

**BETTER TEAMS**  
Achieve **BETTER RESULTS.**



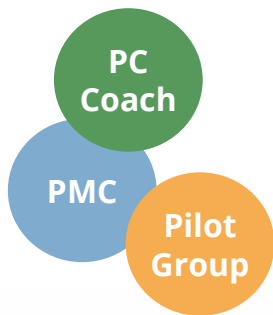
**Leadership Alignment  
Planning Session**

# Adaptive Culture Leadership Alignment Planning Session

We love helping leaders implement the Performance Culture System. The Agenda below is an example of how we helped an organization develop an effective Performance Management Program.



- **Preparation** - Initial Call & Support (up to 3 hours)
- **Onsite Day 1** - Foundation (8 hours)
- **Onsite Day 2** - System Setup & Pilot Training (8 hours)
- **Pilot Support** - Monthly Analysis & Check-Ins (up to 12 hours)



## Participants

Performance Culture Coach  
Performance Management Committee  
Pilot Group (*ideally 10 - 50 team members*)



# Adaptive Culture

## Leadership Alignment Planning Session

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### ● Preparation

#### Initial Call - 1 hour

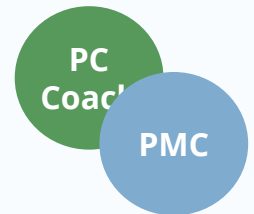
Remote meeting conducted via Zoom.

Identify Performance Management Committee & Pilot Group.

Discuss action plans prior to Onsite Workshop. (See Pre-Work Exercise)

#### PC Support - up to 2 hours

Calls to support action plans, if needed.



### ● Onsite Workshop

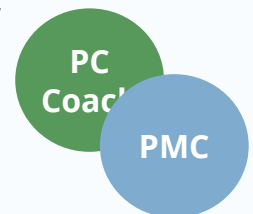
#### Planning Session: Foundation

##### 1st Onsite Day Morning - 4 hours

- Build the foundation for a successful Performance Management Platform: Mission, Vision, Goals, Core Values and how the values will be used for coaching and evaluation.

##### 1st Onsite Day Afternoon - 4 hours

- Begin with the Future in Mind: Define what success looks like for the Pilot Program and the organizational wide roll-out.
- Define expectations for how the application will be used (features and frequency).
- Review Performance Objectives for each member of the Pilot Group.



#### System Setup & Training

##### 2nd Onsite Day Morning - 4 hours

- Enter foundation information in the application, create Performance Reviews and Check-Ins for the Pilot Group.

##### 2nd Onsite Day Afternoon - 4 hours

- Train Pilot Group, covering:
  - Purpose of Performance Culture and Organizational Objectives for Performance Management.
  - Core Values and how values will be used for coaching and evaluation.
  - Performance Objectives.
  - Features enabled and the expectations for frequency.
  - Hands-On practice with the application.



# Adaptive Culture

## Leadership Alignment Planning Session

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### ● Pilot Support (3 months)

Utilization Analysis - up to 2 hours per month

PC  
Coach

Monthly Check-In Call - up to 2 hours per month

PMC

Coaching Support - up to 4 hours total

Members of the Pilot Group can call-in for leadership coaching. Tech support is always available to application users.

Pilot  
Group

### ● Identify success Metrics (Evaluate results in 90, 60, 180 days)

The purpose of our performance management program is to evaluate how the program embraces appreciation, personal development and performance feedback.

- **Did the program support recognition and appreciation?**  
*Strongly Disagree, Disagree, Somewhat Agree, Agree, Strongly Agree*
- **Did the program provide feedback that helped you personally develop your skills and strengths?**
- **Did the program help you provide clear expectations for your responsibilities and how your work supports our organization's mission?**
- **Did your manager deliver timely and fair feedback regarding your performance?**
- **Do you recommend we continue using the program?**
- **HR / Leadership - Will the data generated from the program help us make better decisions?**

# Adaptive Culture

## Leadership Alignment Planning Session

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### ● Pre-Workshop Exercise

#### Purpose - Mission

1. Why should customers (or target audience) purchase our product or service?
2. Why should employees work for us?
3. Why should the community support us?
4. Why should investors/donors invest capital in us?

#### Purpose - Vision

1. What types of products and services do we want to provide in 5 years?
2. What is our ideal target market 5 years from now?
3. Will our Unique Value Proposition be the same or different? If different, how so?
4. How big do we want our organization to be in 5 years? (i.e. Geography, Employees)
5. What will our organization need to look like in 5 years? (i.e. Leadership Positions, Org Structure, Ownership)

#### Organizational Goals

Define the key goals for the upcoming year that can be shared with everyone in the organization.

# Adaptive Culture

## Leadership Alignment Planning Session

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### Core Values

Define your Core Values and how they will be measured. The table below is an example.

Core Value	How do you define this value?	What does meeting expectations look like?	What does exceeding expectations look like?
Quality		<i>i.e., following SOPs</i>	<i>i.e., finding ways to improve quality</i>
Hospitality		<i>i.e., serving patients with a positive attitude and good communication</i>	<i>i.e., going out of the way to help a patient be more comfortable or welcomed</i>
Stewardship		<i>i.e., prudent use of resources</i>	<i>i.e., finding ways of doing something more cost effective with equal or better outcomes</i>
Respect		<i>i.e., treating others the way you want to be treated</i>	<i>i.e., coaching others on how to be more respectful</i>
Justice		<i>i.e., the quality of being just, impartial, or fair</i>	<i>i.e., coaching others on how to improve justice</i>
Teamwork		<i>i.e., help your team meet its goal</i>	<i>i.e., outstanding contributor or leading a team that meets its goals and engages team members to be their best</i>

### Performance Objectives

Define 3 to 5 tangible goals for each pilot team member. Relate these goals to each person's responsibility. Can you easily align these objectives back to an organizational goal? Or a department goal? Consider using the Building Objective Exercise found in Help Center.