

Resource #20.2

Weekly Update to My Supervisor

Commentary & Ideas on Using This Powerful Tool

Excellent Communication Emerges Week After Week!

Weekly one-on-one staff meetings with each of your direct reports can be powerful antidotes to miscommunication. When four eyes are looking at the same schedules, the same calendars, the same concerns and the same targets, excellent communication emerges week after week after week!

CEOs, senior leaders and managers who consistently meet with their direct reports and use a tool such as the “Weekly Update to My Supervisor” form, affirm that the time and energy invested pays rich dividends.

Ten powerful dynamics kick in when you meet weekly with your direct reports:

- #1. Team members are affirmed regularly.
- #2. Direct reports more consistently leverage their strengths, their social styles and their spiritual gifts.
- #3. Standards of performance are clear and goals are achieved on time and under budget.
- #4. Staff conflict, gossip and misinformation challenges are dramatically reduced because truth-telling is a practiced core value.
- #5. Bottlenecks and missed deadlines are eliminated.
- #6. Recommendations are more thoughtful and intentional.
- #7. Communication is enhanced as you use your direct report’s preferred learning style.
- #8. The pulse (morale, passion and energy) of your team is checked weekly.
- #9. Affirmed and productive team members mean less staff turnover.
- #10. And . . . team members often give you affirmation!

The “Weekly Update to My Supervisor” tool is not the solution to every management challenge, but it packs a punch when you use it to build the right foundation. If you’re already meeting weekly with your direct reports but you need a turbo-boost, this process can revolutionize your meetings and your relationships. To download this powerful tool, visit The Buckets at http://www.managementbuckets.com/pages/The_Buckets and click on “The Meetings Bucket.”

Commentary

How to use the “Weekly Update to My Supervisor” form:

Step 1:

Download the template from ManagementBuckets.com.

To download this powerful tool, visit “The Buckets” at http://www.managementbuckets.com/pages/The_Buckets and click on “The Meetings Bucket.” Ask a team member to create a customized template in Word™ for your organization and then email it to each of your direct reports.

Step 2:

Ask each direct report to customize the form.

Once the form is customized by each person, the sections that are shaded should remain the same all year. Then every Tuesday, for example, your direct report simply pulls up the file of the previous week’s report and saves the file with the current date. She will invest less than 10 minutes to fill in her weekly update for you.

Step 3:

Update the report weekly in 10 minutes and submit it every Tuesday by 4 p.m. (for example).

Here’s an example of how Susan Smith might report to her supervisor, Ned Nelson. Read the commentaries below on each of the 13 sections:

Example:

TO: Ned Nelson
FROM: Susan Smith
RE: Weekly Update to My Supervisor

#1. My Snapshot. We’ll assume that you have trained your team in these four key areas, but if not, take the time to bless your staff members with these career-changing insights.

Example: Susan Smith’s Snapshot

My Top-5 Strengths From: <i>Strengths Finder 2.0</i>	1. Empathy 2. Harmony 3. Strategic 4. Connectedness 5. Learner
My Social Style From: <i>The Social Styles Handbook</i>	<input type="checkbox"/> Analytical <input type="checkbox"/> Driver <input checked="" type="checkbox"/> Amiable <input type="checkbox"/> Expressive
My Top-3 Spiritual Gifts From: <i>Discover Your Spiritual Gifts</i>	#1. Hospitality #2. Administration #3. Mercy
My Learning Preference	I am a: <input checked="" type="checkbox"/> Reader <input type="checkbox"/> Listener

→ **My Top-5 Strengths (see THE TEAM BUCKET).** Gallup has identified the 34 most common talents (strengths) in the book, *Strengths Finder 2.0*. Author Tom Rath explains how to leverage the top five strengths of each team member. Each week now, Ned is reminded of Susan’s top five strengths and they both attempt to align her work with her strengths.

→ **My Social Style (see THE PEOPLE BUCKET).** In his one-on-one meeting with Susan each Wednesday, Ned knows he will be more productive if both he and Susan employ their versatility skills as described in *The Social Styles Handbook* and *The Fine Art of Dancing With Porcupines*. There are four social styles: Analytical, Driver, Amiable and Expressive. Since Ned is a driver and Susan is an amiable, they must both work extra hard because neither their priorities nor their pace align. Each of the four styles will approach one-on-one meetings with far different needs and expectations.

→ **My Top-3 Spiritual Gifts (see THE TEAM BUCKET).** God designed the spiritual gifts so the Body of Christ would function effectively. Ignore the spiritual giftedness of your team members and you’ll be missing God’s best for your organization.

→ **My Learning Preference.** Does Susan prefer receiving reports, assignments and feedback verbally or in writing? Does she know Ned’s preferences?

#2. My Supervisor’s Snapshot. Suggestion: fill this section in on the original template and then take time at a team meeting to elaborate on these four elements of your personal snapshot (as the supervisor)—and how team members can serve and support you, based on your strengths, your social style, your spiritual gifts and your learning preference.

Example: Ned Nelson’s Snapshot (Susan’s Supervisor)

Top 5-Strengths	1. Focus 2. Responsibility 3. Significance 4. Belief 5. Maximizer
Social Style	<input type="checkbox"/> Analytical <input checked="" type="checkbox"/> Driver <input type="checkbox"/> Amiable <input type="checkbox"/> Expressive
Top 3-Spiritual Gifts	#1. Administration #2. Leadership #3. Teaching
Learning Preference	My Supervisor is a: <input checked="" type="checkbox"/> Reader <input type="checkbox"/> Listener

#3. Here’s the Status of My “Job Success Tools.” These five tools will help every team member connect the dots between results and effective execution. A carpenter may have the right heart, the right motivation and be a diligent prayer warrior. However, he or she still needs the right tools. These five tools, used properly, will ensure job success.

Example:

Current: Yes or No	Job Success Tools	Date Approved
Yes	Position Description	2/1/07
Yes	Annual Standards of Performance (SOPs)	1/15/08
No	Annual Professional Development Plan (The 3 Cs)	
Yes	To Do List (A, B and C Priorities)	Current
No	Tickler Tracker (Daily/Weekly/Monthly/Quarterly/Annually Repeating Tasks)	Pending

→ **Position Description.** This is an easy one. Confirm that you both agree that the current position description adequately summarizes the position and is dated and initialed by both of you.

→ **Annual Standards of Performance (see THE RESULTS BUCKET).** This is the whole enchilada. Every person should have five to 10 annual SOPs that fit the S.M.A.R.T. test (Specific, Measurable, Achievable, Realistic and Time-dated). Note that the top three SOPs are listed in section 13.

→ **Annual Professional Development Plan.** This one-pager documents both the formal and informal training aspirations for this person for a 12-month period, including mentoring, resource reading/listening, workshops, seminars and conferences, observation excursions and other developmental activities. It also includes a sign-off on the time and expense budget. If it’s helpful, use “The 3 Cs” as a guide: Cause, Community and Corporation (and the 20 buckets).

→ **To-Do List.** This crosses the line into micro-management for some people, but show me a team member who doesn't have an effective To-Do list system and I'll show you a team member that struggles with job success. Use this tool to track tasks and to prioritize tasks into the A, B and C categories.

→ **Tickler Tracker (see THE SYSTEMS BUCKET).** Your direct report has just agreed to track a budget item and report back by the tenth of every month. How will both of you remember this assignment? The Tickler Tracker system works even when your team member is on vacation. It tracks all repeating tasks, whether they are daily, weekly, monthly, quarterly or annually.

#4. Last Week, I Made Progress on the Following. This is just a short "FYI" list to keep you informed. The majority of the reports should tie into the agreed upon annual Standards of Performance (SOPs).

Example:

Last week, I made progress on the following:

1. Completed the Vision 2020 website (SOP #7)
2. Finalized the Red Team recruitment kit for marketing (SOP #5)
3. Hosted celebration party for Partners 101 Initiative: 1,000th Member!!! (SOP #1)

#5. This Week I Am Focusing On. Encourage your direct reports to list items in this section that, again, align with their SOPs. They should also list projects that impact other team members. Many times you'll need to do a heads-up: "Susan, since you're working on the Anderson account this week, please check in with Annika who just revised the timetable for the budget process."

Example:

This week, I am focusing on:

1. Anderson Project: revised timetable for the budget process (SOP #9)
2. Hotel contracts for the 17 metro workshops (SOP #10)
3. Video shoot: role playing on our Five Core Values
4. Train-the-trainer volunteer workshop (Friday) for city homeless shelter

#6. Before I Make My Decision... Susan has the authority and the responsibility to make decisions—but she must rigorously seek advice from her supervisor and others first (read the book, *Joy at Work*). She uses this section for advice-seeking.

Example:

Before I make my decision, I need your advice on:

1. Proposals from three consultants received, but need your insight on why *The Five Old Men Consulting Group* fee is 40% lower. Are they legit?
2. Ready to book staff retreat site. Need your thoughts on my three options.
3. Confidential item (will discuss when we meet)

#7. The Monkey's on Your Back. Using the memorable language from THE DELEGATION BUCKET, this section gives a direct report weekly permission to prod his or her supervisor about the monkeys. Here Susan is reminding Ned that he is late on two key items. Most supervisors look at this section of the weekly update first. By receiving this report on Tuesday at 4 p.m. for a Wednesday one-on-one meeting, Ned has time to get these projects completed for Susan so the monkeys are off his back.

Example:

The monkey's on your back. I am waiting on you for:

1. Approval for non-budgeted expense of \$3,700 for Vision 2020 pre-meeting (SOP #7)
2. Your welcome letter and photo for the website. We are TWO WEEKS past the agreed upon deadline. (Could I write the letter for you and you edit it?)

#8. I Am Recommending That. Have you ever heard this? “Well, I’ve been suggesting that for six months—but you never picked up on it.” This section transforms subtle hints and soft suggestions into written recommendations. Each week, Susan has the opportunity to get Ned’s attention with recommended action items.

In a perfect world, every time a team member says the magic words, “I recommend that...” a dilapidated duck would drop down with a \$100 bill in its mouth for your direct report. That’s what happened every week on the NBC TV primetime game show, *You Bet Your Life With Groucho Marx*. The quiz show ran from 1950 to 1961. When a contestant said the secret word, he or she would win \$100.

“I recommend that...” can be a powerful tool for your team members. It moves inaction to action. It transforms whiners into winners. It changes blamers into doers.

Example:

I am recommending that:

1. We begin quarterly one-day off-site retreats to ensure that the Vision 2020 project stays on track (SOP #7).
2. We eliminate the Top 20 Monthly Report. (According to Suzy, no one has used this report for 36 months!)
3. We move the budget line item for staff fellowship from HR over to *Hoopla!*

#9. FYI! You Should Be Aware of the Following. How many times have you left a staff meeting only to be surprised 24 hours later by information that was available, but never shared? In this section, Susan can list several FYI Updates (For Your Information) to keep Ned in the loop on the latest news and issues.

Example:

FYI! You should be aware of the following:

1. I will be on vacation next week (Monday to Friday)—and OFF email. Deal with it! Jennifer will cover for me.
2. The volunteer team will cover our phones and reception this Friday for our Annual Day of Prayer retreat.
3. Dick Countryman starts today as our new finance manager. Welcome party at 3 p.m.

#10. Overall, I Am... How’s the morale and stress level of your team? This section gives you an instant temperature reading on Susan. She’s probably stressed and so this advance warning report helps Ned prepare more thoughtfully for his one-on-one meeting with Susan the next day. Ned will affirm Susan for being honest about her situation. If other priorities or emergencies kick in on Wednesday, Ned already knows not to shuffle Susan to another day—they need to meet as planned. Susan also is signaling that she needs more than the one hour meeting on Wednesday.

Example:

Overall, I am:

- OK Great! Never been better
- Overwhelmed Overloaded for the next **45** days
- Don’t cancel our meeting! We need to talk!
- Help! I need more time with you. At least **3** hours in the next **5** days.
- Other: _____

#11. Our Next Meetings Are Scheduled For... The calendar is your friend. Always know when you’re meeting again and the purpose for that meeting. When Susan and Ned agree on the major agenda items for future meetings, they both are more focused. When the meeting includes connections to Susan’s annual Standards of Performance (SOPs), the effectiveness of the meeting is enriched even more.

Example: Our next meetings are scheduled for:

Date	Day	Time	Major Agenda Item(s)
Nov. 5	Wed.	1:30 p.m.	Next year’s budget
Nov. 12	Wed.	1:30 p.m.	Compensation reviews
Nov. 19	Wed.	1:30 p.m.	Vision 2020 (SOP #7)

#12. I Continue to Affirm Our Core Value on “Truth-Telling.” **Caution!** Don’t include this section in your weekly update until you have “been there and bought the t-shirt!” (See the principles from Peacemaker Ministries in THE CULTURE BUCKET.) At the end of the day, it’s usually staff conflict—more than anything else—that derails management effectiveness. If you get everything else right, except this one, you still lose. Susan and Ned will honor God and honor each other by creating an environment for truth-telling. (See Matthew 5:23-24; 18:15.) Why put this on a weekly update form? Because conflict, gossip and lack of truth-telling also happen weekly.

“I continue to affirm our core value on “Truth-Telling.” To my knowledge, I have not shared anything inappropriate with others about you (or another staff person) that I have not shared first with you (or the other person). And, to my knowledge, when others have shared something about you (or others) with me that may be “crossing the line,” I have stopped them in their tracks—and reminded them about our core values—and urged them to share it with you (or that person) within 48 hours.”

Example:

This past week, our working relationship has been:

- Excellent Great OK Could Be Better Poor
- You blessed me when you complimented me on the Vision webpage.
- You bugged me when you joked about my proofreading skills.
- I need _____ minutes with you to go into the “Tunnel of Chaos.”

#13. My Top 3 Standards of Performance. (See THE RESULTS BUCKET.) If your weekly one-on-one meeting faithfully focused only on this section—week after week after week—that’s all the reason you need to meet weekly. Here Susan and Ned are both reminded, every Wednesday, of the three most important targets for Susan. However, if the majority of the one-hour meeting is invested on lesser issues and priorities and not on the top three SOPs, Ned will need to coach her back to the fundamentals: results, results, results. *(Note: Once the SOPs are approved, this section remains the same all year on the Word document template.)*

Example:

My Top 3 Standards of Performance *(These remain the same all year.)*

Here are my 3 Most Strategic SOPs that were approved by **Ned Nelson and the Management Team** on **December 15**. I understand that the successful accomplishment of these SOPs is our primary focus in our weekly and quarterly meetings. They will account for about **75%** towards my annual evaluation and future compensation adjustments. *(Consequently, this weekly update focuses primarily on these three SOPs and their critical importance to the mission and goals of our organization.)*


SOP #1. Launch the Partners 101 Initiative by April 15 and grow the membership by an additional 3,000 partners by December 31, with a net profit of \$19 per new member (including acquisition costs).

SOP #7. Create the Vision 2020 business plan (results, budget, timeline, staffing, etc.) by October 15, with Management Team approval by November 1 and Board of Directors approval by November 15.

SOP #8. Create an enriched *Hoopla!* culture on the Ambassador Volunteer Team so the average ratings from the “Annual Volunteer Satisfaction Survey” (survey deadline of October 1) are at least 4.2 on a scale of 1 to 5 (5 is high).

Reminder:

Notes regarding the Word Document Template. Ask a team member to create the template in Word™ and email it to each of your direct reports. (A template is available at ManagementBuckets.com.) Once the report is customized by each person, the sections that are shaded should remain the same all year. Then every Tuesday, for example, Susan simply pulls up the file of the previous week’s report and saves the file with the current date. Susan will invest less than 10 minutes to fill in her weekly update for Ned. She’ll then email the document to Ned or hand-deliver it to the hot rack outside his office door (or cubicle) by Tuesday 4:00 p.m.

	<p>JOHN PEARSON ASSOCIATES, INC. coaches teams in creating and leveraging Standards of Performance (and weekly team meetings and one-on-one meetings) to achieve organizational results. Many teams launch this process with a one or two-day retreat. For information: contact us at: John@JohnPearsonAssociates.com www.JohnPearsonAssociates.com</p>
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