

# Corporate Behavior Analysts, Ltd.

## Tactics and Tips

### COACHING BEHAVIOR AND PERFORMANCE

As Psychologists, we have long known that changing or improving specific employee behavior is the real key to performance improvements in business.

As owners, we can have clear vision about where we want to lead our companies, our managers can develop good goals and performance measurements, we can have what we believe are productive meetings with our teams, give them ideas and answer their questions, and, we can continually remind our employees about the importance of excellent customer service.

In the end, our employees must behave in specific ways on a daily basis for us

to be successful. That means that each employee must be able to perform a specific set of skills and behaviors consistently and to a high standard of performance.

It sounds rather simple to say that employees need to act in certain ways and perform their job to certain standards, the problem is that some people don't do what they are told, and often times managers aren't specific enough when they try to tell employees what to do. In these examples in the next column, the behavior the manager wants is made more specific and explicit by the second example.

Examples of unclear statements of behavior:

- Jane, the receptionist, has a bad attitude
- Jim is not a good team player
- Sally never takes any initiative

Examples of clear and specific statements of behavior:

- Jane needs to smile and say "hello, how may I help you?" when customers enter
- Jim needs to volunteer to help at meetings
- Sally needs to go to her supervisor when she finds a problem in a file she cannot fix

Continued on Page 3

### Manager Rewards Program Workshops

In 2010, Corporate Behavior Analysts (CBA) is offering a unique program designed exclusively for Title Agencies.

The program is designed for agency owners to offer as a reward, to managers and supervisors who have performed well and deserve to attend a special program geared to improve and enrich their professional lives.

To help foster a personalized learning environment, enrollment in each MRP workshop is limited to 20 participants. Workshop participants will learn specific skills and procedures that can be readily applied in their agencies.

The workshops includes a variety of training activities including presentations, group and individual exercises, and culminate in the development of individual action plans for each participant. After each

workshop, participants will be able to follow-up with CBA consultants, as they apply the techniques they have learned.

The program offers four Workshops:

1. *Targeting New Sales*
2. *Financial and Operational Management*
3. *Improving Employee Performance*
4. *Developing New Leadership Skills*

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*"There are some people who, if they don't already know, you can't tell'em."*

Yogi Berra

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## Manager Rewards Program Workshops

### Targeting New Sales

- Identify and target sales growth with existing customers and prospects.
- Learn value-added innovative sales tactics.
- Develop sales plans that can be implemented quickly to improve sales results.
- Adjust your sales style to meet the buying characteristics of your customers.
- Develop procedures to track and monitor sales results.

**When:**

September 14 -15  
Sept 14, 1:00 p.m. to 5:30 p.m.  
Sept 15, 8:30 a.m. to 12:00p.m.

**Where:**

The Courtyard by Marriott  
Houston Galleria  
2900 Sage Road  
Houston, TX 77056

### Financial and Operational Management

- Understand a profit and loss statement
- Develop an annual / department budget
- Use operational metrics: orders; closings; labor ratios
- Make revenue projections & manage by the numbers

**When:**

September 16 -17  
Sept 16, 1:00 p.m. to 5:30 p.m.  
Sept 17, 8:30 a.m. to 12:00p.m.

**Where:**

The Courtyard by Marriott  
Houston Galleria  
2900 Sage Road  
Houston, TX 77056

**Workshop Registration Fees:**

The fee for one participant attending a single workshop is \$750, if paid before June 30. After June 30, there is a \$100.00 late fee to register provided space is available. The fee for two or more people from the same company attending a workshop is \$500 per person. The fee for the same person attending an additional workshop is \$500 for each additional workshop.

**Workshop Registration Process:** To secure participation in workshops (1) or (2) in Houston, workshop registration fees are due, payable in advance, to Corporate Behavior Analysts, Ltd. (CBA), by **Wednesday June 30**. Workshop registration after June 30 will be possible based on availability.

**Cancellation Policy:** All paid workshop registration fees will be completely refundable up to **Monday, August 23, 2010**. After August 23, there is a \$75.00 cancellation fee.

**Hotel Room Rates:** Workshop participants will receive a discounted hotel room rate of \$139.00 per night. Room reservations must be made **after June 30, but before Monday, August 23<sup>rd</sup>, 2010**, to receive the discounted rate.

**Hotel Room Reservations:** Room Reservations for the Houston Workshops are to be made directly with the hotel by calling the hotel at: **713.622.3611 after June 30**. An on-line reservation link will also be available with Marriott after June 30. **Hotel Parking:** Parking is available at the hotel's secure parking ramp at a cost of \$10.00 per day.

### Program Logistics

Workshop length: 1.5 days

Fee: \$750.00

Participants are responsible for their meals and lodging.

Each workshop starts promptly at 1:00 p.m.

Each Workshop includes a 90 minute evening session on day one.

Beverages and snacks are provided throughout the workshop.

Workshop adjournment on day two is at 12:00 p.m.

Each participant receives a training manual and various workshop forms to use.

Electronic copies of workshop materials will be made available to each participant.

### Fall Workshop Dates and Locations:

*Targeting New Sales*  
**HOUSTON**  
**Sept 14, 15**

*Financial and Operational Management*  
**HOUSTON**  
**Sept 16, 17**



## PERFORMANCE COACHING

One problem that many managers face is the difference between telling and doing. Most of us know what “being friendly” means, and we know “being friendly” when we see it. For example, we observe a person smiling and saying, “hello, how may I help you,” and we say that person is friendly. The problem occurs when we tell an “unfriendly” employee that he needs to be friendlier, we think he knows what we want him to do. Even worse, we think simply telling him is sufficient to change his behavior.

The questions we need to ask are does the employee know what being friendly means, does he/she know what is expected and how to do it?

Consider for a moment, if you put one hundred receptionists in a room and asked them what is “good answering the phone.” We know from our customer service training that you will receive at least five different answers, several of which we would not expect or want.

Likewise, if a manager simply tells Jim that he needs to be more of a “team player,” it is highly likely that he, and everyone else on the team, could only guess at what the manager wanted him to be doing differently. Often times in companies, there is a disconnect between what managers think they are telling their employees

and what the employees understand or do.

There is a disconnect between telling and doing.

The first step in changing behavior is to specify the behavior(s) that the employee in question needs to perform to be successful.

Beyond being specific, management practices like providing direction, writing goals, setting expectations, measuring performance and providing feedback on results are all important. We frequently work with companies to help them develop these critical business components. In doing so, we understand that the key ingredient, the starting point, in each of these management practices is identifying, focusing on, and working with employees to improve or change specific behaviors in their day-to-day jobs. One of the best ways we know to help employees improve or change their behavior is through what we refer to as Performance Coaching.

The following reading will explore the basic tenets of Performance Coaching and provide you with a simple set of steps you can follow to change or improve the behavior of your employees.

In sports, there are two types of coaching. There is the coaching that occurs in practice, and the coaching that occurs during the game. In practice, the

coach can set up learning experiences where the player learns the right way to perform and the coach can give very specific feedback about the behavior that is expected. In training, the player can practice a behavior repeatedly until he/she gets it right. For example, in basketball a player could practice free throws, working out his / her mechanics until nearly every throw goes through the hoop.

In a game, the situation is different. Here the players are performing not practicing, and the basketball coach has a different role. During a game, the head coach often roams the sidelines calling out directions to the team. In this role, the coach yells out encouragement and praises his/her players when they perform successfully, for example “great block.” Sometimes the coach is supporting the team as a whole and at other times, he or she may be directing attention or praise to individual players on the floor for their specific performance. During the game, the coach cannot easily focus on correcting specific behavior, rather he/she is trying to provide direction (tactics for winning) and he/she is trying to motivate, encourage, and praise results. During the game, coaching is more about

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PERFORMANCE

“Often there is a disconnect between what managers think they are telling their employees and what the employees understand or do.”

## PROBLEM COACHING

building confidence “I know you can throw this batter out,” and about discipline, “do that again and you are out of the game.”

In the business world, performance can be practiced and planned, but often coaching is spontaneous and on the job. When a manager sees an employee behaving in a certain way and he/she wants to reward or praise that behavior, the manager should spontaneously go up to the employee and say something like, “I like what you are doing. Keep up the good work.”

In order for employees to improve and change, they need positive consequences (praise and words of encouragement) for their behavior and managers need to find ways in their daily routines to observe behavior and provide those positive consequences when the behavior actually happens. The more immediate the positive consequence (i.e., the closer in time to the actual behavior) the more effective the consequence. Each day, there are many informal opportunities available to managers to praise performance and provide coaching. Praising a person’s behavior days or months later may be much less effective, but it is still better than never praising.

In addition to encouraging and praising the behavior that is desired, Performance Coaching often requires that managers meet with the employee on a one-on-one basis when there is a need for improvement or when a problem exists. Here are a few simple steps to follow when dealing with a performance or behavior problem.

**Step One.** Define the specific behavior that needs to change or improve or the outcome that needs to be achieved. Behavior Psychologists call this pinpointing the behavior and the main rule for good behavioral pinpoints is that the behavior you are defining is an observable action that two or more people can reliably agree on when observed.

When you pinpoint, you can specify desired performance, meaning outcomes or results, or you can specify behaviors that need to improve.

Pinpointing is the first step in any problem solving. Pinpointing means clearly stating what needs to change or improve. Pinpointing is a critical form of communication between the manager and the employee.

Here are a few examples:

- Saying “Good morning, Accurate Title, this is Chris, how may I help you?” when answering the phone (a behavior that needs to improve);
- Returns all customer phone calls within two hours (a behavior that needs to improve);
- Holds office meetings with employees once per month (a behavior that needs to improve);
- Submits Sales call reports to the supervisor each Friday by 4:00 p.m. (an outcome);
- Completes six residential exams per day (an outcome);
- Types 20 policies per day (an outcome)

**Step Two.** The second step is to analyze if there are any factors that may be contributing to the employee’s current behavior or if there are supportive factors that are missing. When faced with a problem behavior, for example, a receptionist talking to friends and relatives on the phone during office hours, we would ask a series of fundamental questions regarding the history of the problem and the situation surrounding the behavior (see the questions on page 5.)

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## SITUATIONAL ANALYSIS QUESTIONS

1. What is the desired behavior (i.e., pinpointing the behavior)?
2. Has the desired behavior been communicated clearly to the employee?
3. Does the employee know what behavior or outcome is expected?
4. Does the employee want to perform or believe the behavior is important?
5. Has the employee ever performed the behavior or produced the outcome desired?
6. Did the employee perform the behavior or produce the outcome consistently, but now it is absent or inconsistent.
7. Are there obstacles or other priorities that are preventing the employee from behaving?
8. What are the consequences for behaving in the ways that are expected?
9. What are the consequences for not doing what is desired or for engaging in competing behaviors?
10. What is the employee's solution to the problem?

Answering any of these situational questions may require talking to the employee, observing the situation, and talking to others. For an excellent review of the factors that should be considered, see (Ferdinand F. Fournies, *Coaching for Improved Work Performance*. McGraw-Hill: New York, 2000, pp. 109).

### Step Three

Once you have adequately analyzed the situation, you should be ready for your first meeting with the employee. In this meeting, you want to *Meet with the employee to clearly specify what needs to change and how*. In your first meeting, you may want to use the following *meeting* structure:

1. Explain the purpose of the meeting.
2. Discuss the employee's recent performance, be specific and use facts and measures.
3. Define clearly the specific behavior or performance that needs to improve or change.
4. Turn a negative into a positive. Specify what is to occur rather than what is not to occur.
5. Make sure the employee understands what behavior needs to occur. Have the person say the behavior.
6. Make sure the employee agrees that im-

provement is necessary.

7. Mutually discuss a plan to achieve what is expected. Make sure the employee's ideas and input are part of the plan.
8. Mutually discuss any support the employee needs.
9. Commit to an action plan with timelines and responsibilities.
10. Set a date for a follow-up meeting with the employee to review performance and amend the action plan if necessary.
11. Provide the employee with a written copy of his/her plan. Place a copy in his/her HR record.

In your meeting, it will be important to speak clearly, be direct and to the point. This meeting is part of your formal management or discipline of the employee. In talking with

the employee, be specific and never use phrases that suggest the meeting is informal, secret, or "just between you and me." Having a set of organized facts, dates, or data regarding the employee's current performance, if available, can make all the difference in this type of problem solving meeting. Under no conditions does the manager want this type of meeting to turn into a he said/ she said or even worse, I say / you say confrontation. In the end, what is critical is that the employee agrees to what is being discussed and accepts responsibility.

During this meeting, or before any planning occurs, it is critical that you make sure you obtain agreement from the employee that the specific behavior change or performance improvement is necessary. Think of this like any other human

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**The ideas suggested here are only a start.**

**If you would like more information and ideas on how to improve staff morale and employee engagement in your workplace, or, if you would like help in developing ways to measure employee engagement, please contact us.**

**We currently offer management training on improving staff morale and engagement and can customize a manager training or coaching program to fit your particular needs.**



## SUPPORTIVE COACHING

problem where self-control or personal change is part of the solution, for example quitting smoking, exercising more, or weight loss. Until the person accepts personal responsibility, no plan of action, short of firing the employee will work. Until the employee agrees and commits to change, you should not go any further in your coaching.

Employee ownership and investment in the action plan is also crucial. The more you are able to gain and use employee ideas and input, the better. Employees will often work harder to improve if they know it is their ideas that are being used as a part of the change process. They also will work harder when they know their behavior or performance is being measured.

### Step Four:

*If possible, measure the behavior that needs to improve.* There is a truism in performance coaching that says, "If you measure it, they will do it." Most performance outcomes, by their very nature are easy to measure, because they leave a record; they either happen or they don't. For example, take the behavior pinpoint: "Hands in sales report each Friday". If the measure is "turning in sales reports," the report is either present or it is not.

Measuring behavior or performance can be as sim-

ple as checking off a list, tallying, or counting the behavior when it occurs. The more complicated the measure, the more indirect the measure, or the more distant in time the measure, the less effective the measure will be. For example, measuring and rewarding sales revenue once a year is far less effective than measuring and rewarding it every month.

When possible, we like to take a baseline measurement to determine the current level of behavior performance before the plan is put into effect. For example, before implementing a plan to improve the performance of a policy typist, we might measure the baseline level for typing policies and determine that the employee is typing 10 policies per day. Armed with a baseline measure, we can implement a coaching plan to work with the employee to achieve 20 policies accurately typed each day.

Once you have an action plan in place, you need to provide the employee with supportive coaching. Supportive Coaching means finding ways to provide positive consequences to employees for specific behaviors, on a frequent, if not a daily basis.

In order to be a good supportive coach, the manager must understand what the positive consequences are for the employee in question. Remember, what is

rewarding for one person may not be for another. We all have different likes and dislikes and what some people find rewarding or reinforcing, another person may find unrewarding or even punishing. For example, some employees will enjoy and benefit from public praise and encouragement while others will prefer that their manager talk to them and encourage or praise them in private.

For some employees verbal praise may not be important but written encouragement and positive feedback in the form of an e-mail will be reinforcing. Even something as obvious as money may only work for some people and not others.

For some employees a word of praise once a week is far more valuable than a small bonus at the end of the year. In order to be a supportive coach, a manager needs to be aware and observe how employees are reacting to the consequences he/she provides.

There are many different ways for managers to provide positive consequences to their employees. One good reference available for managers at most bookstores is the book by Bob Nelson: *1001 Ways to Reward Employees*. Workman Publishing Company, Inc. New York: (2005).

Managers in their role as supportive coaches must also keep in mind the seven "Bs" presented on the next page..

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### SUPPORTIVE COACHING

*"Once you have an action plan in place, you need to provide the employee with supportive coaching."*

THE SEVEN “B’s”

1. **Be a good listener and observer.** Conduct a daily “walk around” the office to catch specific behaviors to reward. Remember the idea of “Catch ‘em being good.”
2. **Be specific.** When praising an employee, be specific: “I liked how you volunteered for clean-up”; “The fact that you stayed late for the customer was excellent”.
3. **Be timely.** Timeliness is a key in providing positive consequences to employees. In the beginning when trying to increase specific behavior, deliver positive consequences soon after the behavior occurs. Too far past the target, behavior in question will be ineffective. As your action plan starts to see progress, you can vary the intervals and timing of your use of positive consequences.
4. **Be unpredictable.** Vary the rewards. Use a number of rewards and consequences, and vary your consequences, for example, leave a note, deliver praise in private, praise in front of others, give a financial reward. Remember, variety is important and will keep the employee interested.
5. **Be encouraging.** Break your goal or their achievement into smaller steps and reward progress along the way.
6. **Be patient.** Behavior change is not simple. It takes a while. There will be back steps and small failures along the way. Be patient and keep at it.
7. **Be accessible.** As a supportive coach, your presence and availability will be key to some employees.

Performance Coaching requires a manager to act in supportive ways with his/her employees on a daily and weekly basis, and to conduct one-on-one meetings with employees that focus on specific behaviors, when necessary. When used systematically, the results of Performance Coaching can often mean significant improvements in employee performance. CBA provides both individual coaching and training seminars on Performance Coaching.

If you would like more information on this topic, or the different ways CBA provides training and consulting on Performance Coaching, please contact us.

Here is a checklist of ideas you can use to monitor whether you are being a good supportive coach:

<input type="checkbox"/>	I provide praise often
<input type="checkbox"/>	I encourage my employees
<input type="checkbox"/>	I provide feedback often
<input type="checkbox"/>	I am positive and enthusiastic
<input type="checkbox"/>	I successfully motivate
<input type="checkbox"/>	I am accessible daily
<input type="checkbox"/>	I am a good listener
<input type="checkbox"/>	I focus on specific behavior the employee is doing
<input type="checkbox"/>	I am observant of employee behavior on a daily basis
<input type="checkbox"/>	My employees trust me
<input type="checkbox"/>	I am goal oriented when I coach
<input type="checkbox"/>	I vary my types of rewards and consequences
<input type="checkbox"/>	My staff respect me
<input type="checkbox"/>	I am patient
<input type="checkbox"/>	I set clear expectations
<input type="checkbox"/>	I hold effective team meetings
<input type="checkbox"/>	I evaluate employee performance on a weekly basis
<input type="checkbox"/>	I ask for feedback from my staff

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## WORKSHOPS IN 2010

CBA has several new workshops already developed for your company or state association.

**Making Change Practical and Successful:** Change in our society is happening at a transformational pace that is both energizing and frightening. The title industry is no exception to this phenomenon and must learn to adjust to remain viable. Organizational change can be large or small, company-wide or at the level of a single employee or procedure. Whatever the level and reasons for change, there are basic steps a leader can take to prepare an organization and its employees. In this presentation, CBA considers practical steps critical in any change effort and examines why change efforts fail and what a leader can do to prevent failure and promote successful change. CBA provides a list of practical change recommendations; actions every title company will benefit from doing.

**Putting Great Customer Service back into the Equation:** During this recession, many title agencies have seen customer service levels suffer due to reduced hours of operations and staff reductions. It is time to start planning for how you can raise customer service levels, throughout your company, to attract and retain new customers and ensure loyal customers do not look elsewhere. CBA's WOW Customer Service Training provides a step by step process for managers and staff to put customer service back into the equation for staying competitive in the market place.

**Developing New Sales Strategies and Tactics:** Targeting new sales opportunities and developing new sales tactics is a critical step in planning for business development. CBA can help you develop a simple but thorough sales plan that will target your sales opportunities and detail what sales actions are needed to meet your revenue goals.

**Using Performance Measures to Make Proactive Management Decisions:** It is critical that you have a process in place to track your monthly performance and that enables you to make timely management decisions. As order volume changes in 2010, you need to be able to change staffing levels at points where profit and productivity levels merit adjustments. CBA will help you install and manage a set of performance measures that will help you stay on top of the critical financial and operational decisions you need to be making.

- Develop performance measures for your employees and teams
- Set new goals for improved performance
- Set standards of performance for: Customer Service, Productivity, Quality, and Efficiency
- Track performance improvement

**Building a Strong Management Team:** Your people are one of your most important resources and successful companies in the 21<sup>st</sup> century need strong leadership teams to help steer staff in the right direction. CBA can help you evaluate your management bench strength and provide training to develop a management team that works well together. Building a strong management team will make your company successful.

- Improve your own leadership approach.
- Learn how to overcome resistance to change
- Learn how to run effective meetings
- Improve your communication techniques
- Manage your time more effectively
- Learn how to motivate staff
- Learn how to evaluate your teams
- Evaluate your leadership strengths and development needs

**Recruitment Interviewing and Hiring Practices:** As the real estate market stabilizes and you have hiring needs, you want to make sure that you make good hires who can hit the ground running and are a good fit with your current staff and company. We can help you develop a successful interviewing and hiring process that will ensure you do not take any false steps or waste valuable time and resources.

- Develop a phone interview process including questions designed for your agency
- Develop a hiring interview question guide
- Learn how to conduct successful interviews and work samples
- Identify tactics to ensure success during the first 60 days of employment
- Evaluate and improve your hiring processes and reduce turnover and bad hires
- Learn coaching techniques for improving employee performance

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### Other CBA Workshops

#### MANAGEMENT

Executive Leadership

Unit Management

Supervision

Coaching

Managing performance

Setting business goals

Measuring performance

Employee evaluation

Employee profiles

Achieving goals

Team management

Team development

Implementing change

#### SALES AND SERVICE

Basic sales

Customer interviewing

Customer profiling

Market planning

Sales planning

Sales in the 21st century

Sales management