

Wellness Series Needs Assessment

PDAL 0120, Assignment #5

Susan Kuz, 5718128

Needs Assessment Report

I. Introduction and Background

ABC Auto owns multiple dealerships across Manitoba and Saskatchewan and has been experiencing rapid expansion due to their success. This rapid growth has been a blessing and a curse with new managers being promoted early in their careers. They are often fairly young (in their 20s in many cases) and with less managerial and leadership experience.

It has become obvious that there is a skills gap in the area of emotional intelligence (EI) highlighting the requirement for a needs assessment in this area.

II. Methods

Data was collected for sales managers with less than 18 months in the role and those under the age of 35 as they were the demographic group most likely experiencing skills gaps of this kind. There were 57 sales managers in this group.

- 360 Degree Evaluations - The 360 Degree evaluation data was collected for the 57 sales managers from the last evaluations. These included data from evaluations conducted in the past 24 months as they are the most recent and relevant for this group of managers.
- Senior Management interviews - Individual interviews were conducted over the phone with each senior sales manager over the to dig deeper into the 360 Degree evaluation results from the performance appraisals. In conducting these interviews, we first sent managers questions in advance so they could prepare for the discussions. Interviews followed the question set in a conversational format with a trained interviewer and results were analyzed for overall themes. Interviews were recorded with the permission of the manager to ensure accuracy in data. Interview questions were based on the results of the 360 Degree Evaluations and additional performance data from human resources.
- Emotional Ability Assessment – Assessment tools were used to gauge the level of skill in each of the key. Each of the 57 sales managers in the 360 Degree group as well as all new managers in this category (those that had not yet had a 360 Degree Evaluation) took the assessment. In total 68 managers went through the process.

**Copies and links to the surveys or assessment tools are located in Appendix A*

III. Key Findings

- a. Teams under newer managers are experiencing conflict in the workplace with a higher level of complaints being made to human resources. Short and long term disability costs are increasing for this group as well. Compared to more mature groups, the increase is 87% over the 3-year period of rapid expansion.
- b. Staff turnover is higher (77% higher) among the team members in these groups, including at the management level. This contributes to increased hiring, onboarding and training costs, and reduced sales results (down 65% for the same period).
- c. When interviewing newer managers, many recognized the need for better emotional intelligence skills and are eager to get going with guidance. All areas of EI were seen as needing improvements: self-awareness, self-management, social awareness and, relationship management.
- d. Senior managers welcome a framework for ongoing EI skills development for this group as they see a continued need as the company expands.

IV. Recommendations for Program Planning

Based on the cost/benefit decision matrix our recommendations combine a quick solution that can be put in place immediately to start to close the gap and see results, followed by a longer-term solution that provide ongoing skills development and support to this management group and new hires.

- Develop an internal library of resources that address emotional intelligence skills that staff at these levels can easily access. This can include books, podcasts, Youtube videos, articles, etc.
- Select specific formal training paired with job aides to reinforce the learnings.
- Establish an informal mentoring and a formal coaching program where sales managers can be paired up with appropriate trained coaching partners.

Measuring results:

- Results of this new program will be measured by an analysis in the next round of 360 Degree Evaluations and a survey among senior and new managers.
- As well, regular feedback surveys will be sent to the target groups (senior and new managers) to assess the program's effectiveness and if any changes need to be made along the way.

V. Appendices

- a. The 360 Degree assessment and the Senior Manager interview survey used for ABC Auto are not available as it is proprietary.

- b. Emotional Ability assessment can be found here
<https://www.mindtools.com/pages/article/ei-quiz.htm>
- c. Recommendations decision matrix:

Criteria 0=poor, 5=excellent	Cost	Time to Implement	Potential Impact	Total
Weight:	X2	X3	4	
Informal coaching/mentoring	5x2=10	3x3=9	2x4=8	27
Information Library	5x2=10	4x3=12	3x4=12	34
Informal assessments and reports	5x2=10	3x3=9	2x4=8	27
Exterior masterminds	4x2=8	2x3=6	3x4=12	26
Job-aids	3x2=6	3x3=9	3x4=12	27
Formal courses	2x2=4	3x3=9	4x4=16	29
Mindfulness courses	2x2=4	2x3=6	3x4=12	22
Formal coaching program	1x2=2	3x3=9	5x4=20	31

Additional question notes:

How would the needs assessment be used? - The needs assessment findings would be used to design a program that fit with the tight time-frame needed for ABC Auto and the desire to have a flexible offering that can work in the short term to close the skills gap, and also the long term for ongoing emotional intelligence skills development and practice. Senior managers would be included in the coaching and mentoring process outlined to transfer learning to newer managers as it relates to industry experience and the culture of ABC Auto. All groups, human resources, senior managers, newer managers and strategic planning would be part of the evaluation process of the program given its direct connection to the organization’s financial success.

Was the assessment worth doing? - I’d say that it was. By reviewing the available data from the performance reports, interviewing with senior and newer managers, we were able to gain a deeper insight into the underlying depth of the problem and especially the willingness to solve it by all groups. It became a co-creative process with everyone involved and, in the end, a better solution was developed with this team approach. When rolling it out, it becomes easier to gain buy-in from the management groups involved. When providing feedback as the program is used, everyone is invested in seeing it improve and succeed. It’s a win-win for all and will save significant costs and time in the end.

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Determine Causes of Performance Gaps

- VI. Some potential solutions that could be used to address the performance gaps, including training and non-training solutions and the criteria for assessing the suitability of potential solutions.

Non-Training solutions that could address the emotional intelligence gaps:

- Informal coaching or mentoring by senior sales managers
 - Suitability? How strong is the senior manager in this area, do they have any training for this type of mentoring? What is the receptivity for this approach for the younger sales managers? Do the senior managers have the right incentive to commit to this informal program to make the impact that is needed? It is possible to measure the change that comes from this type of informal arrangement?
- Information library: Youtube videos on various subjects, books, articles, or podcasts
 - These would have to be assessed on a case by case basis. Acceptance of this approach would depend on the younger sales manager and if they read or review and then put the material in action.
- Informal assessments and their related reports
 - These types of assessments and reports can provide individual information for each sales manager. Each would have to be examined and determined if the information addresses the emotional intelligence skills most needed in a way that the young sales managers are able to absorb. Many of these assessments can easily be taken but most require a trained facilitator to help the user translate the information into a positive and useful tool.
- Membership in a mastermind group related to these concepts
 - Exterior mastermind groups can be valuable for learning from more senior people or those that can support or share valuable experiences. It is harder to assess the quality of these groups if they are informally created and sustained. It is also challenging for members to stay committed to regular check-ins and meetings.
- Job-aids on various topics
 - These tools can be related to the new habits desired by the young managers and should be reviewed as to ease of use and timeliness. For example, when a manager is in a stressful situation, he/she needs to recall the training for managing their emotions. Do the tools provided help them to do this in the moment?

Formal training solutions that can be set up:

- Courses in emotional intelligence, crucial conversations, strengths-focus, personality-based communications
 - We’d look at these to see if they are appropriate for sales managers in the auto industry. Do they have quality historically or testimonies from other in the industry? Do they have follow-up in place to ensure the skills are learned and applied?
- Mindful-based strengths practices courses and practice
 - This type of program would be assessed by suitability for the employee and if they are open to practicing the skills from mindfulness. This program requires the student to attend the sessions plus do work in between to best reap the rewards.
- Formal coaching by senior sales managers or consultants
 - This could combine well with clear goals from the students and a commitment to attending the sessions and working one-on-one with the coach. The coach would have to be experienced and trained and the set-up would in some way have to be linked back to improved results.

VII. How you would use at least one of the tools discussed in the unit to assess solutions against the criteria potential solutions.

I would use the Decision Matrix to determine the best collection of tools to close the performance gap. Here’s how it could work:

Criteria 0=poor, 5=excellent	Cost	Time to Implement	Potential Impact	Total
Weight:	X2	X3	4	
Informal coaching/mentoring	5x2=10	3x3=9	2x4=8	27
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Formal coaching program	1x2=2	3x3=9	5x4=20	31

VIII. Recommended solutions to close the performance gaps for emotional intelligence skills for young/new managers

- Based on the available options, the relative importance of cost, time and potential impact I would recommend the following:

- For a quick information solution, develop an internal library of resources that address emotional intelligence skills that staff at these levels can easily access. This can include books, podcasts, Youtube videos, articles, etc.
- Select specific formal training paired with job aides to reinforce the learnings.
- Establish an informal mentoring and a formal coaching program where sales managers can be paired up with appropriate trained coaching partners.

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Determine Causes of Performance Gaps

1. How you would analyze the causes of performance gaps at the job, competency, and goal levels:

Currently we are looking at the emotional intelligence of the newer and younger sales managers. ABC Auto uses a 3 by 3 rating grid to determine areas of low to high job performance and leadership potential. Managers assessed with medium to a high degree of leadership potential, and a low to medium degree of job performance would be selected for further analysis in their skills in emotional intelligence would be part of our population to investigate performance gaps.

From a job performance perspective, data used in the analysis includes performance evaluations, customer feedback for customer facing roles, current role key performance indicators, and a competency assessment.

For these managers we would review and analyze data from:

- the 360-degree feedback
- job performance
- performance evaluations

We would look for common themes related to emotional intelligence categories such as emotional regulation, relationship development, diversity and inclusion, resilience, and optimistic thinking.

2. How you would use at least one of the tools discussed in the unit to identify cause and effect relationships.

The Why Map tool would be used to identify the root cause of problems related to poor emotional intelligence. Once themes were identified as performance gaps, problem statements would be developed for each theme (maybe more than one) and dissected in a Why Map discussion with senior sales managers to get to the possible causes of each performance issues.

Here's an example of one:

		They don't manage their stress well and	They are not self-aware They don't manage their physiology well
	New managers are more likely to create a toxic work environment		
		They focus on their team members weaknesses	They are not familiar with team members strengths They do not know how to work with the different strengths in the workplace
Problem Statement: Staff turnover is 50% higher under a new/young manager			
		They are used to being employees instead of managers	They need to learn how to apply boundaries for their new role The organization needs to support their new role
	New managers are not skilled at communicating with staff		
		They are not skilled at communicating with people different than they are	They don't know how to identify personality types They don't know how to adjust for personality types

3. The potential impacts of the performance gaps you expect to find; and

Based on initial discussions with ABC Auto, I expect to find the following potential impacts of these performance gaps:

- poor customer service during the sales process and after sales follow-ups
- poor team morale due to poor relationship management and emotional regulation
- conflict in sales teams, dysfunctions
- higher turnover in staff
- lower levels of sales
- associated levels of toxic work environments
- higher levels of human resources complaints for related situations and incidents
- stress team members will have higher disability claims, absenteeism and presenteeism

4. The order of priority to address the gaps and your rationale for those priorities.

First look at 'keystone' priorities - those that most influence other areas and can have a trickledown effect on others. Addressing one area can take care of many others. For example, does one problem area affect sales targets for multiple teams or revenue streams? Does one performance gap affect stress levels, causing higher disability claims, which then causes pressure on the remaining staff members? Identify these first.

Which of these areas are fixes that can be addressed quickly and at low cost? Address these immediately.

Then select the ones that have the highest impact when fixed and create a plan for the ones with the highest return on investment.

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PDAL 0120, Assignment #2

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Identifying Performance Gaps

ABC Auto has grown rapidly over the years. They have a policy of promoting from within and many of their new sales managers are young and inexperienced. It's been noted that they lack skills in emotional intelligence and leadership. This Needs Assessment will focus on closing the gap in this area of ABC Auto's team.

3. Sales Managers lack emotional intelligence and leadership skills necessary for their jobs. They are relatively young (some in their 20s) and new to their roles.

Methods used to gather performance data

To get a high-level view of the performance problem Human Resources would be asked to provide a summary report based on information and data from performance reviews of younger sales managers. They would also be asked to provide a similar summary from exit interviews with sales staff. Privacy laws need to be taken into consideration, so we are asking Human Resources to take on this part of the data gathering.

A 360-leadership survey would be used to pinpoint problem areas in emotional intelligence. Sales managers would be assessed by others but also asked to assess themselves in key emotional intelligence measures of interest to the company and positions. These assessments would include quantitative questions as well as open-ended questions. They are commonly used to gain feedback in management levels and are already used by ABC Auto.

Experienced sales managers would be interviewed to gather data on the key skills that are needed in the sales manager roles as well as those that they think are missed. This would also offer an opportunity to dig deeper into areas that are flagged by the 360-leadership assessment process, tap into the wisdom and experience of the older managers and cultivate buy-in as the new training program is developed.

Newer sales managers would be interviewed to gather data on the skills they feel they could improve after 2 or more months on the job. This offers a chance to participate in the training development process and begin to create early buy-in by younger managers when new training rolls out.

An emotional ability assessment will also be administered to see where new sales managers fare on the scales of measurement. An assessment tool specifically for sales managers will be used. This offers an objective way of gathering data that is tried and tested.

Data types to collect and analyze

This type of skills gap is based on the 4 elements of emotional intelligence:

1. self-awareness
2. self-management
3. social awareness and
4. relationship management

Data will be collected for all four areas as they relate to the most important emotional intelligences for sales managers.

The 360 Degree data will be analyzed based on the assessment tool used.

The interviews with experienced and new managers would be analyzed by questions covered. Summary themes would be used when analyzing qualitative data to uncover themes and common data categories.

The emotional ability data would be analyzed based on the assessment tool used.

Performance – current and desired

Currently the younger sales managers struggle in these areas:

- They tend to be unaware of their own strengths and those of others on their team.
- They have difficulty communicating and motivating the different personality types on their team.
- They have a difficult time managing their own stress and it translates poorly in their relationships with their team members.
- They tend to have positive relationships with some members of their team who are most like them, but less than ideal relationships with those that are markedly different in age, ethnicity, gender and other demographic areas.

It is desired that they are able to:

- Communicate effectively with different personality types on their teams.
- Motivate members on their team, based on what connects with each team members.
- Develop positive and healthy ways to manage their own stress.
- Develop positive relationships with all team members, not just those most like them.
- Develop skills to coach and support their team members to be successful.

Wellness Series Needs Assessment

PDAL 0120, Assignment #1

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Needs assessment situation

ABC Auto owns a number of auto dealerships across Manitoba and Saskatchewan. Over the years they have grown as they acquire more dealerships, and build new ones. Their offer range includes models at every price range as well as finance and service divisions. During this rapid growth and with the recent rapid pivots due to the Covid-19 pandemic, they have experienced well-being gaps among their staff.

After interviewing the Manager of HR as part of this needs assessment, a few areas of interest came up:

1. High stress and long workdays are common for sales staff. They typically work 12-hour days, often 6 days a week. There is cultural pressure to work on their day off if sales volume is down. The average age of team members is 34 and many have young families, thus they experience relationship strain as a result of the pressures of the job on the family.
2. During the winter months the sales cycle is at its low point while the service department becomes busier. Sales staff experience extra anxiety at this time every year - during the pandemic, this will be heightened. As a result, customers feel added pressure to buy during this time.
3. Sales Managers lack emotional intelligence and leadership skills necessary for their jobs. They are relatively young (some in their 20s) and new to their roles.
4. There new projects in progress that adds opportunity and stresses.
5. Project managers and staff have in effect two bosses: the leadership at ABC Auto and the car manufacturers who exert their own demands on the organization.

Steps in the needs assessment process

To determine what training is needed at ABC Auto I will:

1. Interview main HR champion to identify the perceived well-being related performance issues at ABC Auto – completed Week 1
2. Review the engagement survey results to identify potential issues areas. - Week 2
3. Identify desired performance goals. - Week 2
4. Conduct additional research to dig deeper into problem areas identified by the engagement survey. – Week 3
5. Review potential training solutions currently identified. Week 3-4
6. Analyze data collected – Week 5
7. Compile a report outlining recommendations – Week 5

External environment and internal context for ABC Auto

There are a number of things to consider when conducting this needs assessment.

- The effects of the Covid-19 pandemic will have add pressure for staff during winter.
- New projects in progress make it more difficult to get staff's attention.
- The corporate culture focusses on sales which may not support training for well-being.
- Family experiences of sales staff partners are affected by the long hours so their inclusion in the training needs to be considered.

Resources available for completing the needs assessment process include:

- Business champion as main resource and contact
- Access to engagement survey results
- Access to staff for additional research
- Access to their Survey Monkey tool
- Access to staff for interviews or focus groups