

Special Webcast

# Creating Engaging, Manager-Led Learning Experiences – for Onboarding, Development, and Retention

THE CONFERENCE BOARD



September 6, 2022



# Our objectives for today

- Improve the quality of the essential relationships between team leaders and team members.
- Build effective coaching conversations for new team members to improve the onboarding process.
- Build effective coaching conversations for current team members that improve performance and retention.
- Engage the underlying core motives of team members to make work personally meaningful.
- Train managers to lead engaging learning experiences with their teams.



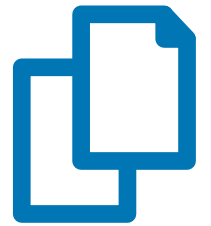
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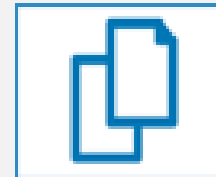


# Making the most of the webcast

Ask Questions  
(via the Q&A box )



Download  
Resources



# Today's Speakers



**Paul Ferguson**  
Sr. Advisor, Team Effectiveness  
*CIBC*



**Tim Scudder**  
Author & Principal  
*Core Strengths*



**Kenneth R. Lay**  
**(Moderator)**  
Senior Fellow, Human Capital  
*The Conference Board*



# CIBC

**Who:** 44,000 strong

**What:** building a relationship-oriented bank for a modern world





**Why:** to help make your ambitions a reality



Canadian Imperial Bank of Commerce

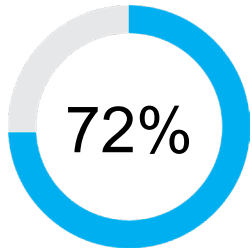


# CIBC's Situation

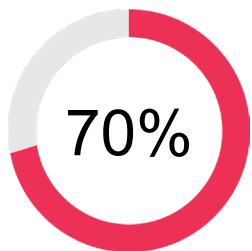
-  CIBC Square Construction
-  Remote and Hybrid Work
-  The Great Resignation
-  Onboarding and Engagement



# What do we **know**?



of organizations say  
**hybrid work is here  
to stay** permanently



of employees say  
**lack of connection**  
is the #1 challenge  
of hybrid teamwork

Employees have embraced the flexibility of hybrid teams, however the **lack of social capital and trust** has compromised connection and relationship-building.

\*2022 Microsoft Work Trend Index Research of 31,000 people in 31 countries





# Do relationships really **matter**?

 Respondents with **thriving** relationships       Respondents with **struggling** relationships

## More productive at work compared to a year ago



## Intend to stay at employer for one more year



\*2022 Microsoft Work Trend Index Research of 31,000 people in 31 countries





When people trust one another and have **social capital**, you get a willingness to take risks, you get more innovation and creativity and less groupthink.

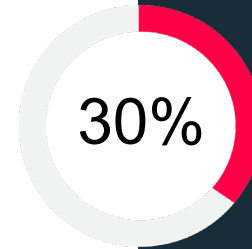
**Nancy Baym**

Principal Researcher,  
Microsoft Research



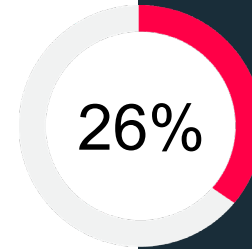
# A global **problem**

-  Less than optimal relationships between leaders and team members.
-  Overall engagement remains low.



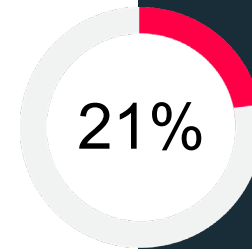
of organizations perceive their managers coach effectively.\*

\*From McKinsey & Company Global Survey 2018



of employees report their manager's feedback helps them improve.\*

\*From Gallup Manager Study 2020



of employees are engaged at work.\*

\*From Gallup State of the Global Workplace 2022



# Appreciative Inquiry: Who's doing well?

## Key Drivers – Engagement

Talent Development Leader



Points this leader scored **above** comparison



Points this leader scored **below** comparison

Business Unit	Organization Overall	Financial Services Norm	Total Favorable Score (Range 0-100)	
2	-1	3	86	Client Focus
7	5	12	89	Empowerment
10	9	17	98	Inclusion

Engagement



# Appreciative Inquiry: What are they doing?

## Coaching with Relationship Intelligence

1. SDI assessment with team members
2. Regular conversations about performance and development
3. Connecting CIBC's "what" with their team members' personal "why"





# Comparing Motives



**Ella Lewis**  
Marketing Manager

Motives | Conflict  
**BLUE** | **B-G-R**  
People | Accommodate-Analyze-Assert

Results

**Results**

**What Motivates Me**  
● **BLUE**

Ella is motivated by the protection, growth, and welfare of others. They have a strong desire to help others who can genuinely benefit.

56% People    28% Performance    16% Process

**Chloe Davis**  
Executive Assistant

Motives | Conflict  
**RED** | **R-G-B**  
Performance | Assert-Analyze-Accommodate

Results

**Results**

**What Motivates Me**  
● **RED**

Chloe is motivated by task accomplishment and achieving results. They have a strong desire to set goals, take decisive action, and claim earned rewards.

24% People    44% Performance    32% Process



# Using **strengths** to co-create the relationship



What strengths do you want from me as your coach?




How can I help you use your strengths?



# Comparing Strengths



Change

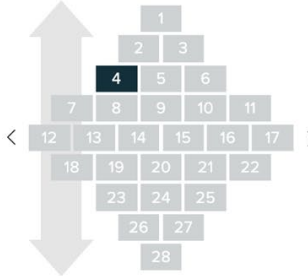


**Ella Lewis**  
Marketing Manager

Motives **BLUE** | Conflict **B-G-R**  
People | Accommodate-Analyze-Assert

Strengths ▼

Most Likely To Use



Least Likely To Use


**4. TRUSTING**

There's a saying you probably resonate with, whether you've heard it before or not: Trust takes years to build, seconds to break, and forever to repair. You, more than most, place your faith in others and they often return the favor by trusting you. You believe the best about people.

Being able to trust others saves a lot of time and effort; when they have your best interests in mind, you can easily accept their advice. The caution arises, however, when you might trust too much. That's when you become gullible. So you need to listen for that quiet voice that might advise you to be careful.

You'll never lose your capacity to trust others, and that's a good thing. It makes you valuable in so many settings and in so many relationships. Everyone appreciates a person who believes in them.

Change

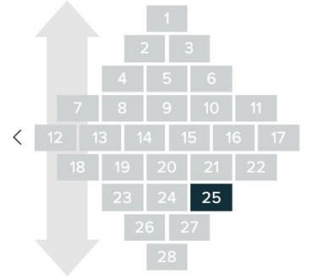


**Chloe Davis**  
Executive Assistant

Motives **RED** | Conflict **R-G-B**  
Performance | Assert-Analyze-Accommodate

Strengths ▼


Most Likely To Use



Least Likely To Use

**25. TRUSTING**

Chloe places their faith in others.





# Comparing Strengths



**Ella Lewis**  
Marketing Manager

Motives: **BLUE** People  
Conflict: **B-G-R** Accommodate-Analyze-Assert

Strengths

Most Likely To Use

Least Likely To Use

**23. RISK-TAKING**  
Ella takes chances on losses in pursuit of high gains.

**Chloe Davis**  
Executive Assistant

Motives: **RED** Performance  
Conflict: **R-G-B** Assert-Analyze-Accommodate

Strengths

Most Likely To Use

Least Likely To Use

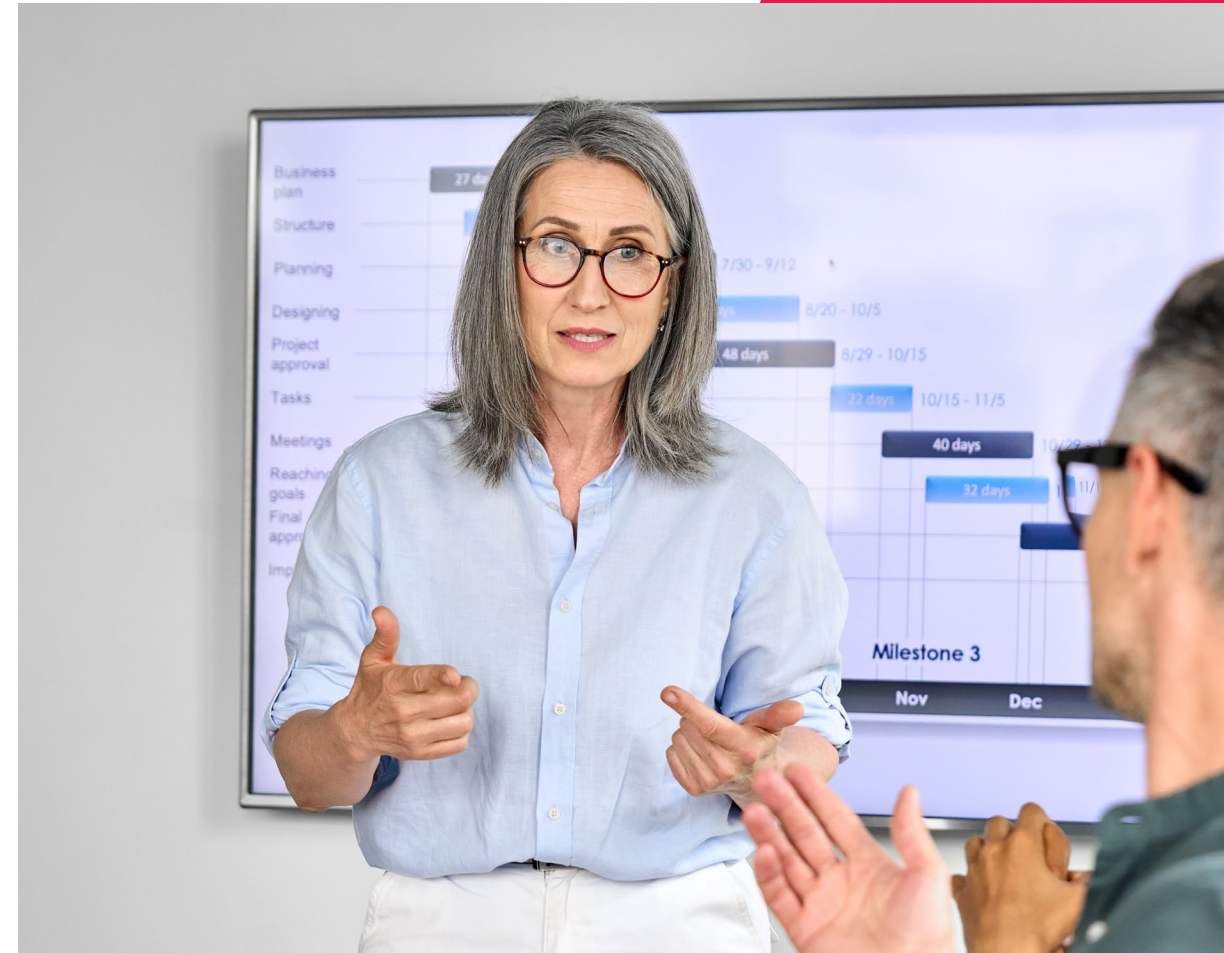
**4. RISK-TAKING**  
Where others see danger, you see opportunity. Where some see risk, you see reward. You're not about playing it safe. You're all about risk. Go big or go home is one of your mottos. You make your own luck, and others know it. They admire your risk-taking much of the time, but it can also scare them silly. They may see you as reckless or even foolish on occasion. But that doesn't stop you from trying to beat the odds and win big.  
  
You know you can lose but you never expect to. That's what energizes you. You thrive on the excitement and adrenaline. You love the rush.  
  
Your risk-taking often serves you well. You embody courage while others are cowering. You are striving for the big win while others are playing it safe.





# Reduce the effect of **overdone strengths** in the relationship

- ❌ As a coach, what do I need to guard against overdoing with you?
- 🧠 What overdone strengths in you are likely to trigger a negative reaction in me?






# Comparing Overdone Strengths



Change

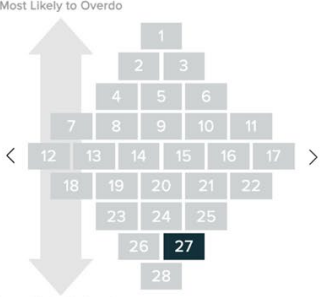


**Ella Lewis**  
Marketing Manager

Motives | Conflict  
**BLUE** | **B-G-R**  
People | Accommodate-Analyze-Assert

Overdone Strengths


Most Likely to Overdo



Least Likely To Overdo

**27. AMBITIOUS (RUTHLESS)**  
Being so ambitious with his/her goals that he/she doesn't have compassion for others.

Change

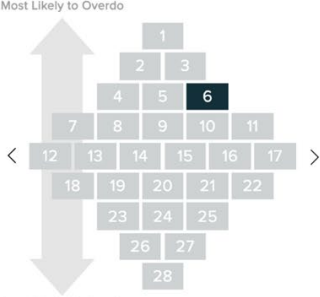


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Executive Assistant

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Overdone Strengths

Most Likely to Overdo



Least Likely To Overdo


**6. AMBITIOUS (RUTHLESS)**  
In your eagerness to advance and to get ahead, you may fail to consider others who are on the same journey. And what seems like an oversight to you comes across as a selfish and deliberate disregard for others.  
  
You can be relentless and single-minded in your pursuit of gain, status, recognition, or accomplishment. While this may increase your chances of accomplishing your goals, the risk is that you will find yourself alone with your accomplishments. If people feel they've been used as a stepping stone, or a rung on your ladder of success, they won't want to support you in the future.  
  
To keep your well-intended ambition productive with others, you may need to be more considerate and collaborative – clearly communicating how your goals align with theirs.



# Comparing Overdone Strengths



Change

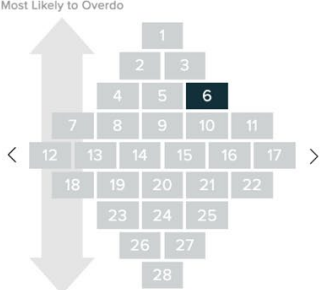


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Overdone Strengths

Most Likely to Overdo



Least Likely To Overdo


**6. HELPFUL (SMOTHERING)**

You know what would be helpful? If you'd leave me alone. If you've ever heard those words, you know your helpfulness has become too much for another person.

You can get frustrated when other people won't let you help them. If you know what they need, you may do something for them even when they ask you not to, because you are so sure that they will appreciate the result once they see it. At these times, you can be smothering – almost invasive in your desire to do good for others.

Sometimes, you may need to remember that the best way to help someone is to let them take care of matters on their own. You can remain available should they request the help that you are so eager to give. Your help will be most appreciated when other people ask for it and believe that they need it.

Change

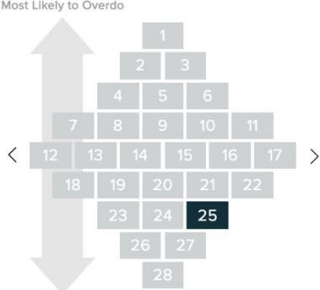


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Overdone Strengths

Most Likely to Overdo



Least Likely To Overdo

**25. HELPFUL (SMOTHERING)**

Being so helpful to others that he/she does things for them that they do not want or need.

# Re-cast the Past

# Master the Moment

# Co-create the Future

Past Strength  
Past Results



Future Strength  
Desired Results



Past Reasons



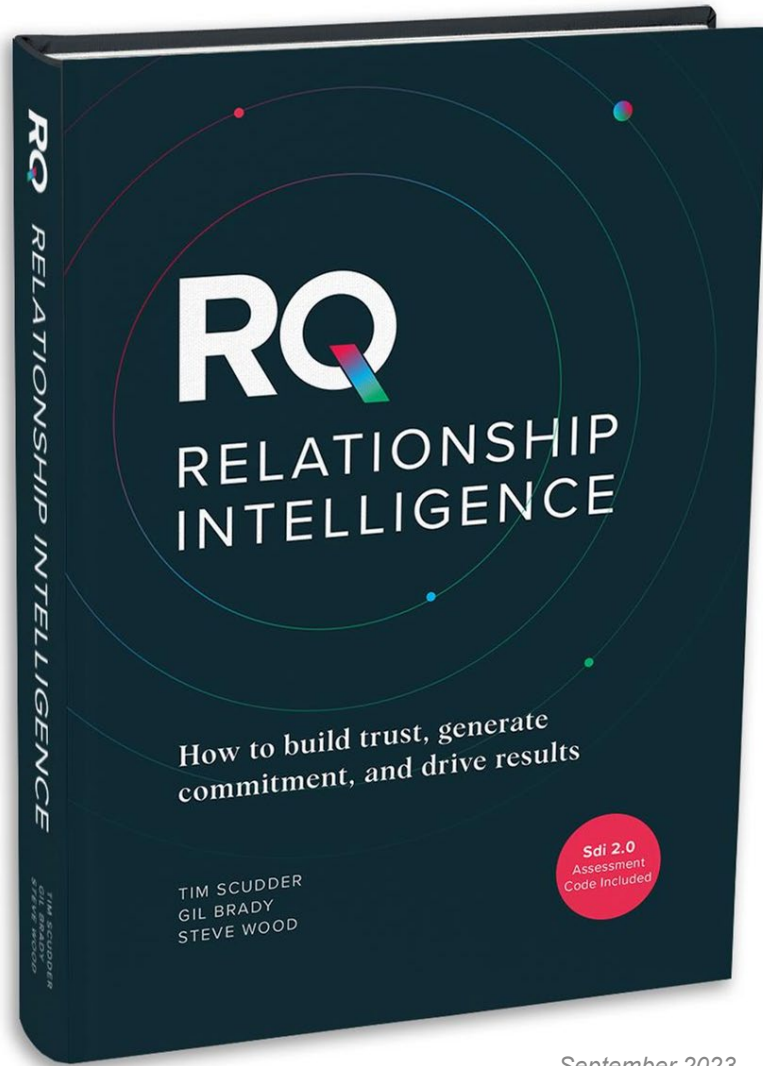
Future Reasons



Personality



# Questions so far?



September 2023

# Relationship Intelligence



The science of people, performance, and process.



Insight for adjusting your approach to make interactions more effective.



DEFINITION

## Relationship

A connection between people built on a foundation of shared experiences, interactions, and expectations.

**IQ**

**EQ**





# Quality of **Relationships**



## **Past**

How favorably we view  
our shared experiences

## **Present**

The effectiveness of  
our interactions

## **Future**

The attractiveness of  
our shared expectations





<b>Relationship Intelligence is...</b>			
<b>four skills...</b>	Positive Regard Personal Accountability	+	Service Orientation Strengths-based Agility
<b>applied in three ways...</b>	Recast the Past	Master the Moment	Co-create the Future
<b>between people...</b>	Shared Experiences	Present Interactions	Aligned Expectations
<b>to improve relationships.</b>	Building Trust	Generating Commitment	Driving Results





## What are the **benefits** or **outcomes** of co-creating the coaching relationship?



Build trust



Generate commitment



Drive results



# Appreciative Inquiry:

How can CIBC do more of that?



Promote value of relationships (internal and external).



Focus internally on primary driver of engagement: relationship with manager (inclusion and empowerment)



Develop Relationship Intelligence in broader teams and culture.

## Organizational Mandate

### Mission (What)

Build a relationship-oriented bank for a modern world.

### Purpose (why)

To help make your ambitions a reality.

### Service (Who)

Customers, Employees, Community



# What's next for CIBC?



Onboarding: SDI assessment into all onboarding programs



Promote and measure coaching as an essential relationship



Integrate with MS Teams so relationship advice is in the flow of work



Change management and executive support



# Coaching Conversations



Onboarding



Development



Engagement (retention)

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Marketing Manager

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**BLUE** | **B-G-R**  
People | Accommodate-Analyze-Assert

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# Coaching Conversation Template

Onboarding – Engagement – Development

**Measure** what matters

Engagement		Total Favorable
2	I believe strongly in the goals and objectives of CIBC	88
7	I would recommend CIBC as a good place to work.	100
12	I work beyond what is required to help CIBC succeed.	100
19	I have the equipment/tools/resources I need to do my job effectively.	100
25	My team is able to meet our work challenges effectively.	88
32	There are no substantial obstacles at work to doing my job well.	75
36	My work gives me a sense of personal accomplishment.	100
40	I am able to sustain the level of energy I need throughout the work day.	88
53	The people I work with usually get along well together.	100

Pulse surveys

**Reinforce** what matters

Conference

Discover Compare Teams

Settings Members

### Create Your Template

Template title:

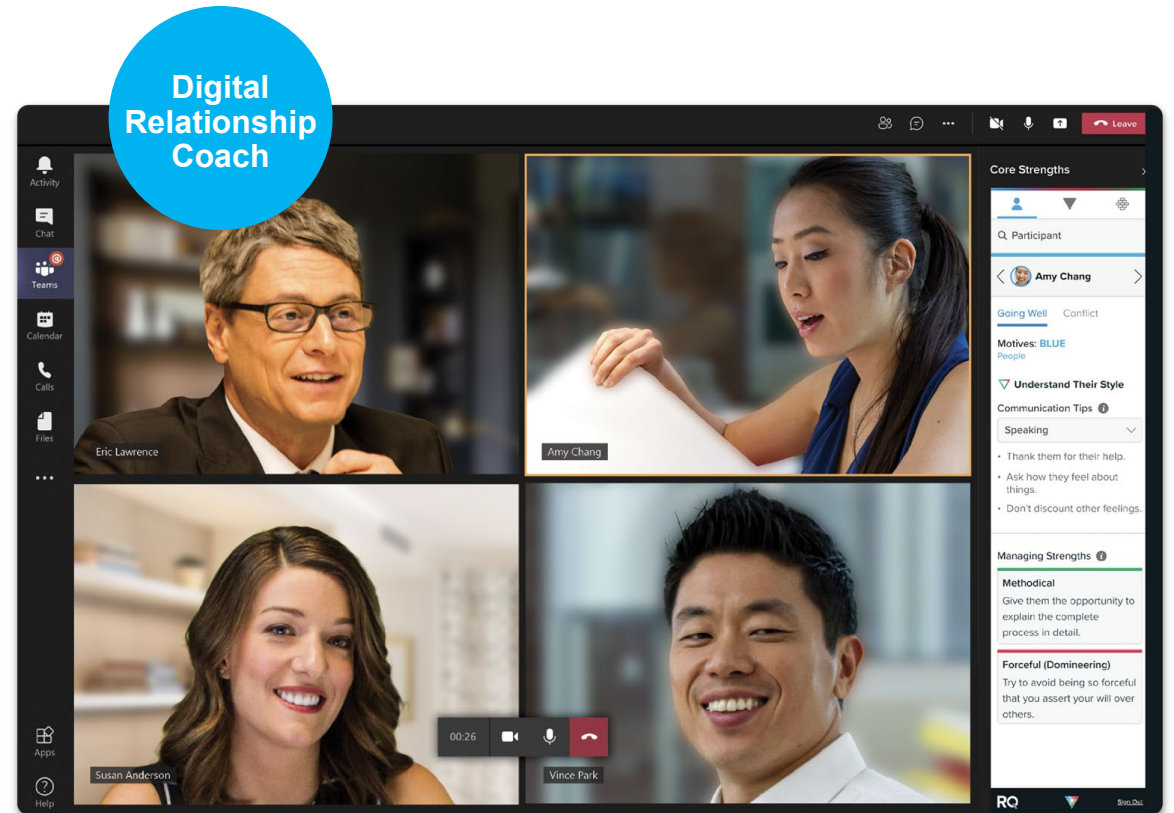
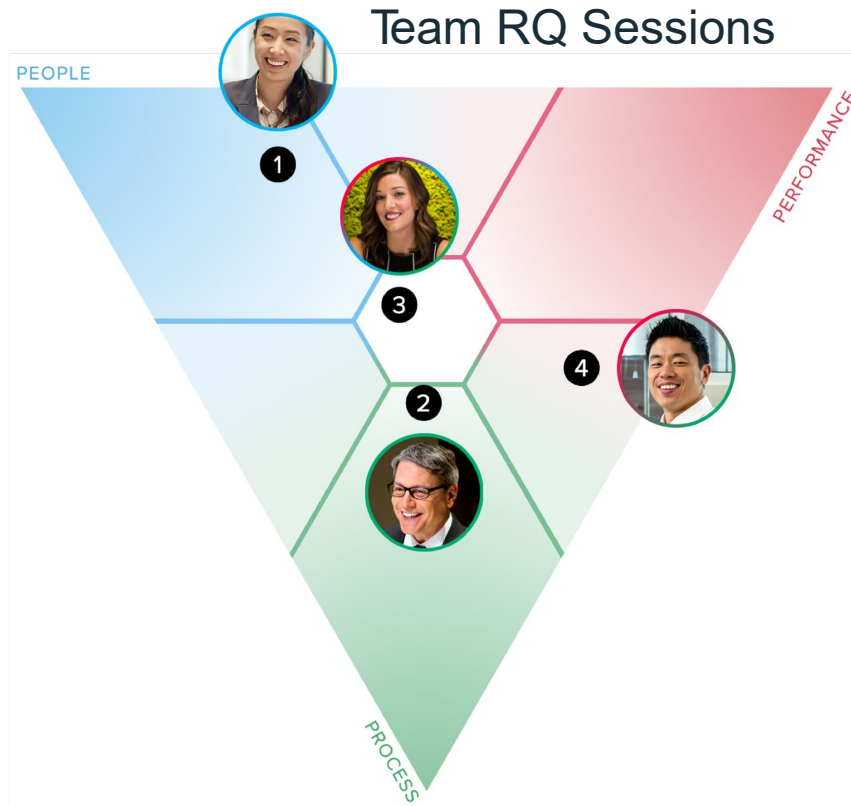
Template description:

Template name	Description
Blank	The coachee onboarding experience is the
Coaching Relationship - Comp...	Coach and coachee view their SDI 2.0 Resu
General Coaching Questions	A guide for recurring conversations. Genera

Core Strengths Coaching Platform



# Relationship Intelligence in the Flow of Work



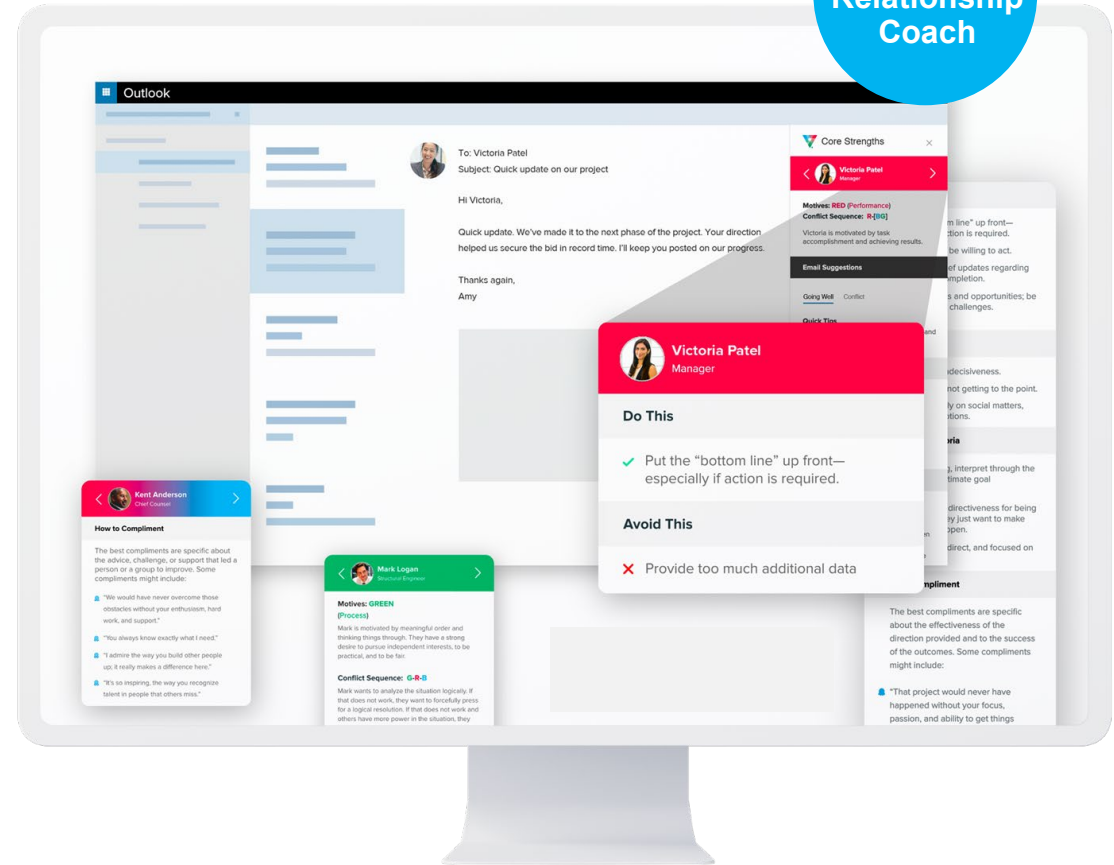
 **corestrengths** for Microsoft Teams



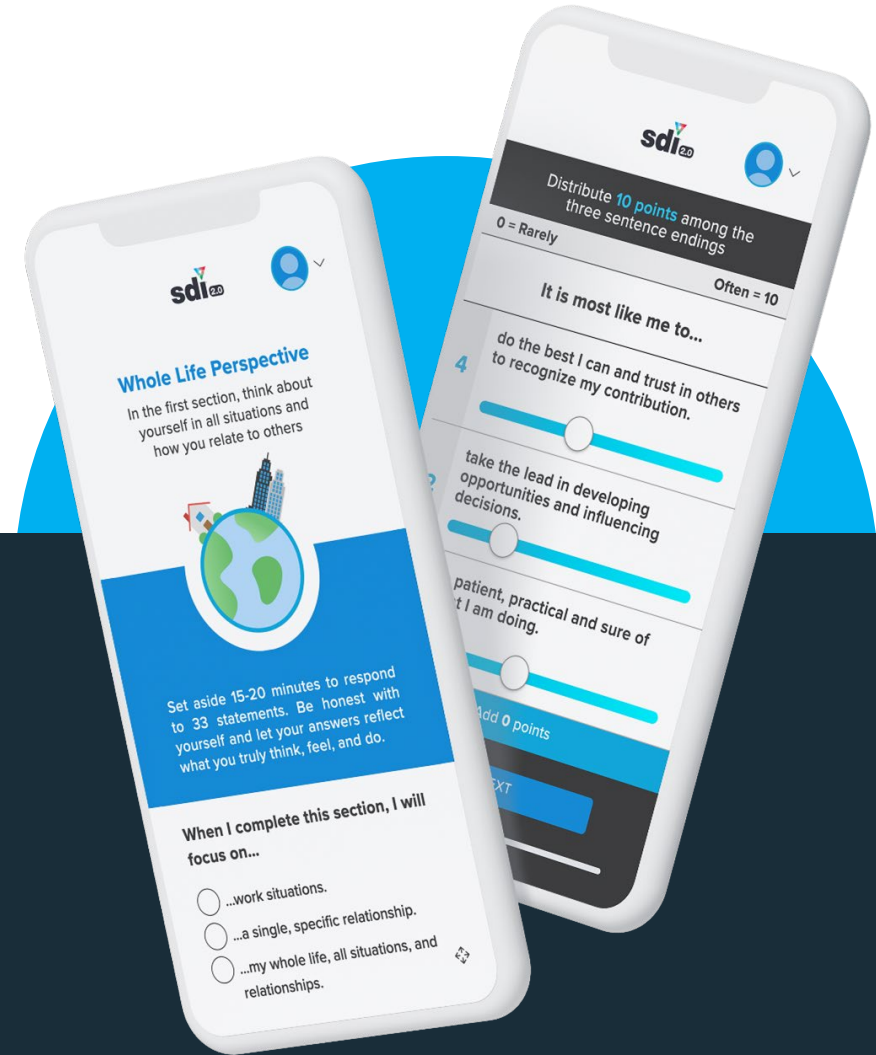
# Relationship Intelligence in the Flow of Work

 **corestrengths**® for Outlook

Digital  
Relationship  
Coach







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# Navigating the Economic Storm

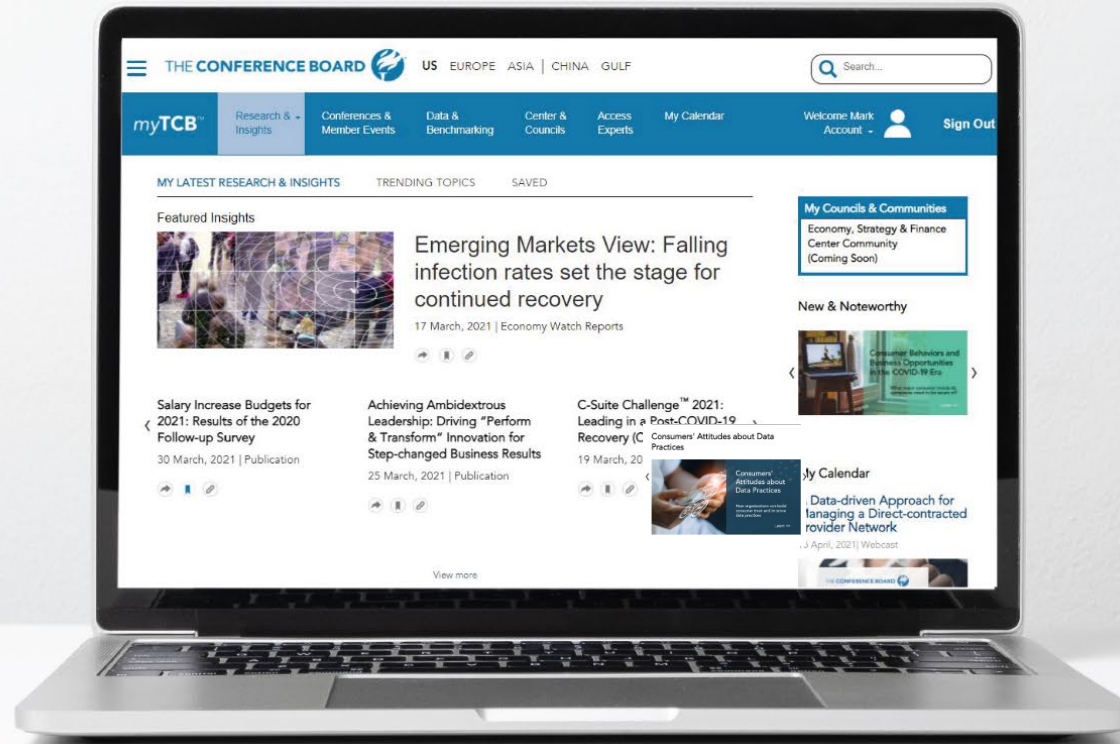
**YOUR INDISPENSABLE GUIDE THROUGH  
THE GLOBAL RECESSION**



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