

Munich RE



# MANAGING PEOPLE & TEAMS

## Day 1 Workbook



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COACHING

# Do it Yourself 360 - Pre-Work Activity

**Instructions: Ask three people these questions and note highlights from their responses. You can ask colleagues, your direct reports, and/or your leader.**

	Person 1	Person 2	Person 3
When you think of me in a leadership role (at work, as a community volunteer etc.) what three words come to your mind to describe me?			
What is one thing that you notice about me that might be holding me back from being effective?			
What is one way/reason that I make our team and organization a better place?			

# Brainstorming Delegatable Tasks - Pre-Work Activity

**Instructions: Keep this table on your desk for one week. Track any tasks that fall into these six categories. Be prepared to discuss this on Day 1.**

**Tiny:** Tasks that are so small they seem inconsequential to tackle but they add up. They are never important or urgent, and even if they only take a few minutes they end up taking you out of the flow of more strategic work.

**Tedious:** Tasks that are relatively simple probably are not the best use of your time. Very straightforward tasks can (and should) be handled by anyone but you.

**Time-Consuming:** Tasks that, although they may be important and even somewhat complex, are time-consuming and do not require you to do the initial 80% of research.

**Teachable:** Tasks that, although complicated seeming at first and possibly comprising several smaller subtasks, can be translated into a system and passed along, with you still providing quality checks and final approval.

**Terrible At:** Tasks that not only do not fall into your strengths but an area where you feel unequipped. You take far longer than people skilled in this area and still produce a subpar result.

**Time Sensitive:** Tasks that are time-sensitive but compete with other priorities; there isn't enough time to do them all at once, so you delegate an important and time-sensitive task so that it can be done in parallel to your other project-based deadlines.

## Foundational Leadership Skills

Our leadership model is designed to equip emerging and mid-level leaders with the foundational leadership skills and tools to lead themselves, their teams, and the organization effectively. At the foundation are 3 essential leadership practices: reflection, listening, and learning. Self Leadership is the foundation that People & Team Leadership Skills and Organization Leadership skills can be built on.



# Munich Re's Continuous Conversations



## Commitment

“What do I need to do?”

**Empower Performance**  
**Build Clear Expectations**  
**Delegate Collaboratively**



## Development

“Where am I going?”

**Developing Self & Others**  
**Build Self Awareness & Identity**

## Feedback

“Where do I stand?”

**Navigating Conversations**  
**Clarify Expectations**  
**Share Feedback & Ideas**  
**(Reinforcing & Corrective)**  
**Hold Accountability**



# Behaviours of a Person with a Strong Leaderstamp

Uses values to  
make  
decisions

Applies  
strengths

Manages  
weaknesses  
blindspots

Articulates  
leadership  
vision

Actively builds  
relationships

Reflects on  
and builds  
effective  
habits

Defines  
clear goals

Engages in  
Leadership  
Conversations

Which areas do I have strength in?	
Which areas do I want to develop in?	

# Managing & Leading - Both are Essential Skills

## Managing

Executing a vision in a systematic way through directing people

TASKS/BUSINESS

## Leading

Inspiring others to achieve a vision or shared objective

VISION/PEOPLE

Managing Work	Leading People
Clearly Communicating Expectations	Influence & Inspiring Communication
Planning Skills	Motivating Skills
Measurement (Counting Value)	Setting Vision/Direction (Creating Value)
Tasks	Goals
Systems & Process Oriented (Execution)	Innovative (Ideas)

Notes:

# Building Clear Expectations is a Collaborative Process



Align on Role  
Commitments



Share Team  
Behaviour Norms



Establish Clear Meeting &  
Communication Processes

<b>First 90 Days Work Plan</b>	
<b>Meetings</b>	
<b>Norms</b>	



# First 90 Days Work Plan

Area	Details	Notes
1. Know my Organization	History, Current State, and Future Vision?	
2. Know my Stakeholders/ Clients	Who are they, what are their needs?	
3. Know my Team	Who are they, what are their needs?	
4. Know my Systems	What are they and my plan to learn them?	
5. Know my Priorities	What are the priority tasks?	
6. Know my Leader	Who are they, what are their needs?	
7. Notice Culture	What examples do I notice of values in action?	
8. Track Ideas/Challenges	What are my innovative ideas? What challenges is my team facing?	

# Norms Brainstorm



# 10 Steps to Collaborative Delegation

**1**

Develop  
Delegation  
Criteria

**2**

Select  
Delegate

**3**

Define Task  
or Decision

**4**

Assess Ability  
& Training

**5**

Explain  
Importance/  
Big Picture

**6**

Determine  
Risks &  
Obstacles

**7**

Consider  
Resources  
Required

**8**

Agree to  
Deadlines

**9**

Support &  
Communicate

**10**

Share  
Feedback &  
Results

# Collaborative Delegation - Scoping a Task/Project - Part 1

Step	Area	Notes
1	<p><b>Develop Delegation Criteria</b>            Use the Brainstorming Delegatable Tasks Worksheet to develop your own criteria and list of tasks/projects you want to delegate.  <b>For this exercise:</b>            What is the task/project you want to delegate?</p>	
2	<p><b>Select Delegate</b>            Who is best suited to take this task?            What attributes/skills do you think will be important here?            Who has capacity?</p>	
3	<p><b>Define the Task/Project</b>            What is the task that you want done?            What does success mean/look like?            What are the smaller steps to achieving the task?            What are the things that won't be done?</p>	
4	<p><b>Assess the Training Needs</b>            What is the current skill level (competence) and motivation level (desire to do this) of the person who will do the task?            What are the training needs?</p>	
5	<p><b>Explain the Importance/Big Picture</b>            Why is this important?            How does it link to the vision/mission/goals?            How this will contribute to the clients or stakeholders involved.</p>	

# Collaborative Delegation - Scoping a Task/Project - Part 2

Step	Area	Notes
6	<b>Determine Risks &amp; Obstacles</b> What are the possible risks of this task/project to be aware of? What are the potential obstacles that could delay or derail the task/project?	
7	<b>Consider Resources Required</b> What will be required to achieve this task? Time, money, other people? What could change that would lead to this plan needing to change?	
8	<b>Agree to Deadlines</b> When will the task be completed? What milestones will you track?	
9	<b>Support &amp; Communicate</b> What is the communication plan? How and when will progress updates be made? What support will the leader offer?	
10	<b>Feedback on Results</b> Go over the task once completed and discuss what worked well, what didn't, and what you each learned from the process.	

# Choosing Which Conversation to Have



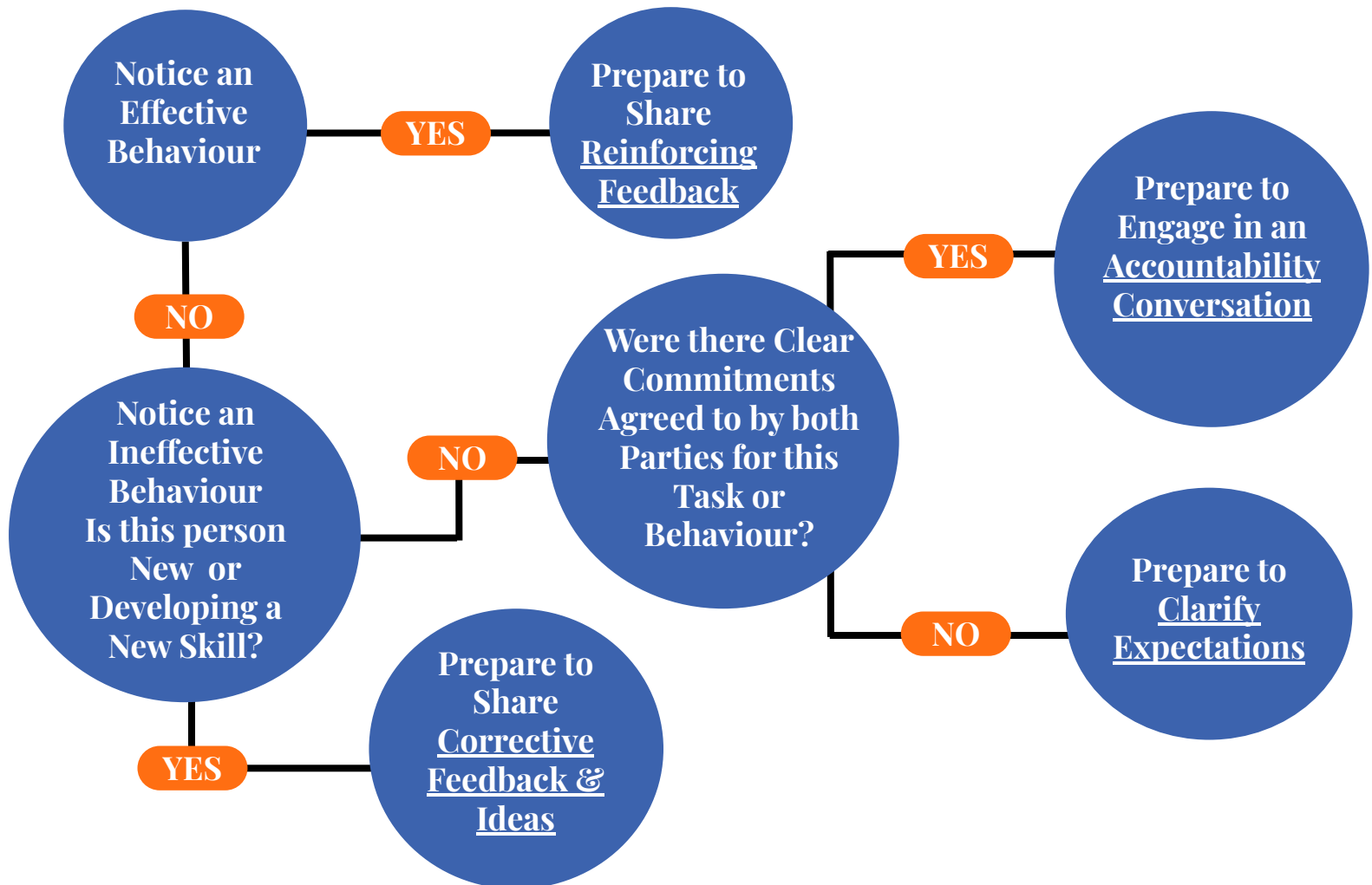
**Clarifying  
Expectations**



**Sharing Feedback & Ideas  
(Reinforcing &  
Corrective)**



**Holding  
Accountability**



# Clarifying Expectations

Describe Situation	Discuss Current Understanding	Align on Commitments	Summarize Next Steps & Capture Commitment
<p>Describe what you have observed in a neutral non-judgmental manner.</p> <p>I notice...</p>	<p>Share your current understanding or the task/plan and/or ask for their current understanding.</p> <p>My understanding is...</p>	<p>Review all commitments and establish clarity.</p> <p>Let's review the details and process to ensure we have clarity going forward.</p>	<p>Ask person to summarize the key milestones or actions verbally &amp; determine check-in point.</p> <p>When/how will we check in on progress?</p>

# Clarifying Expectations

Describe Situation	Discuss Current Understanding	Align on Commitments	Summarize Next Steps & Capture Commitment



# Feedback Factors

**1.**

One Person's  
Perspective

**2.**

Openness  
Varies

**3.**

Who Gives  
Impacts  
Openness

**4.**

Bias,  
Experiences,  
Beliefs, Impact  
Openness

**5.**

Difficult to  
share

**6.**

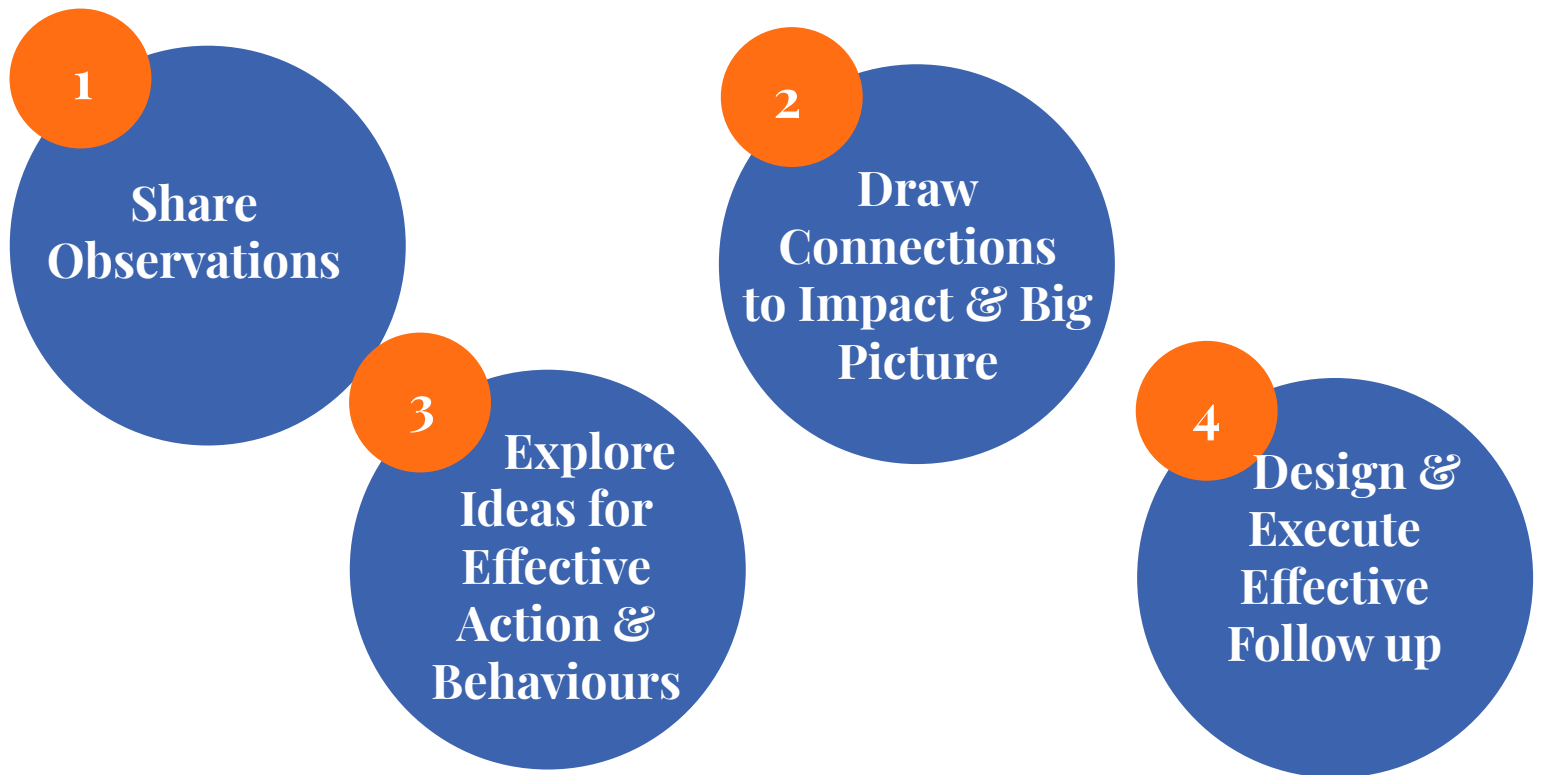
Delivery  
Skill Varies

**7.**

Threatens  
Status

Notes

## Sharing Feedback & Ideas



### Corrective Feedback & Reinforcing Feedback

To promote a change in a specific behaviour or a change to the way someone is performing a specific task

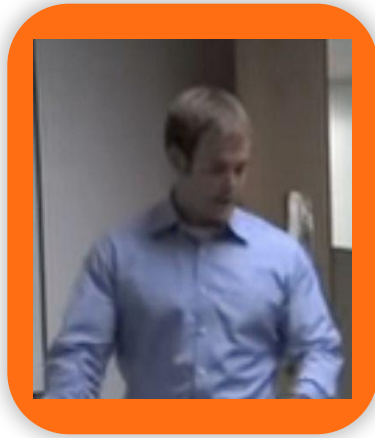
- ❖ Build competencies
- ❖ Improves performance
- ❖ Clarify expectations

To confirm the effectiveness of a specific behaviour or the way someone is performing a specific task

- ❖ Reinforce effective behaviour
- ❖ Increase engagement and motivation
- ❖ Celebrate progress

# Observable Behaviour Exercise

3



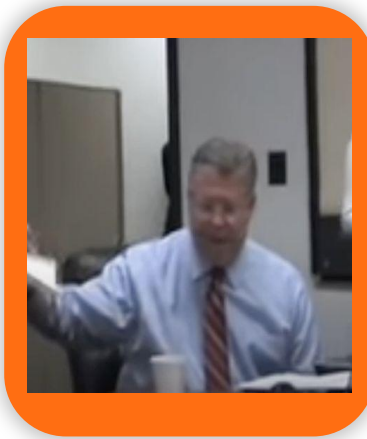
2



4



1



Person 1	Person 2	Person 3	Person 4

## Reinforcing Feedback Flow

Describe Behaviour	Share Impact/Link to Big Picture, Values, & Goals	Celebrate & Acknowledge
<p style="text-align: center;">Describe behaviour observed in a neutral non-judgmental manner.</p> <p style="text-align: center;">I notice...</p>	<p style="text-align: center;">Share the positive impact of behaviour. Why is getting this right important to the big picture.</p> <p style="text-align: center;">The impact was....</p>	<p style="text-align: center;">Celebrate the contribution they are making to the team/ organization Who do you see them becoming? Connect this to their goals (from connection meeting).</p> <p style="text-align: center;">If you continue to do this I really think this will support your goal of...</p>

# Reinforcing Feedback Preparation

Describe Behaviour	Share Impact/Link to Big Picture, Values, & Goals	Celebrate & Acknowledge

## Corrective Feedback & Ideas Flow

3 T's Check-In	Describe Behaviour	Discuss Impact	Define Goal	Share Ideas on Change	Summary & Next Steps
<p>Timing, Transpar- ency Topic</p> <p>“I have some feedback to share about x, is now a good time?”</p>	<p>Describe behaviour observed in a neutral non-judg- mental manner.</p> <p>I notice...</p>	<p>Describe or ask about the impact of behaviour.</p> <p>The impact was....</p>	<p>Share big picture.</p> <p>Why is getting this right important?</p> <p>What does good look like?</p> <p>The goal is....</p>	<p>Share some ideas.</p> <p>What will you do differently next time?</p> <p>I have an idea that I think would help.</p>	<p>Capture actions &amp; determine check-in point.</p> <p>What is your commitment ?</p> <p>When/how will we check in on progress?</p>

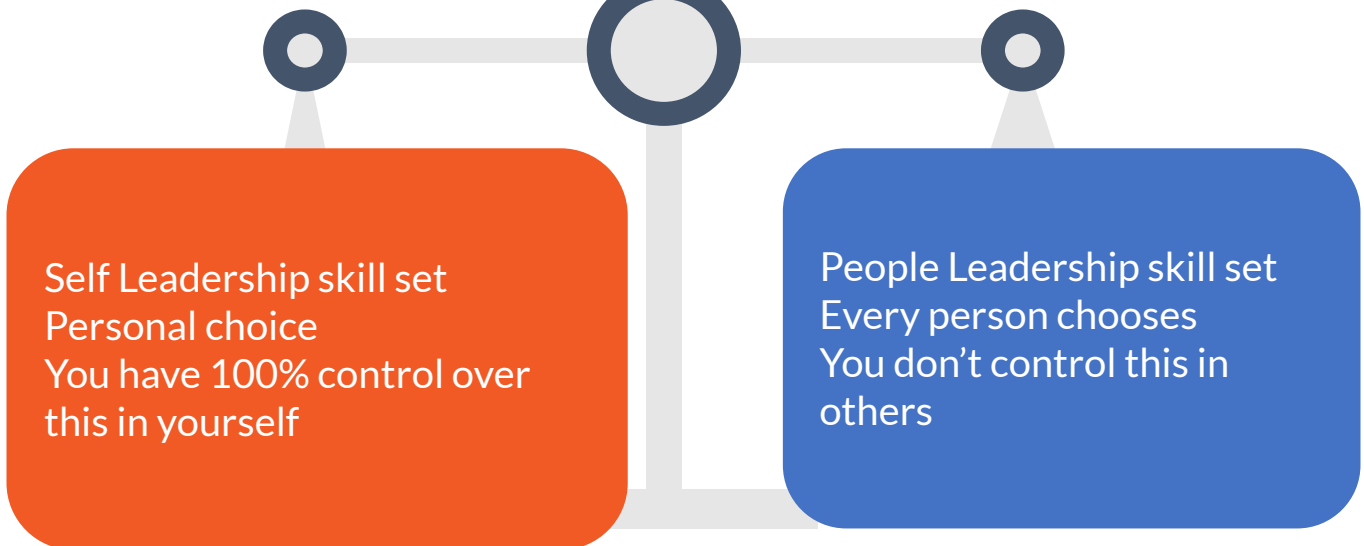
# Corrective Feedback & Ideas Planning

3 T's Check-in	Describe Behaviour	Discuss Impact	Define Goal	Share Ideas on Change	Summary & Next Steps

# Being Accountable & Holding Accountability

## Being Accountable

## Holding Accountability



Notes:



# Holding Accountability

**Balance  
Candor  
with  
Curiosity  
& Care**

**Be willing to  
share that an  
expectation  
was not met**

**Be open to  
getting  
information that  
you didn't have  
before**

**Be willing to  
leave space to  
invite them to be  
more  
accountable**

**Be willing to ask  
them to share  
their  
commitments in  
writing**

## Holding Accountability is a Team Commitment

- ❖ Goal is to hold accountability always - first time a commitment is missed - no saving up!
- ❖ Establish Accountability as a norm - model how to “Hold Accountability” for the team and encourage the team to engage in accountability conversations with each other.
- ❖ Help them build skills to “Hold Accountability” with each other. Role play with members to help them prepare for conversations - do not share second-hand feedback - instead encourage the team to discuss it when there has been a missed expectation.

## Holding Accountability Flow

Share Detail of Missed Commitment	<u>Pause to Invite Response</u>	Discuss Impact	Clarify Expectations Define Goal	Share Ideas on Change	<u>Written Summary &amp; Next Steps</u>
<p>Describe behaviour observed in a neutral non-judgmental manner.</p> <p>We had an agreement that you would do x and I notice you didn't...</p>	<p>Be silent - by leaving space you invite that person to share what happened and/or own that they missed a commitment.</p> <p>Actively Listen</p> <p>I heard you say x</p>	<p>Describe or ask about the impact of behaviour.</p> <p>The impact was....</p>	<p>Why is getting this right important? What does good look like?</p> <p>The goal is....</p>	<p>Share some ideas.</p> <p>What will you do differently next time?</p> <p>I have an idea that I think would help.</p>	<p>Ask them to summarize the follow-up point.</p> <p>Please capture this and send it to me so we have a clear plan for our next check-in.</p>

# Holding Accountability Flow

Share Detail of Missed Commitment	<u>Pause to Invite Response</u>	Discuss Impact	Clarify Expectations Define Goal	Share Ideas on Change	<u>Written Summary &amp; Next Steps</u>

# Conversation Tracking

**Use this document to track your conversation - we will debrief this in our Learning Pod Session.**

What conversation did you choose to have?

What is one thing that went really well in my conversation?

What is one thing that I could have done better in my conversation?

What did I learn about myself (my strengths) in this process?