level of satisfaction which will directly impact its bottom line results.

Leadership plays a vital role in the overall workforce engagement and day-to-day performance. There are multiple variables that influence performance including leadership behaviour and the physical environment where work takes place.

In addition to strong leadership, **orientation** plays an important role in the overall retention strategy and setting employees up for success. Orientation should not be overlooked or forgotten for all of your new employees regardless of their experience, background and training.

Following a successful orientation into the organization, there is a clear need to **develop leadership skills** in individuals and for teams to foster a culture of continuous improvement.

[1]Kotelnikov, V. (2005) "25 Lessons from Jack Welch – Business Leadership and New Management Secrets", Ten Business e-Coach, Innovation Unlimited, 1000ventures.com

Developing leaders and building an effective team will help ensure employee productivity and performance is optimized within an organization. In order for these leadership skills to continuously improve, there needs to be a clear focus on learning and development. A brief summary of best practices and samples of leadership and management development and mentorship programs is provided that will illustrate how the practical application of these methods could be employed throughout an organization.

Proactively managing workforce **performance** is necessary to ensure the expectations of management are clearly communicated throughout an organization. The performance management element of an employees' evaluation needs to be aligned to the overall business strategy and should also be based on measures that are within the control of the employee. This component will need to be closely linked to employee career planning. Effective career planning is achieved when the onus is shared between employer and employee.

Career and succession planning within the organization is essential to its survival and future success. This is where the owner or manager will need to match the needs of the employees with the needs of the organization. A method of best practice is outlined when it comes to developing an effective succession plan for the organization.

The **rewards and recognition** component of an organization is often given more emphasis than other elements of workforce engagement and performance. Compensation can be both an incentive and a deterrent for workforce performance. In order to effectively recognize and reward employees, the compensation and recognition plan needs to be closely aligned with the overall strategy of the organization.

Employee **exit interviews** are used to gather information from departing employees. The goal of the exit interview, from the employer's perspective, is to learn the reasons for the employee's departure which may act as an aid for improvements to the organization in the future. From the departing employee's perspective, an exit interview is an opportunity to provide constructive feedback and to leave the organization on a positive note with good relations and mutual respect.

Leadership and Influencing Employee Performance

"Too many businesses are over-managed and under-lead"

Peter Drucker

Leadership is about capturing the hearts and minds of your workforce. Most people can easily recognize the fakes, particularly over a longer period of time. The most inspiring leaders are the ones who 'walk the talk'. It is important that actions and words are consistent with the organizational goals and values and that management lead by example.

The people in your workforce need to buy-in to the **beliefs** that you want to be known for throughout your community and industry. Organizational **values** are the areas and practices where money is actually spent and not what is written on the wall or over the door – these are the things that an organization truly values. There is a gap between beliefs and values in all organizations. A good leader is a one who recognizes this gap and proactively ensures that the gap is narrowed.

Management vs. Leadership[2]:

Management	Leadership
• Plan	• 'Purveyor of Hope'
• Organize	• Inspire
• Direct	• Empower
• Control	• Coach
• Communicate	• Mentor

[2] Adapted from John Kotter's "A Force for Change: How Leadership Differs from Management", (1990)

Effective leadership is the ability to influence your workforce toward the achievement of a common goal. Common traits of effective leaders include the following:

- An idealized goal – A Vision
- The ability to articulate the goal – A strong communicator
- Strong convictions, assertive and self confident
- Honest with integrity
- Enthusiastic

It is important to build credibility and trust with your employees. How do you build trust? The following are examples of methods of building trust with your workforce:

- Demonstrate that you are willing to work for others' interests as well as your own
- Walk the talk – be a role model
- Be a visible leader
- Let employees know what is happening
- Be open and honest by sharing your feelings and the facts in a timely manner
- Be consistent in your values
- Maintain confidences

Through clear and transparent communication of your vision and strategy and by linking how individual employee performance impacts the greater organization, you can begin to align employee behaviours with the common goals of the organization. Your job as a leader is to assist your employees in overcoming obstacles in the way of attaining their goals by providing inspiring leadership. Leading by example, 'walking the talk' and respecting your employees will help to inspire your workforce to maximize their performance which will directly impact your customer's level of satisfaction. Increased customer satisfaction will lead to a greater number of existing clients engaging your organization for repeat business by building a relationship based on trust in your ability to deliver.

Orientation Best Practices

Orientation is often overlooked in the workforce and engagement and performance process. Some organizations simply hand over an 'orientation book' and employees are left lost and confused to fend for themselves by learning on the fly. Proper orientation practices will increase retention rates and prepare your workforce to be as effective as possible in a shorter period of time and thus increase your overall capacity and drive bottom line results.

Simple elements of the orientation process are often overlooked. It is important that employees are aware of:

- Their clear and specific role and responsibility,
- The expected hours of work,
- The expected performance standards,
- The history and future direction of your organization,
- The products or services that you provide,
- A general overview of your work/office environment including phones, photo copiers, tools, technology etc.,
- Safety procedures,
- Benefits that are provided to them, and
- Goal setting and objectives in the for 3/6/12 months.

Mountain Climbing [3]

The work of Marcus Buckingham and Curt Coffman identifies twelve questions that can be used to measure the strength of any workplace. They equate orientation and thriving in an organization to mountain climbing and the sequential stages of progressing from "Base Camp" to the "Summit". The twelve questions are grouped into the following four subsets:

Base Camp – *"What do I get?"*

1. Do I know what is expected of me at work?
2. Do I have the materials and equipment I need to do my work right?

[3] Buckingham, M & Coffman C (1999) "First, Break all the Rules", Simon & Schuster

Camp 1 – *"What do I give?"*

3. At work, do I have the opportunity to do what I do best every day?
4. In the last seven days, have I received recognition or praise for doing good work?
5. Does my supervisor, or someone at work, seem to care about me as a person?
6. Is there someone at work who encourages my development?

Camp 2 – *"Do I belong here?"*

7. At work, do my opinions seem to count?
8. Does the mission/purpose of my company make me feel my job is important?
9. Are my co-workers committed to doing quality work?
10. Do I have a best friend at work?

Camp 3 – *"How can we all grow?"*

11. In the last six months, has someone at work talked to me about my progress?
12. This last year, have I had opportunities to learn and grow?

All of your employees will travel on this journey through orientation at different speeds and reach different levels. It is important that you, as a manager, understand that each person travels at different speeds and it is your responsibility to recognize where they are in the process and to help them reach the summit if that's the best fit for both them and your company. If the employee can answer all of these questions positively, they have reached the summit and it will result in a higher rate of retention and employees that are engaged and committed to your company and will ultimately drive better results.

A key step with new employees is to clearly establish the "Base Camp" through the orientation process. The following are some orientation design best practices:

Nine Best Practice Orientation Design Principles [4]

1. **Part of the recruitment process:** A great orientation implementation will ensure alignment between messages conveyed during the recruitment process and begin to weave key messages throughout all orientation elements.
2. **Linked into culture and values of the organization:** Great orientation sets the stage for the employee to understand, and integrate, the values, goals and mission of the company.
3. **A process, not an event:** Best practice organizations embrace the belief that orientation is a process that unfolds over an extended period of time, not an event that is completed in a day or two.
4. **Timely:** Time is of the essence when it comes to orientation. The sooner the better.
5. **Fresh:** It is essential that both your message and the tools you choose to deliver that message be as current as possible.
6. **Memorable:** Orientation is learning. Therefore, it's vital that your orientation message be a memorable one so that your message stays in the front of your employee's mind.
7. **First impression:** Yes, we never get a second chance to make a first impression. This old saying is never truer than when applied to new employees.
8. **Involves executive, HR, managers:** Many people have a role to play in effective orientation. A great plan is one that considers all people as valuable to the process, and incorporates their wisdom as well.
9. **Inclusive:** From front line workers to the executive suite, effective orientation helps all workers contribute more effectively to the bottom line.

Orientation, when done properly, can be an extremely cost effective means of increasing your organization's level of engagement and overall performance.

[4] Westwood, R. (2003) "Nine Best Practice Orientation Design Principles", www.westwood-dynamics.com

Developing Leadership Skills

Leadership skills are abilities that have been acquired through some form of training, both on the job or through formal education. Leadership skills are the specific skills that individuals learn in order to help themselves become more proficient in key areas of your organization. Your organization has specific leadership skills that will enable future success within the organization generally falling into the following five categories:

- Leading People
- Leading Change
- Results Driven
- Business Acumen
- Relationship Building/Communication

The benefit of learning various leadership skills is that individuals learn more and better themselves, which in turn helps your organization achieve its long-term goals. The need to learn and develop leadership skills is vital for retention and succession in your organization.

Evaluating and Developing Skills

These five leadership categories have a different subset of specific competencies intended to demonstrate to each employee the individual behaviours associated with each skill. In order to effectively develop leadership skills a formal framework for evaluation and tracking progress can be employed.

The competency framework can be used to provide appropriate development to help employees realize their potential by providing the appropriate mechanisms for appraisal, feedback, and coaching to improve productivity. Competencies provide employees with an objective, defined target for development and realistic career goals. By integrating and implementing these competencies throughout your organization, all employees will have a greater understanding of what behaviours are encouraged and how their behaviour affects to the larger organization. In addition, Competency-based human resource systems help to ensure that the people who get hired into your organization have a greater potential to succeed.

Sample Competency Table[5]:

Competency/Skill	Level 1 Employee	Level 2 Supervisor	Level 3 Manager	Level 4 Executive
Leading People • Coaching • Developing/directing/ confronting subordinates	Basic	Intermediate	Developed	Advanced
Leading Change • Strategic thinking • Strategic leadership • Service motivation	Basic	Intermediate	Developed	Advanced
Results Driven • Project management • Organizing and planning • Decision making • Managing and measuring	Basic	Intermediate	Developed	Advanced
Business Acumen • Process management • HR management	Basic	Intermediate	Developed	Advanced
Relationship Building/Communications • Building team spirit • Interpersonal skills • Understanding others • Command skills	Basic	Intermediate	Developed	Advanced

[5] Adapted from "Centre for Creative Leadership".

Learning and Continuous Improvement

Investing in existing employees and working to improve their skills can be extremely beneficial to your organization. Apart from the obvious time and money savings, there are numerous other aspects which can impact your organizational performance.

Employees' perceptions of their career progression and future prospects change over time. They will be more prepared to make a deeper commitment to an organization which deliberately invests in them by developing and growing their personal skill sets. In addition, if employees feel informed about where your company is going, if they buy-in to your strategy, feel that they have someone guiding their career development and that their accomplishments are recognized, they will be more committed and engaged in the overall success of your company. Increased workforce commitment could include any of the following benefits: loyalty of service, referrals to friends, industry goodwill, willingness to work overtime and improved performance.

Promoting from within and developing your people creates the wider perception that, as others advance, the gaps they leave will create promotion opportunities for their immediate peers rather than outsiders. This creates a sense of career scope and momentum among your entire workforce.

Learning and performance management should be an ongoing process. It is about identifying people who have the capability to fulfill key roles both now and in the future; knowing who could step in immediately, who could be an asset to the company in a couple of years time and who is likely to be leading the company forward in the longer term.

The qualities that distinguish exceptional managers, leaders, drivers and visionaries are more elusive. Your employees who demonstrate perseverance, determination, emotional intelligence and resourcefulness exhibit traits that cannot be taught in a classroom.

Performance Management

The performance management system in an organization is intended to be a process that enables managers to create a work environment where people can perform to the best of their abilities. It should be an ongoing process where both managers and employees make equal contributions to overall improvement and align individual goals and performance with organizational goals and vision.

What is the Performance Management process?

- Deals with the achievement of organizational goals
- A shared responsibility between the organization and the individual
    - It may also deal with behaviors that need to change that are not immediate or urgent problems
- Includes employee development
- Aligns employees' goals, skills, performance measures and recognition with key business objectives
- Assists employees to succeed in their current role and grow in their capability to contribute to the operations of the organization

Performance Management Objectives:

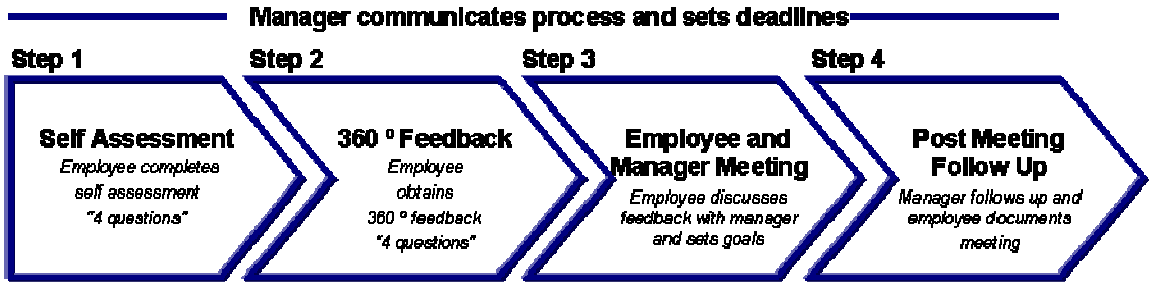
- Align individual and organizational goals
- Employee development
- Increased communication
- Skill development

Remember, this is not a paper producing exercise!

The employee **drives** the performance management process and is **responsible** for:

- Gathering 360 feedback
- Understanding the strategy, objectives and values of the organization

- Linking own goals to those of the organization
- Personal development
- Annual review



Step 1: Self Assessment

1. What do I do well?
2. What could I do better?
3. What 3 things would I like to contribute to the achievement of Company and Unit goals? *Establish expectation for next time period within the context of organizational and unit goals.*
4. What 3 things would I like to learn? *Establish expectation for next time period within the context of the individual's job.*

Step 2: 360 º Feedback

Note: Questions outlined in Step 1 are used for both self assessment and 360º feedback

Why 360 º Feedback?

- It provides individuals with an opportunity to learn how different colleagues perceive them, leading to increased self-awareness
- It encourages self-development
- It increases understanding of the behaviors required to improve personal and organizational effectiveness
- It promotes a more open culture where giving and receiving feedback is an accepted norm
- It increases communication within the organization
- It can be a powerful driver for change

Step 3: Employee and Manager Meeting

Preparing for the meeting:

- Think about how best to give your feedback to this individual – ensure you are using positive language and avoid direct criticisms
- Encourage your employees to gather 360 º feedback on the first two questions
- Encourage your employees to develop their own thoughts on the 4 questions
- Think about desired outcomes of the discussion
- Make notes on your answers to the 4 questions

At the meeting:

- Have employees lead the conversation
- Ask them to go through the 4 questions
- Deliver effective, consistent feedback – positive and improvement

Effective feedback is:

- **Understandable** – keep it clear and simple
- **Focused** – address only 1 or 2 issues
- **Specific** – provide details and examples
- **Substantive** – ensure comments are meaningful
- **Objective** – if possible, provide quantifiable feedback in measurable terms

Example:

- *Instead of saying:* "You are doing a great job!"
- *Try saying:* "You have increased your productivity 10% over the last month and maintained an error free record. Your efficiency and attention to detail is greatly appreciated."

Step 4: Post Meeting Follow Up

- Upon completing the one-on-one discussion, the employee is now responsible for consolidating all of the inputs into a single page document

- Both the employee and the supervisor/manager should keep a copy of this document for their own reference
- Set a follow-up meeting within 60 days to discuss the process and update on progress
- Provide continuous feedback throughout the year

Hints and Tips

Managing the conversation:

- Allow enough uninterrupted time
- Allow the employee to lead the discussion
- Actively listen
- Focus attention on employee's strengths
- Be clear and specific about areas of improvement
- Only focus on a few things
- Focus on performance not the person
- Use personal observations – second hand information can only be used for positive feedback
- Provide clarity on results and behaviors that will meet and exceed requirements (re: organizational and unit goals)
- Ensure you and the employee have the same understanding of future expectations (re: development)
- Give the employee the opportunity to comment on the discussion
- End on a positive note going forward

Providing Improvement Feedback:

- Describe the issue/problem using specific behaviors and not focusing on the individual
- Seek cooperation and not confrontation
- Discuss the cause of the issue or problem
- Ask the employee to identify possible solutions
- Decide and agree on specific actions to be taken
- Offer on-going support and encouragement
- Agree on follow-up dates

Providing Positive Feedback:

- Describe positive results or behaviors using specific details
- Solicit the employee's opinion of the same result or behavior
- Ask employee's to identify elements that contributed to their success
- Discuss ways in which you can support continued positive results
- Reinforce the value of the work the employee is doing and how it fits in with the organizational goals
- Show your appreciation and your confidence in the employee

Provide Ongoing Feedback

- Provide informal feedback daily
- Focus on developing employees
- Endorse effort and growth
- Recognize and reinforce strong performance – celebrate accomplishments
- Identify and encourage improvement (where needed)
- Respect – treat your team the way you want to be treated

Avoid Postponing Action

Postponing action allows behaviours to continue and frustrations to build. Avoid this by conducting behaviour management in a timely fashion.

Common reasons Managers postpone action:

- Don't want to hurt employee's feelings
- Afraid of conflict
- Afraid of not having support of their boss
- Afraid of the employee
- Believe the employee will come around with time
- Too busy

*Remember that **dialogue** is the most important aspect of this process*

Career and Succession Planning

The career and succession plan segment below builds off of your Workforce Planning activity in the Saskatchewan Construction Association HR Tool Kit Module #1.

"By failing to prepare, you are preparing to fail"
Benjamin Franklin

The key to the future success of your organization lies in assessing and understanding the value of the human resources you have at present and what resources you are likely to need in the coming years. The future performance of any company is reliant on the thoroughness and strength of today's succession planning.

Careful planning in the present means your workforce will be less unsettled and disrupted in the future. In short, if you want to boost the value and saleability of your business for the future, start planning for and building the next generation of leaders right now.

Identify the "stars" in your organization who you believe can lead and develop the business in the future. Provide them with the training, guidance and coaching necessary for them to begin to understand what it will take for them to reach the next level in your organization and through conversation, confirm a career / life goal they want and are willing to work for.

The succession roadmap will look something like the following:

1. Goal Setting
2. Succession Strategy Development
3. Execution of the Succession Plan

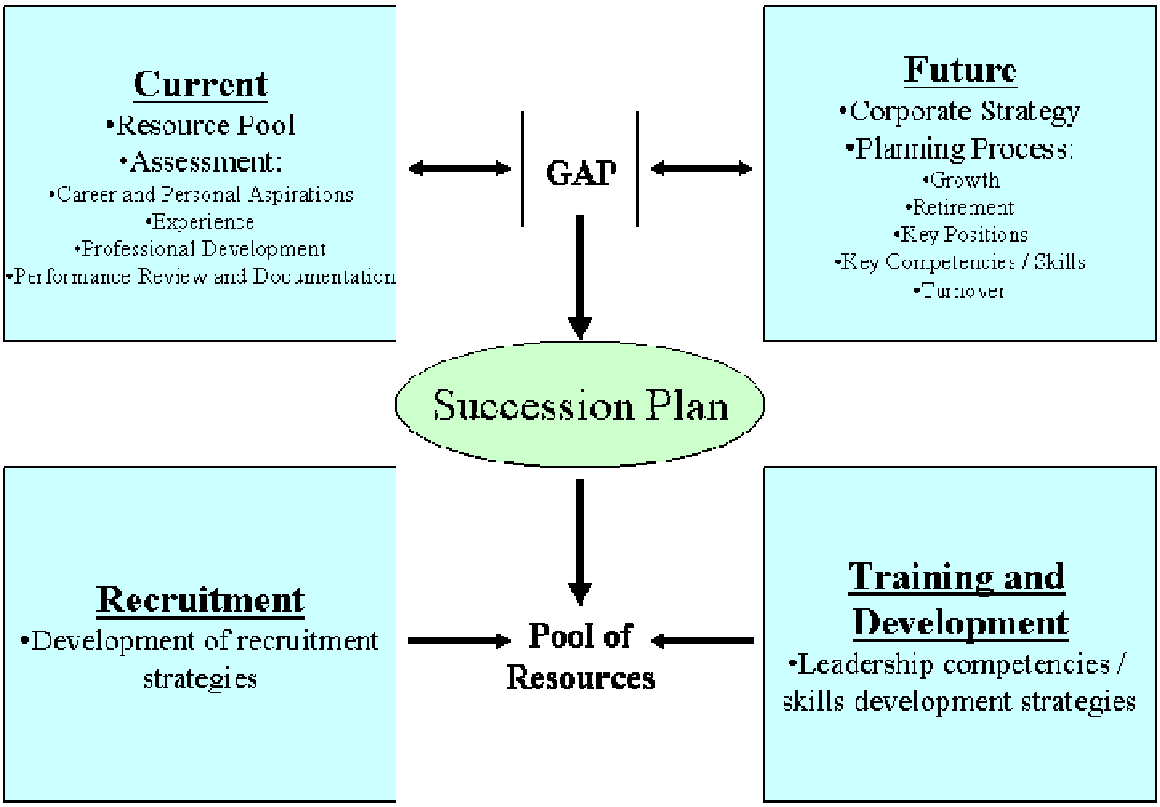
Be clear on what your goals are for your organization. Once you have clearly established business and personal goals you can begin to develop a strategy to get there. Ensure that your employees are fully engaged in the development and execution of the succession plan. If there is a need to make an external hire, be sure your workforce understands why you needed to go outside the organization for specific expertise; ensure that it is not seen as a discredit to the

talent within the organization or that they are not capable of doing the job. Transparency and openness is paramount to the succession planning process to ensure there are no surprises and that employees feel involved and important part of the process.

The following are some sample succession and career planning questions for you and your employees:

- What do you think needs to be done to develop internal talent and address the succession needs of the company?
- Is there someone(s) internally that you have identified that you are grooming for your position? Has this been communicated?
- Do you think a formal strategy and plan to develop internal talent is a top priority?
- As you look at your direct reports, is there an individual(s) ready and capable to move into a more senior role?
- If yes, what in your opinion makes them ready?
- If they are not ready, what is missing? What actions can you take to prepare them?

Succession Planning Process



Rewards and Recognition

The most effective incentive programs are generally ones that align rewards and recognition with the overall strategy of the organization. Employees who understand how their individual performance and behaviour impact the wider organization and their level of compensation are generally more effective. If the organization is thriving, its workforce should be rewarded at a similar level (on an appropriate scale). Employees should be rewarded based on a mix of both personal and overall corporate performance. Best practice organizations also recognize the importance of both informal and formal recognition programs.

Most employees are often not clear on the link between their pay and performance. It is your responsibility as a manager for them to understand the following:

- Pay and employee behavior are linked
- Pay and promotability are also linked
- Many factors affecting employee success are hard to measure
- Many factors affecting employee success are outside an employee's control – however, they need to fully understand which factors are within their control

Informal recognition is often overlooked as a tool for retention and overall productivity. Simple emails, cards or even just a few words of encouragement can go a long way in reinforcing good behaviours and superior performance. These types of positive reinforcements don't have to be time consuming or onerous to you as a manager but may require some diligence on your part – try making a weekly list of people to recognize. Ensure that the sentiments are not insincere, but are truly recognizing behaviours and performance that you value and would like to continue within your organization.

Formal recognition programs can be established within any organization. A recognition program will help to build your employee loyalty by formally recognizing a series of milestones for continuous years of service. Generally, the items and values of the recognition program increase in value over time in order to reinforce loyalty and continued success within your organization.

Sample Recognition and Loyalty Program –Not-for-Profit Organization

Many organizations use recognition and loyalty program effectively. The following is an example of a Not for Profit organization recognition and loyalty program. The program is designed to recognize and reward employees who have shown loyalty and dedication to the organization through continuous years of service. The following is a summary of their program:

STAFF ANNIVERSARY RECOGNITION

- The Anniversary recognition acknowledges staff on their specific anniversary date.
- It is the direct supervisor's responsibility to manage the anniversary recognition program as per the following guidelines.

FULL-TIME STAFF

1 Year	-	Gym Bag
2 Years	-	2 Movie Passes
3 Years	-	$25 Gift Certificate
4 Years	-	$35 Gift Certificate
5 Years	-	$50 Gift Certificate
6-10 Years	-	$75 Gift Certificate
11-15 Years	-	$100 Gift Certificate
16+ Years	-	$150 Gift Certificate

PART-TIME STAFF

1 Year	-	Gym Bag
2 – 4 Years	-	2 Movie Passes
5- 10 Years	-	$25 Gift Certificate
10+ Years	-	$40 Gift Certificate

STAFF LOYALTY PROGRAM

- The loyalty program is designed to recognized staff for their years of continuous service.
- Once a year the organization would host an event to recognize and acknowledge the contributions of the staff in the following various categories.

Term	Approx. Value	Example Item
3 Years	~$100	Swiss Army Watch with Black Leather Strap
5 Years	~$150	Pen and Briefcase or Back-Pack
10 Years	~$250 - $500	Choice of a gold/silver Watch, a 3 piece set of Luggage, Gold Ring, Leather Jacket or I-Pod
15 Years	~$250 - $500	Same as above
20 Years	~$500	To be spent on an appropriate gift chosen by their Direct Supervisor
25 Years	~$700	To be spent on an appropriate gift chosen by their Direct Supervisor
30 + Years	~$1,000	To be spent on an appropriate gift chosen by their Direct Supervisor

Addressing Low Morale

During turbulent economic times, workforce morale becomes an even greater issue and area of focus. Managers need to deal with the uncertainty of market demand and fluctuating economic factors that affect their organizations.

A common cause of low workforce morale is driven by the traditional 'top-down command and control' management model. Most people do not like to take orders and consider certain attitudes and behaviours to be demeaning, degrading and even disrespectful. In addition, another common cause for low morale with the 'top-down' management model is when employees feel that they are not being heard and even when they are asked that their ideas are simply being dismissed. These issues can begin to be addressed through open dialogue with your employees and taking the time to address their day-to-day problems. By fully understanding the facts of the day-to-day operations, your orders and directives can help to address the real problems and not exacerbate them further. Through common understanding and dialogue you can help your employees overcome any problems that they have in doing their job more effectively. The result will be an employee who feels more effective and important while the organization will produce better results for your customers.

Another common cause for low workforce morale is caused by friction between employees or groups of employees. Often this leads to rumours, negativity and gossip. An effective solution to help resolve issues in the team is to spend time and money on teambuilding activities. These activities can be as complicated or simple as necessary, from games and exercises to social activities organized by the social committee.

Exit Interview Best Practices

Employee exit interviews are used to gather information from departing employees, just before they leave. They are typically a voluntary meeting between at least one HR Representative or an alternative neutral manager from the company and the departing employee. Some organizations will use an external unbiased third party to conduct the exit interview on the company's behalf. Exit interviews are best done face to face to allow for open communication and understanding, however electronic or paper questionnaires are better than nothing! [6] [7]

The interview covers issues such as benefits, working conditions, opportunities for career advancement, the quality and quantity of the workload, and relationships with co-workers and supervisors. The goal of the exit interview, from the employer's perspective is to learn the reason's for the employee's departure which may act as an aid for improvements to the organization in the future. From the departing employee's perspective, an exit interview is an opportunity to provide constructive feedback and to leave the organization on a positive note with good relations and mutual respect.

QuestionPro suggests the following format, which is divided into three broad sections:

Section 1: Introduction and Informational Multiple Choice Questions

1. Reasons for joining
2. Department / Business Unit
3. Reasons for leaving

Section 2: "Agreement" Questions:

[6] Adapted from Vivek Bhaskaran's "Employee Exit Interview Template" , www.questionpro.com
[7] Adapted from John Steven Niznik's "Exit Interview", www.about.com

4. The job itself
5. The Supervisor
6. The Department
7. Management
8. Compensation and benefits

Section 3: Conclusion and Closing Comments

Section 1

The introduction and initial multiple choice questions give you a quick pulse check on why employees join your company in the first place and why they are leaving. These sets of questions can help you answer questions like:

1. What are the top three reasons employees are leaving the company?
2. What is the most important reason people choose to work in the company?
3. How do the reasons vary with the various departments within the organization? For example, do employees in the IT Department leave because of "Pay" more than other departments?

Section 2

The next series of agreement/disagreement sections allow the employee to rate the different attributes like the job, management, compensation and benefits, etc. on a 5 point scale. The items in the scale can be customized for each organization so that they are more relevant. These sets of questions can give you "relative" problem areas. In face-to-face interviews, remember to probe and ask “why” especially if the answer is vague or they have answered “Disagree” or “Strongly Disagree”.

For example, if the employee does not agree with the statement "Work load was reasonable" he is allowed to expand upon his thoughts and give details as to why the situation is bad and what can be done about it.

Section 3

In the last section, an additional question for closing comments is included, to capture data that might not have been covered in the other sections. This should be monitored for "Gaps" in the survey itself. If a large percentage of people have comments about a particular issue, it should be added to the qualitative sections above. This allows for capturing that data qualitatively and having analytical metrics that can be measured.

For example, if a large percentage of people have comments or issues with working excessive hours, it usually makes sense to add that as an item in the "The Job" section of the interview.

As the employer, be sure to end the interview on a positive note. Commit to using the information provided to improve your workplace. Reassure the employee the information provided is confidential and no attribution will be made to their comments. Wish the employee success in their new endeavor and end the exit interview graciously.

In the following 'TOOLS' section we provide sample questions that could be easily adapted for your organization.

TOOLS

360 Performance Review (Sample)

Name:	
360 Reviewers:	

	Response	**Competency** *Identify the competency supported: Business Acumen, Leading People, Leading Change; Results Driven; Relationship Focus*
What do I do well?		
What could I do better?		
What three things would I like to contribute to the achievement of the company's goals?		
What three things would I like to learn?		

Signed by: **Date:**	**Reviewed by:** **Date:**

Sample Professional Development Questionnaire

Your Organization is committed to supporting the growth and development of its employees. Accordingly, we would like to get an understanding of any professional development you may presently be pursuing, as well as any professional development you would like to pursue to assist you in better performing your current duties and responsibilities.

Please complete the brief questionnaire by (date) and return it to (name). Should you have any questions concerning the questionnaire, please feel free to contact (name).

Thank you for your participation. We value your input and we look forward to receiving your responses.

1) ***Current Professional Development***

Please indicate below any professional development you **are presently pursuing**.
(Include seminars, workshops, courses, certifications, designations and/or degrees, etc.)

Title of Professional Development Item	*Institution/Organization*

2) Future Professional Development

a. Please indicate below any professional development you **would like to pursue** to assist you in the execution of your present duties and responsibilities. (Include seminars, workshops, courses, conferences, certifications, designations and/or degrees, etc.)

Title of Professional Development Item	*Institution/Organization (if known)*

b. Please indicate below any professional development you **would like to pursue** to position you for future career opportunities. (Include seminars, workshops, courses, conferences, certifications, designations and/or degrees, etc.)

Title of Professional Development Item	*Institution/Organization (if known)*

3) Memberships

- Do you presently hold membership with any associations that relate to your career background? Please also include professional affiliations and provide details below. Please indicate if your membership also includes any committee involvement, etc.

Are there any associations you would like to consider membership with to assist you with your professional/career development? Please provide details below.

_____

_____

_____

_____

4) **Internal Development**

- There may be areas for which you feel additional experience internally within Your Organization would benefit your career development and/or your ability to perform your present duties and responsibilities. (i.e., committee involvement, project involvement, functional responsibility, etc). If so, please provide details below.

_____

_____

_____

_____

5) Leadership and People Management

- Specifically as it concerns the ability to lead and manage a business and its people, are there any other suggestions you have that will enhance your ability to perform your current duties and responsibilities and your overall career in this area? Please provide details below. This may include, but is not limited to **any** professional development, memberships, internal experience, etc. not mentioned above.

_____

_____

_____

6) Other Comments

- If you have any other comments concerning professional development we encourage you to share them below.

_____

_____

_____

_____

Thank you for completing this form.

We appreciate your time and comments.

Please return your completed copy to your supervisor by Date

Sample Exit Interview Questions

- What is your current position?
- Which department did you work in?
- How long have you worked for the Company?
- What originally attracted you to this position and Company?
- What would you say is your main reason(s) for leaving?
- How would you rate your level of satisfaction today with the features that attracted you to the company originally?
- Has your position met your expectations (specifically how and how not)?
- What would you say have been the most satisfying aspects of your job?
- What would you say have been the least satisfying aspects of your job?
- What would you say have been the most satisfying aspects of working with the Company?
- What would you say have been the least satisfying aspects of working with the Company?
- Do you feel you have been able to apply your professional/technical competencies at the Company?
- Have you felt encouraged to make suggestions or improvements?
- Were your job duties as you expected?
- Do you have any comments on your job function and/or skill set required for you job? (i.e., areas for improvement)
- Have you felt comfortable talking with someone in authority in the Company?
- Do you feel your efforts were appropriately recognized?
- Do you feel you were provided sufficient learning/development opportunities to keep you competitive in the marketplace?
- Do you feel the Company's corporate values were demonstrated by your peers and superiors?
- Do you feel you were fairly compensated (salary, benefits) for your job (both internally and relative to the competitive marketplace)?
- What did you think of your performance reviews and did you address any areas of dissatisfaction with your superior?

- Was your workload manageable?
- Did you generally know where you stood with your superior?
- Do you have any comments with respect to how you were managed by your superior(s)?
- Would you ever consider working with the Company in the future? If so, what would be the key attraction(s)?
- Under what conditions (if any) might you have stayed with the Company?
- What do you think the Company could do to improve as an organization and employer?
- What do you think Company could do to avoid losing other employees?
- Do you have any other comments or suggestions?

* * *

D.I.Y.

1. What does your company currently do for new employee orientation? Are there any gaps or areas of improvement?

_____

_____

_____

_____

2. List what you think are your strongest competencies/skills. How do you demonstrate them in the workplace?

_____

_____

_____

3. Are there competencies/skills that you would like to improve upon? If so, list them below and brainstorm how you will do this

_____

_____

_____

4. List some types of informal positive reinforcements that you could initiate immediately for your team.

_____

_____

_____

TELL ME MORE

Resources

The following resources were referenced in development of this Human Resource Tool Kit:

Footnote Summary:

1Kotelnikov, V. (2005) "25 Lessons from Jack Welch – Business Leadership and New Management Secrets", Ten Business e-Coach, Innovation Unlimited, www.1000ventures.com

2 Adapted from John Kotter's "A Force for Change: How Leadership Differs from Management", (1990)

3 Buckingham, M & Coffman C (1999) "First, Break all the Rules", Simon & Schuster

4 Westwood, R. (2003) "Nine Best Practice Orientation Design Principles", www.westwood-dynamics.com

5 Adapted from Vivek Bhaskaran's "Employee Exit Interview Template", www.questionpro.com

6 Adapted from John Steven Niznik's "Exit Interview", www.about.com

Other Resources

A Google search for the following key words will also lead you to dozens of web-sites to explore with relevant information.

- Key words:
  - leadership;
  - performance management;
  - employee engagement;
  - employee recognition;
  - employee retention;
- Some free internet resources as of February 2009 include:
  - www.1000ventures.com
  - www.questionpro.com
  - www.about.com

For More Information

This material has been designed to provide you with practical tools and examples to assist you in the effective management of your most important asset, your people. It has been developed in accordance with best practices, but tailored to meet the unique needs and requirements of the Saskatchewan Construction Association. The four Human Resource Modules are:

Module #1 ***Workforce Planning***
Module #2 ***Recruitment & Selection***
Module #3 ***Workforce Engagement & Performance***
Module #4 ***A Prescription for Leading in Changing Times***

If you require additional information, consultation, coaching and/or a workshop regarding any element contained within the modules, we request that you contact either the Saskatchewan Construction Association or Conroy Ross Partners. Specific contact information for these groups is:

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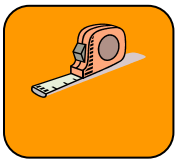
April 29, 2009



HUMAN RESOURCE TOOL KIT

Module #4:

Prescription for Leading in Changing Times

SASKATCHEWAN CONSTRUCTION ASSOCIATION

Prescription for Leading in Changing Times[1]

As the economy weakens, many organizations are responding by implementing vigorous cost cutting measures. While this is an important step, it is only a small part of the best solution. Like many of the best solutions to difficult situations, effective leadership and management will entail doing a number of things well, in a coordinated way. There are five areas for you to focus on.

1. Conserve Cash

The days of easy credit and financing will not return anytime soon. We are likely to see credit markets tighten up over months and years, not weeks and months. This is a time to look at cash management practices and consider how it can best be preserved and utilized. The following are questions to consider:

- How many months of cash reserves do we need to ensure we never have to undertake actions that would cripple our business?
- How can we sharpen our billing and collection practices without provoking our customers?
- Should we centralize cash management practices to avoid having a cash surplus in one area when there is a need for financing in another?

2. Manage Meaningful Expenses

Avoid the tendency to see every dollar as a potential saving. Rather, increase your marketing and business development efforts, and find ways to have stronger market impact with less money. The underlying message is do more with less, not simply spend less.

[1]The white paper was developed and written by Conroy Ross Partners, January 2008.

Meanwhile, this is not the time to consider across-the-board cuts to various expense categories. Implementing a 20% company-wide reduction in travel costs, for example, usually has indiscriminate impacts.

A dollar spent on travel in Marketing or Operations has a different effect than a dollar spent on travel in Accounting. Set targets for key costs, but let your management and supervisory teams make the spending decisions.
More significantly, reduce complexity and streamline your operations; this is where the real opportunities exist. Now is the perfect time to confront the high cost but low return elements of your business. Use the old rule that 80% of your profit will come from 20% of your activities as a lens by which you judge your business actions. The following are questions to consider when examining your market and customers:

- Are there products or services we offer that do not add value?
- Do we differentiate which of our lower value products and services eventually lead to higher value work and those that do not?
- Are there prospective customers whom we should be engaging with?
- Are there customers whom we should not be dealing with?
- Are there customers we need to acquire more business from?
- Can we bundle some products or services in ways that will be more attractive to current and prospective customers?

Apply a similar rigor when you evaluate your internal processes and practices. The following are some questions you should debate internally:

- What could we do better and faster for our customers?
- What could we do less of that would not affect customer satisfaction?
- What internal processes could be streamlined using inexpensive technology fixes?
- What internal process hand-offs are the most inefficient? What can we do about them?
- What support function processes (e.g. HR) are the most time-consuming and how could we streamline them?

3. Place a Premium on Leadership

Management is the practice of planning, organizing, directing, controlling and communicating. It preoccupies most of senior management's time in organizations. Leadership, on the other hand, is the practice of inspiring others to do things they did not know they could do. It is about encouraging best efforts in tough times, and setting a tone of optimism and possibility. In our view, the best definition of Leadership comes from Peter Drucker who said *"Good leaders are purveyors of hope."* He also said that most North American businesses are *"Over managed and under led."*

In tough times senior people need to be held accountable for both conducting effective management practices and demonstrating excellent leadership skills. A workforce that is fearful and preoccupied with listening for bad news will never deliver the same results as an inspired and enthusiastic team that is looking for opportunities. This is not about becoming skilled at delivering inspiring speeches; it is about setting high standards, recognizing good work, and setting a personal example. The following are questions you need to debate at the management and supervisory levels of your business:

- Is everyone in the organization clear on what is expected of them in these times?
- Have we engaged everyone to be part of the solution?
- As a leadership team are we demonstrating enthusiasm and providing hope?

4. Optimize your Workforce

When things are booming it becomes a challenge to get everything done. Reluctantly, you often settle for average skills and performance when you would rather have a higher standard. You also tolerate behaviors that you would rather not. Tougher times provide you with an opportunity to address this situation.

You need to begin by understanding that individual goals must link up to the Company's goals. Oftentimes, we find there is only a tenuous link between the goals set by the leadership team and the goals of the individuals at lower levels in the organization. By tightening these linkages and setting higher performance targets, everyone becomes

more engaged to thrive in tougher times. This step also lets you identify who cannot measure up to the higher expectations.

Additionally, you need to make clear the difference between managing performance and managing behavior. Performance is about how a person's work outputs are contributing to Company results. Behavior, in contrast, is about how an individual acts in the workplace. More people are fired for poor behavior than for poor performance, but regardless, these departures are usually long overdue.

Now is the time for you to take a critical look at the entire workforce to ensure you have the best possible combination of skills, performance, and behavior. Identify those you absolutely need and then actively work to retain them. Use the same criteria to identify those with potential that you would really like to keep. Then, actively work on moving the remainder out of the organization. The other employees in the organization will thank you for it. The following are questions for your leadership team to consider:

- What key performance measure(s) do we need to improve?
- Who or what can have the biggest impact on changing it?
- Is everyone clear on the behaviors that lead to termination?
- Who are the absolute critical keepers?
- Who should we replace with a better player?
- Where can we find a better player?

5. Actively Prepare for an Upswing

We know from experience that there will be a turnaround, the question remains only when. Regardless of the timing, we believe all organizations need to be thinking about and preparing for an improved future. In our experience, the tendency for many organizations is to turn inwards, consequently missing out on customer or competitor trends.

Now is the time to develop plans for new products and markets. Acquaint yourself with events outside of your usual periphery. Develop an 'opportunity bank' mindset and

incorporate it into your business planning. The following are questions for you to consider:

- What key industry trends are we actively tracking and updating each other on?
- Who is responsible for developing our 'opportunity bank'?
- How do we strengthen our balance sheet, so when the time is right we can be the first one out of the blocks?

Summary & Conclusion

Even though the headlines are full of dire predictions, we are confident that innumerable opportunities still exist for our clients. To realize these opportunities, we propose you focus attention on five areas:

1. **Conserve cash and use it wisely**
2. **Manage meaningful expenses by improving services and reducing complexity**
3. **Place a premium on Leadership and continue to manage well**
4. **Optimize your workforce by getting and keeping the best talent**
5. **Actively prepare for the opportunities the upswing will provide**

In looking at this list and at each of the individual elements, we encourage our clients to think of them as part of a 'package'. Doing one or two of them will be helpful, but collectively they will be transformative.

Resources

The following resource was referenced in development of this Human Resource Tool Kit:

[1]The white paper was developed and written by Conroy Ross Partners, January 2008.

For More Information

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April 29, 2009