A sample activity from the Fenman trainer's resource:

Setting Objectives and Seeing them Through

Written by Beverley Williams

Thank you for downloading this sample activity. You are welcome to use this material in your courses.

This sample activity is additional to the 16 contained in the trainer's activity pack '*Setting Objectives and Seeing them Through*', published by Fenman. Details of the other activities are given at the end of this document.

Setting Objectives and Seeing them Through

Contents:

Introduction:

Involve managers, team leaders and individuals in linking personal development with corporate goals. These activities enable you to focus on the responsibility everybody has for writing objectives that not only develop the individual, but also contribute to the overall goals of your organisation.

The activities draw upon your participants' own work environment to develop objectives that are relevant and immediately useful. There is also a generous selection of role-plays, case studies and examples based on real examples and taken from a range of organisations.

As well as activities that demonstrate the importance of having objectives that are Specific, Measurable, Agreed, Realistic and Time-bound, you'll also find activities that focus on team objectives, developmental objectives, task objectives and every other aspect of objective setting you could possibly imagine!

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AGREEING SMART OBJECTIVES: ROLE-PLAYS

PURPOSE

To give participants the opportunity to put theory into practice by working through role-plays that ask them to agree SMART objectives in a range of circumstances.

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AGREEING SMART OBJECTIVES: ROLE-PLAYS

INTRODUCTION

Role-plays provide the means of allowing participants to put the theories they have explored into practice. This allows them to learn more about their strengths and development areas in a safe and supportive environment where feedback is delivered for the sole purpose of helping to improve performance.

The process of agreeing objectives can be straightforward or far more tricky depending on the personalities and types of objective involved. Line managers and team members can become more skilled at the process of agreeing SMART objectives with practise and by focusing on what they want to achieve from the objective-setting session.

Working through the role-plays contained in this activity gives participants the opportunity to tackle a range of situations and helps them to develop skills that can then be transferred to their own workplace environment.

PURPOSE

To give participants the opportunity to put theory into practice by working through role-plays that ask them to agree SMART objectives in a range of circumstances.

APPLICATION

Most suitable for use with participants who are responsible for helping others to set objectives – that is, manage others in some capacity. Participants should already have covered Activities 1 to 7 plus Activities 11 and 12 of *Setting Objectives and Seeing Them Through* before working on this activity.

WHAT HAPPENS

You open by explaining the benefits of role-playing with regard to objective setting. You spend some time focusing on the value of observation and feedback in a role-play situation, and the importance of taking a responsible attitude when giving and receiving feedback.

Then you briefly cover the main points of the role-play you wish to use first and ask participants to prepare for the role-play. You run the role-play, then lead the feedback using the supplied trainer's briefs to help you. Next, you repeat the process with further role-plays. You may also wish to ask participants to develop their own role-play situations using current or planned objectives.

Finally, you close by inviting participants to give one or two of their action points from this activity.

TIME

Overall time required: 2 hours using 1 role-play; add 45 minutes for each additional role-play to be used

- Opening: 5 minutes
- Key stages of the objective-setting interview: 20 minutes
- Potential problems: 15 minutes
- Observation and feedback: 15 minutes
- The role-plays: 45 minutes for each role-play
- Key learning points: 20 minutes

MATERIALS & RESOURCES

- 1 OHT master:
  1 *Key stages*

- 7 Handout masters:
  2 *Key stages of the objective-setting interview*
  3 *Observation and feedback – getting it right*
  4 *Straightforward task-based objective role-play – Parts A and B*
  5 *More difficult task-based objective role-play – Parts A and B*
  6 *Straightforward developmental objective role-play – Parts A and B*
  7 *More difficult developmental objective role-play – Parts A and B*
  8 *Observation sheet*

- 2 Trainer's briefs
  9 *Managing the feedback*
  10 *Role-play guide*

- Overhead projector and screen
- Flipchart and stand or whiteboard
- Marker pens for trainer
- Paper and pens for participants
- Separate room for role-play preparation (not essential but useful)
- Optional: video camera
- Optional: blank tapes
- Optional: television and VCR

IN PREPARATION

Please ensure that you are familiar with Trainer's brief 9 Managing the feedback, before you run the role-plays. This handout also contains hints and tips on recording the role-play sessions.

HOW DO I DO IT?

OPENING

Open by telling participants that role-plays provide the means of putting what they have learnt about agreeing SMART objectives into practice. Explain that this allows them to learn more about their strengths and development areas in a safe and supportive environment where observation of role-plays is carried out and feedback given for the sole purpose of helping individuals to improve their performance.

Explain that the process of agreeing objectives can be straightforward or far more tricky depending on the personalities and types of objective involved. Tell participants that now they are going to spend some time developing their skills in order to be able to agree objectives more effectively back in their own working environment.

TRAINER'S NOTE

If you have already covered *Activity 5, Agreeing individual objectives*, with participants, please cover the next three sections Key Stages …, Potential Problems, and Observation and feedback as a refresher. The depth in which you cover them will depend on when participants last tackled the activity. Please ensure that all OHTs are shown and all handouts distributed.

KEY STAGES OF THE OBJECTIVE-SETTING INTERVIEW

Tell participants that the effective objective-setting interview works in the same way as other interview situations. Ask participants to give you a few examples of other types of interviews. They will probably come up with ideas like:

- selection interview
- appraisal interview
- coaching session.

This is a good time to point out that the objective-setting interview may not be a stand-alone session. It will often be part of an appraisal interview, or may be combined with a formal or informal coaching session. Explain that effective interviews will usually have defined stages.

Show OHT 1
Key stages

Spend 10 minutes or so reading through the stages, using the information supplied on Handout 2 Key stages of the objective-setting interview, and your own knowledge of the organisation and participants to enlarge on each point. For example, under the heading Create the right atmosphere you could discuss the shortage of meeting rooms within your own organisation and ask for ideas on how this could be overcome.

NB: It is not acceptable to hold this type of one-to-one meeting in the staff restaurant, a pub, café, and so on.

Distribute Handout 2
Key stages of the objective-setting interview

This handout summarises what has been discussed. Give participants a few minutes to read through it.

POTENTIAL PROBLEMS

Explain that we picked up on most of the potential problems that we are likely to come across as we covered the key stages of the interview. However, it's worth spending a few minutes to pay specific attention to them. Ask participants to work individually for 5 minutes to think about what problems may arise during an objective-setting interview. Spend about 10 minutes writing one or two responses from each person on the flipchart and asking the whole group for ideas on how the problems mentioned could be handled should they arise. They may come up with ideas such as the ones that follow:

- Team members who are inexperienced or who lack confidence may find it difficult to put their ideas forward.

- Team members may not know where to start or how to structure their thoughts.

- Team leaders may rush interviews and take over from team members.

- Inexperienced people may find it difficult to see the logical steps that will take them from starting out to achieving their objectives.

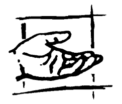
- Enthusiastic people may rush at ideas without prioritising effectively.

- Negative people may see the non-negotiable parameters as insurmountable barriers.

Handling these problems will engender a variety of specific ideas. However, you should explain that the key to dealing with all problem areas lies with the person who is managing the interview. This is why it is essential that they understand the key stages and are given help to develop their own interviewing skills. Point out that interviewing skills are transferable.

OBSERVATION AND FEEDBACK

Tell participants that because giving and receiving feedback is so important, they are going to spend some time thinking about what needs to happen to ensure that this is done as effectively as possible.



Distribute Handout 3
Observation and feedback – getting it right

Read through the handout, asking participants to give you examples (for example, 'Have you ever been in a situation where you felt that feedback was unhelpful or inappropriate?') or comment wherever you feel is appropriate (for example, 'Do you think that could be useful to you?').

Lay particular emphasis on point 12 of this handout. People are often polite, nice, anxious to please and concerned about the feelings of others. It goes against their nature and their sense of what is socially acceptable to make what they see as criticisms. By making it clear that the purpose of identifying development areas is to help others to improve their performance, you can help them to overcome the feeling that they are being 'mean' or 'rude' to the role-player.

On the other hand if you have any potentially destructive participants, lay particular emphasis on point 11 instead. If you are particularly concerned, add something to this point along the lines of, 'and of course giving that sort of feedback says a great deal more about the person giving it than receiving it, although I'm sure that we won't have that problem here'.

THE ROLE-PLAYS

The role-plays are broadly divided into the following:

1. Agreeing a straightforward task-based objective.

2. Agreeing a more difficult task-based objective.

3. Agreeing a straightforward developmental objective.

4. Agreeing a more difficult developmental objective.

This doesn't mean that there won't be a need to focus on some development to achieve the task-based objectives and vice versa. You may also want to ask participants to develop their own role-plays using current or planned objectives and run these in addition to all, or some, of those given in this activity.

It works well if you run the easier version of one role-play, then follow it up with the more difficult version after feedback has been given. You will need to tell participants that the role-plays are 'graded' as less and more difficult and point out whether you are using a primarily task-based or developmental theme.

Divide participants into two groups. Issue one group with Part A and the other group with Part B of one selected role-play from the following.

Distribute Handout 4
Straightforward task-based objective role-play – Parts A and B

or

Distribute Handout 5
More difficult task-based objective role-play – Parts A and B

or

Distribute Handout 6
Straightforward developmental objective role-play – Parts A and B

or

Distribute Handout 7
More difficult developmental objective role-play – Parts A and B

Give the groups up to 15 minutes to prepare for the role-play, asking them to select a role-player a few minutes before the end of preparation time. Give help if needed during the preparation. Handout 2 Key stages of the objective-setting interview, along with the two Trainer's briefs mentioned below will help you coach and lead feedback.

Trainer's Brief 9
Managing the feedback and
Brief 10
Role-play guide

Reconvene all the participants.

Distribute Handout 8
Observation sheets

Explain that all those *not* playing a role will be observers. Briefly read through each section checking that everyone understands them. Explain that the role-players will have an opportunity to complete the sheets at the end of the role-play. Run the role-play (which should take up to 15 minutes), then facilitate feedback (allow up to15 minutes), again using Trainer's brief 9 Managing the feedback, and the appropriate section of Trainer's brief 10 Role-play guide, to help you. Remember to give everyone, including the role-players, 2 minutes to complete their observation sheets at the end of each role-play.

Run subsequent role-plays in the same way (allow 45 minutes for each role-play). If you have time, you may also wish to ask participants to develop their own role-play situations using current or planned objectives.

KEY LEARNING POINTS

Ask participants to spend 10 minutes thinking about their key learning points from this activity, then invite them each to give one or two points. Close by thanking everyone for their hard work and participation.

Key stages

1

- Create the right atmosphere
- Introduce the broad subject area
- Identify the non-negotiable parameters
- Guide the conversation towards the topics that need to be addressed (play a greater or lesser role here depending on the experience of team members)
- Encourage the team member to put forward their ideas for discussion
- Agree SMART objectives or interim steps
- Agree action points, summarise and set next meeting date
- Close.

Key stages of the objective-setting interview

2

Create the right atmosphere

- Use a private room.
- Book sufficient time for the interview.
- Ensure that you won't be interrupted.
- Be prepared. Read all the relevant information in advance. Be aware of the non-negotiable parameters you will need to work within.
- Arrange furniture so that you can sit comfortably with the interviewee. Ideally, have two comfortable chairs with a low coffee table between or beside you for your paperwork. Don't sit behind a desk, which could act as a barrier.
- Make sure the room is at a comfortable temperature and that the sun is not shining in anyone's eyes.
- Arrange for tea or coffee to be available.
- Most importantly, be welcoming and show that you are looking forward to the discussion.

Introduce the broad subject area

This may include the following examples.

- Discuss and agree objectives for the coming year.
- Discuss and agree objectives for a specific project.
- Discuss and agree objectives for a task or series of tasks.
- Discuss and agree objectives for personal development.

Identify non-negotiable parameters

This must be done before the main discussion begins. In many cases all parties will already be aware of non-negotiable parameters. If this is not the case allow time for the team member to absorb the new information. Non-negotiable parameters normally exist as a result of corporate or executive decisions. Examples include:

- a commitment to improving customer service at all levels
- a stop on any additional recruitment
- the introduction of new working practices
- the development of new products
- changes in legal requirements.

Continued …

Key stages of the objective-setting interview

… continued **2**

Everyone must understand and accept that these parameters are non-negotiable and that our job is to agree effective objectives within this framework before the discussion moves forward.

Guide the conversation towards the topics that need to be addressed
The line manager will play a greater or lesser role here depending on the experience of the team member. An experienced, clear-thinking team member may only need a prompt like, 'Well, I'm sure that you've already put a great deal of thought into this Lynne. How do you see it moving forward?' to start the discussion. A less experienced or less confident team member may need far more guidance. For example, a line manager could say, 'Customer service is a big topic. How about if we begin by thinking about the different ways that our team provides customer service?'.

Encourage the team member to put forward ideas for discussion
How you manage this part of the objective-setting process will depend to a large degree on the experience and confidence of the staff member. With the experienced team member this will flow naturally from the previous stage. The less experienced team member will need support. This is another opportunity for you to build rapport with your team. Show that you are taking their ideas seriously and point out flaws in a constructive manner. For example, 'I'm glad that you've identified queuing times as a problem, Jack. I agree that it definitely needs addressing. I'd like to put two extra cashiers on the counter. However, as you know I can't recruit more staff at the moment. I'm aware that the people who know most about this problem are those dealing with it every day. Can you think of any areas where perhaps we aren't as streamlined as we could be?'.

Agree SMART objectives or interim steps
As the discussion progresses, you will need to ask appropriate questions to ensure that the resulting objectives will be SMART. It's a good idea to focus on SMART once you have an objective you both feel you can broadly work with. For example, 'The idea of introducing a laminated A5 job card should definitely sort out the problem of working with dog eared, grubby bits of paper that do nothing to impress the customer. Let's see if we can apply

continued …

Key stages of the objective-setting interview

… continued **2**

the SMART criteria to it. We may need to set some interim tasks – for example, speaking to the printer – before we can agree the final SMART version'.

It's important that you don't mentally assess objectives for SMART without involving the team member. If SMART objectives are the norm for the whole team, you will find yourselves working in agreement without having to make major efforts to do this.

It's important to accept that agreeing SMART objectives may need more than one session. It's sensible, and may result in SMARTer objective setting, to check out details before agreeing the final version if appropriate.

Agree action points, summarise and set next meeting date
Write down the action points (for agreed objectives and interim steps), whose responsibility they are and timescales. Each person present needs a copy.

Ask the team member to summarise, out loud, what you have agreed during the objective-setting session. A more experienced team member will probably have no problem with this. However, a younger or junior team member may feel a little nervous. It's good development for them to take an active role at this stage, and as long as you are patient, this will help build confidence and strengthen your relationship.

Agree a date for the next meeting. This could be to report back on interim steps or to report back on the progress of objectives that have been set during this meeting.

Close
Thank the team member for their input. Try and pick up on something they did particularly well. For example, 'I'm really pleased with the amount of preparation you did for this meeting, Jack. It's enabled us to make some real progress'.

Observation and feedback – getting it right

3

Feedback is an extremely valuable tool when used responsibly. However, it must be carried out in a supportive and constructive manner.

Giving feedback
For a variety of reasons people often find it difficult to give feedback on their observations of another's skills or behaviour. The following guidelines will help you to ensure that your feedback is constructive and supportive.

1. Always remember that your purpose is to help the other person.

2. Find out what the person receiving feedback wants to know. They may have a particular concern about a certain area.

3. Don't say the first thing that comes into your head. Take some time to think about your comments.

4. Most people feel very vulnerable while receiving feedback and so will be very sensitive to your comments. Be aware of this when deciding what to say. It's a good idea to think about how you would feel if the same comments were made about you.

5. Speak directly to the person you are feeding back to. Don't talk *about* them to the group or the course tutor.

6. Your feedback is personal to yourself, so say 'I' rather than 'We' or 'The group'.

7. Think about your non-verbal communication. Make eye contact and ensure that both your posture and your expression are relaxed and informal.

8. Be honest but non-judgmental. For example, 'You interrupted the other person on five separate occasions,' rather than, 'You were so full of your own opinions that you wouldn't let the other person get a word in edgeways'.

Continued …

Observation and feedback – getting it right

… *continued*

3

9. Talk about the specific behaviour rather than your personal opinion of the person receiving feedback. For example, 'No dates were set for the next meeting,' rather than 'You're a poor organiser'.

10. Make sure that you comment on the good points as well as the development areas. It's important that people are made aware of their strengths.

11. Don't overload the person with development points. Being given two or three areas to consider may be valuable; 15 is demoralising and pointless.

12. Give at least one development area for the person to work on. It's unfair to refuse help because you feel awkward about it.

13. Make your remarks specific. For example, 'You had a friendly approach' is of little value. A better example would be, 'You made good eye contact, had a friendly smile, and your posture was open and relaxed. All these things made me feel that you were looking forward to the interview'.

14. Remember that your feedback is something the other person may wish to consider. They do not have to accept any or all of it.

Receiving feedback

1. Ask observers to give you feedback on specific areas before you begin. For example, 'I've been told that I tend to ask questions, then don't wait for a complete answer before asking another. Can you look out for that please?'.

2. Remember that the person giving feedback may feel uncomfortable about doing so. They may be worried that you will be upset or angry. It is important that you help to generate a relaxed atmosphere that will allow supportive and constructive feedback to take place.

3. Listen carefully and ask for more detailed information if you need it.

continued …

Observation and feedback – getting it right

… continued **3**

4. Expect to receive feedback on both your strengths and your development areas.

5. Adopting an argumentative or defensive stance while receiving feedback will mean that observers will be less likely to be honest with you.

6. What you hear is useful information on how others perceive you. You do not have to accept it as an absolute truth.

Straightforward task-based objective role-play – Parts A and B

4

Part A
You are the manager, managing, among others, an administrative team of five people consisting of a team leader and four administrators. The team responds to the majority of customers' letters as part of their role; the current response time is usually within four days. This standard has evolved rather than having been analysed and agreed. A recent customer survey showed that customers rate this turnaround time as poor compared with other similar organisations and you need to improve your performance. The focus is not on poor performance but rather on being glad that this issue has been highlighted giving you the opportunity to do something about it.

You are about to have an objective-setting meeting with the team leader who is aware of the topic to be discussed and has been asked to think about initial ideas. The team leader is enthusiastic, keen to improve performance, and often comes up with interesting and useful ideas. The team leader has provided you with a list of the current procedures (shown below) and frankly, it's a bit of a shambles. However, you are confident that this can be sorted out and are approaching the meeting in a positive manner.

Use your knowledge of SMART, and of the key stages to plan and conduct an effective objective-setting interview. You will have up to 15 minutes to role-play the interview.

Current procedures and problems

- Mail normally opened late on the day it arrives by first available person.

- Shared out by number between four administrators – that is, 40 letters, 10 each. Often then passed to the appropriate person at some point if another administrator has been handling the query to date.

- Administrators find the appropriate file as they deal with each letter.

Continued …

Straightforward task-based objective role-play – Parts A and B

… continued **4**

- Problems sometimes arise – for example, two separate letters referring to the same issue may be allocated to separate administrators, causing confusion.

- Team leader approached to check and sign each completed letter.

- Letters given individually to post collection person at the end of each day. This means that they are sometimes missed if the administrator is away from their desk.

continued …

Straightforward task-based objective role-play – Parts A and B

… continued **4**

Part B

You are the team leader of an administrative team consisting of four administrators plus yourself. One of the team's key tasks is to respond to customers' letters. You are preparing for an objective-setting meeting with your manager to discuss the fact that a recent customer survey showed that customers rate your response time of four days as poor compared with other similar organisations. The focus is not on poor performance but rather on being glad that this issue has been highlighted giving you the opportunity to do something about it.

You are enthusiastic, keen to improve performance and often come up with interesting and useful new ideas. You are a big believer in involving your team in developments and now you need to ask them for help to prepare for the objective-setting meeting. You have documented the current procedure (shown below) and given a copy of it, warts and all, to your manager. You feel a bit embarrassed about it, as turning your attention to it has made it obvious that it couldn't be described as efficient. Still, you are confident that it can be drastically improved.

Use your knowledge of SMART and of the key stages to prepare for, then take part in, an effective objective-setting interview. You will have up to 15 minutes to role-play the interview.

Current procedures and problems

- Mail normally opened late on the day it arrives by first available person.

- Shared out by number between four administrators – that is, 40 letters, 10 each. Often then passed to the appropriate person at some point if another administrator has been handling the query to date.

- Administrators find the appropriate file as they deal with each letter.

continued …

Straightforward task-based objective role-play – Parts A and B

… continued **4**

- Problems sometimes arise – for example, two separate letters referring to the same issue may be allocated to separate administrators, causing confusion.
- Team leader approached to check and sign each completed letter.
- Letters given individually to post collection person at the end of each day. This means that they are sometimes missed if the administrator is away from their desk for any other reason.

More difficult task-based objective role-play – Parts A and B

5

Part A

You are the manager, managing, among others, an administrative team of five people consisting of a team leader and four administrators. The team responds to the majority of customers' letters as part of their role; the current response time is usually within four days. This standard has evolved rather than having been analysed and agreed. A recent customer survey showed that customers rate this turnaround time as poor compared with other similar organisations and you need to improve your performance.

You are about to have an objective-setting meeting with the team leader who is aware of the topic to be discussed and has been asked to think about initial ideas. The team leader (who you inherited) is a negative person who pleads pressure of work as an excuse for never improving performance. They have a particularly irritating habit of saying, 'But I'm already snowed under!' at all available opportunities. The team leader has provided you with a list of the current procedures (shown below) and frankly, it's a bit of a shambles. However, you are determined that this will be sorted out and are approaching the meeting in a positive manner although you know that you will have to work hard to help your team leader understand that changes must be made.

Use your knowledge of SMART and Handout 2 Key stages of the objective-setting interview, to plan and conduct an effective objective-setting interview. You will have up to 15 minutes to role-play the interview.

Current procedures and problems

- Mail normally opened late on the day it arrives by first available person.
- Shared out by number between four administrators – that is, 40 letters, 10 each. Often then passed to the appropriate person at some point if another administrator has been handling the query to date.
- Administrators find the appropriate file as they deal with each letter.

Continued …

More difficult task-based objective role-play – Parts A and B

… continued **5**

- Problems sometimes arise – for example, two separate letters referring to the same issue may be allocated to separate administrators, causing confusion.
- Team leader approached to check and sign each completed letter.
- Letters given individually to post collection person at the end of each day. This means that they are sometimes missed if the administrator is away from their desk.

continued …

More difficult task-based objective role-play – Parts A and B

… continued **5**

Part B

You are the team leader of an administrative team consisting of four administrators plus yourself. One of the team's key tasks is responding to customers' letters. You are preparing for an objective-setting meeting with your manager to discuss the fact that a recent customer survey showed that customers rate your response time of four days as poor compared with other similar organisations. You know that people don't see you as a mover and a shaker but it's difficult when you feel as weighed down by your workload as you do. Your habitual response to any call for improvement is to say, 'But I'm already snowed under!'.

You have documented the current procedure (shown below) and given a copy of it, warts and all, to your manager. You feel a bit embarrassed about it as turning your attention to it has made it obvious that it couldn't be described as efficient, still you are snowed under!

Prepare to play the role of the negative team leader. It will be the job of your manager to help you understand that changes need to be made. Come around to being a reasonable person if your manager is making a good case for it. Don't hold out too long or give in too soon and don't forget your war cry!

Current procedures and problems

- Mail normally opened late on the day it arrives by first available person.

- Shared out by number between four administrators – that is, 40 letters, 10 each. Often then passed to the appropriate person at some point if another administrator has been handling the query to date.

- Administrators find the appropriate file as they deal with each letter.

- Problems sometimes arise – for example, two separate letters referring to the same issue may be allocated to separate administrators, causing confusion.

continued …

More difficult task-based objective role-play – Parts A and B

… continued **5**

- Team leader approached to check and sign each completed letter.
- Letters given individually to post collection person at the end of each day. This means that they are sometimes missed if the administrator is away from their desk.

Straightforward developmental objective role-play – Parts A and B

6

Part A
You are preparing for an objective-setting meeting with one of your team. You are both aware that the team member is actively seeking promotion and you are helping them to develop the appropriate skills for the next move. The team member is enthusiastic, conscientious and committed and you would like to agree objectives during this meeting that will work towards improving their communication skills.

You are keen to take their ideas on board regarding the best methods of doing this but you want to include making formal presentations at departmental level, getting involved in writing and running team briefings and, something that your team member has no idea of yet, being part of the team that runs the information stand at a trade/industry exhibition. You realise that they may be a little surprised but are looking forward to the meeting as they have a really positive approach.

Use your knowledge of SMART and Handout 2 Key stages of the objective-setting interview, to plan and conduct an effective objective-setting interview. You will have up to 15 minutes to role-play the interview.

Continued …

Straightforward developmental objective role-play – Parts A and B

… continued **6**

Part B
You are preparing for an objective-setting meeting with your team leader as part of an ongoing programme where they are helping you to develop your skills. You have asked for help to prepare you to apply for promotion when the next opportunity comes along. This meeting will look at ways of developing your communications skills. You know that your team leader is thinking about getting you involved in writing and running the team briefings, and that making presentations at departmental level is the next step.

You are positive and enthusiastic, and looking forward to the meeting.

Use your own ideas about communications skills, your knowledge of SMART and of the key stages to plan and take part in an effective objective-setting interview. You will have up to 15 minutes to role-play the interview.

More difficult developmental objective role-play – Parts A and B

7

Part A

You are preparing for an objective-setting meeting with one of your team. You are both aware that the team member is actively seeking promotion. There is a difficulty in that the team member has been with the organisation for a very long time and feels that promotion is owed and that they are ready for it without further development.

You believe that they have not yet been exposed to a sufficient number of opportunities to allow them to develop the appropriate formal communication skills that will be needed before they can be considered for promotion. You aren't prepared to recommend the team member for promotion before these skills have been developed although you don't want it to come to the point where you have to say this. If possible, you would like to focus on the benefits of developing the skills.

You are keen to take their ideas on board regarding the best methods of doing this but want to include making formal presentations at departmental level, getting involved in writing and running team briefings and, something that your team member has no idea of yet, being part of the team that runs the information stand at a trade/industry exhibition. You realise that they may be a little negative to begin with but see it as a personal challenge to get them to take the ideas on board.

Use your knowledge of SMART and Handout 2 Key stages of the objective-setting interview, to plan and conduct an effective objective-setting interview. You will have up to 15 minutes to role-play the interview.

Continued …

More difficult developmental objective role-play – Parts A and B

… continued **7**

Part B
You are preparing for an objective-setting interview with your team leader. It will focus on developing your formal communications skills to enable you to apply for promotion when the next opportunity arises. You feel that this is a bit of a joke as you have been with the company for years and know the job inside out.

You haven't got anything against your team leader, but you do feel a bit put out that your length of service doesn't seem to count for much and that everyone has to be 'developed' to make 'presentations'. For heaven's sake, you speak to people about work and all the issues surrounding it every day!

Prepare to play the role of the 'Been there, done that' team member. It will be the job of your team leader to help you understand the benefits of developing your skills. Come around to being a reasonable person if your team leader is making a good case for it. Don't hold out too long or give in too soon.

Observation sheet

8

Did you feel that the interviewer had created a welcoming atmosphere? Give reasons for your answer.

Did you feel that the interviewer successfully introduced the broad topic of discussion and explained the non-negotiable parameters? Give reasons for your answer.

Did the interviewer effectively guide the conversation towards the topics that needed to be addressed? What happened exactly?

Observation sheet

8

Did the interviewer encourage the other person to put forward their ideas? What happened exactly?
Did the interviewer agree objectives, interim steps or both? Give examples.
How was the action points, summary and next meeting stage handled?
Any other comments.

OK TO COPY

Managing the feedback

Key points

- Feedback should take place after each role-play. Don't run all the role-plays together, then take feedback.

- When you run the session you will have already covered Handout 3 Observation and feedback – getting it right, and should therefore encounter few problems with aggressive or reticent observers. However, you must be prepared to intervene immediately if feedback is unnecessarily harsh or excessive – for example, 'Thanks for helping David with some development points Helen. Now I'd like you to focus on what you thought was particularly good'.

- You must also be prepared to intervene with those people who find it difficult to give any development points – for example, 'So overall you felt that Mandy managed the interview very competently. Can you give her one development area to work on to give her the opportunity to reach an even *higher* standard?'.

- Make sure that the amount and intensity of feedback given is not excessive. Cut short the session if you can see that someone is having great difficulties dealing with the feedback. You can offer some one-to-one coaching later if this is feasible.

Recommended role-play feedback structure

- Give some **immediate reaction** as the role-play ends – for example, 'Well done'. Participants will be feeling nervous and will imagine the worst if no comment is made.

- Ask everyone, including the role-players, to spend **2 minutes completing their observation sheet**. (If you are recording the role-plays it's a good idea to find the first section of tape you want to play back while the group is doing this.)

- **Ask the role-players (one at a time) how they feel the role-play went**. Make sure that they cover what they felt went particularly well and what they would have done differently.

Continued …

Managing the feedback

… continued

9

- **Bring your observers in here and ask them to feedback to the role-players** (bearing in mind the key points detailed in this handout). You can regulate the amount of feedback according to numbers in the group, time available and value of feedback.

- Conclude the feedback session with **your own observations** (if recording the role-plays, use the selected parts of the taped role-plays to illustrate what you mean). Be sure to end the feedback on a positive point by focusing on something that you feel went particularly well.

- **Ask the role-players (one at a time) if they have any final comments** they would like to add.

Recorded role-plays

- If the training room is large enough, set the camera up before the training course begins and leave it in the room. Although this goes against the 'no clutter in the training room' rule it will result in participants being less nervous than if you set everything up just before the role-plays.

- During the role-play identify at least two points that you particularly like and one that you feel is a development area. Check their exact place on the tape by making a note of the tape counter number which is visible in the camera viewer. You don't have to watch the entire role-play through the viewer, just make sure that you're in a position where you can quickly glance at it.

- If your camera doesn't have a counter, it's a good idea to position your role-play props (tables, chairs, and so on) in front of a large clock. You can then make a note of the time on the clock and look for it when you're searching for the right place on the tape.

- Don't play back the whole of the tape, just the points that you particularly liked and the one that highlights a development area (unless you are doing one-to-one coaching and feel that it would be valuable).

- Reassure participants that the tape will be kept confidential. People sometimes have nightmare visions of their really embarrassing moments being shown at the Trainers' Christmas Party!

Role-play guide

10

Use the information provided in Handout 2 Key stages of the objective-setting interview, to help you assess and feed back on all the role-plays in terms of:

- creating the right atmosphere
- introducing the broad subject area
- identifying the non-negotiable parameters
- guiding the conversation towards the topics that need to be addressed
- encouraging the team member to put forward their ideas for discussion
- agreeing SMART objectives or interim steps
- agreeing action points, summarising and setting the next meeting date
- closing.

Now take the following points into account for the individual role-plays.

Handout 4 Straightforward task-based objective role-play – Parts A and B

- *What specific objective or objective and supporting statements have they agreed on?*
  For example, reduction to a one- or two-day turnaround is fine as long as they can show that this is realistic. If they have reduced the turnaround time to three days, you will need to question whether that is likely to meet the customers expectations.

- *The team leader may be able to give appropriate timescales at this point or may wish to report back after making an assessment.*
  Either option is fine as long as the question of how long it will take to complete the task-based objective is addressed.

Continued …

Role-play guide

… continued **10**

- *The practical issues of streamlining their current system must be addressed.* An example of an improved system would be as follows.

  1. A rota system is set up to make one individual responsible for opening the post each morning, sorting through it to allocate it correctly where possible, finding the appropriate file and handing it together with the letter to the administrator.

  2. Ideally, the rota person would come in half an hour early to do this. Time could be made up in a variety of ways or overtime could be paid.

  3. Team leader has a basket or tray on desk where letters are placed for checking and signing. This will allow it to be done in batches and eliminate the constant interruptions.

  4. Letters that are ready for the post are placed in a central basket or tray; post person collects all letters from this point.

  5. Current signing system is examined to see if any areas can be delegated to allow the team members to check and sign their own letters.

  6. Any recurring problems – for example, layout, spelling – are addressed at the source and the appropriate development is given to eliminate these problems.

  7. Incoming letters are analysed for common problems and the appropriate action is taken to tackle these letters at source.

Please note that this is not a model answer and your participants may find other ways to tackle the issue. However, you should ensure that the areas described above are dealt with during the role-play.

continued …

Role-play guide

… continued **10**

Handout 5 More difficult task-based objective role-play – Parts A and B

- *This will be tackled as for the role-play on Handout 4. However, the manager will have a much more difficult time when getting the team leader to buy-in to achieving the new objective of reducing turnaround times.*
  Point out during preparation that the manager's group should be using Handout 2 to help them prepare to do this.

- *During the role-play, the team leader may be enjoying playing the negative person to the extent that they don't 'come round' when it is clear that they would in all normal circumstances.*
  Be prepared to step in here, just something like, 'OK Sue. I think he's suffered enough. Time to start warming to the idea a little' will steer things onto the right track without disrupting the role-play or making the team leader feel that they are doing anything wrong.

- *During the feedback make the point as often as is needed that the team leader was playing the part of a negative person.*
  This sounds obvious but it can sometimes make people feel very uncomfortable when their performance is criticised, even if they have been asked to act like this.

- *The manager may have to work hard on turning around the team leader's negative attitude during this role-play perhaps ending with an agreement to look at what can be done prior to a further meeting taking place.*

- *Streamlining the actual procedures needs to be tackled as for the role-play on Handout 4.*

Handout 6 Straightforward developmental objective role-play – Parts A and B

This should run as an extremely straightforward role-play and following the bulleted points on the first page of this handout will enable you to coach and facilitate the feedback without problems.

continued …

Role-play guide

… continued **10**

An additional point to look out for is whether there should be an interim step to investigate the availability of training courses and so on, if it is agreed that the team member should receive some formal training.

Handout 7 More difficult developmental objective role-play – Parts A and B

- *This will be tackled as for the role-play on Handout 6. However, the team leader will have a much more difficult time getting the team member to agree to the value of the developmental objectives.*
  Point out during preparation that the team leader's group should be using Handout 2 to help them prepare to do this.

- *During the role-play, the team member may be enjoying playing the 'Been there, done that' character to the extent that they don't 'come round' when it is clear that they would in all normal circumstances.*
  Be prepared to step in here, just something like, 'OK Jack. I think he's suffered enough. Time to start warming to the idea a little' will steer things onto the right track without disrupting the role-play or making the team member feel that they are doing anything wrong.

- *During the feedback make the point as often as is needed that the team member was playing the part of a negative person.*
  This sounds obvious but it can sometimes make people feel very uncomfortable when their performance is criticised, even if they have been asked to act like this.

- *The team leader may have to work hard on turning around the team member's negative attitude during this role-play ending with an agreement to look at what can be done prior to a further meeting taking place.*

Setting Objectives and Seeing them Through

Complete list of activities:

1: Objectives: what they are and why they exist

This activity introduces participants to the broad topic of setting objectives and seeing them through. It emphasises that objectives exist to improve performance, motivation and levels of satisfaction.

2: Introducing SMART objectives

Participants get to know SMART Objectives and to understand the value of applying SMART when agreeing objectives.

3: Let's get specific

An activity that focuses on the Specific aspect of agreeing objectives. Participants work on improving examples of vague statements that are often put forward as objectives.

4: Measuring progress and success

Exercises and case studies that focus in great detail on the Measurable aspect of objectives. The activity emphasises the importance of considering all the measurable aspects that may affect objectives, not just the most obvious.

5: Agreeing individual objectives

An activity that concentrates on why objectives need to be Agreed by those involved rather than imposed on members of staff. This activity examines the benefits of gaining commitment to the objectives and focuses on how objectives are agreed during a one-to-one interview.

6: Setting realistic objectives

Exercises and a case study that focus in great detail on the importance of agreeing Realistic objectives that stretch people, but not to breaking point.

7: When will it all happen?

Exercises and case studies that focus on ensuring that objectives are Timebound. This activity emphasises the importance of including interim steps to check timings before agreeing final timescales where appropriate. The activity also guides participants through a full project-planning exercise, which will enable them to assess timescales as accurately as possible.

8: The organisational perspective

An activity that examines objective setting from an organisational perspective and illustrates how objective setting at all levels must tie in with organisational aims.

9: Departmental objectives

This is where objectives start to get more specific, giving a clear view of the targets and expectations of departments and functions. This activity examines departmental objective setting and asks participants to show where their own departmental objectives fit in to the bigger picture.

10: Team objectives

The key link between departmental and individual objectives. Agreeing team objectives can be more difficult than agreeing individual objectives as more people need to be involved in the process. This activity introduces the line manager to a method of agreeing team objectives that has been designed to gain maximum input and commitment.

11: Task-based objectives

Task-based objectives normally relate to discrete tasks or projects with a clearly stated outcome. This activity covers the benefits of task-based objectives while raising awareness of the problems associated with an overly task-orientated approach.

12: Developmental objectives

Developmental objectives are more difficult t set, monitor and review than task-based objectives but can be far more valuable. This activity focuses on what's best for your team rather than what brings the easiest results.

13: Monitoring progress

All objectives need to be monitored formally and informally. This activity helps the manager to work with team members to decide on an appropriate monitoring system. It also emphasises the importance to the manager of continuing to discreetly monitor progress to avoid any surprises as the buck suddenly returns home!

14: Reviewing progress

Formal progress reviews are an essential part of seeing objectives through to a successful outcome. This activity examines review methods and appropriate timescales.

15: Keeping up momentum and rewarding success

It's hard to keep up the enthusiasm that marks the launch of a project. It's even harder to keep the momentum going when objectives are ongoing and not so high profile. This activity looks at the importance of making specific efforts to raise the profile of work in progress, and to give reward and recognition of what has been achieved so far. Maslow's Hierarchy of Needs plus the participants' own knowledge of what motivates individual members of their team helps them plan a rewards programme that ranges from 'Thanks David, I appreciate that' to a full-blown awards ceremony. The guiding themes of this activity are what's appropriate and what works.

16: Amending objectives

Things change and we have to meet changes with flexibility. Striving to fulfil objectives that have shifted in importance is a waste of everyone's time. There are also times when objectives will need to be amended because of fundamental flaws at the setting stage. If this happens, it must be accepted and lessons learnt from it. This activity examines the situations when amendments may be needed and looks at how to implement them.

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